OREGON
WATERSHED
ENHANCEMENT BOARD

Virtual Meeting
January 24 - 25 2023

Oregon Watershed Enhancement Board Meeting Agenda
January 24 & 25, 2023

Business Meeting:	**Tuesday, 1/24 8:00 a.m.**	**Wednesday, 1/25 8:00 a.m.**

The public is welcome to listen to the virtual meeting through the following methods:

- **YouTube Streaming**: https://www.youtube.com/channel/UC0dl-TOwLt4Sp--i1KEa_OA. Please note that there may be a slight delay when streaming the meeting content.
- **Phone**:
  - **Jan 24:** Dial 1 669 900 6833, when prompted, enter ID number: 828 1345 8598 and passcode: 572125
  - **Jan 25:** Dial 1 669 900 6833, when prompted, enter ID number: 873 9557 4781 and passcode: 694313
- The board book (eBook) is available at: https://www.oregon.gov/oweb/about-us/Pages/board/meetings.aspx
- For each agenda item, the time listed is approximate. Anyone interested in a particular agenda item is encouraged to give ample time and listen in to the meeting at least 30 minutes before the approximate agenda item time.

Public comment
OWEB encourages written or verbal public comment on any agenda item. However, items marked with an asterisk (*) are subject to a formal public hearing, and the board cannot accept comments at the meeting, as the public comment period for those items is closed. All comment requests should be sent to April Mack at April.mack@OWEB.oregon.gov no later than 4:00 p.m. Thursday, **January 19**.

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

Verbal comments:

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

Tuesday, January 24, 2023

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

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

B. Review and Approval of Minutes (9:05 a.m.)

The minutes of the October 25 & 26, 2022, meeting will be presented for board approval. *Action item*.

C. Directors Updates (9:10 a.m.)

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

D. Committee Updates (9:50 a.m.)

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

E. General Public Comment (10:20 a.m.)

This time is reserved for the board to hear general public comments and review the written public comment submitted for the meeting. *Information item*.

F. Oregon Agricultural Heritage Commission (OAHC) Appointments (10:35 a.m.)

Grants Program Manager Eric Williams and Oregon Agricultural Heritage Program Coordinator Taylor Larson will recommend the OWEB Board appoint Laura Masterson, Eduardo Contreras, and Russ Hoeflich to the Oregon Agricultural Heritage Commission. *Action item*

G. Budget and Legislative Update (11:35 a.m.)

Executive Director Lisa Charpilloz Hanson, Deputy Director Stephanie Page and Board and Legislative Policy Coordinator Eric Hartstein will provide an update on the agency budget and the 2023 legislative session. *Information item.*

H. OWEB 101 – Focused Investment Partnership (FIP) and Council Capacity (12:50 p.m.)

Grant Program Manager Eric Williams, Monitoring and Reporting Manager Courtney Shaff, North Coast Program Representative Katie Duzik, Willamette Valley Program Representative Liz Redon, Partnerships Coordinator Denise Hoffert, Partnerships Coordinator Jillian McCarthy, and Board and Legislative Policy Coordinator Eric Hartstein will provide an 'OWEB 101' presentation highlighting the Focused Investment Partnership (FIP) and Council Capacity grant programs. *Information Item.*

I. Quantifying Conservation Outputs and Outcomes Funding Requests (2:15 p.m.)

Conservation Outcomes Coordination Audrey Hatch and Effectiveness Monitoring Coordinator Ken Fetcho will request the board provide funding for the 'Telling the Restoration Story' grant program and a Carbon and Riparian Condition Monitoring Project. *Action Item.*

Wednesday, January 25, 2023

J. General Public Comment (8:05 a.m.)

This time is reserved for the board to hear general public comments. *Information item*.

K. FIP 2021-2023 Reporting (8:20 a.m.)

Grant Program Manager Eric Williams, Partnership Coordinators Jillian McCarthy and Denise Hoffert, Conservation Outcomes Coordinator Audrey Hatch, and Board and Legislative Policy Coordinator Eric Hartstein will provide an update on Cohorts 2 and 3 Focused Investment Partnership (FIP) initiatives' progress. Representatives from each of the five Cohort 2 initiatives will then update the board on progress made in the 2021-2023 biennium. *Information item*.

L. OWEB Grant Program Rulemaking (11:10 a.m.) *

Grant Program Manager Eric Williams and Board and Legislative Policy Coordinator Eric Hartstein will request the board approve proposed administrative rule revisions for the Grant Program. *Action Item.*

M. Revisit In-Person vs. Virtual Board Meetings (11:55 a.m.)

Board and Legislative Coordinator Eric Hartstein will provide an update about in-person and virtual options for future meetings. The board will be asked to approve a format for meeting in 2023 and beyond. *Action Item.*

N. Shared Stewardship and the 20-Year Strategic Plan (1:00 p.m.)

OWEB Fire, Klamath, and Drought Programs Manager Renee Davis, Oregon Department of Forestry State Forester Cal Mukumoto, and Strategic Planning Coordinator Nathan Beckman, and will present information about Oregon's 20-year strategic plan as outlined in the state-federal Memorandum of Understanding on Shared Stewardship and Senate Bill 762 (2021). *Information Item.*

O. 2023-2025 Spending Plan (1:45 p.m.)

Executive Director Lisa Charpilloz Hanson and Grant Program Manager Eric Williams will update the OWEB Board on the 2023-2025 spending plan timeline and present recommendations for major spending plan category percentages. *Information Item.*

P. Other Business (2:45 p.m.)

This item is reserved for other matters that may come before the board. *Information 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 for an item to be heard. Any such times are indicated on the agenda.

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

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

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

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

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

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 the necessary procedures.

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

Oregon Watershed Enhancement Board Membership

Voting Members

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

Non-voting Members

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

Contact Information

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Lisa.CHARPILLOZ.HANSON@OWEB.oregon.gov

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

2023 Board Meeting Schedule

January 24 & 25 – Virtual
April 25 & 26 –TBD
July 25 & 26 – Sisters/Hybrid
October 24 & 25 – TBD/Hybrid

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

The Approach We Take

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

Our work is characterized by…

Involving stakeholders broadly and in partnership

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



Using best available science supported by local knowledge

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



Investing collaboratively with long-term outcomes in mind

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

Demonstrating impact through meaningful monitoring and evaluation

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



Reaching and involving underrepresented populations

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



OWEB Staff Culture Statement

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

Amended as of 1/20/2023

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

	GRANTS	2022 Spending Plan	TOTAL Awards To-Date	January 2023 Proposed Board Awards	TOTAL Awards To-Date & Proposed Awards	Remaining Spending Plan after Awards To-Date
1	**Open Solicitation:**					
2	Restoration	33.500	23.401		23.401	10.099
3	Technical Assistance					
4	Restoration TA	5.500	3.249		3.249	2.251
5	CREP TA	1.200	1.200		1.200	-
6	Stakeholder Engagement	2.750	1.236		1.236	1.514
7	Monitoring grants	4.750	4.579		4.579	0.171
8	Land and Water Acquisition	8.500	3.079		3.079	5.421
9	Weed Grants	3.250	3.250		3.250	-
10	Small Grants	2.800	2.800		2.800	-
11	Quantifying Outputs and Outcomes	1.250	0.263	0.250	0.513	0.737
12	**TOTAL**	**63.500**	**43.057**	**0.250**	**43.307**	**20.193**
13	**% of Total Core Programs**	**51.42%**				
14	**% of OWEB Spending Plan total**	**37.56%**				
15	**Focused Investments:**					
16	Deschutes	1.915	1.915		1.915	-
17	Willamette Mainstem Anchor Habitat	1.400	1.400		1.400	-
18	Harney Basin Wetlands	0.100	0.100		0.100	-
19	Upper Grande Ronde	0.466	0.466		0.466	-
20	John Day Partnership	4.000	4.000		4.000	-
21	Baker Sage Grouse	2.435	2.435		2.435	-
22	Warner Aquatic Habitat	2.293	2.293		2.293	-
23	Rogue Forest Rest. Ptnrshp	2.700	2.700		2.700	-
24	Clackamas Partnership	3.082	3.082		3.082	-
25	New FIP Solicitation	13.000	12.910		12.910	0.090
26	FI Effectiveness Monitoring	1.000	0.750		0.750	0.250
27	**TOTAL**	**32.391**	**32.051**	**-**	**32.051**	**0.340**
28	**% of Total Core Programs**	**26.23%**				
29	**% of OWEB Spending Plan total**	**19.16%**				
30	**Operating Capacity:**					
31	Capacity grants (WC/SWCD)	17.021	15.121		15.121	1.900
32	Statewide org partnership support	0.450	0.450		0.450	-
33	Organizational Collaboration	0.700	0.442		0.442	0.258
34	Partnership Technical Assistance	1.500	0.797		0.797	0.703
35	**TOTAL**	**19.671**	**16.810**	**-**	**16.810**	**2.861**
36	**% of Total Core Programs**	**15.93%**				
37	**% of OWEB Spending Plan total**	**11.63%**				
38	**Other:**					
39	CREP	0.750	0.750		0.750	-
40	Governor's Priorities	0.947	0.947		0.947	-
41	Klamath Post Dam Removal Watershed Restoration/KRRC-Contingency	4.053	4.053		4.053	-
42	Strategic Implementation Areas	1.500	1.500		1.500	-
43	Gov. directed-Lower Columbia Estuary Partnership	0.330	0.330		0.330	-
44	Gov. directed-Sage Grouse Conservation Partnership	0.350	0.350		0.350	-
45	**TOTAL**	**7.930**	**7.930**	**-**	**7.930**	**0.000**
46	**% of Total Core Programs**	**6.42%**				
47	**% of OWEB Spending Plan total**	**4.69%**				
48	**TOTAL Core Programs**	**123.492**	**99.848**	**0.250**	**100.098**	**23.394**
49	**General or Other Funds:**					
50	2020 Fire Recovery & Restoration					
51	Riparian/upland rest. & water quality	10.750	10.750		10.750	-
52	Floodplain restoration & reconnection	5.000	5.000		5.000	-
53	2021 Fire Recovery & Restoration	5.000	5.000		5.000	-
54	2021 Drought Resiliency					
55	Irrigation District Grants	1.551	1.551		1.551	-
56	Irrigation District Grants - N Unit	1.906	1.906		1.906	-
57	Jefferson Co Resiliency Grants	0.852	0.852		0.852	-
58	Klamath Livestock Wells & off channel const grants	2.733	2.733		2.733	-
59	Klamath Co Resiliency Grants	0.731	0.731		0.731	-
60	Jefferson SWCD Soil Conservation Grants	3.000	3.000		3.000	-
61	Oregon Agricultural Heritage Program (OAHP)					
62	OAHP Conservation Easements*	4.315	-		-	4.315
63	OAHP Conservation Management Plans*	0.150	-		-	0.150
64	Water Acquisitions	9.596	-		-	9.596
65	**TOTAL**	**45.584**	**31.523**	**-**	**31.523**	**14.061**
66	**% of OWEB Spending Plan total**	**26.96%**				
67	**TOTAL OWEB Spending Plan**	**169.076**	**131.371**	**0.250**	**131.621**	**37.455**
68	**Funds transferred from/to other agencies**					
69	Transfer to ODFW - PCSRF	12.884	12.884		12.884	-
70	Transfer to Eugene Water & Electric Board - GF	4.000	4.000		4.000	-
71	Transfer from ODF for Forest Health Collaboratives-OF	0.500			-	0.500
72	Transfer from PSMFC - IMW - OF	0.600		-	-	0.600
73	Transfer from NRCS - Farm Bill technical support - FF	-	-		-	-
74	**TOTAL**	**17.984**	**16.884**	**-**	**16.884**	**1.100**
75	**OWEB Spending Plan & Other Directed Funds**	**187.060**	**148.255**	**0.250**	**148.505**	**38.555**

MINUTES ARE NOT FINAL UNTIL APPROVED BY THE BOARD

Oregon Watershed Enhancement Board (OWEB)
October 25 & 26, 2022, Board Meeting

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

OWEB MEMBERS PRESENT
Addington, Greg
Allen, Chris
Boyer, Barbara
Brandt, Stephen
Brown, Dan
Buckmaster, Bruce
Coates, Kelly
Curtis, Aaron
Labhart, Mark (10/26 only)
Marshall, Gary (10/25 only)
McAlister, Liza Jane
McClary, Lindsay
McLeod-Skinner, Jamie
Murray, Eric
Owens, Cory
Reeves, Meg

OWEB STAFF PRESENT
Charpilloz Hanson, Lisa
Ciannella, Greg
Davis, Renee
Duzik, Katie
Fetcho, Ken
Grenbemer, Mark
Hartstein, Eric
Mack, April
Menton, Coby
Page, Stephanie
Redon, Liz
Repplinger, Linda
Shaff, Courtney
Williams, Eric

OTHER
Barton, Alexis
Beamer, Kelley
Crowell, Courtney
Ferrari, Chandra
Fraser, James
Gratz-Weiser, Morgan
Green, Vanessa
Larson, Kristen
Lee, Jan
Lloyd, Diane
Mallon, Zac
Miner, Jason
Purpura, Holly
Rancier, Racquel
Richardson, Shannon
Sievert, Guy
Weinman, Dov
Wigal, Jennifer
Zwissler, Sarah

Tuesday, October 25, 2022

The meeting was called to order at 8:05 by co-chair Liza Jane McAlister.

A. Board Member Comments (Audio = 0.00.07)

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

B. Review and Approval of Minutes (Audio = 1:07:27)

The minutes of July 26 & 27, 2022, were presented for board approval. *Action item*.

Bruce Buckmaster moved the board to approve the minutes from the July 26 & 27, 2022 hybrid meeting. Jamie McLeod-Skinner seconded. The motion passed unanimously.

C. Directors Updates (Audio = 1:08:15, continued audio = 2:22:39)

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

D. General Public Comment (Audio = 1:55:55)

This time was reserved for the board to hear general public comments and review the written public comment submitted for the meeting. *Information item*.

- Oregon Association of Conservation Districts – Jan Lee
- Coalition of Oregon Land Trusts – Kelley Beamer

E. Committee Updates (Audio = 2:44:56)

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

F. Spring Open Solicitation Grant Offering Board Awards (Audio = 3:00:27)

Introduction

Grant Program Manager Eric Williams and OWEB Regional Program Representatives provided background information on the Spring 2022 Open Solicitation Grant Offering and funding recommendations.

Public Comment

This time was reserved for public comment on pending grant applications to be considered for funding by the board. No public comment was given.

Board Consideration of Pending Open Solicitation Grant Applications
The board considered grant applications submitted through the Spring 2022 Open Solicitation grant offering. Applications, supporting materials, and funding recommendations were discussed and acted on by the board. *Action item*.

Meg Reeves moved the board to approve the funding recommendations as described in Attachment D to the Spring 2022 Open Solicitation Grant Offering staff report, but with the removal of project #s 222-1015, 222-1016, 222-1020, 222-2024, and 222-2030, with an award date of October 25, 2022. Bruce Buckmaster seconded the motion. The motion passed unanimously.

G. Oregon Conservation Partnership Second Year Funding Award (Audio = 6:18:22)

Business Operations Manager Courtney Shaff described the Oregon Conservation Partnership's (Partnership) accomplishments to date for the biennium and provided a funding recommendation for the remainder of the Partnership's biennial grant. *Action Item.*

Liza Jane McAlister moved the board to award an additional $225,000 to the Oregon Conservation Partnership in grant #222-8006-19999. Jamie McLeod-Skinner seconded the motion. The motion passed unanimously.

The meeting was adjourned at 2:37 by co-chair Barbara Boyer

Wednesday, October 26, 2022

The meeting was called to order at 8:02 by co-chair Barbara Boyer.

H. General Public Comment (Audio = 0:02:20)
This time was reserved for the board to hear general public comments. *Information item*.

- Tryon Creek Watershed Council – Alexis Barton
- Middle Fork Willamette Watershed Council – Dov Weinmann
- Network of Oregon Watershed Councils – Vanessa Green
- Mary's River Watershed Council – Holly Purpura
- Luckiamute Watershed Council – Kristen Larson

I. OWEB 101: Fund Sources (Audio = 0:23:11)
Executive Director Lisa Charpilloz Hanson, Board and Legislative Policy Coordinator Eric Hartstein, and Oregon Department of Justice Assistant Attorney General Diane Lloyd discussed the types of funding OWEB allocates through grants, along with limitations of how the funding can be used to support different types of projects. *Information Item.*

J. Klamath River Post-Dam Removal Watershed Restoration – Contingency Funding (Audio = 1:37:10)

Introduction

Governor Brown's Natural Resources Policy Director Jason Miner and OWEB Fire, Klamath, and Drought Programs Manager Renee Davis discussed the Klamath dam removal project and requested board action to commit funding in support of watershed restoration work in Oregon following dam removal.

Public Comment [Audio = 2:16:24]

This time was reserved for public comment on funding by the board for post-Klamath dam removal habitat restoration.

- Trout Unlimited – James Fraser

Board Discussion of Klamath River Post-Dam Removal Watershed Restoration Contingency Funding (Audio = 2:30:40)

The board discussed the request for funding in support of watershed restoration work in Oregon following the Klamath dam removal. *Action Item.*

Motion #1: Liza Jane McAlister moved the board to commit $15 million over 5 years for grant funding for Klamath River Post-Dam Removal Watershed Restoration. Bruce Buckmaster seconded the motion. The motion passed with eight in favor; Bruce Buckmaster, Jamie McLeod-Skinner, Kelly Coates, Lindsay McClary, Liza Jane McAlister, Barbara Boyer, Mark Labhart, and Meg Reeves, and one opposed; Greg Addington.

Motion #2: Jamie McLeod-Skinner moved the board to amend its current spending plan to reallocate funding to include $4.053 million for post-dam removal restoration contingency costs in the current biennium (2021-2023). Meg Reeves seconded the motion. The motion passed with eight in favor and one opposed.

Motion #3: Mark Labhart move the board to award an initial amount of $4.053 million from the Klamath Post Dam Removal Watershed Restoration line item in the board's 2021-2023 amended spending plan to support post-dam removal restoration contingency costs incurred by the Klamath River Renewal Corporation, and delegate to the Executive Director the authority to distribute the funds through appropriate agreements with an award date of October 26, 2022. Liza Jane McAlister seconded the motion. The motion passed with eight in favor and one opposed.

Motion #4: Meg Reeves moved the board to include the remainder of the $15 million in funding, or $10.947 million, in future spending plans. Jamie McLeod-Skinner seconded the motion. The motion passed with eight in favor and one opposed.

Motion #5: Jamie McLeod-Skinner moved that if existing funding sources are not sufficient, the board authorizes OWEB staff to apply for a loan of funds from the Clean Water State Revolving Fund for post-dam removal restoration activities. Mark Labhart seconded the motion. The motion passed with eight in favor and one opposed.

K. Local Partner Panel (Audio = 3:30:10)

Business Operations Manager Courtney Shaff, North Coast Regional Program Representative Katie Duzik, and local partners participated in a panel discussion with the board about how local groups leverage local, state, and federal funds and partnerships to build capacity and achieve local restoration and conservation goals. *Information Item.*

L. Interagency Panel on Water Issues and Initiatives (Audio = 5:01:06)

Deputy Director Stephanie Page, Governor Brown's Natural Resources Deputy Policy Advisor Morgan Gratz-Weiser, Water Policy Advisor and Regional Solutions Coordinator for Eastern Oregon Courtney Crowell, Oregon Department of Environmental Quality Water Quality Administrator Jennifer Wigal, Oregon Water Resources Department Deputy Director Strategy and Administration Racquel Rancier, and Oregon Department of Fish and Wildlife Habitat Division Deputy Administrator & Water Program Manager Chandra Ferrari provided updates to the board regarding several water-related initiatives in the state. *Information Item.*

M. 2023-2025 Initial Spending Plan Discussion (Audio = 6:23:02)

Executive Director Lisa Charpilloz Hanson and Grant Program Manager Eric Williams led a board discussion on the process for building and approving the 2023-2025 Spending Plan. *Information Item.*

N. Volunteer Water Quality Monitoring Equipment Funding (Audio = 6:39:56)

Deputy Director Stephanie Page and Effectiveness Monitoring Coordinator Ken Fetcho requested board approval of funding for monitoring equipment that is provided for use by local groups as part of the Oregon Department of Environmental Quality's volunteer water quality monitoring program. *Action item.*

Liza Jane McAlister moved the board award up to $113,000 from the Quantifying Outputs and Outcomes line item in the 2021-2023 spending plan in support of new and replacement equipment for the Volunteer Water Quality Monitoring Program and delegated to the Executive Director the authority to distribute the funds through appropriate agreements with an award date of October 26, 2022. Meg Reeves seconded the motion. The motion passed unanimously.

O. Other Business, Next Meeting, Adjourn (Audio = 7:04:33)

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

The meeting was adjourned at 3:17 by co-chair Liza Jane McAlister

This report provides an update about the agency's development and distribution of the 2022 Annual Tribal Report that describes how OWEB engaged and fostered relations with the nine federally recognized tribes in Oregon and the Nez Perce Tribe. The 2022 Annual Tribal Report has been submitted to the Legislature Commission on Indian Services (LCIS) and the Governor's Office.

Background

Oregon Revised Statute (ORS) 182.166 (3) requires OWEB to submit an annual report by December 15 to the LCIS and the Governor's Tribal Liaison, that must describe; the policy developed and implemented to establish and promote relations with tribes; the names of the individuals who are responsible for developing and implementing programs that affect tribes; the effort made to promote communication between the state agency and the tribes and government-to-government relations between the state and tribes; the process established to identify the programs that affect tribes; a description of training attended; and the method established for notifying employees of legislation detailing Oregon's relationship with tribes and the agency's tribal policy.

2022 Annual Tribal Report

The 2022 Annual Tribal Report includes a description of the following:

- Agency overview to identify the key contacts responsible to establish and promote relations with tribes and a description of OWEB;
- Tribal participation in OWEB's Board and grant programs;
- Promotion of communication between OWEB and tribes, and
- Training for staff to learn more about the provisions of legislation detailing Oregon's relationship with tribes.

The annual report includes a summary of the amount of funding OWEB has provided to tribes and summarizes the amount of funding that tribes have contributed to grants through match.

Across all grant programs, OWEB provided $1,689,730 to tribes in 2022. Three Open Solicitation grants totaling $581,967 were awarded to tribes (two grants totaling $366,490 to the Confederated Tribes of the Umatilla Indian Reservation and one grant in the amount of $215,477 to the Nez Perce Tribe). In addition, the Confederated Tribes of Warm Springs received one grant for $400,000 and the Confederated Tribes of the Umatilla Indian Reservation received a grant for just over $680,000, both through the existing John Day Basin Focused Investment Partnership initiative. Across all grant programs, tribes provided $1,043,828 in cash and $60,661 of in-kind support to grants that were completed in 2022.

Staff Contact

If you have questions or need additional information, contact Ken Fetcho, Tribal Liaison, at ken.fetcho@oweb.oregon.gov or 971-345-7081 or Lisa Charpilloz Hanson, Executive Director, at lisa.charpilloz-hanson@oweb.oregon.gov or 971-345-7022.

Attachment

A. 2022 Annual Tribal Report

OREGON WATERSHED ENHANCEMENT BOARD

2022
Annual Tribal Report

Oregon Watershed Enhancement Board
775 Summer Street NE, Suite 360, Salem, OR 97301-1290

Agency Overview

- **Key Contact**
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The Oregon Watershed Enhancement Board (OWEB) is a state agency that administers grants to organizations for voluntary conservation actions. Grant-funded projects improve overall watershed health and provide on-the-ground habitat restoration and conservation across the state. Agency responsibilities include:

- Grant management and administration for watershed protection and enhancement; and
- Assistance in the development and implementation of watershed-scale restoration initiatives; and
- Coordination and support for locally-led initiatives throughout the state to achieve voluntary cooperative conservation outcomes.

OWEB is led by an 18-member policy oversight and decision-making board. Board members represent the public at large, federally recognized tribes, five state natural resource agency boards and commissions, Oregon State University Extension Service, and six federal land management and natural resource agencies.

OWEB works with the nine federally recognized tribes in Oregon to address watershed-scale restoration needs. OWEB operates grant programs that tribes can apply for to fund a variety of watershed management, protection, and restoration projects. Tribes can leverage those funds to meet their natural and cultural resource restoration goals and objectives.

Tribal Policy

In 2018, OWEB revised its tribal policy by working with the Legislative Commission on Indian Services (LCIS) and tribal input. In 2022, OWEB's leadership and tribal liaison continued to work together to communicate the intent of OWEB's Tribal Policy and identify opportunities for staff to work effectively with tribes.

Summary of Programs and Process for Involving Tribes

OWEB works closely with tribes and involves them in programs and decision-making processes at all levels of the organization. The following sections describe the agency's interactions during 2022 with the nine federally recognized tribes in Oregon and the Nez Perce Tribe that occupies lands in Idaho and Oregon.

OWEB Board and Grant Programs Tribal Participation

Board Membership

The Governor appoints a tribal representative as a voting member of the OWEB Board. The position is currently occupied by Kelly Coates, Natural Resources Program Director of the Cow Creek Band of the Umpqua Tribe of Indians.

Additionally, Governor Brown nominated Lindsay McClary to fill a recently opened at-large position. Lindsay is the Restoration Ecologist/Fish & Wildlife Policy Analyst for the Confederated Tribes of Grand Ronde, and her term began on March 1, 2022, following Senate confirmation. We are extremely grateful to have two bright and energetic tribal professionals participating on the OWEB Board. Kelly and Lindsay help identify opportunities for collaboration and ensure the OWEB board and staff are aware of their responsibilities to involve and consider tribal interests.





▲ Photo 1 (left). Jeremy Ojua with Pacific Willow at the Confederated Tribes of Grand Ronde native nursery. Photo 2 (right). Prescribed burn at Herbert Farm and Natural Area.

Oregon Agricultural Heritage Program (OAHP)

OAHP was established by the Oregon legislature in 2017 to provide voluntary incentives to farmers and ranchers to support practices that maintain or enhance agriculture and fish, wildlife, or other natural resources on agricultural lands. The Oregon Agricultural Heritage Commission (commission) oversees the program and makes funding and policy recommendations to the OWEB Board. The commission consists of 12 members who are appointed by the OWEB Board, including one member selected by the OWEB Board who is a representative of tribal interests. This position is filled by Nathan Jackson, who is a rancher and manages the K Bar Ranches Corporation for the Cow Creek Band of Umpqua

Tribe of Indians. Nathan is also an enrolled tribal member of the Cow Creek Band of Umpqua Tribe of Indians.

Tribes are recognized as eligible applicants for all OAHP grant programs. OAHP received $5 million in funding during the 2022 legislative session to increase the economic viability of Oregon's agricultural operations, reduce the fragmentation of working lands, and enhance fish and wildlife habitat, water quality, and other natural resources. The commission has met numerous times throughout 2022 to further develop this Program and prepare for its first grant offering. Applications were received in October 2022 and grants awards are anticipated in the spring of 2023. Additionally, OWEB performed outreach with the federally recognized tribes in Oregon to recruit applicants for a vacant commission seat to represent natural resource interests.



▲ Photo 3. Vegetation monitoring transect performed by the Cow Creek Band of Umpqua Tribe of Indians as an in-kind match contribution to a water acquisition grant with Trout Unlimited

Grant Program

Grant Applicants

OWEB grants are available to a broad range of entities, including tribes [ORS 541.375(1)]. **Since 2006, OWEB has awarded just over $11,030,000 in grants to tribal governments.** Across all grant programs, OWEB provided $1,689,730 to tribes in 2022. In addition to eligibility on their own, tribes are often members of, or partners with, local watershed councils. Oregon law describing watershed councils (ORS 541.388) specifically identifies

"federally recognized Indian Tribes" as potential members of these local organizations. Tribes are critical partners in watershed restoration in Oregon and often contribute vital match funds to grant projects. In 2022, 18 completed grants included tribal contributions. **Across all grant programs, tribes provided $1,043,828 in cash and $60,661 of in-kind support to OWEB grants in 2022.**

Small Grant Program

In OWEB's Small Grant program (OAR Chapter 695, Division 35), tribes are eligible to be members of Small Grant Teams in each of the state's 28 Small Grant areas. These Small Grant Teams have access to $100,000 per biennium to recommend grants of up to $15,000 for watershed restoration projects. Other team members include watershed councils and soil and water conservation districts. All Small Grant Teams have reorganized the composition of their Teams for the 2021-2023 biennium. Representatives of all nine federally recognized tribes in Oregon and the Nez Perce Tribe serve on 21 of the 28 Small Grants Teams. This number has increased from 20 to 21 over the last biennium, likely due to the increased outreach OWEB completed in 2019. Some tribes sit on several Small Grant Teams and some Teams have more than one tribe participating together.

Open Solicitation Grant Program

OWEB solicits grant applications twice a year through the Open Solicitation Grant Program also known as the Regular Grant Program. During 2022, three grants totaling $581,967 were awarded to tribes (two grants totaling $366,490 to the Confederated Tribes of the Umatilla Indian Reservation and one grant in the amount of $215,477 to the Nez Perce Tribe). Tribal agencies have also submitted two applications in the most recent grant cycle, for which awards have not yet been made.

OWEB's Regional Program Representatives (RPRs) have regular contact with appropriate tribal staff. They meet with interested tribes before grant application submission and throughout the life of each grant to ensure tribes can meet their goals and objectives. Tribes often partner with watershed councils and soil and water conservation districts (SWCDs) by helping manage the projects and at times receive funding to implement projects as contractors. In 2022, approximately 19% of the applications that were submitted had tribal participation. Tribes participate in applications in several ways. They may be applicants, provide cash matches, landowners, contractors for project implementation, partners, board members of the applicant's organization, or supporters of the applicant (such as writing letters of support). In 2022, applications with tribal participation have a 74% success rate (are funded) compared to applications without tribal participation which have a 63% success rate.

Open Solicitation Grant Program – Regional Review Teams

Applications received through OWEB's Open Solicitation Grant Program are reviewed by one of six Regional Review Teams, comprised of state, federal, and tribal natural resource professionals. All six regional review teams have at least one tribal natural resource

professional participating in the review process. In 2022, seven tribal agency representatives participated in OWEB Regional Review Teams, including representatives from the Nez Perce Tribe, Confederated Tribes of the Umatilla Indian Reservation, Confederated Tribes of Siletz Indians, Confederated Tribes of Warm Springs, Cow Creek Band of Umpqua Tribe of Indians, and the Confederated Tribes of Grand Ronde.

Land Acquisition Grant Program

OWEB's land acquisition grant program provides funding for projects that acquire interests in land from a willing seller to address the conservation needs of priority habitats and species. OWEB notifies all tribes after receiving a land acquisition application to solicit input in the decision-making process. Additionally, OWEB notifies tribes once a recommendation has been made allowing tribes to provide additional input before the OWEB Board's funding decision.

Water Acquisition Grant Program

OWEB's water acquisition grant program provides funding for programs or projects that acquire an interest in water from a willing seller to increase instream flow. Like the land acquisition grant program, OWEB notifies tribes after a water acquisition grant application is received and once a recommendation has been made to allow multiple opportunities to provide input in the decision-making process.



▲ Photos 4. Before and after photos from the Longley Meadows Fish Habitat Enhancement Project, implemented by the Confederated Tribes of the Umatilla Indian Reservation.

Focused Investment Partnership Program

In 2022, tribes continued to participate in the Focused Investment Partnership (FIP) Program. The OWEB Board made the initial FIP awards in 2016. Implementation funding provides opportunities for tribes and others to work collaboratively on long-term, landscape-scale programmatic restoration initiatives. These initiatives create measurable outcomes within priority areas that were identified by the OWEB Board.

OWEB invested in five new FIP Initiatives in 2022.

- East Cascades Oak Partnership includes the Confederated Tribes of the Warm Springs

- Coos Basin Coho Partnership includes the Confederated Tribes of the Coos, Lower Umpqua, and Siuslaw Indians and the Coquille Indian Tribe
- Siuslaw Coho Partnership includes the Confederated Tribes of the Coos, Lower Umpqua, and Siuslaw Indians and the Confederated Tribes of the Siletz Indians
- Oregon Central Coast Estuary Collaborative includes the Confederated Tribes of the Siletz Indians.
- Klamath Siskiyou Oak Partnership works closely with the Inter-Tribal Ecosystem Restoration Partnership (ITERP). ITERP is a collaboration of regional tribes, tribal community leaders, federal and state agencies, and non-profit conservation organizations throughout Oregon and northern California that is operated by the Lomakatsi Restoration Project.

The FIP Program is another great opportunity for tribes to pursue and receive grant funding from OWEB. In 2022, the Confederated Tribes of Warm Springs received a grant for $400,000 and the Confederated Tribes of the Umatilla Indian Reservation received a grant for just over $680,000, both through the existing John Day Basin FIP.

Focused Investment Partnership Technical Assistance Program

In 2019, the OWEB Board approved a new grant program, which evolved from the previously offered Development FIP grant program. The new Partnership Technical Assistance grants offer two tracks:

1) Partnership Development to produce or enhance a Strategic Action Plan and governance documents.
2) Partnership Capacity to support strategic action plan coordination and implementation.

Partnership Technical Assistance applications were received in October 2021 and were awarded by the OWEB Board in 2022. Two of these funded partnerships include tribes as partners.

- East Cascades Oak Partnership includes the Confederated Tribes of the Warm Springs.
- Coquille Coho Partnership includes the Coquille Indian Tribe.

Post-Wildfire Immediate Response and Recovery Grant Program

At the July 2021 OWEB meeting, the board approved an allocation of $300,000 for wildfire recovery immediate response grants under the Governor's Priorities line item in the 2021-2023 OWEB spending plan. Building upon OWEB's experiences in 2020, these limited grant offerings respond to short-term gaps in wildfire recovery funding. Two of the four fire areas were awarded grants to one lead entity that works in cooperation with area partners. Partners in the Skyline Ridge and Elbow Creek fire areas did not pursue a grant. The Cougar Peak Fire area was awarded $49,876 and the Bootleg Fire area was awarded $75,000 to fund short-term, high-priority needs for a limited set of implementation, technical assistance, and stakeholder engagement activities.

Ongoing efforts to provide funding to the 2020 wildfire areas were expanded. Part of House Bill 5006 (2021) provided OWEB with a total of $19.75 million in funding for grants to support natural resource recovery in areas impacted during the 2020 fire season. Funding was intended to support on-the-ground implementation activities focused on upland and riparian replanting and floodplain restoration. Eligible applicants included tribes, among other entities. As of October 2022, seven projects have been funded for 6 of the 14 fire areas. Six additional projects are pending and will be funded following approved application revisions. While no tribes have submitted applications, they have partnered with applicants to help scope and implement the projects.

Additionally, during the 2022 Oregon Legislative Session, OWEB received a total of $5 million in funding to provide grants to support natural resource recovery in areas impacted during the 2021 fire season. Funding was intended to support on-the-ground implementation activities focused on natural resource recovery in upland, riparian, and instream habitats. Eligible applicants include tribes, among other entities. The first cycle closed on October 20, 2022, and received three applications, two of which have tribal participation and will be reviewed for funding consideration in late fall 2022. Additional cycles may be possible in early 2023.

Drought Recovery Grant Program

Senate Bill (SB) 5561 passed during the December 13, 2021, special legislative session and allocated $11.627 million in General Funds to OWEB for grant-making and program administration to address the ongoing impacts of the drought. As part of program development, OWEB staff participate in a monthly Klamath livestock water working group to find solutions that will provide stock water and improve streamside vegetation. The group is comprised of representatives from agencies and the Klamath Tribes. OWEB conducted extensive outreach with local partners, reaching out to over 45 different groups, including Tribes to assist in designing the following grant programs.

- $3,000,000 for distribution to the Jefferson County Soil and Water Conservation District (SWCD) to support stewardship practices on irrigated land that is at high risk for erosion and soil degradation, and to limit the proliferation of noxious and invasive weeds.
- $3,000,000 to provide grants for livestock watering wells and construction of off-channel water facilities in Klamath County. Funding is provided to help defer the cost for irrigated pasture owners to move livestock watering facilities away from riparian areas, minimizing grazing impacts to riparian areas and the dependency on in-stream water sources.
- $2,000,000 to North Unit Irrigation District (NUID) for matching grants to support investments in irrigation modernization projects within the NUID boundary in Jefferson County.
- $1,627,000 to irrigation districts for matching grants to support statewide investments in irrigation modernization projects.

- $1,000,000 to support drought resilience projects in Jefferson County. OWEB opened a targeted grant offering for Drought Resiliency Technical Assistance Projects in Jefferson County. In addition, OWEB is working with Central Oregon Intergovernmental Council to develop an interagency agreement to support coordination and technical support activities for the Deschutes Basin Water Collaborative.
- $1,000,000 to support drought resilience projects in Klamath County. OWEB opened two grant offerings for Drought Resiliency Projects in Klamath County: one focuses on Technical Assistance and Stakeholder Engagement, and a second focuses on on-the-ground drought resilience actions.

Other Grant Program Involvements

The Upper Middle Fork John Day River Intensively Monitored Watershed (IMW) is a long-term, large-scale monitoring effort to evaluate watershed restoration projects. OWEB participates on the steering team and assists with securing funding for several aspects of the program. The Confederated Tribes of Warm Springs continues to be a key participant in the Upper Middle Fork John Day River IMW and received $19,000 in funding this year to continue their important work in this long-term watershed monitoring effort.

OWEB staff also participates in the Willamette Wildlife Mitigation Program (WWMP). The WWMP is the result of the State's 2010 agreement with Bonneville Power Administration for mitigation of the loss of fish and wildlife habitat due to the construction of 13 dams and reservoirs on major tributaries to the Willamette River from 1946-1964. Members from Confederated Tribes of the Warm Springs, Confederated Tribes of Grand Ronde, and Confederated Tribes of Siletz Indians participate in the WWMP, as they all have historic hunting, fishing, and trading areas in the Basin.



▲ Photo 5. Middle Fork John Day River restoration work completed by the Confederated Tribes of Warm Springs.

Promotion of Communication between OWEB and Tribes

Tribal Liaison

In conformance with OWEB's tribal policy, OWEB's designated staff person, Ken Fetcho, continues to operate as a tribal liaison for the agency. The tribal liaison is responsible for ensuring that OWEB's programs and policy development adhere to our tribal policy. This includes coordinating program and policy notices to tribal natural resource key contacts and providing training to staff as appropriate.

In 2022, OWEB's tribal liaison continued to emphasize the importance of OWEB's tribal policy to new employees and board members. Starting in 2019, each new employee and board member is briefed on the tribal policy and receives a copy of the current Annual Tribal Report.

The tribal liaison continued to meet with Calla Hagle, the Natural Resources Director of the Burns Paiute Tribe, to explore the potential for planning training for OWEB staff that would occur in the future. The purpose of the training would be to learn more about the Burns Paiute Tribe and learn how OWEB can be a better partner in areas of mutual interest. OWEB is interested in learning more about how the Burns Paiute Tribe government is structured, their cultural and natural resource priorities, and how that might influence how they pursue our funding. OWEB looks forward to scheduling this training in 2023.

The tribal liaison worked with Jennifer Karson-Engum to provide tribal training at OWEB's All-Staff Meeting in October 2022. Jennifer is a cultural anthropologist and ethnographer for the Confederated Tribes of the Umatilla Indian Reservation. Jennifer's presentation taught staff about the Tribe's traditional areas of use that spread across the Western United States and how the importance of the cultural resources being integrated into the Natural Resources Department. She highlighted their efforts to document the traditional place names for wide geography in NE OR and SE Washington. This training was extremely valuable to help OWEB staff learn more about the importance of place names and the rich information they provide for the Tribes and the broader public.

At the July 2022 OWEB Board meeting in Enterprise, partners from the Confederated Tribes of the Umatilla Indian Reservation, the Nez Perce Tribe, ODFW, Wallowa Lake Irrigation District and OWRD presented and hosted a field tour of the Wallowa Lake dam rehabilitation and fish passage project. These partners came together to describe the efforts to rehabilitate the dam, provide fish passage, instream flows for fish, irrigation, drinking water, and flood control.



▲ Photo 6. Wallowa Lake Field Tour (left to right): Bobby Hills- Nez Perce Tribe, Courtney Warner-Crowell - Governor's Office, Jeff Yanke- ODFW, Dan Butterfield- Wallowa Lake Irrigation District, Gary James- CTUIR, Joe Dawson- Wallowa Lake Irrigation District, David Bates- OWRD.

Tribal Water Task Force

In September of 2021, the nine Sovereign Tribes of Oregon wrote Governor Brown addressing the state of Oregon's 100-year Water Vision. The letter shared tribal perspectives on water and noted the importance of tribal engagement in any water planning process. The letter continued by requesting the establishment of a Tribal Water Task Force, which would serve two primary functions:

1. Educate Oregon's nine Federally Recognized Tribes to the full complement of State agencies that touch upon 'water' and that have a bearing on one or more of Oregon's water resources.
2. Educate Oregon's nine water-related agencies on the full complement of Tribal interests/issues that 'Oregon's Water Vision' needs to acknowledge and address.

In response to the request, Governor Brown directed the OWRD along with members of her team to help organize and convene a Tribal Water Task Force (Task Force) to address the above topics. OWEB has participated in the six Task Force meetings that occurred during the summer and fall of 2022. OWEB presented at the July 13 Task Force meeting to describe its roles and responsibilities that are related to watershed enhancement and protection. In addition, OWEB provided a thorough review and comments on the draft report that is currently under development. We look forward to working with the Federally Recognized Tribes in Oregon to implement the Task Force's recommendations that are proposed in this report.

Oregon Water Data Portal

In 2022, OWEB began to work with several other state agencies to scope and design the Oregon Water Data Portal (OWDP). This is a project funded by the Oregon Legislature to help improve access to statewide data and information to make water and water infrastructure decisions. OWEB, ODEQ, and OWRD provided a briefing at the Tribal Natural Resources Workgroup in October. The discussion touched upon mutual interests in water and water data gaps, as well as tribal data sharing and sovereignty. As a result of the conversation, efforts are underway to engage with tribes through a formal consultation letter. Tribes were also invited to two additional listening sessions to discuss the planning for the OWDP project: one session focused on interested parties, and a session tailored to water data users, practitioners, and managers. Each of these three meetings resulted in key information that is being used to inform long-term strategic water and water infrastructure-related decisions, with a report anticipated to be provided to the Legislature in early 2023.

Cultural Resources Protection

OWEB continues to emphasize the importance of grantees and grant project managers complying with regulations that protect cultural resources. OWEB grants pay for expenses to comply with cultural resource regulations and legally implement watershed improvement projects. In 2022, OWEB continued to work with National Oceanic and Atmospheric Administration (NOAA) Fisheries and the State Historic Preservation Office (SHPO) regarding programmatic agreements to address the potential effects that the Pacific Coastal Salmon Recovery Fund (PCSRF) grant program may have on cultural resources.

OWEB, NOAA, and their contractor hosted an informational webinar in March 2022. The webinar enabled tribal, state, and federal agencies to describe NOAA's plan to draft and execute a Programmatic Agreement (PA) for the PCSRF Grant Program to comply with Section 106 of the National Historic Preservation Act in Oregon. Additionally, OWEB, NOAA, and their contractor presented at the Cultural Resources Cluster in July 2022 to further describe the PA development process and receive input from the tribes. NOAA is working to provide a draft PA for tribal review in early 2023 and additional engagement will occur to ensure their feedback is incorporated into this important document.

Assessment of Grant Practices Impact on Tribes

In October 2021, OWEB partnered with a Portland State University graduate student on an assessment of how OWEB's granting practices impact federally recognized Tribes' ability to apply for and receive grant funding to meet their watershed enhancement goals and objectives.

Results from this assessment are summarized in a final report and are available online at: https://www.oregon.gov/oweb/Documents/2021-Oct-ItemO-Tribal-Granting-Practices-Assessment-Report.pdf

The findings in the report were developed directly from interviews conducted with staff from each of the nine federally recognized tribes in Oregon, as well as the Nez Perce Tribe. Using these findings, the PSU student developed recommendations to address barriers identified through the assessment. In 2022, OWEB staff prioritized these recommendations and started implementing them. One of the high-priority recommendations involves providing training for tribes on aspects of OWEB's grantmaking and clearing up areas of confusion, so OWEB has started to plan this training for 2023.

Climate Resolution

In January 2022, OWEB's board adopted a Climate Resolution (OWEB Resolution 01-2022). The resolution states that OWEB will:

Integrate climate mitigation and adaptation in their budgeting, investing, and policy-making decisions by:

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

Following the adoption of the resolution, OWEB staff embarked on a tribal and stakeholder engagement process with the intent of learning from partners about the potential challenges and opportunities associated with incorporating mitigation, adaptation, and DEI evaluation criteria in grantmaking. The public engagement process included a virtual tribal listening session. All nine of the federally recognized tribes in Oregon were invited to attend. Representatives from eight of the nine tribes attended, with multiple representatives from each tribe in attendance in almost all cases. Feedback from the tribal engagement process will be used to inform considerations around rulemaking to include the climate and DEI evaluation criteria in all grant programs.

At the July 2022 board meeting, the OWEB board approved the agency to start the rulemaking process to add these criteria into its grantmaking rules. The agency successfully recruited Helena Linnell, Biological Planning and Operations Manager for the Coquille Indian Tribe, to participate in the Rulemaking Advisory Committee (RAC). The rulemaking process will include extensive ongoing tribal engagement and OWEB anticipates the process will take at least one year.

Annual Tribal Summit and Tribal Work Groups

Director Charpilloz Hanson and Liaison Fetcho attended the Annual Tribal Summit and evening reception in Florence on October 3 and 4 to engage and listen to tribal representatives to understand the issues that are important to them. The tribal liaison also continued to attend the State/Tribal Natural Resources Workgroup meetings in 2022.



▲ Photo 7. 2022 Annual Tribal Summit panel with Governor Kate Brown and tribal leaders, Florence, OR.

Meetings with Tribes

Director Charpilloz Hanson, Deputy Director Page, and Liaison Fetcho met with natural resource program leaders from each of the nine federally recognized tribes and the Nez Perce Tribe in 2022. These meetings aimed for OWEB's new leadership to introduce themselves and get to know the tribe's natural resource managers and establish a productive working relationship. These meetings were a great opportunity for OWEB to learn about the tribe's natural resource/fisheries priorities and how they might intersect with OWEB's grant opportunities and policy initiatives. We also described OWEB's current priority initiatives and learned how each tribe might be willing to engage in them. We hope that establishing these relationships and exchanging information is mutually beneficial so we can continue to foster and develop relations between OWEB and each federally recognized tribe in Oregon. OWEB looks forward to meeting with the tribes on their lands in 2023 to see some of their watershed enhancement projects and continue to learn more.

January 24-25, 2023, OWEB Board Meeting

Executive Director Update C-3 Strategic Plan Update

This report provides the board updates on progress implementation of the 2018-2028 strategic plan.

Background

In June 2018, the board approved a new, ten-year strategic plan. Beginning with the July 2022 board meeting, staff developed a new template to track quarterly progress on strategic plan priorities and report out to the board and stakeholders.

Attached is the latest update of actions related to the strategic plan between October 2022 and January 2023.

During this quarter, OWEB was very active in the community, attending the annual tribal summit, meeting with several traditional and non-traditional partners, and presenting at conferences and meetings. OWEB continued to forge ahead on OAHP, Drought, Wildfire, and Water Acquisition grant offerings. Additionally, OWEB committed to support funding for DEQ's volunteer water quality monitoring program equipment and post-Klamath dam removal restoration.

Staff Contact

If you have questions or need additional information, contact Courtney Shaff, Monitoring and Reporting Program Manager, at **Courtney.Shaff@oweb.oregon.gov or 971-345-7012**

Attachments

A. OWEB Strategic Plan Report January 2023

OREGON Watershed Enhancement Board



Clackamas River, Bonnie Moreland, cc

2018-2028 Strategic Plan

Quarterly Report to the Board | January, 2023

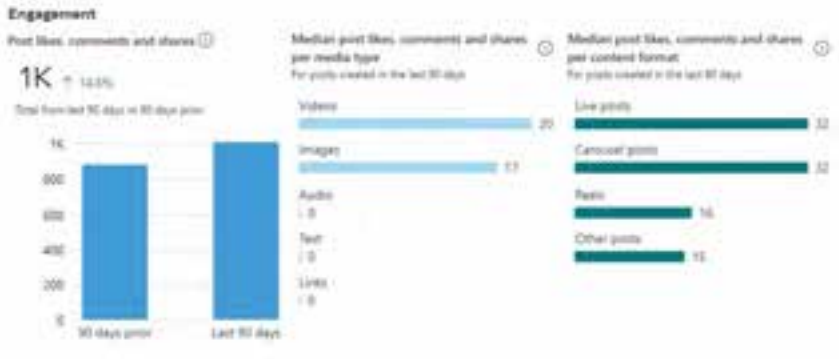
Mission: To help protect and restore healthy watersheds and natural habitats that support thriving communities and strong economies.

Priority 1
Broad awareness of the relationship between people and watersheds



Top recent Instagram post: video of Rock Creek restoration site (grantee activity).
Top recent Facebook posts: board and staff gatherings (OWEB activity).

Continued **social media efforts** to create awareness about watersheds and highlight watershed work accomplished by OWEB partners. Post engagement continues to steadily increase, especially on the Instagram site shown here.





Annual Tribal Summit, 2022.

OWEB's Executive Director and Tribal Liaison participated in **annual Tribal Summit** in October, convening with leaders from each of Oregon's federally recognized tribes. The 2022 Tribal Summit, presented at the Oregon Water Resources Congress, included a panel focused on water management challenges and potential solutions.

Priority 2
Leaders at all levels of watershed work reflect the diversity of Oregonians



Photo of Partners in Diversity "Say Hey" event: OWEB

OWEB leadership **continued to meet with non-traditional partners to expand relationships.** This quarter, leadership met with leadership from:

- SOLVE
- Audubon Society of Portland
- Pew Charitable Trusts
- Sustainable Northwest
- Organic Coalition
- Agricultural Organizations
- Conservation Stakeholders
- Attended Say Hey, a networking event for diverse professionals hosted by Partners in Diversity.



Lisa Charpilloz Hanson, OWEB Executive Director speaking at the Oregon Association of Conservation Districts annual conference.

OWEB Board members and staff attended and presented at the **Oregon Association of Conservation Districts annual conference,** learning directly from leaders on-the-ground about challenges they are facing and discussing potential solutions.

Priority 3

Community capacity and strategic partnerships achieve healthy watersheds



Oregon Central Coast Estuary Collaborative meets to discuss the Restoring Resilience in Two Estuaries project, awarded an anticipated OWEB investment of $7,834,950 over three biennia.

OWEB continued to support **Focused Investment Partnerships (FIPs),** collaborating with the five newly awarded FIPs to launch their initiatives and establish outcome tracking systems. OWEB also reached out to FIP applicants that were not awarded funding to gather feedback on the application process, as part of the program's effort to improve the application process for the next application cycle.



Select trees killed by wildfire are marked for restoration use before they are logged for timber salvage. Photo from the 2020 Archie Creek Fire area.

Launched the **2022 Wildfire Recovery Immediate Response grant offering** which provides assistance for restoration implementation, technical assistance, and stakeholder engagement activities related to fire recovery in eligible areas.

OWEB's Executive Director and staff participate in a state-federal agency work group to develop a shared and all-lands fire stewardship plan.

Priority 4

Watershed organizations have access to a diverse and stable funding portfolio



A past Water Acquisition grant: Fifteenmile Creek Action to Stabilize Temperatures (FAST), implemented by The Freshwater Trust, was completed in 2015. Photo by Zachary Collier.

OWEB opened **Water Acquisitions grant program** in November 2022. These grants support the planning and implementation of an interest in water from a willing seller, including a range of project activities. The purpose is to maintain or restore instream flows to benefit watersheds and native fish and wildlife habitat.



Courtney Shaff, OWEB with agency representatives in Washington DC.

OWEB's leadership continued networking efforts with foundations and federal funding agencies to **identify additional opportunities for partner funding.** OWEB leadership joined ODFW along with agency representatives from Idaho and Washington to meet with federal agency partners in Washington DC to discuss the importance of federal funding to support local priorities.

Priority 5

The value of working lands is fully integrated into watershed health



Still from a video about the OAHP Program interviewing applicants, by Oregon Agricultural Trust.

The Oregon Agricultural Heritage Program (OAHP) launched the **first grant offering for conservation easements, covenants, and conservation management plans.** OWEB conducted extensive public and stakeholder engagement during the program rollout, and accepted public comments on the first round of grant applications. OWEB also offered an "OAHP 101" session for agriculture and conservation stakeholders.



Deschutes River Flow Restoration–Arnold Irrigation District Infrastructure Modernization Project: view of main canal section in residential area.

The Drought Program held drought relief grant offerings to engage communities in Jefferson and Klamath counties to develop or plan **drought resilience and water use reduction projects.** The Drought Program provides grants to assist agricultural producers with:

- soil conservation
- off-channel livestock water
- irrigation modernization
- drought resilience to ensure sustainability of working lands during drought conditions

Priority 6

Coordinated monitoring and shared learning to advance watershed restoration effectiveness



Slide from an Oregon Water Data Portal listening session.

OWEB staff and leadership are participating in the steering committee and technical team for the **Oregon Water Data Portal project,** led by Oregon DEQ. The goal of this project is to make high quality water data readily available to support water planning, management, investments, and public access.



DEQ staff checking volunteer monitoring partners field instruments against National Institute of Standards and Technology (NIST) certified standards. Photo from DEQ Water Quality Monitoring Strategy 2020.

At the October 25-26 OWEB Board meeting, the Board approved funding to the DEQ laboratory to support **water quality monitoring equipment replacements and updates for DEQ's volunteer water quality monitoring program.** In this program, DEQ loans monitoring equipment out to local groups to conduct the monitoring, and also provides technical assistance to volunteer groups, connecting diverse communities with information about the quality of their water.

Priority 7

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



Slide from the Climate Evaluation Criteria Rulemaking Advisory Committee Meeting.

Initiated rulemaking and convened rules advisory committee to **implement the Board's climate resolution** and incorporate climate considerations into OWEB's grantmaking processes.



Request for post-Klamath dam removal funding presented at the October, 2022 board meeting.

Worked closely with the Governor's Natural Resource Office, OWEB Board, and agency partners to present a **request from the Governor for funding for post-Klamath dam removal restoration.** The OWEB board approved the request at the October 2022 board meeting.

Strategies Chart July 2022 - May 2023

highlighted in update

July | October | January | May

1	**Broad awareness of the relationship between people and watersheds**			
1.1	Develop and implement broad awareness campaigns and highlight personal stories to tell the economic, restoration, and community successes of watershed investments.	●	●	●
1.2	Increase involvement of non-traditional partners in strategic watershed approaches.		●	●
2	**Leaders at all levels of watershed work reflect the diversity of Oregonians**			
2.1	Listen, learn and gather information about diverse populations.	●	●	●
2.2	Create new opportunities to expand the conservation table.	●		●
2.3	Develop funding strategies with a lens toward diversity, equity and inclusion (DEI)		●	●
3	**Community capacity and strategic partnerships achieve healthy watersheds**			
3.1	Evaluate and identify lessons learned from OWEB's past capacity funding.	●	●	●
3.2	Champion best approaches to build organizational, community and partnership capacity.		●	●
3.3	Accelerate state/federal agency participation in partnerships.	●		●
4	**Watershed organizations have access to a diverse and stable funding portfolio**			
4.1	Increase coordination of public restoration investments and develop funding vision.	●	●	●
4.2	Align common investment areas with private foundations.	●	●	
4.3	Explore creative funding opportunities and partnerships with the private sector.			●
4.4	Partner to design strategies for complex conservation issues that can only be solved by seeking new and creative funding sources.	●	●	●
5	**The value of working lands is fully integrated into watershed health**			
5.1	Implement the Oregon Agricultural Heritage Program.	●	●	●
5.2	Strengthen engagement with a broad base of working landowners.	●	●	●
5.3	Enhance the work of partners to increase working lands projects on farm, ranch and forestlands.		●	●
5.4	Support technical assistance to work with owners/managers of working lands.			
5.5	Develop engagement strategies for owners and managers of working lands who may not currently work with local organizations.			●
6	**Coordinated monitoring and shared learning to advance watershed restoration effectiveness**			
6.1	Broadly communicate restoration outcomes and impacts.		●	●
6.2	Invest in monitoring over the long term.	●		●
6.3	Develop guidance and technical support for monitoring.	●	●	●
6.4	Increase communication between and among scientists and practitioners.			●
6.5	Define monitoring priorities.	●	●	
6.6	Develop and promote a monitoring framework.		●	●
7	**Bold and innovative actions to achieve health in Oregon's watersheds**			
7.1	Invest in landscape restoration over the long term.	●	●	●
7.2	Develop investment approaches in conservation that support healthy communities and strong economics.	●	●	●
7.3	Foster experimentation that aligns with OWEB's mission.	●	●	●

This report provides the board with an update on the status of OWEB's investment in Klamath River Post-Dam Removal Watershed Restoration costs associated with work by the Klamath River Renewal Corporation.

Background

The states of Oregon and California have been working together with PacifiCorp and federal regulatory agencies to plan and implement the removal of four hydroelectric dams on the Klamath River. PacifiCorp previously owned and operated these dams, three in California and one in Oregon (J.C. Boyle dam). PacifiCorp determined that it is in the best interest of the company and its customers to stop operating the dams rather than spending substantial amounts on improvements needed if they were to continue generating power.

The Klamath River Renewal Corporation (KRRC) is a private, independent nonprofit organization formed by signatories of the amended Klamath Hydroelectric Settlement Agreement (KHSA). Signatories of the amended KHSA, including the States of Oregon and California, local governments, Tribal nations, PacifiCorp, irrigators, and several conservation and fishing groups, appointed KRRC to take ownership and oversee the removal of the four Klamath River dams.

PacifiCorp agreed to transfer ownership of the dams to KRRC, which is working with multiple contractors to remove the dams and restore the river to a free-flowing condition. Funding in the amount of $450 million for removal and watershed restoration is committed.

As KRRC implements the dam removal, former reservoir areas will become exposed and require restoration and stabilization of bare sediment deposits for long-term water quality, long-term ecological benefits, and restoration of natural river functions and processes. KRRC submitted a Reservoir Area Management Plan (RAMP) to the Federal Energy Regulatory Commission (FERC), the responsible entity for principal federal regulatory review of the project. The RAMP describes measures for restoration, monitoring, and adaptive management of the former reservoir areas and high-priority tributaries, including actions specifically planned for the former reservoir area upstream of J.C. Boyle dam, the section of the project located in Oregon.

During the FERC review, a question was raised about whether existing contingencies and risk tools provide a high enough level of certainty that the work will be completed on time and within budget. In response to this concern, the states and PacifiCorp agreed to provide up to $45 million in additional financial support for the project, divided equally among the three partners.

On August 26, 2022, FERC released a Final Environmental Impact Statement and recommended approval of the proposed license surrender, decommissioning, and removal of the four Klamath River dams.

On October 26, 2022, the OWEB Board committed $15 million over a period of 3-5 years for Klamath River post-dam removal restoration watershed restoration contingency costs incurred by KRRC. The funding is consistent with OWEB's constitutional and statutory authority to fund projects that address habitat needs for native fish and wildlife, along with water quality. Multiple funding sources administered by OWEB will be utilized for this commitment. The initial grant award made by the board is $4.053 million, which was delegated to the OWEB Executive Director for distribution. The remaining $10.947 million will be included in the OWEB Board's spending plans for future biennia, beginning in 2023-2025.

Status Update

The final License Surrender Order from FERC approving the decommissioning and removal of the dams was issued on November 17, 2022. Ownership of the four dams on the mainstem Klamath River previously owned by PacifiCorp was transferred to KRRC effective December 1, 2022. The removal of the J.C. Boyle facility located in Oregon is expected to occur in 2023.

Since the October 2022 board meeting, staff—in coordination with legal counsel—have developed a partnership agreement with KRRC. The agreement affirms the intent of OWEB's investment in Klamath River post-dam removal watershed restoration and describes the framework, scope, tasks, and timeline for the overarching $15 million in funding. The structure of the partnership agreement and the framework established in the agreement for distributing funds for the restoration work is like the structure of a Focused Investment Partnership.

The partnership agreement was fully executed on December 27, 2022. Staff also have drafted a project-level grant application and associated guidance documents for use by KRRC to propose projects that would utilize the OWEB's post-dam removal watershed restoration funding. Grant applications submitted by KRRC will mirror the restoration actions for the J.C. Boyle area as outlined in the RAMP and will adhere to minor additional requirements included in FERC's final order. Per the partnership agreement, on or before February 17, 2023, staff will make available for use the online grant application and guidance documents. Following this, staff will stay in regular communication with KRRC about implementation progress for post-dam removal restoration. Quarterly reports will be provided to the OWEB Board at each meeting.

Staff Contact

If you have questions or need additional information, contact Renee Davis, Fire, Klamath, and Drought Programs Manager, at renee.davis@oweb.oregon.gov or 971-345-7231.

This report provides the board with an update on the status of OWEB's Post-Fire Recovery and Drought Relief grant programs.

Background

During the 2021 and 2022 Legislative sessions, OWEB received General Fund support for post-fire recovery grant-making. Allocations included $19.75 million in grant funding to address impacts of the 2020 wildfire season and $5 million in grant funding to address impacts of the 2021 wildfire season (in addition to program administration funding to OWEB). During the 2nd Special Session in December of 2021, OWEB received $11.627 million in General Funds to support drought relief grants and grant program administration.

Post-Fire Recovery Grants

Following is a status update for each of the 2020 post-fire recovery allocations:

- $10.75 million for riparian and upland replanting: Three grant cycles have been completed. More than $5.3 million have been awarded or are pending in nine grants. These grants address priority post-fire recovery needs in eight 2020 fire areas: Beachie Creek, Brattain, Echo Mountain, Holiday Farm, Lionshead, Riverside, South Obenchain, and White River. A fourth grant cycle, which is anticipated to be the final grant cycle, closed on January 6, 2023. Eight grant applications from six fire areas—242, Almeda, Beachie Creek, Brattain, Holiday Farm, and Slater—requesting nearly $4.3 million were received. The review process will occur in January-February 2023.
- $5 million for floodplain restoration and reconnection: Three grant cycles have been completed. Approximately $3.3 million have been awarded or are pending in five grants. These grants address priority post-fire recovery needs in four 2020 fire areas: Almeda, Beachie Creek, Holiday Farm, and Indian Creek. A fourth grant cycle, which is anticipated to be the final grant cycle, closed on January 6, 2023. Two grant applications from two fire areas—Brattain and Beachie Creek—requesting more than $600,000 were received. The review process will occur in January-February 2023.
- $4 million for restoration and targeted land acquisition to Eugene Water and Electric Board (EWEB): OWEB staff are working with EWEB and local partners such as McKenzie Watershed Council and McKenzie River Trust (MRT), for post-fire restoration and acquisition grant applications, respectively, in the Holiday Farm fire area. One restoration grant cycle has been completed and a $3 million grant awarded. EWEB and MRT currently are completing due diligence for one land acquisition project to reduce post-fire impacts on riparian and floodplain areas.

For the 2021 post-fire recovery funding, staff developed the grant offering for this funding, and the first grant cycle closed on October 20, 2022. Just over $4 million have been awarded or are pending in two grants. These grants address priority post-fire recovery needs in three 2021 fire areas: Bootleg, Cougar Peak, and Patton Meadow. A second grant cycle will run from January 13 to February 17, 2023.

Drought Relief Grants

General funds provided to OWEB support six categories of drought relief funding. These categories, the total grant funding allocated to each program, and status updates about the programs follow. Unless specified otherwise below, following the close of a grant cycle, a

technical review of applications will occur, and award decisions made within approximately 4-6 weeks of the application deadline.

- $3,000,000 in grant funding to the Jefferson County Soil and Water Conservation District (SWCD) to support stewardship practices on irrigated land that is at high risk for erosion and soil degradation, and to limit proliferation of noxious and invasive weeds – OWEB staff created a grant offering for this funding, and a grant agreement was executed in early July. Nearly $3 million in payments has been made to the SWCD for reimbursements to 85 local producers for soil conservation work. Jefferson SWCD will submit the required status reports to OWEB in the coming months.
- $2,733,500 to support grants for livestock watering wells and construction of off-channel water facilities in Klamath County – The two grant cycles are complete, and three grants totaling $1.66 million have been awarded. A third grant cycle closed on January 6, 2023. One grant application requesting $412,599 was received. The review process will occur in January-February 2023. Access to well drillers continues to be a limiting factor for local partners utilizing this grant program.
- $1,906,325 for matching grant funding to North Unit Irrigation District (NUID) for investments in irrigation modernization projects within the NUID boundary in Jefferson County – The grant agreement with NUID was finalized on December 20, 2022. OWEB and NUID staff communicate regularly about the use of this non-federal match funding for the longer-term watershed plan developed by NUID for the federal PL 83-566 funding program with the USDA Natural Resources Conservation Service.
- $1,550,752 to irrigation districts for matching grants to support statewide investments in irrigation modernization (IM) projects – One grant cycle is complete for the Statewide IM program, and two grants—to the Arnold Irrigation District in the Deschutes Basin and the East Fork Irrigation District in the Hood River Valley—totaling nearly $1.16 million have been awarded. A second grant cycle closed on January 9, 2023. Two grant applications requesting $784,208 were received. The remaining grant funding available totals $392,104. The review process will occur in January-February 2023.
- $852,073 to support drought resiliency projects in Jefferson County – Three grants totaling $850,984 are pending or have been awarded under this targeted offering for Drought Resiliency Technical Assistance Projects in Jefferson County. The grants support work by NUID, Deschutes River Conservancy, and Jefferson SWCD. Under this funding, OWEB also developed an agreement with Central Oregon Intergovernmental Council to support coordination and technical activities for the Deschutes Basin Water Collaborative.
- $930,770 to support drought resiliency projects in Klamath County – OWEB created two grant offerings for Drought Resiliency Projects in Klamath County: one focusing on Technical Assistance (TA) and Stakeholder Engagement, and a second focusing on on-the-ground “Restoration” activities for drought resilience and water-use reduction. Given the demand for these programs, staff worked with the Governor’s Office to reallocate contracted services funding under this General Fund allocation to use for grants. A total of six grants—three TA and stakeholder engagement and three on-the-ground restoration projects—have been awarded, utilizing the full funding allocation.

Staff Contact

If you have questions or need additional information, contact Renee Davis, Fire, Klamath, and Drought Programs Manager, at renee.davis@oweb.oregon.gov or 971-345-7231.

October January 24-25, 2023, OWEB Board Meeting

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

Committee Members

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

Meeting Summary

The DEI and Environmental Justice Committee met on December 7, 2022. At the meeting, Ken Fetcho, OWEB's Effectiveness Monitoring Coordinator and Tribal Liaison provided the committee with an update on the Tribal Assessment Report, which was completed by Portland State University Intern Allie Miller in 2021. Ken and other OWEB staff are preparing training for tribes in 2023 to address some of the questions and concerns raised in the report. Ken will continue to provide updates to the committee as OWEB works to address topics raised in the report.

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

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

- SOLV
- SayHey
- Sustainable NW
- Pew Charitable Trust – Blue Carbon Program

Courtney Shaff and Eric Hartstein shared an updated draft equity statement with the committee. The committee members appreciated the reformatted draft and the new versions that incorporated previous comments from the committee. Members also recognized that developing an equity statement for the OWEB Board will be a journey and we need to take the time and be thoughtful of our approach and the words we use. The committee plans to review another draft at the March 2023 meeting and then decide on the next steps.

No written or public comment was submitted to the committee.

To Be Presented at the January 2023 Board Meeting by:

Dan Shively

Staff Contact

Courtney Shaff, Monitoring and Reporting Program Manager
courtney.shaff@oweb.oregon.gov or 971-345-7012

January 24-25, 2023, OWEB Board Meeting
Water and Climate Committee Update

Committee Members

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

Meeting Summary

The Water and Climate Committee met on December 15, 2022. Scott Altenhoff, Urban and Community Forestry Manager, and Josh Barnard, Forest Resources Division Chief from the Oregon Department of Forestry, presented to the committee on the emerald ash borer invasion in Oregon. The presentation included an update on the current emerald ash borer situation in Oregon and key actions to date, the threats and challenges related to climate and water resources, and opportunities for responding to and recovering from threats and challenges posed by emerald ash borer. Deputy Director Stephanie Page encouraged the committee to think about possible ideas and a role for OWEB in providing support to address these challenges.

Dr. Rose Graves, Natural Climate Solutions Scientist with The Nature Conservancy, shared information about a new statewide project aimed at measuring climate benefits of riparian reforestation, particularly carbon sequestration and storage. Several OWEB staff have been working with Dr. Graves on a proposal to add project parameters that would enhance understanding of climate adaptation-related benefits of riparian reforestation. Effectiveness Monitoring Coordinator and Tribal Liaison Ken Fetcho shared that at the upcoming OWEB board meeting, staff plan to request funds to support this monitoring project.

Board and Legislative Policy Coordinator Eric Hartstein updated the committee on the rulemaking process to implement the climate resolution. The first rules advisory committee meeting convened on December 5th to review draft climate evaluation criteria, which are planned to be integrated into the OWEB grant program administrative rules. The rules advisory committee consists of 12 members representing applicants, grantees, review team members, and non-traditional partners. Staff will take comments and revisions from the first meeting and incorporate them into the updated draft climate evaluation criteria.

Committee members briefly discussed cross-cutting topics from other board committees. The Diversity, Equity, and Inclusion committee reviewed a draft OWEB equity statement at its last meeting and discussed the importance of giving adequate time to statement development.

One public comment was received and sent to committee members prior to the meeting; the public comment will also be shared during the board meeting.

To Be Presented at the January 2023 Board Meeting by:

Bruce Buckmaster and Jamie McLeod-Skinner

Staff Contact

Stephanie Page, Deputy Director
Stephanie.Page@oweb.oregon.gov or 971-345-7004

January 24-25, 2023, OWEB Board Meeting
Grants Committee Update

Committee Members
Barbara Boyer and Dan Brown (co-chairs), Greg Addington, Chris Allen, Mark Labhart, Liza Jane McAllister, Lindsay McClary

Meeting Summary

The Grants Committee met on November 14, 2022, and December 1, 2022. The November 14 meeting was dedicated to lessons learned and areas for exploration of process improvements to the implementation FIP solicitation. The December 1 included a recommendation for an OWEB-appointed position on the Oregon Agricultural Heritage Commission, a preview of two Quantifying Conservation Outputs and Outcomes items on the upcoming January board agenda, and an update on the Division 5 rulemaking process, which will also be before the board in January.

Following staff presentations and discussion, the committee reached a consensus on the following process improvements for the next FIP solicitation:

- Pre-application – include a self-assessment process in advance of the pre-application consultation so that partnerships are better prepared to submit applications that address evaluation criteria;
- Application – eliminate duplicate questions and streamline remaining questions so that information included in Partnership Strategic Action Plans is not repeated in application questions. Application questions will focus on partnership components and detailed work plans;
- Technical review – consolidate technical review from two teams to one that includes both partnership and ecological priorities expertise. Review teams will rank applications; the grants committee will continue to make a funding recommendation to the board. The technical review team will address criterion a) the extent to which the initiative addresses a board-designated priority, which previously has been evaluated only by the grants committee;
- Grants committee recommendation – designate a committee member as "lead presenter" for each initiative application. While committee members read all applications, the lead presenter is responsible for leading committee discussion;
- Board process – at the January board meeting, staff will present "FIP 101," including a discussion of the 7 board-designated priorities.

The committee discussed whether to continue including eligibility for land acquisition grants within FIPs. The committee agreed that land acquisition grants are an important tool in some FIP initiatives and will discuss guidelines for successfully integrating land acquisition in FIPs at the February 6 committee meeting.

To Be Presented at the October 2022 Board Meeting by:

Dan Brown and Barbara Boyer

Staff Contact

Eric Williams, Grant Program Manager
eric.williams@oweb.oregon.gov or 971-345-7014

January 24 & 25 2023,

OWEB Board Meeting

Agenda Item E

Written Public Comment

Oregon
Kate Brown, Governor

State Fish and Wildlife Commission
4034 Fairview Industrial Drive SE
Salem, OR 97302
(503) 947-6044
FAX (503) 947-6042
odfw.commission@state.or.us

December 16, 2022

Oregon Watershed Enhancement Board
Chair Barbara Boyer and Board Members
775 Summer St. NE #360
Salem, OR 97301

Co-Chairs Boyer and McAlister and Board Members,

The Oregon Fish and Wildlife Commission submits this letter in strong support of the Oregon Watershed Enhancement Board (OWEB) Focused Investment Partners (FIP) program and encourages continued investment in ongoing, locally led collaborative conservation efforts to ensure their success and effectiveness throughout Oregon.

The FIP program has been crucial to conservation and restoration of Oregon Conservation Strategy's priority fish and wildlife habitats across the state. With FIP program investments, place-based partnerships have made significant conservation gains in restoring coho habitat along the Oregon Coast, helped protect and enhance remaining oak woodlands and savannas, addressed migratory waterfowl needs in Oregon's closed basin lake systems, and restored habitat for Greater sage-grouse and other sagebrush associated species. We believe the key to the success of these projects has been the sustained investment in local capacity.

Place-based collaborative partnerships have been critical to the success of the FIP program because they draw upon local and traditional knowledge bases about the land's capabilities, and this in turn has built relationships and community resilience. And conversely, the FIP program has been critical to sustaining place-based collaborative partnerships because many federal and state funding opportunities cannot go toward organizational capacity, or the grant application environment has grown increasingly competitive.

OWEB is uniquely positioned to help sustain Oregon's large scale, collaborative conservation efforts through its FIP program. The Commission fully supports continued FIP investment in the program, its conservation priorities, and the local collaboratives doing the work. The Oregon Fish and Wildlife Commission is similarly committed to helping sustain these efforts through the Oregon Department of Fish and Wildlife's grant programs and regional staff capacity. We appreciate the opportunity work closely with OWEB as we sustain our conservation investments in Oregon's Strategy Habitats.

Sincerely,

Mary Wahl

Mary Wahl, Chair

c: Curtis E. Melcher, Director, Oregon Department of Fish and Wildlife
Jill Zarnowitz, Vice-chair, Oregon Fish and Wildlife Commissioner

Our mission is to protect and enhance Oregon's fish and wildlife and their habitats for use and enjoyment by present and future generations.

Mark Labhart, Oregon Fish and Wildlife Commissioner
Becky Hatfield-Hyde, Oregon Fish and Wildlife Commissioner
Bob Spelbrink, Oregon Fish and Wildlife Commissioner
Leslie King, Oregon Fish and Wildlife Commissioner
Kathayoon Khalil, Oregon Fish and Wildlife Commissioner

Lake County Umbrella Watershed Council
P.O. Box 848
Lakeview, OR 97630
www.lakecountywsc.com

December 1, 2022

Curt Melcher, Director
Oregon Department of Fish and Wildlife
4034 Fairview Industrial Drive SE
Salem, Oregon 97302

Dear Mr. Melcher and Oregon Department of Fish and Wildlife

On behalf of the Lake County Umbrella Watershed Council (LCUWC), thank you for decades of partnership in restoring Lake County watersheds. This letter serves to express our concerns regarding the recent Oregon Department of Fish and Wildlife's (ODFW) proposal to apply for instream water rights (ISWR) in Lake County.

Lake County lies in the rain shadow of the Cascade Range and is comprised of many closed-basin watersheds. This particular region of Oregon is solely dependent on winter snow pack to feed stream flow and lake fill. Water availability and reliability is unpredictable as cycles of drought are not uncommon. The county is currently experiencing its third year of exceptional drought conditions, placing great challenges and hardship on the communities and species that rely so heavily on water.

Unique to the closed basins of Lake County are endemic fish species. These fish species have evolved to become morphologically and genetically distinct, adapting to alkaline waters and fluctuating flows. Key to the survival of these species is connectivity to upstream refuge habitat during periods of drought. Limiting factors impacting population distribution and abundance include road infrastructure with perched or undersized culverts, irrigation diversions, and channel modifications that have degraded stream function and valued habitat.

The need for action to address these limiting factors has been an LCUWC priority for decades. In 1991 and in response to the 1987-1994 drought, the entire Goose Lake fish fauna were proposed for listing as "Threatened" under the Federal Endangered Species Act. The Goose Lake Fishes Working Group was formed shortly after with representation from private landowners, state and federal agencies, non-governmental organizations, and universities. By 1995, the Goose Lake Fishes Conservation Strategy was developed to help conserve and restore native fish populations. The strategy outlines actions made through cooperative efforts in order to achieve healthy and functioning ecosystems.

Cooperative and voluntary efforts by resource users have led to an extensive amount of restoration work throughout the closed basins of Lake County. Since 1996, the Lake County Umbrella Watershed Council and partners have achieved fish passage at multiple sites on multiple streams in the Goose, Warner, Abert, Summer, and Silver Lake Basins. Complementary to fish connectivity, stream habitat and riparian health restoration projects have been implemented throughout the county. Each successful

project has contributed to large-scale socio-cultural, economical, and ecological benefits. Please see the enclosed map to understand the full scope of LCUWC and partner efforts between 2004 and early 2021.

With recent drought conditions, the LCUWC has experienced an increase in project work and momentum as resource users are seeking ways to improve irrigation infrastructure for ecosystem resiliency and irrigation efficiency through the conservation of water. The LCUWC is currently involved with 16 stream-related projects on Honey Creek, Deep Creek, and Twentymile Creek in the Warner Basin, 10 stream-related projects on Cottonwood Creek, Drews Creek, Cox Creek, Thomas Creek, Camp Creek, and Cogswell Creek in the Goose Lake Basin, and four stream-related projects in the Chewaucan tributaries in the Abert Basin.

These restoration efforts would be impossible without the relationships among funders, partners, and landowners. At the core of our Council's operation; however, is the ***voluntary*** involvement of private landowners. ODFW's recent application has disrupted this delicate balance of cooperation as many of our previous and current landowner partners believe they are working to achieve the needed balance between irrigated agriculture and species benefit. ODFW's ISWR filing demonstrates that voluntary restoration action is not enough and leaves many water users in the county questioning their continued involvement in project work.

With strong relationships already established, the Council has fielded numerous concerns from project stakeholders as everyone seeks to understand how ISWR held by the State of Oregon will affect current and future operations. The LCUWC understands the value of instream water and the purpose of the water right filings. We understand the fish and wildlife you represent are experiencing many of the same environmental pressures as the agricultural and natural resource groups of Lake County. With an over-allocation of some streams, the need to support fish and wildlife, and the need to support our landowners, our Council finds itself in a difficult situation in which we must maintain creditability and relationships with our landowners, while respecting the missions and values of our agency partners.

An ISWR application in a closed-basin system at a time of exceptional drought, coupled by large-scale movements to assess and make decisions regarding Oregon water, have landowners feeling uncertain. As a Council with members and staff deeply engrained in our communities, we need support in restoring a level of confidence in the restoration work we are trying to accomplish. We are experiencing a "stand - still" on 50% of our project work as land managers wait on the outcome of the ISWR application.

The LCUWC works closely with our local ODFW Fish Biologist and the ODFW Fish Screening and Passage Program. We sincerely value our partnership with ODFW and have accomplished a great deal of work as we all strive to balance the instream and out of stream water needs. We believe the greatest ecological benefit for our watersheds will only be achieved through cooperative restoration actions to address limiting factors in Lake County's closed-basin systems.

We understand ODFW uses ISWRs as a tool to "provide water for fish needs and healthy ecosystems that support multiple public uses." We understand ODFW is attempting to meet the goals of an overarching strategic plan (Oregon's Integrated Water Resources Strategy) just as the LCUWC works to meet the goals of its strategic action plan and other conservation strategies.

The LCUWC respectfully asks what additional tools might ODFW have to assist our group in restoring landowner and other stakeholder confidence in cooperative watershed restoration work? How can

ODFW empower their local employees to enhance and maintain the hard-earned relationships and successful partnerships to provide reassurance for Lake County landowners and natural resource groups?

We look forward to your response and hope to continue strong relationships with ODFW and all of our valued partners.

Respectfully,

The Lake County Umbrella Watershed Council:

Tom O'Leary
Tom O'Leary (Dec 13, 2022 07:42 PST)
Tom O'Leary, Silver Lake Community Watershed

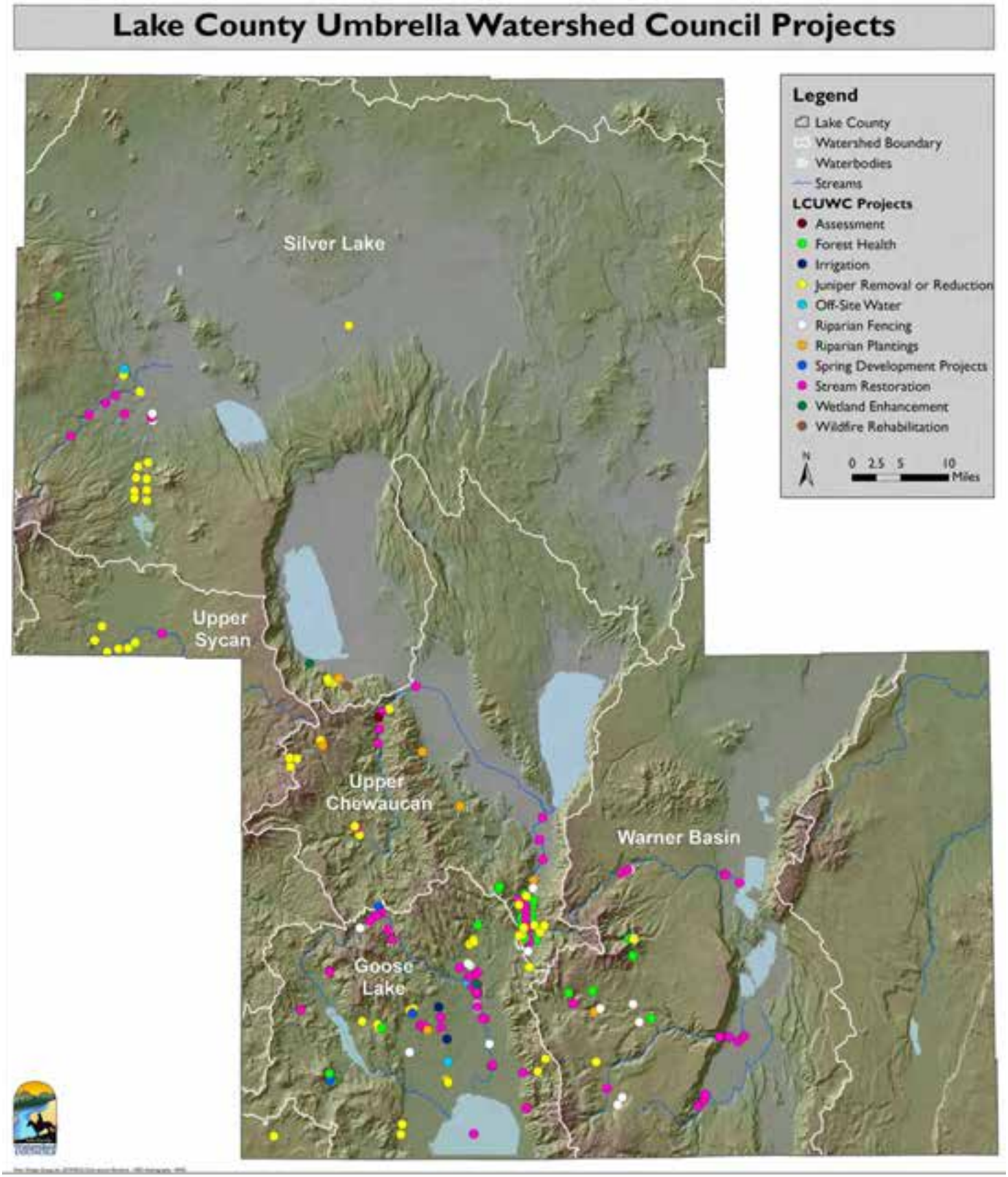
John Taylor
John Taylor (Dec 13, 2022 10:04 PST)
John Taylor, Warner Basin Watershed

Matt Withers
Matt Withers (Dec 13, 2022 10:58 PST)
Matt Withers, Upper Sycan Watershed

Jack O'Leary (Dec 13, 2022 11:14 PST)
Jack O'Leary, Chewaucan Watershed

Jayna Ferrell
Jayna Ferrell (Dec 13, 2022 16:19 PST)
Jayna Ferrell, Crooked Creek Watershed

Pete Talbott
Pete Talbott (Dec 14, 2022 05:10 PST)
Pete Talbott, Goose Lake Basin Watershed



Since 2004, the Lake County Umbrella Watershed Council has completed over 150 restoration projects county-wide. Map courtesy of River Design Group. Created in early 2021

Final Draft

Final Audit Report 2022-12-14

Created:	2022-12-12
By:	Colleen Withers (slidemountainsolutions@gmail.com)
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2022-12-13 - 7:14:23 PM GMT- IP address: 174.247.183.160

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2022-12-14 - 1:10:49 PM GMT- IP address: 148.59.244.176

Document e-signed by Pete Talbott (ptcows@gmail.com)
Signature Date: 2022-12-14 - 1:10:51 PM GMT - Time Source: server- IP address: 148.59.244.176

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Adobe Acrobat Sign

From: Aubrey Cloud
To: MACK April * OWEB
Subject: OWEB Public Comment
Date: Friday, January 20, 2023 11:26:26 AM

Good morning,

I am submitting this public comment in regards to potential updates to the climate change considerations and requirements in the OWEB grant evaluation process. Specifically, this is in reference to the potential requirement or preferential consideration for revegetation contractors to replace their gas-powered manual power tools with electric versions.

This would be a huge climate benefit, and I am very supportive of that transition. However, I need to emphasize what a burdensome lift that would be to require contractors to make this switch on their own. Many reveg contractors are small operations, and do not have large reserves of money available to pay for the cost of replacing all of their tools with electric versions, extra batteries to keep them running all day, and other infrastructural needs that these tools would require.

This is also important because it is not practical or efficient for contractors to make a gradual shift; phasing the tools in/out, so to speak. This is due to practical, logistical considerations they have to plan for, like how much space is available in their work rigs to haul tools & supplies to sites, etc. For an electric tool transition to make sense for day-to-day operations, it would really have to be a complete inventory upgrade all at once.

I have successfully used electric tools in a restoration context and believe we should be transitioning. But many contractors will need help to make the transition if it is to become a requirement. I strongly urge OWEB to consider establishing some kind of assistance fund for contractors to utilize in order to transition their inventories.

If OWEB decides to implement this requirement, they would need to fund the transition, and do that statewide. This will:

- Make contractors more receptive to and accepting of the transition rather than fostering resentment and resistance to an otherwise positive change.
- Ensure that there are not uneven pockets of 'qualifying' contractors throughout the state. Many restoration groups already have difficulty finding contractors, and the ones around are often overbooked and over-extended, especially given all of the work funded through the Infrastructure bill and the Inflation Reduction Act. Facilitating tool transitions would avoid potential issues of equitability, and also ensure that non-profit grant-seekers would not find themselves in an 'electric tool desert', where no one available to them has transitioned (which would hurt their grant competitiveness, creating significant inequities within granting processes at OWEB).
- Accelerate the rate and broaden the scope of transition. This would also accelerate and amplify the climate benefits associated with it.

I appreciate you taking the time to add this to your considerations. Thank you very much and best regards,

Aubrey Cloud (he/him)
Assistant Project Manager
Marys River Watershed Council

A Deeper History of the FIP Program

The Focused Investment Partnership program has a deeper history. Starting in 2007 with Board discussions on the limitations of single project restoration actions. They explored how to invest in a program for a longer period of time to accomplish restoration at scale. The conversation among Board members at the time and between Board and staff explored many of the issues that have been consolidated in the FIP program. I believe it is important to look at the history and deliberations that previous Board members had and the approach they made to explore options to achieve lasting and scaled restoration of important ecological systems.

SIP History

In 2007 and 2008 the OWEB Board asked the staff to explore alternative funding and relationship approaches to accomplish large-scale ecological restoration (see sidebar on SIP Purpose and Characteristics). The staff made a number of inquiries and solicited interest. The Board wanted to make longer term commitments to accomplish ecological outcomes at a larger scale. Early interest came from the Deschutes basin where the Deschutes Land Trust, Deschutes River Conservancy, and Upper Deschutes Watershed Council had articulated a vision of necessary activities to support the reintroduction of salmon and steelhead above Round Butte Dam on the Deschutes River.

At the same time, a Board co-chair was aware that Meyer Memorial Trust was exploring a funding initiative on the Willamette River. OWEB staff had also participated with the National Fish and Wildlife Foundation in developing a "business plan" for restoration of fish habitat in the upper basin in anticipation of the eventual removal of the dams on the Klamath River.

The Board identified six characteristics they wanted to have addressed before consideration of any partnership. They expected any program to address; 1) Higher level ecological outcomes, 2) Sustainability, 3) Strong community partnerships, 4) Efficiencies, 5) Leveraging of Effort, and 6) Ripeness. The Board was particularly interested in identifying programs that had a matching source of funds.

Throughout 2007 and into 2008 the staff identified the Deschutes Partnership as the first to be recommended for funding and shortly thereafter the Willamette with a growing partnership with Meyer Memorial Trust. There was strong interest in considering the Upper Klamath, however the partnership was not ready for recommendation by staff until 2012.

Deschutes Partnership

In January of 2008 the Deschutes SIP was the first long-term investment made by the OWEB Board. The Deschutes Partnership came out of the FERC relicensing of the Pelton/Round Butte Hydroelectric Project. The three principal partners formulated a plan to address the habitat factors to make reintroduction of salmon and steelhead above Round Butte Dam successful. The partners were part of a "model watershed" program of Bonneville Environmental Foundation and had access to Pelton- Round Butte Funds, mitigation funds from the FERC relicensing, to match OWEB SIP funds. The Pelton-Round Butte Fund was established in 2005 and has awarded $27.5 million to habitat restoration projects in the Deschutes basin. The SIP dedicated funding through the 2013-2015 biennium. OWEB invested some $15+ million between 2008 and 2015. The Deschutes SIP funds were matched with $20+ million from other sources (much of it from the Pelton-Round Butte Fund). (see https://digital.osl.state.or.us/islandora/object/osl:16918/datastream/OBJ/view)

Willamette River Partnership

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

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

In 2012 the Willamette Initiative was awarded the Thiess International RiverPrize, considered the Nobel Prize for river restoration.

The SIP program from 2008-2015 matched OWEB funds of $13+ million with some $39+ million in match, dominantly from Bonneville Power Administration in land acquisition along with a $9+

SIP Purpose and Characteristics

SIP Purposes (from March 2007 OWEB Staff Report Agenda Item H)

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

SIP Project Characteristics (from January 2008 OWEB Staff Report Agenda Item J)

Partnerships through SIP are defined by these characteristics:
1. Ecological Significance.
2. Importance of OWEB's Contribution.
3. Robust Partnerships.
4. Triple Bottom Line.
5. Captures the Imagination/High Visibility.
6. Ripeness.

million match from Meyer Memorial Trust. (see https://digital.osl.state.or.us/islandora/object/osl:16952/datastream/OBJ/view)

The Willamette Restoration Initiative

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

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

Wiley et al. (2013)[1] concludes: "The importance of making a long-term commitment when trying to address large-scale ecosystem restoration cannot be overstated. Moving the needle in these systems requires change, whether in agency behavior, funding practices, or farming methods; such changes require cultural shifts, and cultural shifts take time. Small improvements in land and water conditions aggregate and interact slowly and may not be detectable for many years." They state: "We believe at least a decade of funding is needed to develop the organizational capacity and critical mass of restoration projects needed to reverse the trajectory of change in many watersheds." The authors further state: "…we believe that without the application of new approaches (and the assumption of some risk on our part) it is more likely that status quo funding methods will generate limited ecological benefit in this large and complex river system."

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

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

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

Upper Klamath River

In 2012 OWEB awarded the Upper Klamath River partners SIP funding to partner with the work of the National Fish and Wildlife Foundation strategy for the Upper Klamath. The SIP funding lasted for two biennia (through the 2013-2015 biennium). The total Upper Klamath River SIP investment made by OWEB is over $1.37 million, with the partners leveraging another $2.57 million, bringing the total investment from 2012 to 2015 to nearly $4 million. The Upper Klamath lost their leadership and did not have the capacity to continue after the SIP funding.

Carryover from the SIP Program

Following the development of the FIP program the Deschutes Partners were funded in the first FIP cycle from 2015-2021. Under the 2015 FIP program the Willamette program was funded for three additional biennia (2015-2021). This decision by OWEB extended the life of these two successful partnerships to allow them to make significant ecological progress towards their goals. At that time it was recognized that the importance of strong leadership and a protracted time frame for ecological results was recognized. At the end of the first cohort FIP funding both initiatives changed by losing leadership, losing funding partners (MMT), and accomplishing major objectives.

Lessons

The SIP program was a proof-of-concept approach for what became the FIP program. It demonstrated that long-term commitment for identified restoration outcomes could work. The effort was fortunate to partner with a private non-profit (MMT) that was exploring the same question. Some of the primary lessons learned included the importance of having clear goals, having some monitoring methods to be accountable, the significant importance of having strong leadership and partner relationships, and the central importance of support for the capacity of the organizations to make a long-term commitment. Some of the clear lessons for funders is to have flexibility, provide support, and maintain a long-term commitment. It was clear that the 6-year timeframe was in many circumstances too short to accomplish the goal of significant ecological uplift. The importance of a long-term funder for match was also very clear and demonstrated when you compare the Deschutes and Willamette examples with the Klamath example.

Considerations

As you consider the FIP program and weigh its strengths and weaknesses it might be important to consider the strength of a convening entity and the time necessary to accomplish measurable ecological outcomes.

Bierly & Associates LLC

January 16, 2023

Oregon Watershed Enhancement Board
775 Summer Street NE Suite 360
Salem, OR 97301-1290

RE: Agenda Item H: OWEB 101 - Focused Investment Partnership and Council Capacity Grant Programs

Dear OWEB Board:

I would like to provide a bit of background for the genesis of long-term investments in restoration, identify some of the changes that have occurred over time, and offer a perspective on the strengths and weaknesses of the current FIP program. A description of the origins of the Board's earlier discussions of how to make long-term investments and the results of those discussions in the formation of the Special Investment Program (SIP) and selection of early partners is detailed in an attachment (Attachment A). The deliberations by the Board in 2007-2008 and in subsequent years has helped to refine the effort to accomplish restoration at scale and better focus on Board adopted ecological priorities.

While many of the lessons learned during the duration of the SIP program (2007-2015) have been addressed in the FIP program, I believe there are additional lessons that have not been fully integrated. The Attachment details what I believe to be the improvements made by the FIP program but also identifies areas identified during the SIP program that have not been fully integrated in the FIP program.

From both the Willamette and Deschutes programs it has been clear that long-term, stable leadership is critical for the effort. These efforts relied on a strong and continuously engaged partnership leaders (Deschutes Partnership) and/or on a strong convening partner such as Meyer Memorial Trust for the Willamette Initiative. The Willamette Initiative required significant convening effort on the part of OWEB staff as well, especially through fostering and coordinating funding from others. Both of these initiatives became a part of the first cohort of FIP investments. It is interesting to note that neither partnership applied for FIP funding for the second cohort. In both cases staffing turnover led to reduced capacity; key leaders left the Deschutes partner organization, and a key leader (TNC) and a convening partner (Meyer Memorial Trust) left the Willamette Initiative. This is an important indicator that the strength of a partnership is essential for a large-scale restoration initiative to be sustained. It also appears that unless there is a stable entity that a decade is about the limit for a partnership to focus on common restoration goals.

If you look at the "Challenges" for each FIP from Cohort 2 (Agenda Item K) you will notice that nearly all have struggled with maintaining the partnership and leadership. For example: Baker sage-grouse "***The Baker LIT experienced turnover in the coordinator role, as well as in some of its member organizations.***"; Clackamas Partnership "***Partnership capacity was a challenge (e.g., 2 organizations did not have a Project Manager). Turnover and capacity in partnering agencies slowed processes.***"; John Day Partnership "***There still is not widespread local community understanding about the need for and benefits of local conservation efforts in the John Day Basin, and there have been challenges disseminating information about the Partnership throughout the greater community.***"; and Rogue

Forest Partnership "***Having multiple partners makes arriving at consensus time-consuming yet rewarding. Staying faithful to RFRI's communications plan is a regular challenge because of emerging opportunities and demands***." Only the Warner Basin partnership did not identify partnership stability as a challenge throughout their first two biennia (2019-2023).

Initiatives such as the Lower Columbia River Estuary Partnership and the Salmon River Estuary restoration efforts demonstrate the importance of long-term commitment to accomplish an ecological outcome. The Little et al. (2022) study[1] documents the ability to build restoration projects to scale and focus on critical areas and processes through integrated learning and small projects. The experience from the LCRE clearly documents that it took at least 14 years to reach a mature stage necessary to take on larger, more complex projects.

I would urge the OWEB Board to seriously consider the continuation of successful partnerships over the initiation of new partnerships if the desire is to accomplish ecological outcomes at scale.

The FIP program is an excellent effort to go beyond one-off projects but there needs to be considerations of what is necessary to accomplish the stated OWEB objective of: "***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***." The aspirational goal of the FIP program takes both consistent leadership and time. As you deliberate on the FIP program into the future, please consider the relative importance of these elements.

Sincerely,

Kenneth F. Bierly

Kenneth F. Bierly

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

From: Jessica McDonald
To: MACK April * OWEB
Subject: Comment for OWEB Board Meeting
Date: Wednesday, January 18, 2023 4:03:51 PM

This comment is being submitted for consideration at OWEB's upcoming Board Meeting, concerning the spending plan being proposed.

OWEB's draft 2023-25 Spending Plan proposes increasing funding in two key areas – Focused Investment Partnerships (FIPS) and Operating Capacity. While Greenbelt supports increases to these line items, it is a third bucket of spending that we are concerned about. While FIP and Capacity line items have proposed increases, the Open Solicitation line item is being proposed to stay at the current level ($8M) for the next biennium.

Open solicitation is the avenue for land protection funding, a core element of Measure 76, and work that is directly supported through the unique mission of land trusts. **I urge the board to consider spreading the boost across all three of these core programs, giving staff direction to invest more funds in Open Solicitation.**

Greenbelt, like land trusts across the state, is poised to increase the pace and scale of our conservation efforts at a time when the demand for permanent land conservation is greater than ever. It is critical that our sole dedicated state funding source for permanent land protection is also anticipating this trajectory of growth and investing more into its acquisition program. Greenbelt Land Trust is looking 2-5 years down the road for fish and wildlife-focused acquisitions, and it is imperative that OWEB is in lockstep with these expanding needs.

Thank you,

JESSICA MCDONALD (*she/her*)
Executive Director | Greenbelt Land Trust
101 SW Western Blvd., Ste. 111 Corvallis, OR 97333 | 541.752.9609
greenbeltlandtrust.org | 541.207.5528 (c)

Protect. Steward. Enjoy.

UPPER DESCHUTES
WATERSHED COUNCIL

January 19, 2023

Oregon Watershed Enhancement Board
775 Summer St NE
Salem, OR, 97301

Re: Support for OWEB funding for land acquisition program

Dear OWEB Board and Staff,

I am writing to share support from the Upper Deschutes Watershed Council (UDWC) encouraging OWEB to continue strong financial support for land acquisition through the Focused Investment Program (FIP) and the Open Solicitation program.

Watershed conservation and restoration requires working and partnering with numerous entities and different types of landowners, including public agencies and private landowners. Sometimes a project needs to happen on federal land to remove a fish passage barrier or sometimes modernizing an irrigation structure is needed on a ranch or farm, and sometimes the best way to realize a conservation goal involves purchasing land to hold for conservation ownership by a land trust. In the Deschutes Basin, and likely in most other watersheds, all these different tools are needed (and have been utilized) for watershed restoration and species recovery. The pace and scale and positive outcomes that have been achieved in Whychus Creek, as one example, involved restoration on public land, restoration on private ranches, and restoration on lands conserved by the Deschutes Land Trust. The scale of restoration needed in certain portions of the Whychus watershed was only realized because of funding from OWEB that allowed the Deschutes Land Trust to conserve properties along Whychus Creek that allowed for large-scale restoration to support the reintroduction of salmon and steelhead by the Deschutes Land Trust and Upper Deschutes Watershed Council.

Thank you for continuing to fund the important work of land trusts in Oregon.

Sincerely,

Kris W. Knight

Kris Knight
Executive Director, Upper Deschutes Watershed Council

Lake County Umbrella Watershed Council
P.O. Box 848
Lakeview, OR 97630
www.lakecountywsc.com

December 1, 2022

Curt Melcher, Director
Oregon Department of Fish and Wildlife
4034 Fairview Industrial Drive SE
Salem, Oregon 97302

Dear Mr. Melcher and Oregon Department of Fish and Wildlife

On behalf of the Lake County Umbrella Watershed Council (LCUWC), thank you for decades of partnership in restoring Lake County watersheds. This letter serves to express our concerns regarding the recent Oregon Department of Fish and Wildlife's (ODFW) proposal to apply for instream water rights (ISWR) in Lake County.

Lake County lies in the rain shadow of the Cascade Range and is comprised of many closed-basin watersheds. This particular region of Oregon is solely dependent on winter snow pack to feed stream flow and lake fill. Water availability and reliability is unpredictable as cycles of drought are not uncommon. The county is currently experiencing its third year of exceptional drought conditions, placing great challenges and hardship on the communities and species that rely so heavily on water.

Unique to the closed basins of Lake County are endemic fish species. These fish species have evolved to become morphologically and genetically distinct, adapting to alkaline waters and fluctuating flows. Key to the survival of these species is connectivity to upstream refuge habitat during periods of drought. Limiting factors impacting population distribution and abundance include road infrastructure with perched or undersized culverts, irrigation diversions, and channel modifications that have degraded stream function and valued habitat.

The need for action to address these limiting factors has been an LCUWC priority for decades. In 1991 and in response to the 1987-1994 drought, the entire Goose Lake fish fauna were proposed for listing as "Threatened" under the Federal Endangered Species Act. The Goose Lake Fishes Working Group was formed shortly after with representation from private landowners, state and federal agencies, non-governmental organizations, and universities. By 1995, the Goose Lake Fishes Conservation Strategy was developed to help conserve and restore native fish populations. The strategy outlines actions made through cooperative efforts in order to achieve healthy and functioning ecosystems.

Cooperative and voluntary efforts by resource users have led to an extensive amount of restoration work throughout the closed basins of Lake County. Since 1996, the Lake County Umbrella Watershed Council and partners have achieved fish passage at multiple sites on multiple streams in the Goose, Warner, Abert, Summer, and Silver Lake Basins. Complementary to fish connectivity, stream habitat and riparian health restoration projects have been implemented throughout the county. Each successful

project has contributed to large-scale socio-cultural, economical, and ecological benefits. Please see the enclosed map to understand the full scope of LCUWC and partner efforts between 2004 and early 2021.

With recent drought conditions, the LCUWC has experienced an increase in project work and momentum as resource users are seeking ways to improve irrigation infrastructure for ecosystem resiliency and irrigation efficiency through the conservation of water. The LCUWC is currently involved with 16 stream-related projects on Honey Creek, Deep Creek, and Twentymile Creek in the Warner Basin, 10 stream-related projects on Cottonwood Creek, Drews Creek, Cox Creek, Thomas Creek, Camp Creek, and Cogswell Creek in the Goose Lake Basin, and four stream-related projects in the Chewaucan tributaries in the Abert Basin.

These restoration efforts would be impossible without the relationships among funders, partners, and landowners. At the core of our Council's operation; however, is the ***voluntary*** involvement of private landowners. ODFW's recent application has disrupted this delicate balance of cooperation as many of our previous and current landowner partners believe they are working to achieve the needed balance between irrigated agriculture and species benefit. ODFW's ISWR filing demonstrates that voluntary restoration action is not enough and leaves many water users in the county questioning their continued involvement in project work.

With strong relationships already established, the Council has fielded numerous concerns from project stakeholders as everyone seeks to understand how ISWR held by the State of Oregon will affect current and future operations. The LCUWC understands the value of instream water and the purpose of the water right filings. We understand the fish and wildlife you represent are experiencing many of the same environmental pressures as the agricultural and natural resource groups of Lake County. With an over-allocation of some streams, the need to support fish and wildlife, and the need to support our landowners, our Council finds itself in a difficult situation in which we must maintain creditability and relationships with our landowners, while respecting the missions and values of our agency partners.

An ISWR application in a closed-basin system at a time of exceptional drought, coupled by large-scale movements to assess and make decisions regarding Oregon water, have landowners feeling uncertain. As a Council with members and staff deeply engrained in our communities, we need support in restoring a level of confidence in the restoration work we are trying to accomplish. We are experiencing a "stand - still" on 50% of our project work as land managers wait on the outcome of the ISWR application.

The LCUWC works closely with our local ODFW Fish Biologist and the ODFW Fish Screening and Passage Program. We sincerely value our partnership with ODFW and have accomplished a great deal of work as we all strive to balance the instream and out of stream water needs. We believe the greatest ecological benefit for our watersheds will only be achieved through cooperative restoration actions to address limiting factors in Lake County's closed-basin systems.

We understand ODFW uses ISWRs as a tool to "provide water for fish needs and healthy ecosystems that support multiple public uses." We understand ODFW is attempting to meet the goals of an overarching strategic plan (Oregon's Integrated Water Resources Strategy) just as the LCUWC works to meet the goals of its strategic action plan and other conservation strategies.

The LCUWC respectfully asks what additional tools might ODFW have to assist our group in restoring landowner and other stakeholder confidence in cooperative watershed restoration work? How can

ODFW empower their local employees to enhance and maintain the hard-earned relationships and successful partnerships to provide reassurance for Lake County landowners and natural resource groups?

We look forward to your response and hope to continue strong relationships with ODFW and all of our valued partners.

Respectfully,

The Lake County Umbrella Watershed Council:

Tom O'Leary
Tom O'Leary (Dec 13, 2022 07:42 PST)
Tom O'Leary, Silver Lake Community Watershed

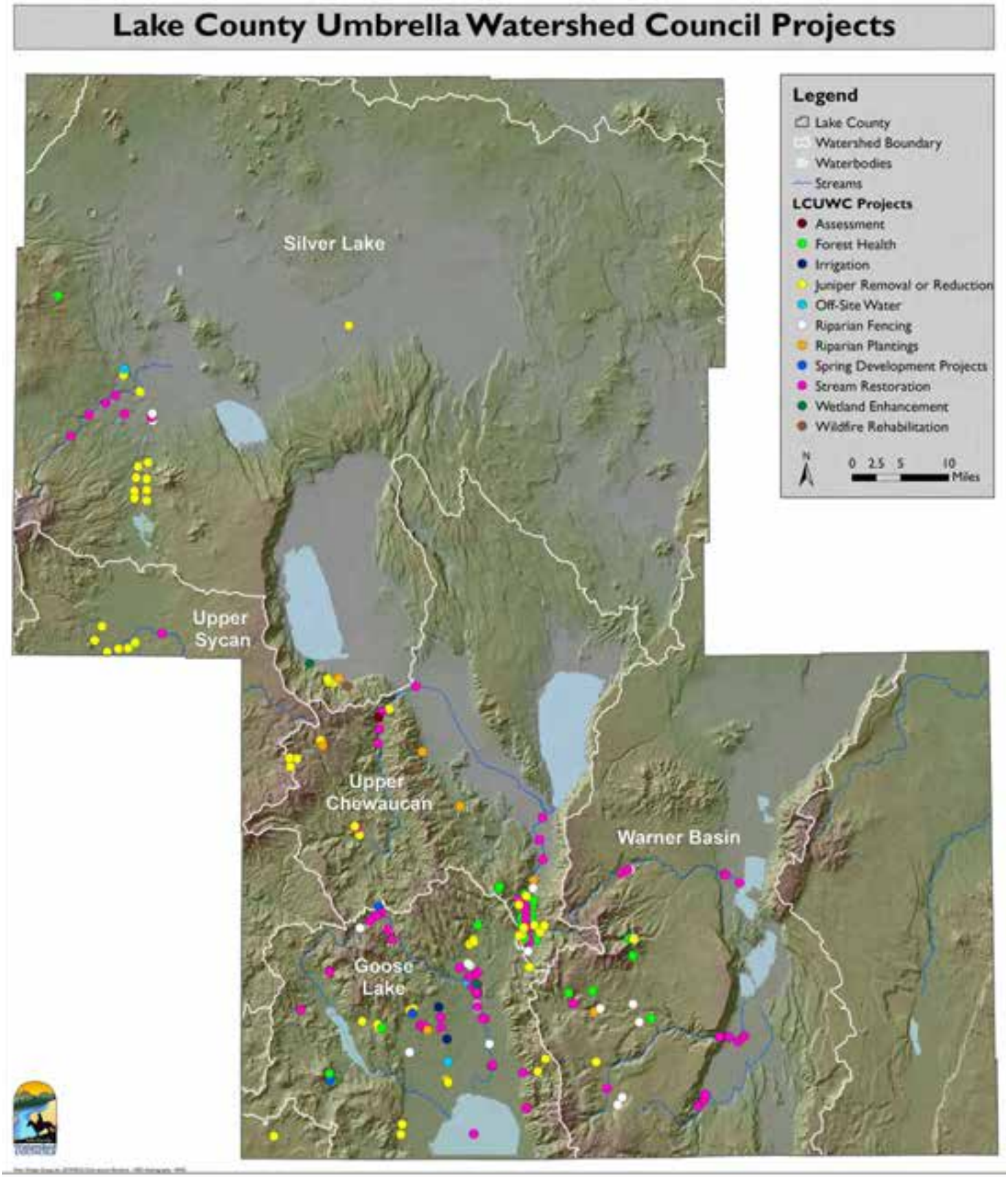
John Taylor
John Taylor (Dec 13, 2022 10:04 PST)
John Taylor, Warner Basin Watershed

Matt Withers
Matt Withers (Dec 13, 2022 10:58 PST)
Matt Withers, Upper Sycan Watershed

Jack O'Leary (Dec 13, 2022 11:14 PST)
Jack O'Leary, Chewaucan Watershed

Jayna Ferrell
Jayna Ferrell (Dec 13, 2022 16:19 PST)
Jayna Ferrell, Crooked Creek Watershed

Pete Talbott
Pete Talbott (Dec 14, 2022 05:10 PST)
Pete Talbott, Goose Lake Basin Watershed



Since 2004, the Lake County Umbrella Watershed Council has completed over 150 restoration projects county-wide. Map courtesy of River Design Group. Created in early 2021

Final Draft

Final Audit Report 2022-12-14

Created:	2022-12-12
By:	Colleen Withers (slidemountainsolutions@gmail.com)
Status:	Signed
Transaction ID:	CBJCHBCAABAAvrHhNYiSKbCXu1ik5_GywxHzvNAga9ki

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Signature Date: 2022-12-14 - 1:10:51 PM GMT - Time Source: server- IP address: 148.59.244.176

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lands in trust protected forever

DESCHUTES LAND TRUST

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danielle lordi
daniele mckay
gonzalo mendez
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inge wells

advisors
robert brunoe
allen dobbins
mike hollern
betsy johnson
jim knapp
rick rupp
john shelk
bill smith
fran willis

executive director
rika ayotte

January 19, 2023

Dear OWEB Board,

The Deschutes Land Trust is writing to encourage the Oregon Watershed Enhancement (OWEB) Board to increase funding in the 2023-2025 biennium spending plan for Open Solicitation grants. The Deschutes Land Trust conserves and cares for the lands and waters that sustain Central Oregon so local communities and the natural world can flourish together for generations to come. Land acquisition is a big part of achieving our mission and OWEB has been a major funding partner in our land acquisition projects. Since 1995, the Land Trust has received over $3M in funding from OWEB to help conserve over 6,000 acres. As we pursue climate change resiliency goals, our land protection work in Central Oregon is accelerating, along with the work of all other Oregon land trusts. There has never been a more important moment for OWEB to increase its investment in land trust work to protect Oregon landscapes and biodiversity for long-term resilience.

The high-level spending plan brought before the Board proposes to boost investment in two areas (FIPS and Capacity) but leaves Open Solicitation investments at the same level as the previous biennium. As Open Solicitation grants fund most OWEB land protection projects, this infers that the line item for land protection will remain the same. While we support overall capacity-building of organizations and increased investment in FIPs, we also strongly support increased investment for on-the-ground projects with organizations that are staffed up and have the expertise to execute. OWEB is one of the only state sources of funding for land acquisition projects. Flat-lining funding now will significantly decrease the pace and scale at which Oregon is able to protect landscapes and biodiversity for long-term resilience.

Land trusts are designed to do our work 'forever'. We work to protect land for the long-haul and our organizations are designed to ensure long-term legal protection of that land and the biodiversity within it. We encourage the OWEB Board to strengthen its investment of this work by increasing funding for Open Solicitation.

Sincerely,

Natasha Bellis

Natasha Bellis
conservation director

Oregon
Kate Brown, Governor

State Fish and Wildlife Commission
4034 Fairview Industrial Drive SE
Salem, OR 97302
(503) 947-6044
FAX (503) 947-6042
odfw.commission@state.or.us

December 16, 2022

Oregon Watershed Enhancement Board
Chair Barbara Boyer and Board Members
775 Summer St. NE #360
Salem, OR 97301

Co-Chairs Boyer and McAlister and Board Members,

The Oregon Fish and Wildlife Commission submits this letter in strong support of the Oregon Watershed Enhancement Board (OWEB) Focused Investment Partners (FIP) program and encourages continued investment in ongoing, locally led collaborative conservation efforts to ensure their success and effectiveness throughout Oregon.

The FIP program has been crucial to conservation and restoration of Oregon Conservation Strategy's priority fish and wildlife habitats across the state. With FIP program investments, place-based partnerships have made significant conservation gains in restoring coho habitat along the Oregon Coast, helped protect and enhance remaining oak woodlands and savannas, addressed migratory waterfowl needs in Oregon's closed basin lake systems, and restored habitat for Greater sage-grouse and other sagebrush associated species. We believe the key to the success of these projects has been the sustained investment in local capacity.

Place-based collaborative partnerships have been critical to the success of the FIP program because they draw upon local and traditional knowledge bases about the land's capabilities, and this in turn has built relationships and community resilience. And conversely, the FIP program has been critical to sustaining place-based collaborative partnerships because many federal and state funding opportunities cannot go toward organizational capacity, or the grant application environment has grown increasingly competitive.

OWEB is uniquely positioned to help sustain Oregon's large scale, collaborative conservation efforts through its FIP program. The Commission fully supports continued FIP investment in the program, its conservation priorities, and the local collaboratives doing the work. The Oregon Fish and Wildlife Commission is similarly committed to helping sustain these efforts through the Oregon Department of Fish and Wildlife's grant programs and regional staff capacity. We appreciate the opportunity work closely with OWEB as we sustain our conservation investments in Oregon's Strategy Habitats.

Sincerely,

Mary Wahl

Mary Wahl, Chair

c: Curtis E. Melcher, Director, Oregon Department of Fish and Wildlife
Jill Zarnowitz, Vice-chair, Oregon Fish and Wildlife Commissioner

Our mission is to protect and enhance Oregon's fish and wildlife and their habitats for use and enjoyment by present and future generations.

Mark Labhart, Oregon Fish and Wildlife Commissioner
Becky Hatfield-Hyde, Oregon Fish and Wildlife Commissioner
Bob Spelbrink, Oregon Fish and Wildlife Commissioner
Leslie King, Oregon Fish and Wildlife Commissioner
Kathayoon Khalil, Oregon Fish and Wildlife Commissioner

From: Chris Gannon
To: MACK April * OWEB
Subject: Re: PC
Date: Wednesday, January 25, 2023 8:36:42 AM

Sure -

Chris Gannon, Director, Crooked River W.C.:

I want to encourage the board to consider adding Water Quality to the FIP priority list in Oregon. With thousands of miles of 303d listed water bodies, there is little chance we will get in front of these needs without more significant action. I am aware and acknowledge that there is an intentional and formal process for providing input to the FIP program specific to statewide priorities. I plan to provide more detailed input in that process when available.

Thank you -

From: MACK April * OWEB <April.MACK@oweb.oregon.gov>
Sent: Wednesday, January 25, 2023 8:32 AM
To: Chris Gannon <Chris@crwc.info>
Subject: RE: PC

OK, thank you Chris. Can you send that to me and I will get it to the co-chairs to share.

Have a great day.

April

April Mack
Assistant to Oregon Watershed Enhancement Board Executive Director & Board
971-345-7001 (call & text); 503-986-0199 (f)
April.Mack@OWEB.Oregon.gov

Oregon
Tina Kotek, Governor

OREGON WATERSHED ENHANCEMENT BOARD

775 Summer Street NE, Suite 360
Salem OR 97301-1290
www.oregon.gov/oweb
(503) 986-0178

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

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Eric Williams, Grants Program Manager
Taylor Larson, Oregon Agricultural Heritage Program Coordinator

SUBJECT: Agenda Item F –Oregon Agricultural Heritage Commission Appointments
January 24-25, 2023, Board Meeting

I. Introduction

The Oregon Agricultural Heritage Commission (OAHC) oversees the Oregon Agricultural Heritage Program (OAHP) and makes funding recommendations to the OWEB board for all applications funded through the Oregon Agricultural Heritage Fund. The OACH is made up of 12 members appointed by the OWEB Board (Attachment A). Due to expiring term limits and retirements, there are currently three vacancies on the OAHC. At the January 2023 meeting, staff will provide an overview of the nomination process for the three vacant seats, present the nominated candidates, and request that the OWEB Board appoint candidates to the vacant OAHC seats.

II. Background

House Bill 3249 established the OAHP and was signed into law on August 15, 2017. In January 2018 the OWEB Board appointed the first 12 members to serve on the OAHC (Attachment B). Voting members of the OAHC can serve no more than two consecutive terms. Since then, the OAHC has drafted program rules and provided input on program guidance and structure. In March of 2023, the OAHC will review the first round of grant applications received and make funding recommendations to the OWEB Board.

III. OAHC Seat Representing Agricultural Interests

Ken Bailey has served on the OAHC since its inception in 2018. Ken was nominated by the Board of Agriculture to serve on the OAHC to represent the interests of farms and ranches throughout the State. Ken's second term expires in January 2023.

Staff solicited applications to fill Ken's seat earlier this year and received two applications (Attachment C). These applications were shared with the Board of Agriculture on August 18, 2022, OWEB staff received their formal nomination of Laura Masterson. If appointed to this seat, Laura would serve through January 2027 and be eligible for a second four-year term.

IV. OAHC Seat Representing Fish and Wildlife Interests

Mary Wahl was appointed to the OAHC in January 2018. Her second term was to expire in January 2023; however, she resigned on February 14, 2022. Mary was originally nominated by the Fish and Wildlife Commission to serve on the OAHC to provide expertise regarding fish and wildlife habitat.

Staff solicited applications earlier this year to fill Mary's vacant seat and received four applications (Attachment C). These applications were shared with the Fish and Wildlife Commission who in turn nominated Eduardo Contreras to serve on the OAHC at their September 19, 2022, Commission meeting. If appointed to this seat, Eduardo would serve through January 2027 and be eligible for a second four-year term.

V. OAHC Seat Representing Natural Resource Interests

Mark Bennett was appointed by the OWEB Board to serve on the OAHC in January 2018 to represent the interests of natural resource values. Mark's term was set to expire in January 2024; however, he resigned from the commission on August 5, 2022.

Staff solicited applications earlier this year to fill the vacant seat and received four applications (Attachment C). These applications were shared with the OWEB Grants Committee which considered them at their December 1, 2022, meeting and voted to recommend Russ Hoeflich be appointed to the vacant seat. If appointed to this seat, Russ would serve the remaining one-year term expiring January 2024 and be eligible for a second four-year term.

VI. Recommendation

OWEB staff recommend the OWEB Board appoint Laura Masterson, Eduardo Contreras, and Russ Hoeflich to the Oregon Agricultural Heritage Commission.

Attachments

A. 2023 OAHC Roster
B. 2018 OAHC Roster
C. 2022 OAHC Applications

OAHP Commission Members 2023

	Name	Recommending Body	Residence City	Interest Represented	Term Beginning	Term Ending	Term Number
1	**Chad Allen**	Board of Agriculture	Tillamook	Farm/Ranch	Jan 2018	Jan 2024	**2**
2	**Dr. Sam Angima**	OSU Extension	Corvallis	OSU Extension	Jan 2018	Jan 2024	**2**
3	**Bruce Taylor**	Fish & Wildlife Comm.	Portland	Fish & Wildlife	Jan 2018	Jan 2025	**2**
4	**Lois Loop**	Board of Agriculture	Salem	Agricultural Water Quality	Jan 2018	Jan 2025	**2**
5	**Woody Wolfe**	Board of Agriculture	Wallowa	Farm/Ranch	Jan 2018	Jan 2025	**2**
6	**Doug Krahmer**	Board of Agriculture	St. Paul	Farm/Ranch	Jan 2018	Jan 2026	**2**
7	**Nancy Duhnkrack**	Land Conservation & Development Comm.	Portland	Easements	Jan 2022	Jan 2026	1
8	**Nathan Jackson**	OWEB Board	Myrtle Creek	Indian tribal	Jan 2018	Jan 2026	**2**
9	**Ed Contreras**	Fish & Wildlife Comm.	Klamath Falls	Fish & Wildlife	Jan 2023	Jan 2027	1
10	**Laura Masterson**	Board of Agriculture	Portland	Farm/Ranch	Jan 2023	Jan 2027	1
11	**Russ Hoeflich**	OWEB Board	Portland	Natural Resources	Jan 2023	Jan 2027	1
12	**Barbara Boyer**	OWEB Board	Yamhill	Ex Officio, non-voting	July 2019	*unspecified	*unspecified

OAHP Commission Members 2018

	Name	Recommending Body	Residence City	Interest Represented	Term Beginning	2nd Term Ending	Initail Term Length
1	**Mary Wahl**	Fish & Wildlife Comm.	Portland	Fish & Wildlife	Jan 2018	Jan 2023	1-year
2	**Ken Bailey**	Board of Agriculture	The Dalles	Farm/Ranch	Jan 2018	Jan 2023	1-year
3	**Mark Bennett**	OWEB Board	Unity	Natural Resources	Jan 2018	Jan 2024	2-years
4	**Chad Allen**	Board of Agriculture	Tillamook	Farm/Ranch	Jan 2018	Jan 2024	2-years
5	**Dr. Sam Angima**	OSU Extension	Corvallis	OSU Extension	Jan 2018	Jan 2024	2-years
6	**Bruce Taylor**	Fish & Wildlife Comm.	Portland	Fish & Wildlife	Jan 2018	Jan 2025	3-years
7	**Lois Loop**	Board of Agriculture	Salem	Agricultural Water Quality	Jan 2018	Jan 2025	3-years
8	**Woody Wolfe**	Board of Agriculture	Wallowa	Farm/Ranch	Jan 2018	Jan 2025	4-years
9	**Doug Krahmer**	Board of Agriculture	St. Paul	Farm/Ranch	Jan 2018	Jan 2026	4-years
10	**Derek Johnson**	Land Conservation & Development Comm.	Portland	Easements	Jan 2018	Jan 2026	4-years
11	**Nathan Jackson**	OWEB Board	Myrtle Creek	Indian tribal	Jan 2018	Jan 2026	4-years
12	**Will Neuhauser**	OWEB Board	Yamhill	Ex Officio, non-voting	Jan 2018	*unspecified	*unspecified

INTEREST FORM

Oregon Agricultural Heritage Commission

Oregon Watershed Enhancement Board

This form is used to obtain general information and qualifications of persons interested in serving on the Oregon Agricultural Heritage Commission. This information will be used by the Oregon boards and commissions that recommend applicants to the Oregon Watershed Enhancement Board (OWEB), and by the OWEB Board, which will appoint the commissioners.

Applicant Information

Name Laura Masterson

Affiliation 47th Ave Farm

Occupation

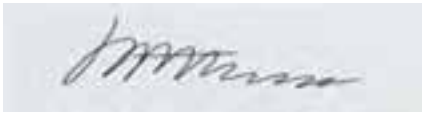
☐ Retired Farmer

Mailing address [redacted]

Town/City Portland **State** OR **Zip Code** [redacted]

Phone Number **Cell or Alternate #** [redacted] **Fax Number**

Email [redacted]

Applicant Signature 

By signing above, you certify that:

- All of the information on this form is true;
- You are a legal citizen of Oregon and the United States of America;
- You will accept appointment to the Oregon Agricultural Heritage Commission if selected by the OWEB Board;
- You have an email address and are able and willing to check your email on a near-daily basis and conduct some commission business via email; and
- You will be able to attend scheduled meetings across the state.

Position Sought

Check the box next to each position for which you are currently applying. You may select multiple boxes. This information may be used to contact you for the Rules Advisory Committee or for future vacancies on the commission.

X **Farmer or Rancher** (recommended by the State Board of Agriculture)

☐ **Fish and Wildlife Habitat** (recommended by the State Fish and Wildlife Commission)

☐ **Agricultural Water Quality** (recommended by the State Board of Agriculture)

☐ **Conservation Easements and Similar Land Transfers** (recommended by the Land Conservation and Development Commission)

☐ **Indian Tribal Interests** (selected by the OWEB Board)

☐ **Natural Resource Value Interests** (selected by the OWEB Board)

Statement Of Interest

Use the space below to explain why you are interested in being a representative on the Oregon Agricultural Heritage Commission and why you will be a good commissioner.

I've been interested in protecting Oregon farmland since I first started farming near the edge of the UGB 26 years ago. The 47th Ave Farm was started on my double lot in Portland. I expanded the farm by leasing small parcels of farmland across the Metro region. I now farm 50 acres in Clackamas & Yamhill Co. Though my farm has grown in scale, the philosophy is still the same: to grow healthy delicious local food, for local folks. Our organic vegetables are sold to year round through a CSA (Community Supported Agriculture) program and to award winning restaurants in the Portland Metro region.

In 2008, as a board member at the East Multnomah SWCD, I helped start a program that was dedicated to using easements to protect ag lands in our district. At that point, easements were a new concept in Oregon. Many people across the state thought that the EFU zoning was sufficient to protect our agricultural land base, but as the continued conversion of farmland has demonstrated, strong zoning is important but can't do the job alone.

Farms and ranches in Oregon are challenged by development near urban areas and by conversion to a variety of other non-farm uses. With very few exceptions, that conversion of farmland is a one way road resulting in the loss of an extremely valuable resource. Agricultural lands also support a variety of natural ecosystems including fish and wildlife habitat that can be lost if support is not provided to help protect them.

I have been helping farmers & ranchers come up with creative solutions to address these challenges for many years including my work on EMSWCD, Oregon Board of Ag and the OWEB Board. Given my long career of advocating for ag and natural resource land protection, I would look forward to bringing that perspective and passion to a position on the Oregon Ag Heritage Commission.

Experience/Involvement

Please describe any work experience and/or involvement that has provided you with knowledge, skills, or abilities to successfully represent the interests of the position(s) for which you are applying and to fulfill the duties of a member of the Oregon Agricultural Heritage Commission. Include any previous experience on boards or commissions.

You may attach a résumé and/or work history.

47th Ave Farm, Owner
1996 - present

Member Board Of Directors
Oregon State Board of Agriculture
Oct 2010 - Oct 2018
Board Chair September 2015 - 2016
Vice Chair September 2014 - 2015
Chair of Land Use Committee
Food Safety & Marketing Committee

Member Board Of Directors
Oregon Watershed Enhancement Board (OWEB)
Feb 2016 - Oct 2018
2018 OWEB Committee Membership:

- Oregon Ag Heritage Program (OAHP) Member of the Technical Committee
- OWEB Board Subcommittee, Operating Capacity
- OWEB Board Subcommittee, Acquisitions

Elected Board of Directors, Zone 2
East Multnomah Soil and Water Conservation District
Jan 2007 - Present
Board Chair Jan 2009 - Jan 2014

Supplemental Question

Describe what you believe to be the main issues facing the future of Oregon agriculture and the fish and wildlife habitat and other natural resources on Oregon's agricultural lands.

The main issues facing Oregon agriculture are conversion to non-farm uses including a myriad of allowed and conditional use exceptions to the original EFU zoning. Conversions that significantly shrink or fragment farmland make it especially challenging to support the regional ag economy over the long run.

Farmland can provide a variety of ecosystem services that the public cares about including clean water, fish & wildlife habitat, open space and carbon sequestration. Since the Dust Bowl, it has been a challenge to provide sufficient funds to help farmers and ranchers maximize these benefits at scale through additional conservation practices.

Equity is also an issue that the Oregon agricultural community needs to address. Women and BIPOC communities do much of the work on farms, but are underrepresented in the ownership of Oregon farms and ranches.

References

Please identify three references that may be contacted if you are selected as a top candidate. Individuals or representatives of associations/organizations are acceptable.

Letters of support from relevant staff, associations, or similar groups are encouraged; feel free to attach any such letters to your application.

Reference #1

Name Nellie McAdams

Affiliation (if any) Oregon Agriculture Trust

Mailing Address 1050 Sunnyview Rd, NE #7359

City/Town Salem

State OR

Zip Code 97303

Phone Number 971-409-6806

Email nellie@oregonagtrust.org

Reference #2

Name Stephanie Hallock

Affiliation (if any) Retired, DEQ Director

Mailing Address 1425 Greentree Circle

City/Town Lake Oswego

State OR

Zip Code 97068

Phone Number 503-799-1437

Email Stephanie.Hallock@gmail.com

Reference #3

Name Mike Guebert

Affiliation (if any) EMSWCD, Board Chair

Mailing Address SE Hurlburt Rd

City/Town Corbett

State OR

Zip Code 97206

Phone Number 503-849-8121

Email Guebertm@gmail.com

Please send your completed application via email to april.mack@oweb.oregon.gov or via mail to:

Oregon Agricultural Heritage Program
ATTN: April Mack
Oregon Watershed Enhancement Board
775 Summer Street NE #360
Salem, Oregon 97301

Applications must be sent via email or post-marked by June 30, 2022 in order to be considered for a position.

INTEREST FORM

Oregon Agricultural Heritage Commission

Oregon Watershed Enhancement Board

This form is used to obtain general information and qualifications of persons interested in serving on the Oregon Agricultural Heritage Commission. This information will be used by the Oregon boards and commissions that recommend applicants to the Oregon Watershed Enhancement Board (OWEB), and by the OWEB Board, which will appoint the commissioners.

Applicant Information

Name Gary Horning

Affiliation Deerhaven Farms Inc

Occupation

☐ Retired Farmer

Mailing address [redacted]

Town/City Corvallis **State** Or **Zip Code** [redacted]

Phone Number [redacted] **Cell or Alternate #** [redacted] **Fax Number**

Email [redacted]

Applicant Signature

By signing above, you certify that:

- All of the information on this form is true;
- You are a legal citizen of Oregon and the United States of America;
- You will accept appointment to the Oregon Agricultural Heritage Commission if selected by the OWEB Board;
- You have an email address and are able and willing to check your email on a near-daily basis and conduct some commission business via email; and
- You will be able to attend scheduled meetings across the state.

Position Sought

Check the box next to each position for which you are currently applying. You may select multiple boxes. This information may be used to contact you for the Rules Advisory Committee or for future vacancies on the commission.

x **Farmer or Rancher** (recommended by the State Board of Agriculture)

☐ **Fish and Wildlife Habitat** (recommended by the State Fish and Wildlife Commission)

☐ **Agricultural Water Quality** (recommended by the State Board of Agriculture)

☐ **Conservation Easements and Similar Land Transfers** (recommended by the Land Conservation and Development Commission)

☐ **Indian Tribal Interests** (selected by the OWEB Board)

☐ **Natural Resource Value Interests** (selected by the OWEB Board)

Statement Of Interest

Use the space below to explain why you are interested in being a representative on the Oregon Agricultural Heritage Commission and why you will be a good commissioner.

Born and raised on a family farm near Monroe I understand the issues concerning family farms in Oregon. From succession to conservation issues and of course the day to day business of farming we need to work together to insure the future of family farms is bright.

Experience/Involvement

Please describe any work experience and/or involvement that has provided you with knowledge, skills, or abilities to successfully represent the interests of the position(s) for which you are applying and to fulfill the duties of a member of the Oregon Agricultural Heritage Commission. Include any previous experience on boards or commissions.

You may attach a résumé and/or work history.

Work History
Part owner Horning Farms Inc 1980-1996
Owner Deerhaven Farms Inc 1996-present

Deerhaven is a 1500 acre farm along the Willamette and Long Tom rivers
600acres turf type tall fescue
700 acres hazelnuts
250 acre conservation easement

Past Committees
Benton County FSA
Oregon Processed Vegetable Commission
Willamette Waterworld 2100 (technical advisory group)
Southern Willamette Groundwater Management committee member

Skills

My family has survived succession in the past and realizes how difficult and important it is.

Having grown crops from mint, wheat, cattle, dairy, beans, corn, raspberries, and alfalfa as well as a conservation easement I understand the changes that happen in Ag and the flexibility we need to adapt for the future.

Supplemental Question

Describe what you believe to be the main issues facing the future of Oregon agriculture and the fish and wildlife habitat and other natural resources on Oregon's agricultural lands.

Concerns
Inheritance taxes
Out of state corporate farms
Bureaucracy
Labor Shortages
Changing climate

As you can see I listed many things that on the surface do not include fish and wildlife. I believe the best thing for conservation is a strong partnership with family farms. We truly care about where we live. The same values are needed for fish and wildlife as for farmers to not only survive but to thrive.

References

Please identify three references that may be contacted if you are selected as a top candidate. Individuals or representatives of associations/organizations are acceptable.

Letters of support from relevant staff, associations, or similar groups are encouraged; feel free to attach any such letters to your application.

Reference #1

Name Jessica McDonald
Affiliation (if any) Greenbelt Land Trust
Mailing Address [redacted]
City/Town Corvallis
State Or
Zip Code [redacted]
Phone Number [redacted]
Email [redacted]

Reference #2

Name Stan Gregory
Affiliation (if any) Oregon State
Mailing Address
City/Town
State
Zip Code
Phone Number [redacted]
Email [redacted]

Reference #3

Name Terry Ross
Affiliation (if any) Hazelnut Growers Bargaining Association
Mailing Address
City/Town
State
Zip Code
Phone Number [redacted]
Email [redacted]

Please send your completed application via email to april.mack@oweb.oregon.gov or via mail to:

Oregon Agricultural Heritage Program
ATTN: April Mack
Oregon Watershed Enhancement Board
775 Summer Street NE #360
Salem, Oregon 97301

Applications must be sent via email or post-marked by June 30, 2022 in order to be considered for a position.

To Whom it may concern

My name is Steve Horning, together with my father and our families we own and operate Deerhaven Farms in Monroe Oregon. Throughout my life I have got to see firsthand my dad's passion and intelligence for the land that we have the privilege to steward. I believe his experience and perspective will make him an outstanding commission member. He has always understood the connection and impact that we have on the land, as well as the importance of making sure we are in a position to hand it down to future generations. Through an open mind and dynamic thinking, he has already navigated one generational transition, and we currently have a path for a second successful succession. Through this I believe you'll find he will make an enormous positive impact towards the goals of the commission.

Thank you for your consideration

Steve Horning

COALITION OF OREGON LAND TRUSTS
511 SE MORRISON ST. PORTLAND, OR 97214 • OREGONLANDTRUSTS.ORG

Oregon Watershed Enhancement Board
775 Summer St. NE #360
Salem, OR 97301

June 30, 2022

CC: Oregon Department of Agriculture
635 Capitol St. NE
Salem, OR 97301

Re: Letter of Recommendation for Gary Horning's Appointment to the Oregon Agricultural Heritage Commission

On behalf of the Coalition of Oregon Land Trusts (COLT), I am reaching out to offer strong support for the appointment of Gary Horning to serve as the farmer/rancher representative on the Oregon Agricultural Heritage Commission.

COLT is a statewide coalition that works to serve and strengthen the land trust community of Oregon by increasing the effectiveness of land trusts, strengthening public policies and programs that are supportive of land conservation, and communicating to key audiences the value of conserving Oregon's natural heritage and the economic activities that depend on it.

As a multi-generational farmer and an experienced land steward, Mr. Horning will contribute indispensable knowledge to the Oregon Agricultural Heritage Commission as Oregon confronts challenges facing our working lands. The Horning family has farmed along the Willamette Valley for four generations. Gary's father and uncle started their careers as vegetable farmers, and now Gary and his son Steve grow hazelnuts and grass seed.

In 2010, the Horning family worked with Greenbelt Land Trust to place an easement to protect and restore over 200 acres of their land along the Willamette River floodplain. The easement is a model example of how conservation can complement and enhance productive agricultural land. The Hornings used their family's knowledge of the land and farming equipment to help Greenbelt refine their restoration practices. Mr. Horning's commitment to this project helped build trust with other local landowners for similar projects.

COALITION OF OREGON LAND TRUSTS
511 SE MORRISON ST. PORTLAND, OR 97214 • OREGONLANDTRUSTS.ORG

I have personally known Gary for over four years and I wholeheartedly recommend him to serve on the Commission. Gary is a well-respected farmer in the Willamette Valley who is dedicated to shaping a successful statewide agricultural protection program. I am confident that he will be an effective and valuable voice for Oregon's agricultural lands and the natural resources they provide. I urge the Board to consider him for this seat.

Sincerely,



Kelley Beamer, Executive Director for the Coalition of Oregon Land Trusts

Eduardo Contreras

Phone: (208) 631-9212
E-mail: edcontreras483@gmail.com

Education

The University of Montana-Missoula, MT 2009-2013

- B.S. Wildlife Biology with Honors: Terrestrial Option
- B.S. Resource Conservation with Honors: Range Management and Grassland Ecology
- GPA: 3.44

Professional Experience

SONEC Conservation Delivery Coordinator November 2018-Present

Intermountain West Joint Venture-Klamath Falls, OR

- Coordinate wetland habitat conservation efforts for migratory birds on public and private lands in Southern Oregon and Northeastern California (SONEC).
- Collaborate with state, federal, tribal, NGO's, and private landowners to fund and implement habitat enhancement and restoration activities.
- Oversee strategic private lands habitat conservation program focused on irrigation practices benefitting migratory birds. Manage two private land habitat biologists.
- Developed successful proposal for a $3.8 million NRCS Regional Conservation Partnership Program (RCPP) grant focused on wetlands in the Klamath Basin. Coordinated implementation of $2.6 million RCPP grant focused on irrigated wet meadows across SONEC.
- Build momentum for conservation easements in SONEC through partnerships with land trusts, agencies, local conservation groups, and landowners. Assist land trusts with securing funding for conservation easement acquisition.

SGI Range & Wildlife Conservationist January 2014-October 2018

Pheasants Forever/NRCS-Mountain Home, ID

- Implemented Natural Resources Conservation Service (NRCS) Farm Bill Programs with a focus on the Sage Grouse Initiative (SGI)
- Worked closely with agricultural producers to implement numerous habitat projects that complement agricultural operations on private and public lands.
- Planned, implemented and monitored structural, vegetative and management conservation practices on rangelands to improve wildlife habitat
- Collaborated with various agencies and organizations including: US Fish and Wildlife Service, Idaho Fish and Game, Idaho Department of Lands, Bureau of Land Management, Idaho Governor's Office of Species Conservation
- Conducted outreach for Farm Bill programs, applied for grants and funding, led and assisted with workshops and tours, and developed outreach materials.

Eduardo Contreras

Ranch Intern May 2013-October 2013
Clark Fork Coalition-Deer Lodge, MT

- Assisted on all aspects of operating a conservation-focused, cow-calf and grass-finished beef operation
- Haying: irrigating, swathing, bailing, stacking
- Livestock: moving, feeding, branding, sorting, doctoring
- Applied progressive agricultural practices: temporary and permanent electric fence, cell grazing, range riding, soil moisture monitoring
- Applied riparian conservation practices: planting riparian vegetation, riparian fencing, maintaining water developments, managing livestock distribution.

Rangeland Research Technician October 2012-May 2013
University of Montana-Missoula, MT

- Provided plant data summaries for developing a Rangeland Vegetation Simulator
- Reviewed scientific literature and collected information on plant characteristics and response to management and disturbance.
- Formatted and edited reports. Produced maps and geospatial files.

Rangeland Conservationist Intern July 2012
U.S. Forest Service-Bishop, CA

- Monitored grazing allotments: fencing, lessee compliance
- Conducted vegetation inventories and identified vegetation in the field
- Collected measurements on grazing utilization

Wrangler/Mule Packer Summers 2010, 2011, 2012
Rock Creek Pack Station-Bishop, CA

- Guided day rides and multi-day horse packing trips
- Hosted clients in backcountry camps.
- Cared for horses and mules.
- Observed U.S. Forest Service, Wilderness, and National Park Service stock grazing and outfitter regulations
- Trained new employees

Boards and Community Activities

Klamath Lake Land Trust-Board Recruit 2022-Present
HDTR Chapter, Back Country Horsemen of Oregon-Board Member 2020-Present
Harney Basin Wetlands Collaborative–Participant 2018-Present

INTEREST FORM

Oregon Agricultural Heritage Commission

Oregon Watershed Enhancement Board

This form is used to obtain general information and qualifications of persons interested in serving on the Oregon Agricultural Heritage Commission. This information will be used by the Oregon boards and commissions that recommend applicants to the Oregon Watershed Enhancement Board (OWEB), and by the OWEB Board, which will appoint the commissioners.

Applicant Information

Name Eduardo Contreras

Affiliation Intermountain West Joint Venture

Occupation

☐ Retired Habitat Program Coordinator

Mailing address [redacted]

Town/City Klamath Falls **State** OR **Zip Code** [redacted]

Phone Number [redacted] **Cell or Alternate #** **Fax Number**

Email [redacted]

Applicant Signature Eduardo Contreras

By signing above, you certify that:

- All of the information on this form is true;
- You are a legal citizen of Oregon and the United States of America;
- You will accept appointment to the Oregon Agricultural Heritage Commission if selected by the OWEB Board;
- You have an email address and are able and willing to check your email on a near-daily basis and conduct some commission business via email; and
- You will be able to attend scheduled meetings across the state.

Position Sought

Check the box next to each position for which you are currently applying. You may select multiple boxes. This information may be used to contact you for the Rules Advisory Committee or for future vacancies on the commission.

☐ **Farmer or Rancher** (recommended by the State Board of Agriculture)

☒ **Fish and Wildlife Habitat** (recommended by the State Fish and Wildlife Commission)

☐ **Agricultural Water Quality** (recommended by the State Board of Agriculture)

☐ **Conservation Easements and Similar Land Transfers** (recommended by the Land Conservation and Development Commission)

☐ **Indian Tribal Interests** (selected by the OWEB Board)

☐ **Natural Resource Value Interests** (selected by the OWEB Board)

Statement Of Interest

Use the space below to explain why you are interested in being a representative on the Oregon Agricultural Heritage Commission and why you will be a good commissioner.

Private agricultural lands play a vital role in sustaining multiple ecosystem services. In the arid West, settlement patterns influenced by access to water have concentrated private ownership over some of the most productive and biodiverse areas on the landscape. The stewardship of these natural resources by landowners and agricultural producers has been integral to the continued persistence of wildlife habitat, clean water, open vistas, and many other natural assets that the we all treasure today. Conserving habitat by developing partnerships with agriculture has been a space where I have dedicated my career. Many natural resources challenges in Oregon and across west are intertwined with agriculture. Through my work, I have learned how agricultural practices interact with the environment and I have found that developing solutions that include agricultural producers, systems and practices as a way to conserve and enhance ecosystem functions have led to great outcomes in conservation. Working with the Oregon Agricultural Heritage Commission to protect special agricultural lands and the many natural resource values they support, would be an energizing opportunity and responsibility that I would invest in wholeheartedly.

Experience/Involvement

Please describe any work experience and/or involvement that has provided you with knowledge, skills, or abilities to successfully represent the interests of the position(s) for which you are applying and to fulfill the duties of a member of the Oregon Agricultural Heritage Commission. Include any previous experience on boards or commissions.

You may attach a résumé and/or work history.

Over the last 9.5 years I have worked with farmers and ranchers to implement habitat projects on rangelands and wetlands in the states of Montana, Idaho, Oregon, and California. My education and interests in rangeland resource management and wildlife biology have set me on a trajectory to work at the intersect of wildlife habitat and livestock production. My work experience has ranged from being a ranch intern and laborer, conducting the day-to-day activities common on a working ranch, to developing and implementing new collaborative conservation programs for strategic habitat conservation on private lands.

I am especially familiar with Farm Bill Conservation Title programs and have worked closely with the Natural Resources Conservation Service (NRCS) in three states since 2014. I have applied habitat projects using the Environmental Conservation Incentive Program (EQIP), Conservation Stewardship Program (CSP), Agricultural Conservation Easement Program-Agricultural Land Easements (ACEP-ALE), and Regional Collaborative Conservation Program (RCPP). Some of the NRCS funded projects I am most proud of involve partnerships with other agencies or NGO's to leverage technical resources and complement financial investments.

I have long had an affinity for conservation easements and have sought opportunities to become involved with this important conservation tool. In my current position, one of my first tasks was to oversee the implementation of $1.6 million in ACEP-ALE funds as part of an RCPP funded project. I developed a competitive and targeted application and review process to identify conservation easement projects that would protect wetlands on irrigated ranches. This effort resulted in two conservation easement projects with multiple funding partners. Since then, I have continued developing partnerships with land trusts in Oregon and California, assisted with writing technical and biological summaries on grant proposals for easement acquisition, transferred science for strategic conservation easement planning, and helped landowners in the early development of their conservation easement projects. To date, I have helped landowners and land trust partners with conservation easements on approximately 7,000 acres of farm and ranchland resulting in the strategic protection of upland and wetland habitats.

Outside of my professional employment I have participated in boards of community organizations. Over the last two years, I have served as a board member of the High Desert Trail Riders Chapter of the Back Country Horsemen of Oregon. This organization is dedicated to maintaining open trail for all users on public, and we volunteer regularly with agencies to assist in trail clearing or habitat projects like fish stocking in remote locations where pack stock is required. Recently, I accepted to participate as a Board-recruit for the Klamath Lake Land Trust, a local land trust based in my community of Klamath Falls, Oregon.

Supplemental Question

Describe what you believe to be the main issues facing the future of Oregon agriculture and the fish and wildlife habitat and other natural resources on Oregon's agricultural lands.

The primary threat to Oregon's agricultural lands and the natural resources they sustain are land use changes that upset the delicate balance of agricultural production and environmental sustainability. Stressors that drive these changes are often economic, policy, or climate related.

In arid Eastern Oregon, for example, climate induced drought and water demands are resulting in an accelerated level of water scarcity with measurable impacts to both agricultural production and wetland/riparian habitats. Water quantity concerns are not a new issue in this region and are increasingly widespread but are generalized as a competition between users for an overallocated resource. However, these issues can be more complex than they appear. Approximately 70% of wetlands for waterbirds and mesic habitat for species in the sagebrush biome are found on private lands in this part of the state, making private lands essential to stable wildlife populations. In many cases the same water that is growing forage for livestock using "inefficient" systems like flood-irrigation are providing foraging areas for migrating waterfowl or brood-rearing habitats for sage grouse. Policy changes that attempt to address water quantity concerns, without a system wide perspective, could have adverse impacts to both the sustainability of ranching and the habitats they maintain. Understanding watershed function and how agriculture uses interact with water is essential to developing lasting solutions and preventing unintended impacts.

Farm economics are an unavoidable element that have and will continue to drive the future of agriculture. Economic assessment and cost studies of agricultural operations show how scant margins can be for family-owned farms and ranches. Across the nation, the limited profitability of smaller agricultural operations has resulted in the consolidation of agricultural lands and development to non-agricultural uses. Clean water and wildlife can be products of good stewardship of a ranch but these are often not financially rewarded. Identifying appropriate ways to compensate or incentivize the ecosystem services provided by private lands may be essential to the economic sustainability of family-run, conservation-minded agricultural operations.

References

Please identify three references that may be contacted if you are selected as a top candidate. Individuals or representatives of associations/organizations are acceptable.

Letters of support from relevant staff, associations, or similar groups are encouraged; feel free to attach any such letters to your application.

Reference #1

Ron Alvarado

Oregon NRCS

[redacted]

Phone Number: [redacted]

Email [redacted]

Reference #2

Larry Maxwell

Rancher/Conservation Easement Landowner

Phone Number: [redacted]

Email: [redacted]

Reference #3

Bruce Taylor

Former OAHC Commissioner

Phone Number: [redacted]

Email: [redacted]

Please send your completed application via email to april.mack@oweb.oregon.gov or via mail to:

Oregon Agricultural Heritage Program
ATTN: April Mack
Oregon Watershed Enhancement Board
775 Summer Street NE #360
Salem, Oregon 97301

Applications must be sent via email or post-marked by June 30, 2022 in order to be considered for a position.

INTEREST FORM

Oregon Agricultural Heritage Commission

Oregon Watershed Enhancement Board

This form is used to obtain general information and qualifications of persons interested in serving on the Oregon Agricultural Heritage Commission. This information will be used by the Oregon boards and commissions that recommend applicants to the Oregon Watershed Enhancement Board (OWEB), and by the OWEB Board, which will appoint the commissioners.

Applicant Information

Name Amanda E. Lowe

Affiliation Employee of the Confederated Tribes of the Umatilla Indian Reservation

Occupation

☐ Retired Soil Conservationist

Mailing address [redacted]

Town/City Pendleton **State** OR **Zip Code** [redacted]

Phone Number [redacted] **Cell or Alternate #** [redacted] **Fax Number**

Email [redacted]

Applicant Signature AEKowe

By signing above, you certify that:

- All of the information on this form is true;
- You are a legal citizen of Oregon and the United States of America;
- You will accept appointment to the Oregon Agricultural Heritage Commission if selected by the OWEB Board;
- You have an email address and are able and willing to check your email on a near-daily basis and conduct some commission business via email; and
- You will be able to attend scheduled meetings across the state.

Position Sought

Check the box next to each position for which you are currently applying. You may select multiple boxes. This information may be used to contact you for the Rules Advisory Committee or for future vacancies on the commission.

☐ **Farmer or Rancher** (recommended by the State Board of Agriculture)

X **Fish and Wildlife Habitat** (recommended by the State Fish and Wildlife Commission)

☐ **Agricultural Water Quality** (recommended by the State Board of Agriculture)

☐ **Conservation Easements and Similar Land Transfers** (recommended by the Land Conservation and Development Commission)

☐ **Indian Tribal Interests** (selected by the OWEB Board)

☐ **Natural Resource Value Interests** (selected by the OWEB Board)

Statement Of Interest

Use the space below to explain why you are interested in being a representative on the Oregon Agricultural Heritage Commission and why you will be a good commissioner.

I believe I can represent the needs and interest of both agricultural producers and conservationists, due to my years of experience working as an intermediary between the two groups. Through graduate school, I studied communications and education specific to agricultural communities and commodities. I have put this to practice for the last 6 years working in Eastern Oregon with wheat producers and cattle ranchers. The producers are well aware that ecologically sustainable management decisions will provide them with an economically sustainable operation; it's my job to help provide them with the tools, information, and connections necessary to make their plans a reality.

In my current position as soil conservationist for the Confederated Tribes of the Umatilla Indian Reservation, my work operates under the First Foods Mission, "to protect, restore, and enhance the First Foods – water, salmon, deer, cous, and huckleberry – for the perpetual cultural, economic and sovereign benefit of the CTUIR. We will accomplish this utilizing traditional ecological and cultural knowledge and science to inform: 1) population and habitat management goals and actions; and 2) natural resource policies and regulatory mechanisms." Applying this mission to the farm and grazing conservation plans I am responsible for has helped me to develop a whole-system view to conservation and agricultural, wherein knowing that a fully functioning ecosystem is capable of balancing and producing for both sets of management goals.

Experience/Involvement

Please describe any work experience and/or involvement that has provided you with knowledge, skills, or abilities to successfully represent the interests of the position(s) for which you are applying and to fulfill the duties of a member of the Oregon Agricultural Heritage Commission. Include any previous experience on boards or commissions.

You may attach a résumé and/or work history.

Resume attached.

Supplemental Question

Describe what you believe to be the main issues facing the future of Oregon agriculture and the fish and wildlife habitat and other natural resources on Oregon's agricultural lands.

I believe the primary issue of concern for the future of both agriculture and fish and wildlife habitat within Oregon is the current and impending implications of climate change which all parties are facing. Within the last 2 years in our own local area, we have seen catastrophic and unpredictable flooding events, caused by variations in the historic timing and intensity of rain events. These heavy precipitation events have been followed only a few months later by devastating drought, decreasing crop and forage yields, and leaving both agricultural and wild animals at a loss for feed. The way forward for producers and conservationists, through these variable and unpredictable swings in climate patterns, is to create more resilient systems that are equipped to withstand shifts in weather.

The status of the supply chains and inflation within the U.S. are also causing damaging effects to the agricultural community in Oregon, and challenging the ability of historic farm and ranch operations to stay in business. These operations are not seeing commodity prices keeping pace with input costs, and that challenges their capacity to provide wages to family or employees that can keep pace with the inflating cost of living. It is within the best interests of the fish and wildlife community to continue to work with these operations and find areas of communal interest, as these working lands provide protection from urban development, and greater loss of habitat.

References

Please identify three references that may be contacted if you are selected as a top candidate. Individuals or representatives of associations/organizations are acceptable.

Letters of support from relevant staff, associations, or similar groups are encouraged; feel free to attach any such letters to your application.

Reference #1

Name: Eric Quaempts

Affiliation (if any): Confederated Tribes of the UIR

Mailing Address: [redacted]

City/Town: Pendleton

State: OR

Zip Code: [redacted]

Phone Number: [redacted]

Email: [redacted]

Reference #2

Name: Gordy Schumacher

Affiliation (if any): Confederated Tribes of the UIR

Mailing Address: [redacted]

City/Town: Pendleton

State: OR

Zip Code: [redacted]

Phone Number: [redacted]

Email: [redacted]

Reference #3

Name: Sarah Silbernagel

Affiliation (if any): USDA NRCS & Wallowa County SWCD

Mailing Address

City/Town

State

Zip Code

Phone Number: [redacted]

Email: [redacted]

Please send your completed application via email to april.mack@oweb.oregon.gov or via mail to:

Oregon Agricultural Heritage Program
ATTN: April Mack
Oregon Watershed Enhancement Board
775 Summer Street NE #360
Salem, Oregon 97301

Applications must be sent via email or post-marked by June 30, 2022 in order to be considered for a position.

Amanda E. Lowe

[redacted]

Professional Objective:

To serve my community utilizing my knowledge and experiences in soil and plant science to help landowners and operators manage their land sustainably into the future; and to further develop my knowledge and skills within an organization with whom I share the value of promoting sound conservation science and research principles.

Education:

Master of Science: Agricultural and Extension Education, May 2016
University of Idaho, Moscow, ID 83844
Area of specialization: Adult Education and Communications
Topic of Research: Extension Clientele Preferences in Facebook Strategies Utilized by County Extension 4-H Programs
Major Professor: Dr. Erik Anderson

Bachelor of Science: Agricultural Communication, Public Relations, May 2010
Washington State University, Pullman, WA 99164

Work Experience:

Confederated Tribes of the Umatilla Indian Reservation
46411 Timine Way, Pendleton, Oregon 97801
Supervisor: Gordy Schumacher, 541-429-7238
Soil Conservationist: December 2016 – Present
Integrate the protection, conservation, utilization and enhancement of Indian lands for the desires of the beneficial owners. Utilize conservation practices consistent with NRCS planning documents, as well as prioritizing management actions through ecological touchstones and First Foods priorities as described in the CTUIR Department of Natural Resources Upland Vision document and First Foods Mission. Advises and works with landowners and producers to develop soil and water conservation plans on farm and pasture leases. Inspects farm and pasture tracts to determine conservation needs based on the resource inventories and soil health assessments. Provide for involvement of Indian landowners in management of trust assets and administer natural resources as outlined in federal law and regulations as well as tribal law. Provides educational and technical information to tribal committees/commissions and other relevant groups that promotes sympathetic interests in cultivating natural resource values. Pursue liaison with other federal, state and local entities to the fullest possible in protecting treaty rights and planning/implementing management systems on intermingled land ownership. Collaborates with United States Department of Agriculture to insure Tribal eligibility and participation in various conservation programs relevant to conserving and enhancing Trust assets and First Foods. Ensure compliance with relevant Federal, State, Tribal land management policies and regulations. Lead staff member for the pasture leasing program.

Umatilla County Soil & Water Conservation District
1 SW Nye Ave. Suite 130 Pendleton, Oregon 97801
Supervisor: Kyle Waggoner; 541-278-8049
CREP Technician: July 2016 – November 2016
Worked with NRCS staff for project specification design, monitoring, implementation, inspection and status reviews. Utilized NRCS Customer Service Toolkit, ArcMap, and WIN-PST in the documentation and management of conservation plans and technical assistance. Conducted Stream Visual Assessment Protocol (SVAP2) for analysis of Oregon CREP eligibility and for design of NRCS Conservation Practices. On-the-job training from the NRCS State Soil Scientist for field soil testing and soil survey report interpretation. Cultivated a working knowledge of the NRCS Field Office Technical Guide to create job sheets for contracted practices and to review practice standards. Provided professional technical assistance to landowners and managers, regarding natural resource concerns. Communicated and worked directly with landowners and operators through face-to-face contact, telephone, and written correspondence. Assisted with inventorying and surveying projects to help develop conservation practice designs for implementation. Conducted outreach on natural resource issues, water quality, and conservation activities at workshops, seminars, fairs, and conventions. Application of numerous environmental and cultural resource laws, regulations and policy in relation to trust responsibilities.

University of Idaho – Office of Research Assurances
875 Perimeter Dr. Moscow, Idaho 83844
Supervisor: Arch Harner; 208-885-2142
Administrative Coordinator: August 2015 – September 2016
Laboratory Animal Technician: September 2013 – August 2015
Began employment as a laboratory animal technician; applied for and gained promotion to administrative coordinator. Interim coordinator for the university-wide conflict of interest program. Researched federal regulations and interpreted for coworkers and investigators. Provided oral and written communications to investigators on federal regulations. Developed and maintained an information and document management system for organizing and cataloging correspondence, contracts, and agreements. Supported research compliance committees by processing protocol applications, maintaining records databases, and issuing notifications to researchers. Managed web content and social media presence for the Northwest Knowledge Network, a big data service center. Coordinated appointment and travel schedules for staff. Arranged meetings and scheduled training events for both large and small groups. Supported the communication and production processes of a project management and research compliance system. Wrote news articles for departmental newsletter. Managed colonies of research animals, including mice, rats, guinea pigs, kangaroo rats, and zebra fish. Applied and interpreted federal regulations and university policies to deliver excellent animal care. Worked with diverse individuals from varying backgrounds at all organizational levels to ensure successful collaboration. Provided customer service to UI researchers and applied interpersonal skills to create mutually beneficial relationships.

Washington State University – Department of Animal Sciences
1815 NE Wilson Rd., Pullman, Washington 99164
Supervisor: Dr. Margaret Benson; 509-335-1521
Animal Care Facility Manager: September 2011 – September 2013
Managed the swine center and a research animal vivarium, including husbandry of mice, rats, rabbits, chickens, sheep, swine, and cattle. Mediated between veterinarians and investigators to ensure best care and use of research animals. Performed liaison activities with internal and external researchers. Explained meat processing practices to buyers and 4-H youth. Interpreted, applied, and explained federal regulations and university policies for the execution of research activities. Supported the work of project teams by interpreting and applying research protocols, procuring supplies, and organizing and delegating workloads. Balanced and coordinated workload for multiple facilities and directly supervised 15 employees. Managed facility budget.

The Scotts – Miracle-Gro Company
14111 Scottslawn Rd, Marysville, Ohio 43040
Supervisor: William Barber; 509-952-3231
Merchandiser and Product Counselor: February 2011 – August 2011; March 2010 – July 2010; March 2007 – July 2007
Educated and counseled customers and store employees on chemical uses and application, including: herbicides (glyphosate, triclopyr and 2, 4-D); insecticides; fertilizers (N-P-K ratio, micronutrients); and soil management and remediation practices. Self-assigned training to maintain knowledge of current best practices in agriculture. Provided information on organic management practices.

Certifications:

- National Wildfire Coordinating Group, Wildland Firefighter Type 2. 2018 – Present

Training:

- Native American Rangelands Training Initiative, Oregon State University
  - 12 week course on Rangeland Science, covering site evaluation, conservation, and sustainable land management
- NRCS Conservation Planning Course
  - Coursework and fieldwork on NRCS conservation planning documents for certified planners

Community Involvement:

- Umatilla County Weed Board, Member at Large. 1/2018 – Present
- Umatilla County 4-H Association Board, President. 5/2019 – 5/2020
- Pendleton Little League, Volunteer Coach. 2022

References:

Available upon request

INTEREST FORM

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Applicant Information

Name Kenneth F. Bierly

Affiliation personal

Occupation

☒ Retired

Mailing address [redacted]

Town/City Salem **State** OR **Zip Code** [redacted]

Phone Number [redacted] **Cell or Alternate #** [redacted] **Fax Number**

Email [redacted]

Applicant Signature Kenneth F. Bierly

By signing above, you certify that:

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☐ **Indian Tribal Interests** (selected by the OWEB Board)

☒ **Natural Resource Value Interests** (selected by the OWEB Board)

Statement Of Interest

Use the space below to explain why you are interested in being a representative on the Oregon Agricultural Heritage Commission and why you will be a good commissioner.

I grew up in Jefferson County and grew peppermint to put me through college at Oregon State University. I studied ecology and received a M.S. from Colorado State University in Plant Ecology. I was a private environmental consultant from 1972 until 1983. In 1983 I was hired by the Division of State Lands (now the Department of State Lands). I worked with the agency in their Removal-Fill program and was the primary technical staff in the development of the 1989 Freshwater Wetlands Law (Senate Bill 3) that passed both houses of the legislature with a single dissenting vote. I became the Wetlands Program manager and led the development of the state wetlands management program.

In 1996 I was asked by Governor Kitzhaber's Natural Resource Advisor to take the position of Program Manager for the Governor's Watershed Enhancement Board (GWEB). As part of the Governor's Natural Resources team, I was involved in the development of the Oregon Plan for Salmon and Watersheds. I was also involved in the development of the GWEB grant program from the relatively small program that was developed in the 1980's to a more substantial program with a variety of funding sources.

I was responsible for developing and negotiating the Oregon Conservation Reserve Enhancement Program with the U.S. Department of Agriculture that brought the Secretary of Agriculture to Oregon for a signing ceremony in 1998. The program was based on agricultural economics research from Oregon State University and designed to help private landowners comply with water quality and native fish habitat recovery. The Oregon CREP program is a state-federal partnership incentive program that helps landowners to comply with Oregon's Agricultural Water Quality Program.

With passage of a November 1998 ballot measure that dedicated State Lottery funds for conservation, I was the technical staff assigned to assist the development and negotiate implementating legislation. Following the long process during the 1999 Legislative Session, I was appointed Deputy Director of the Oregon Watershed Enhancement Board that was created by the legislation. As Deputy Director I assisted with program and staff development for a growing grant program. I was part of the Willamette Initiative that developed a partnership with the Meyer Memorial Trust and the Bonneville Environmental Foundation which was awarded the Thiess International RiverPrize in 2012.

I currently manage a 1,000-acre ranch in northern Jefferson County. I have been manager for the last 4 years for my wife's family who own the inherited ranch. I am aware of the difficulty of making any kind of a profit off dryland agriculture.

I have seen the implementation of Oregon's Land Use program and been party to efforts to connect land conservation with regulation and have seen firsthand the struggle to address "working lands" through a conservation lens. I have broad experience from all corners of the state.

See Attached Resume

Experience/Involvement

Please describe any work experience and/or involvement that has provided you with knowledge, skills, or abilities to successfully represent the interests of the position(s) for which you are applying and to fulfill the duties of a member of the Oregon Agricultural Heritage Commission. Include any previous experience on boards or commissions.

You may attach a résumé and/or work history.

As a fourth generation Oregonian, I am very interested in the future of Oregon as a home for my granddaughter and her (possible) children. I am proud of the Donation Land Claim for the homestead in Benton County of my mother's great grandfather, signed by President Johnson only 8 months after the assassination of President Lincoln, that hangs in our home. With a long history in Oregon and a hoped-for future, I would like to use my talents to help shape that future.

I have had the opportunity to visit all corners of Oregon and have become familiar with the incredible diversity of ecosystems, economies, and people in the state. I am passionately interested in understanding the socio-ecological systems of the state and finding ways to protect and restore the resiliency of our communities and ecosystems.

I am a student of ecology and have a deep interest in socio-ecological systems. I have coauthored peer reviewed papers on Oregon's wetlands and restoration of Oregon's estuarine wetlands. I have seen the shift from a purely regulatory "protection" approach to add a more economic based conservation approach using incentives that have a basis in economics as well as ecology.

I have participated in Legislative and public conversations about conservation in Oregon for more than 30 years. During that time, I have seen changes in both public awareness and citizen involvement in issues associated with land conservation. I have seen a greater awareness of the complexity and integrated nature of Oregon's socio-ecological systems.

I was raised in a small, agricultural, rural community (Madras) and obtained an intimate connection to the agricultural economy and lifestyle. My father was a County Extension Agent and often took me on field tours and farm visits. I grew potatoes and peppermint to put me through college. My High School classmates were dependent on farm income either directly or indirectly for their support. I would like to see the opportunities that I had continue for others.

I believe that I have a breadth of experience, depth of knowledge and openess to opportunities that would allow me to help the Commission function in the best interest of all Oregonians.

Supplemental Question

Describe what you believe to be the main issues facing the future of Oregon agriculture and the fish and wildlife habitat and other natural resources on Oregon's agricultural lands.

Oregon agriculture is facing significant pressures of water resource availability, climate change, economic pressure and land use compatibility. While the Oregon Land Use program has reduced conflicts seen in other areas there remains conflicts at the edge of urban areas and in a political sense between urban centers and rural areas of the state.
Water resource conflicts are acute in the Klamath, Harney, Lake, Umatilla, and Malheur basins and likely to be felt throughout the East side. While water resource conflicts are evident west of the Cascades, they are often between instream uses and domestic water uses on the coast.
Oregon's diversity is a major factor affecting the complexity of both agriculture and fish and wildlife habitat conservation. The diversity of Oregon's agriculture makes it difficult to generalize when more than 220 commodities are produced in the state. I have seen a significant shift in the dominant forms of agriculture over the years. The Oregon Land Use Planning program has slowed the conversion of agricultural and forest lands to urban and rural residential uses. The effects are dramatic when compared to land use change in Washington.

There are, however, significant remaining issues associated with agricultural land tenure and management. There have been a number of significant recent reports looking at the issues facing agriculture in the state. Oregon's farm operators are aging with the average age of 60. Over the next 20 years nearly 65% of Oregon's farmland will change ownership. This transition could have a significant effect on rural communities throughout the state. Creating alternative opportunities for agricultural landowners will only become more important in the future.

Other factors affecting agriculture is water security, urban-rural conflicts, and legacies from past policies. Water availability is especially problematic in the arid two thirds of the state. Locations such as the Harney Basin are facing water well curtailment due to over allocation of groundwater permits.

Urbanization is a primary driving force linked to population change. Those areas with the highest growth rates often have the greatest conflicts.

Legacy policies such as dikes and revetments constructed under the Flood Control Acts of the 1930's, 1940's, and 1950's have a legacy of diked lands that in only a few locations retain significant agricultural value. Projects such as the recently constructed Beaver Slough Drainage District project in the Coquille Valley has worked towards a balance between agricultural production and fish and wildlife enhancement. In a similar manner projects such as the easement on Deer Haven Farm in Benton
County provides for the opportunity to retain a Century Farm yet restore floodplain function.

In other locations irrigation districts with senior water rights are being rapidly urbanized while junior water right holders are producing high value agricultural products. The balance between the rights based on historical precedent and current need/value is difficult to achieve.

Issues facing Oregon's natural resources are similar in that habitat loss and fragmentation is the leading cause of species declines. The Oregon Conservation Strategy provides a good starting point for the primary issues that pose the greatest potential impact to Oregon Fish and wildlife resources are Climate Change, Land Use Changes, Invasive Species, Disruption of Disturbance Regimes, Barriers to Animal Movement, Water Quality and Quantity. These result in challenges and provide opportunities for private landowners. The significant mix of public and private lands in Oregon are both a significant benefit and a challenge for fish and wildlife management. Addressing these issues also affects people by considering land productivity, opportunities for recreation, water supplies, or risk of severe wildfires.

The greatest challenge is looking at the fish and wildlife species and ecosystems that support them in context of the social and economic systems that have developed around them. Understanding the connections and feedback loops is critical for wise policy choices.

References

Please identify three references that may be contacted if you are selected as a top candidate. Individuals or representatives of associations/organizations are acceptable.

Letters of support from relevant staff, associations, or similar groups are encouraged; feel free to attach any such letters to your application.

Reference #1

Name Mark Owens
Affiliation (if any) Oregon State Legislature
Mailing Address [redacted]
City/Town Burns
State OR
Zip Code [redacted]
Phone Number [redacted]
Email [redacted]

Reference #2

Name Brenda Smith
Affiliation (if any) High Desert Partnership
Mailing Address [redacted]
City/Town Hines
State OR
Zip Code [redacted]
Phone Number [redacted]
Email [redacted]

Reference #3

Name Mary Wahl
Affiliation (if any) Wahl Ranches
Mailing Address
City/Town Langlois
State OR
Zip Code [redacted]
Phone Number [redacted]
Email [redacted]

Please send your completed application via email to april.mack@oweb.oregon.gov or via mail to:

Oregon Agricultural Heritage Program
ATTN: April Mack
Oregon Watershed Enhancement Board
775 Summer Street NE #360
Salem, Oregon 97301

Applications must be sent via email or post-marked by June 30, 2022 in order to be considered for a position.

Kenneth F. Bierly

Resume of Experience and Education

Professional Accomplishments

Awards

- 2013 Pacific Northwest Region U. S. Forest Service, Special Appreciation Award, Program Partnership
- 2012 International River Foundation, Thiess Riverprize winner for Willamette River Initiative
- 2012 Ecological Society of America, ESA Regional Policy Award for Informing Policy with Ecological Science
- 2012 U.S. Forest Service, Collaborative Aquatic Stewardship Award
- 1997 Vice President Al Gore, Hammer Award
- 1992 Environmental Law Institute, National Wetlands Award

Non-Profit Boards

- 2014-2017 Glenn Gibson Creek Watershed Council
- 2015-2017 Institute for Applied Ecology
- 2013-2017 Nellie Thompson-Dorothy Patch Scholarship Fund
- 2017 Straub Environmental Center Advisory Board

Public Boards

- 2002-2004 Chair, Environmental Commission –Salem, Oregon
- 2015-2017 Fish passage Task Force – Oregon Department of Fish and Wildlife
- 2015- present Institute for Applied Ecology, Chair

Bierly & Associates LLC 2013 - present

- Harney Basin Integrated Water Resource Management Plan technical writer
- Strategic Plan for Harney County Wate3rshed Council
- Strategic Plan for Tillamook Bay Watershed Council
- Assistance with Lower Nehalem Community Trust acquisition of Bott's Marsh
- Grant facilitation for Winter Lake tidegate restoration project

Oregon Watershed Enhancement Board 1999 - 2013

- As Deputy Director oversaw the development of staff and program for the newly developed agency
- Developed grant program offerings, evaluation criteria and procedures
- Supervised contracts to develop land acquisition and restoration priorities
- Reviewed policies and proposed actions with the OWEB Board
- Coordinated with other agencies in the implementation of the Oregon Plan for Salmon and Watersheds
- Led the Willamette Initiative for OWEB, coordinating with Meyer Memorial Trust and Bonneville Environmental Foundation.
- Established an applied research project review process with OSU Sea Grant Program.
- Provided tribal coordination for OWEB

Governor Kitzhaber Staff, Governor's Watershed Enhancement Board Program Manager 1996-1999

- Contracted for and oversaw the development of the Oregon Watershed Assessment Guide
- Technical lead for legislative interaction with Oregon Legislature for a portfolio of natural resource agencies

during legislative sessions 1997 and 1999
- Developed and negotiated the Oregon Conservation Reserve Enhancement Program (CREP) with U.S. Department of Agriculture.
- Governor's staff for the Healthy Streams Partnership to integrate water quality and salmon recovery
- Participant in the development of the Oregon Plan for Salmon and Watersheds

Wetlands Program Manager, Oregon Division of State Lands 1983-1996

- Drafted Administrative rules for wetland and waterway permitting
- Provided administrative enforcement of state wetland and waterway alteration laws
- Agency technical lead for Oregon Freshwater Wetlands Act during legislative session in 1989
- Development of agency Wetlands Program
- Provided testimony to Oregon legislative committees, administrative law judges, and state court settings on Oregon wetlands laws
- Testified before the U.S. Senate Committee on Energy and Natural Resources on the reauthorization of the Clean Water Act
- Developed detailed technical comments on the Corps of Engineers Wetlands Delineation Manual
- Project Manager for Astoria Airport Mitigation Bank
- Responsible for review of wetland delineations by consultants

Wetland and Waterway Resource Consultant 1974-1983

Montagne & Associates, Inc., Montagne-Bierly & Associates, Inc., Bierly & Associates, Inc.

- Environmental Impact evaluation of proposed offshore oil platform fabrication facility, Warrenton, Oregon – Client Brown & Root, Inc.
- Wetland delineation and Estuary Planning information for Grays Harbor Estuary Management Plan, Grays Harbor, Washington – Client Wilsey & Ham, Inc.
- More than 200 consulting assignments throughout the Pacific Northwest for private and public clients with an emphasis on wetland and waterway resources and regulation

Education

1972	M.S.	**Colorado State University**, Ft. Collins, Colorado
1966	B.S.	**Oregon State University,** Corvallis, Oregon

Thesis

Meadow and Fen Vegetation of Big Meadows, Rocky Mountain National Park, Colorado 1972

Publications

Boule, M.E. and K.F. Bierly. 1987. History of estuarine wetland development and alteration: what have we wrought? Northwest Environmental Journal. 3(1): 43-61.

Bernert, J.A., J.M. Eilers, B.J. Eilers, E. Blok, S.G. Daggett and K. F. Bierly. 1999. Recent wetlands trends (1981/82-1994) in the Willamette Valley, Oregon, USA. Wetlands. 19(3): 545-559.

Flitcroft, R.L., D.L. Bottom, K.L. Haberman, K. Bierly, K.K. Jones, C.A. Simenstad, A. Gray, K.S. Ellingson, E. Baumgartner, T. J. Cornwell, and L.A. Campbell. 2016. Expect the unexpected: place-based protections can lead to unforeseen benefits. Aquatic Conservation: Marine and Freshwater Ecosystems 26. (Suppl 1):39-59.

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

INTEREST FORM

Oregon Agricultural Heritage Commission

Oregon Watershed Enhancement Board

This form is used to obtain general information and qualifications of persons interested in serving on the Oregon Agricultural Heritage Commission. This information will be used by the Oregon boards and commissions that recommend applicants to the Oregon Watershed Enhancement Board (OWEB), and by the OWEB Board, which will appoint the commissioners.

Applicant Information

Name Gregory Green

Affiliation Ducks Unlimited

Occupation

☐ Retired Director of Conservation Programs – Pacific Northwest (AK, ID, OR, UT, & WA)

Mailing address [redacted]

Town/City Vancouver **State** WA **Zip Code** [redacted]

Phone Number [redacted] **Cell or Alternate #** [redacted] **Fax Number**

Email [redacted]

Applicant Signature

By signing above, you certify that:

- All of the information on this form is true;
- You are a legal citizen of Oregon and the United States of America;
- You will accept appointment to the Oregon Agricultural Heritage Commission if selected by the OWEB Board;
- You have an email address and are able and willing to check your email on a near-daily basis and conduct some commission business via email; and
- You will be able to attend scheduled meetings across the state.

Position Sought

Check the box next to each position for which you are currently applying. You may select multiple boxes. This information may be used to contact you for the Rules Advisory Committee or for future vacancies on the commission.

☐ **Farmer or Rancher** (recommended by the State Board of Agriculture)

☒ **Fish and Wildlife Habitat** (recommended by the State Fish and Wildlife Commission)

☐ **Agricultural Water Quality** (recommended by the State Board of Agriculture)

☐ **Conservation Easements and Similar Land Transfers** (recommended by the Land Conservation and Development Commission)

☐ **Indian Tribal Interests** (selected by the OWEB Board)

☐ **Natural Resource Value Interests** (selected by the OWEB Board)

Statement Of Interest

Use the space below to explain why you are interested in being a representative on the Oregon Agricultural Heritage Commission and why you will be a good commissioner.

Oregon's farm and ranchlands provide valuable benefits to fish and wildlife throughout the state, including migratory birds. It's estimated that a significant portion of wetlands in Oregon (~70%) are located on private land. Maintaining and protecting those resources while keeping farms and ranches sustainable is an important component of Ducks Unlimited's conservation program delivery. As DU's Director of Conservation Programs for the Pacific Northwest including Oregon, I oversee a team of biologists and engineers that deliver a suite of conservation actions on private working lands, including conservation easements, habitat restoration and enhancement actions, and farm efficiency and infrastructure improvements. I am interested in being a representative to the Commission, as I believe that my background, experience, and appreciation for protecting and improving private working lands will provide context and value to a successful Oregon Agricultural Heritage Program, as well as the longevity of Oregon's working lands.

Organizational Disclaimer: Ducks Unlimited (DU) is a 501(c)3 private corporation with a mission dedicated to protecting and conserving habitats important to North America's waterfowl. These habitats also benefit other wildlife and people through numerous ecosystem services. Founded in 1937, DU has conserved more than 15 million acres of habitat in North America including 126,817 acres in Oregon. DU / Wetlands America Trust (WAT) is accredited by the Land Trust Alliance. Holding conservation easements to more than 479,000 acres of private lands in the United States, DU/WAT is the third largest land trust in North America. DU may be a potential applicant or sponsor to OAHP funded programs, and may also provide capacity and assistance to other partnering land trusts. As a voting member of the OAHP Commission for approving fund allocations, DU would remove itself if concerns of Conflicts of Interest are warranted.

https://www.ducks.org/conservation/land-protection

Experience/Involvement

Please describe any work experience and/or involvement that has provided you with knowledge, skills, or abilities to successfully represent the interests of the position(s) for which you are applying and to fulfill the duties of a member of the Oregon Agricultural Heritage Commission. Include any previous experience on boards or commissions.

You may attach a résumé and/or work history.

- Grew up on family-owned small farm and forest lands in rural north Louisiana.
- Strong ethic for responsible land management coupled with wildlife conservation.
- BS in Wildlife Conservation (Louisiana Tech University). MS in Ranchland & Ecology Management (Texas A&M University).
- 20+ years as a restoration practitioner/project manager. With Ducks Unlimited since 2003; worked in numerous states including California, New Mexico, Oregon, Texas, and Washington.
- DU's Director of Conservation Programs – PacNW since 2015.
- First wildlife related job was a Wildlife Internship at Malheur NWR in 1995.
- Coordinated and delivered numerous projects on private lands including habitat restoration, water efficiency improvements, land purchases and conservation easements.
- Manage DU's land protection program in Pacific Northwest, which includes 6 CEs in Oregon (622.52 acres).
- Have collaborated with other Oregon Land Trusts to bring pass-through funding from state and federal sources to aid their conservation easement actions.
- Familiar with land transaction processes including title review and due diligence, appraisals, purchase agreements, and conservation easement language.
- Have monitored CEs and provided landowner stewardship.
- Familiar with calculating easement monitoring and land stewardship costs.
- Delivered the first purchased easement for the Texas Farm and Ranch Lands Conservation Program in 2010.
- Member and organization representative to Coalition of Oregon Land Trusts (COLT).
- Participated in OAHP lobby day with COLT in June 2017.
- Served on numerous Boards and working committees including COLT, Pacific Birds Habitat Joint Venture Coastal Wetland Committee, Coastal Prairie Partnership Board (Texas), San Francisco Bay Joint Venture Technical Committee, Gulf Coast Joint Venture Implementation Teams, and Salmon Creek Lions Club Board.

Supplemental Question

Describe what you believe to be the main issues facing the future of Oregon agriculture and the fish and wildlife habitat and other natural resources on Oregon's agricultural lands.

- Water availability and use in competitive markets complicated by droughts and changing climate scenarios.

- Rapid development and loss of working lands through conversion pressures and increasing land values.

- Aging infrastructure with challenging regulatory processes.

- Loss or conversion of wildlife friendly farming crops and practices to less beneficial ones, primarily driven by market factors.

References

Please identify three references that may be contacted if you are selected as a top candidate. Individuals or representatives of associations/organizations are acceptable.

Letters of support from relevant staff, associations, or similar groups are encouraged; feel free to attach any such letters to your application.

Reference #1

Name: Kelley Beamer
Affiliation (if any): COLT
Mailing Address: [redacted]
City/Town: Portland
State: OR
Zip Code: [redacted]
Phone Number [redacted]
Email: [redacted]

Reference #2

Name Daniel Upshaw
Affiliation (if any): Prvt. Landowner / Farmer
Mailing Address: [redacted]
City/Town: McMinnville
State: OR
Zip Code [redacted]
Phone Number: [redacted]
Email :

Reference #3

Name: Monica Iglecia
Affiliation (if any): Pacific Birds Habitat Joint Venture
US Coordinator
Mailing Address
City/Town: Portland
State: OR
Zip Code
Phone Number: [redacted]
Email: [redacted]

Please send your completed application via email to april.mack@oweb.oregon.gov or via mail to:

Oregon Agricultural Heritage Program
ATTN: April Mack
Oregon Watershed Enhancement Board
775 Summer Street NE #360
Salem, Oregon 97301

Applications must be sent via email or post-marked by June 30, 2022 in order to be considered for a position.

INTEREST FORM

Oregon Agricultural Heritage Commission

This form is used to obtain general information and qualifications of persons interested in serving on the Oregon Agricultural Heritage Commission. This information will be used by the Oregon boards and commissions that recommend applicants to the Oregon Watershed Enhancement Board (OWEB), and also by the OWEB Board, which will appoint the commissioners. Agencies are required to pay per diem compensation and expenses for "qualified members," defined as members who are (1) not in full-time public service, and (2) have an adjusted gross income for the previous tax year of less than $50,000, or less than $100,000 reported on a joint income tax return. The only exception to the requirement is if the qualified member declines compensation. The agency will reimburse board members for travel expenses.

Applicant Information

Name Sara Evans-Peters

Affiliation Pacific Birds Habitat Joint Venture

Occupation

☐ Retired U.S. Assistant Coordinator

Mailing address [redacted]

Town/City [redacted] **State** [redacted] **Zip Code** [redacted]

Phone Number [redacted] **Cell or Alternate #** **Fax Number**

Email [redacted]

Applicant Signature [redacted]

By signing above, you certify that:

- All of the information on this form is true;
- You are a legal citizen of Oregon and the United States of America;
- You will accept appointment to the Oregon Agricultural Heritage Commission if selected by the OWEB Board;
- You have an email address and are able and willing to check your email on a near-daily basis and conduct some commission business via email; and
- You will be able to attend scheduled meetings across the state.

Position Sought

Check the box next to each position for which you are currently applying. You may select multiple boxes. This information may be used to contact you for the Rules Advisory Committee or for future vacancies on the commission.

☐ **Farmer or Rancher** (recommended by the State Board of Agriculture)
☐ **Fish and Wildlife Habitat** (recommended by the State Fish and Wildlife Commission)
☐ **Agricultural Water Quality** (recommended by the State Board of Agriculture)
☐ **Conservation Easements and Similar Land Transfers** (recommended by the Land Conservation and Development Commission)
☐ **Indian Tribal Interests** (selected by the OWEB Board)
X **Natural Resource Value Interests** (selected by the OWEB Board)

Statement Of Interest

Use the space below to explain why you are interested in being a representative on the Oregon Agricultural Heritage Commission and why you will be a good commissioner.

Please consider this application as my letter of interest in filling the seat on the Oregon Agricultural Heritage Commission to represent natural resource interests.

I am interested in being a representative on the Oregon Agricultural Heritage Commission because the impact of this program not only will reduce conversion and fragmentation of Oregon's working lands but will increase the economic viability and resilience of Oregon's agricultural operations and local communities. These are core tenants to Pacific Birds work over the last 30 years. I joined Pacific Birds in 2010. In my current role as U.S. Assistant Coordinator my emphasis is on building strategic partnerships and initiatives and incorporating working lands concepts into how we plan for, and implement conservation across Oregon and the West. I lead the development and implementation of Pacific Birds' conservation programs and work to thoughtfully bridge the gap between science and delivery. Through my work I strive to preserve our natural resources while meeting the needs of Oregonians including local communities, farmers, producers, ranchers, hunters, birders, and recreationists.

As a Commissioner I would bring a high-level non-bias understanding of the natural resource issues in Oregon and a strong connection to partners across the state. Partnerships are the backbone to the Joint Ventures and central to my work experience. Pacific Birds is a collaborative, international partnership of hundreds of organizations and individuals implementing strategic conservation actions across private and public lands in Oregon and across the Pacific Northwest, British Columbia, Alaska and the Pacific Islands. As a Joint Venture, we work to accelerate conservation through our partners which takes a landscape level understanding of the conservation landscape and the natural resources issues we face. My work is guided by diverse partners including local producers, conservation and recreation-based non-governmental organizations, local government, tribes, and state and federal agencies. I work closely on initiatives with Ducks Unlimited, Trout Unlimited, Pheasants Forever, land trusts, Audubon, and other NGOs. I work to support program goals and bring capacity to local Soil and Water Conservation Districts and Watershed Counsels and OSU Extension programs. I work to align and advance state and federal priorities by maintaining connection to the Director Offices and program staff of the Natural Resource Conservation Service, US Fish and Wildlife Service, US Forest Service, Oregon Department of Forestry, OWEB, and Oregon Department of Fish and Wildlife. Understanding the diversity of partners and missions has helped shape the context for how I work and understand the issues in this state and beyond.

I own a small farm in the heart of the Willamette Valley, hunt, fish, and recreate across the state, and have a deep appreciation for the natural resources of Oregon and the communities and farmers that make Oregon, Oregon. I surround myself with farmers and ranchers both in work and in my personal life. I support the Oregon Agricultural Heritage Program goals and view conversion of farmland to non-farm uses, complex regulations, and generational transfers as one of the biggest threats to land use and our natural resources in Oregon.

The Oregon Agricultural Heritage Program advances Pacific Birds mission and well as my personal commitment to multiple benefit conservation and farmland preservation. Providing voluntary incentives to farmers and ranchers to support practices that maintain both agriculture and natural resources is one of the most effective tools to advance conservation today. I bring a ground-up, landscape scale, solution-oriented approach to my work and feel this skillset will be valuable to the program and the Commission. I am dedicated to finding solutions that move conservation forward by making conservation the rational choice, by catalyzing conservation actions, and by leveraging resources across partners to find economies in scale. My career is about making conservation the rational choice–for generations of families, nature-lovers, hunters, and farmers to come.

Experience/Involvement

Please describe any work experience and/or involvement that has provided you with knowledge, skills, or abilities to successfully represent the interests of the position(s) for which you are applying and to fulfill the duties of a member of the Oregon Agricultural Heritage Commission. Include any previous experience on boards or commissions.

You may attach a résumé and/or work history.

My work experience, personal interests, and connection to Oregon's landscapes provide me with a unique skillset to successfully represent the natural resource interests on the Oregon Agricultural Heritage Commission. Please see attached resumé for additional background.

Currently, I serve on the Willamette Wildlife Mitigation Program Wildlife Advisory Committee, The Natural Resources Conservation Service (NRCS) Oregon Technical Advisory Committee, NRCS Washington State Advisory Committee, Oregon Wildlife Foundations Grant Review Committee, the Trinational Partners in Flight Executive Team, Western Forest Birds Working Group Leadership Team, and as the Pacific Flyway Council Joint Venture Liaison. I have led the development of over 6 formal governance agreements for partnerships across the state and serve on the Steering Committee of each. I co-developed the Pacific Birds International Board Bylaws and Operating Procedures. I also serve on the Willamette Wildlife Mitigation Wildlife Advisory Group and the Oregon Wildlife Foundation Project Committee.

Though Pacific Birds geographic scope does not cover the entirety of Oregon, I work across issues and boundaries through numerous facets of my work. Recently, I have been working in close partnership with the Intermountain West Joint Venture to develop a joint Western Forest Bird Initiative that takes into consideration all forest types and the issues that face them. Using a One Health lens we are working to inform active forest management on both private and public lands across the West. Advancing active restoration increases forest health, resulting in clean air, increased freshwater availability, more resilient rural communities, recreation and tourism opportunities, more carbon storage and sequestration, and vital habitat for declining species.

My work through the Pacific Flyway Council addresses largescale natural resource concerns across the Pacific Flyway. The Pacific Flyway Council is an administrative body that forges cooperation among public wildlife agencies for the purpose of protecting and conserving migratory birds that inhabit western North America. As the Joint Venture Liaison, I inform how Joint Ventures within the Pacific Flyway can intersect with Council decisions, like water resources issues and energy development in Oregon, including the Klamath Basin and the Intermountain West.

By serving on both the NRCS Oregon Technical Committee and the NRCS Washington State Advisory Committee I engage with producers and conservation partners from across the state to provide advice for technical considerations and technical guidelines necessary to implement conservation provisions of USDA legislation. The committee also helps assure that Civil Rights requirements in Program Delivery are met. The NRCS State Conservationist and Farm Service Agency (FSA) State Director co-chair the committee. Additionally, the State Technical Advisory Committees provide recommendations on several issues within a variety of conservation programs.

Pacific Birds is focused on the highest-priority conservation needs in the West, in habitats where investments in private and public lands will accelerate bird habitat conservation and benefit local communities: resilient coasts and healthy forests. To address these challenges, Pacific Birds Habitat Joint Venture is working to

- Protect, restore, and manage resilient intertidal and freshwater wetlands and adjacent farmlands in coastal watersheds to benefit wetland-dependent birds.
- Halt the loss of oak and prairie habitat and reverse the declines of oak-dependent species through oak-friendly conservation options for private landowners and producers.
- Halt and reverse declines of Western Forest birds by informing active forest management on small family forests, private industrial, and state and national forests that aligns multiple benefits for our most imperiled birds and people.

Supplemental Question

Describe what you believe to be the main issues facing the future of Oregon agriculture and the fish and wildlife habitat and other natural resources on Oregon's agricultural lands.

The main issues facing the future of Oregon agriculture and fish and wildlife habitat and other natural resources on Oregon's agricultural lands is loss of habitat and agricultural land due to conversion (development, generational turnover, sea-level rise, energy development), water availability and water quality, catastrophic wildfire, soil health, invasive species and pests, and the decline of pollinators. And, with expected climate change, all these existing issues are expected to be exacerbated in coming years.

Equally important, is the ability of farmers and ranchers to keep farms in production, while simultaneously providing co-benefits for fish and wildlife. This is critical to how we increase the economic viability of agricultural operations and support the next generation in being successful through generational land transitions. Strong incentives for farmers and ranchers to support practices that maintain or enhance both agricultural and natural resources on agricultural lands is needed. Though underfunded incentives are being provided through this program as well as other state and federal programs. Supporting farmers and ranchers for the benefit of communities, economies, and natural resources is a critical issue facing the future of Oregon agriculture.

Oregon Agricultural Trust summarize the issue well, 25% of Oregon is in farming and ranching and 64% of that land wil change hands in 20 years. The average age of Oregon farmers and ranchers is 60 and unfortunately, 81% of Oregon farmers and ranchers don't have succession plans. The threat of land conversion and development and subdivision of farmland remains the highest conservation concern in Oregon.

Now, more than ever, drought and climate change are fundamentally altering the valuable wetland and irrigated agricultural lands in Eastern Oregon, Southwest Oregon, and the Willamette Valley. These lands provide vital habitat for migratory birds, sustain floodplain function, and recharge aquifers, but are at risk from competing water demands, fragmentation from rural subdivision, and climate change. Additionally, Oregon is home to approximately 30 million acres of forestland which is deeply rooted in Oregon's history and current economy. Beyond the economic, social, and wildlife benefits of forests, an estimated 2.8 million Oregonians rely on water that comes from forested landscapes.

Oregon's coastal communities are already seeing the effects of climate change. Rising sea level is already inundating low-lying lands, eroding coastline, and exacerbating coastal flooding. Tide gates are failing making it difficult for family farms to economically sustain themselves into the future. Along the West Coast, tidal and freshwater wetlands and adjacent agricultural lands, provide important habitats for Pacific Flyway bird species and maintaining agricultural uses on lands vulnerable to sea level rise, as long as feasible, benefits family farms and increases the resiliency of coastal communities.

Landward, an estimated 80% of western forests have been lost since European settlement and most forest dependent species are rapidly declining. Birds dependent on Western forests have plummeted nearly 20% since 1980, and almost half have declining populations. Across the Western U.S., approximately 4.5 million homes and millions of acres of forested watershed are at high or extreme risk of wildfires. While the causes of increased catastrophic wildfires are complex, climate change and declining forest health are at the core of these trends**.** Climate change and 100-years of fire suppression in Western forests are yielding bigger, more frequent, and more severe wildfire. The benefits of resilient forests and watersheds extend beyond forest-dependent birds and healthy fish populations –healthy forests result in clean air, increased freshwater availability, more resilient rural communities, recreation and tourism opportunities, more durable and stable carbon storage and sequestration, and biodiversity and habitat for species.

Sagebrush rangelands drive our nation's economy through energy and livestock production and provide critical regional water resources. Equally important, sagebrush provides important wildlife values, for many species including sage grouse, mule deer, and migratory birds. These valuable rangelands are at risk from encroaching trees that displace native birds and other wildlife and reduce livestock forage. Deep-rooted western livelihood, from Native American cultural traditions to ranching to big game hunting, all rely on healthy sagebrush rangelands (IWJV 2022). Sagebrush once covered roughly 247 million acres in western North America and although some sagebrush habitats are still common and widespread in eastern Oregon, some sagebrush habitat types are of conservation concern due to large-scale threats like catastrophic wildfire and cheatgrass.

References

Please identify three references that may be contacted if you are selected as a top candidate. Individuals or representatives of associations/organizations are acceptable.

Letters of support from relevant staff, associations, or similar groups are encouraged; feel free to attach any such letters to your application.

Reference #1

Name Steve Denney

Affiliation (if any) Landowner, The Nature Conservancy, Oregon Department of Fish and Wildlife

Mailing Address [redacted]

City/Town [redacted]

State [redacted]

Zip Code [redacted]

Phone Number 541 [redacted] 1803

Alternate #

Fax #

Email [redacted]

Reference #2

Name CalLee Davenport

Affiliation (if any) US Fish and Wildlife Service, Partners Program State Coordinator

Mailing Address [redacted]

City/Town [redacted]

State [redacted]

Zip Code [redacted]

Phone Number [redacted]

Alternate #

Fax #

Email [redacted]

Reference #3

Name Ken Bierly

Affiliation (if any) Bierly & Associates, LLC

Mailing Address [redacted]

City/Town [redacted]

State [redacted]

Zip Code [redacted]

Phone Number [redacted]

Alternate # [redacted]

Fax #

Email [redacted]

Please send your completed application via email to april.mack@oweb.oregon.gov or via mail to:

Oregon Agricultural Heritage Program

ATTN: April Mack

Oregon Watershed Enhancement Board

775 Summer Street NE #360

Salem, Oregon 97301

Applications must be sent via email or post-marked by Oct 26th, 2022 in order to be considered for a position.

SARA EVANS-PETERS

US ASSISTANT COORDINATOR

CONTACT

503.957.3282
sara@pacificbirds.org
Independence, OR 97351

SKILLS

- Ability to work across political and social lines
- Working lands priority
- Passion for conservation
- Effective communicator
- Landscape-level perspective
- Knowledge of state and federal policies
- Knowledge of state and federal funding programs

INTERESTS

- Backcountry hunting
- Waterfowl hunting
- Gardening and canning
- Backpacking horse packing
- Supporting 4H and FFA

EDUCATION

M.S. Wetland Ecology
Department of Fish and Wildlife
Oregon State University
2009 - 2012
Advisor: Dr. Bruce Dugger, GPA 3.8

Bachelor of Science
Department of Biology
Southern Oregon University
2000-2003
Advisor: Dr. Karen Stone, GPA 3.6

PROFESSIONAL STRENGTHS

Working lands and compatible use planning; migratory bird management; multi-species and approach to conservation; building and fostering cooperative partnerships; strategic planning; landscape-level/regional planning; conservation policy; land protection and acquisition; restoration ecology; human dimensions and social science, species habitat relationships; habitat and nutritional ecology

WORK EXPERIENCE

US ASSISTANT COORDINATOR
Pacific Birds Habitat Joint Venture | 2013 - Present
Supervisor: Monica Iglecia, U.S. Coordinator

Build and implement Pacific Birds programs. Forge relationships with conservation and agriculture leaders, local community, and tribal leaders to promote Pacific Birds priorities. Developed and lead of Pacific Birds Oak and Prairie program, developing a Joint Venture lead western states Western Forest Initiative and reestablishing Pacific Birds Coastal Wetland Program.

Program Development and Strategic Planning

Design, build, and implement Pacific Birds Conservation programs. Lead and facilitate strategic and adaptive management planning for external partners and partnerships. Participate in and contribute to local, national, and international planning efforts.

Partnership Development

Build a stronger bird habitat conservation partnership in the Pacific Northwest by fostering and building partnerships at the local, regional, and multi-state, and international levels. Work across sectors, including agriculture, community, tribes, and the conservation community.

Communication and Outreach

Serve as the subject matter expert, providing program information and content that is showcased on the program website. Build awareness of conservation priorities by writing recurring articles that are included in the monthly electronic newsletter. Serve as a liaison to connect partners to Pacific Birds Outreach and Education Specialist to provide updated content for blog posts and newsletter stories. Assist with partner communication activities.

Grant Assistance and Project Development

Serve as a conduit to provide awareness of federal, state and private funding sources that are available for conservation partners. Provide consultation and assistance to partners on project and grant development.

WORK EXPERIENCE CONTINUED

GRADUATE RESEARCH ASSISTANT

Oregon State University | 2009 - 2011

Supervisor: Dr. Bruce Dugger, Professor and Associate Department Head

Designed primary scientific research project, collected and analyzed data and clearly reported results, both written and orally. Hired, supervised and trained research technicians and advised an undergraduate capstone project.

Wild Turkey (Meleagris gallopavo) Foraging Ecology in the Pacific Northwest

Characterized the diet of wild turkeys in Oregon and Washington by examining the crop contents of wild turkeys. Organized a widespread collection effort targeting hunters though state agency mailings, media outreach, multimedia communication, and presented to groups including the National Wild Turkey Federation, Oregon Hunters Association, Oregon and Washington Department of Fish and Wildlife, US Forest Service and youth hunt programs. Used relatively new and advanced non-parametric statistical procedures to test the null hypothesis of no difference in diet composition between region and season.

Wild Turkey Seed Dispersal in the Pacific Northwest

Evaluated the ability of turkeys to disperse plant seed by examining viability of fecal samples collected during the fall/winter in Oregon and Washington. Fecal samples were collected with assistance of multiple volunteers across both states.

RESEARCH BIOLOGIST

Oregon State University | 2008 - 2010

Supervisor: Dr. Bruce Dugger, Professor and Associate Department Head

Assisted with designing and implementing numerous academic research projects. Projects: Comparative Foraging Ecology and Habitat Use of Cackling and Dusky Canada Geese and Waterfowl Food Resource Assessments.

WILDLIFE BIOLOGIST I

Washington Department of Fish and Wildlife | 2005 - 2008

Supervisor: Don Kraege, State Waterfowl Coordinator

Assisted State Waterfowl Coordinator in the implementation of Wildlife Program goals, objectives and assignments. Key responsibilities included conducting various wildlife surveys, managing wildlife populations, managing wildlife related recreation (hunter access and land acquisition), managing wildlife habitat public uses, and conducting various wildlife management tasks (direct volunteers, communicate with public, participate in public meetings). *Major projects:* Land Acquisition, Restoration, Private Lands Hunter Access Program, Landowner Incentive Program, surveillance for H5N1 avian influenza virus in wild bird populations, Puget Sound Ambient Monitoring (seabirds), Avian Mortality Investigations, Western Pond Turtle Reintroduction.

LEAD RESEARCH TECHNICIAN

Southern Oregon University | 2004 - 2005

Supervisor: Dr. Karen Stone, Department Head

Coordinated and directed fisher (*Martes pennanti*) survey effort. Trained and managed staff and volunteers, managed budget and assigned project area goals.

BIOLOGICAL FIELD TECHNICIAN

Bureau of Land Management | 2003 - 2004

Supervisor: Jeff Stephens, Wildlife Biologist

Compiled and tabulated wildlife inventory data conducted field surveys on proposed actions for federally listed and sensitive wildlife species. Determined pair status, nesting status, and nest success for great gray owls, northern spotted owls, northern goshawks and peregrine falcons through capture, banding, radio attachment, calling and telemetry surveys.

MAJOR PROJECTS

PACIFIC BIRDS WORKING LANDS INITIATIVE (Lead, 2022-current)

Unique, large-scale funding opportunities, such as the Inflation Reduction Act, can add beneficial capacity to Pacific Birds Conservation Priorities. Pacific Birds recognizes this opportunity and will work with other Joint Ventures and with partners in the Pacific Birds region to strengthen relationships with NRCS, USFWS Partners for Fish and Wildlife, Oregon Department of Forestry and other state and federal agencies and non-governmental organizations dedicated to conservation on private lands. This includes co-leading an Oregon-specific and national effort to formalize relationships between Joint Ventures and NRCS.

WESTERN FOREST INITIATIVE (Leadership Team 2021-current)

Co-leading development of a shared initiative between multiple Joint Ventures. Pacific Birds and Intermountain West Joint Venture (IWJV) examined opportunities for the Joint Ventures to add value and momentum to Western Forest conservation. Through a shared investment of Pacific Birds and IWJV, a data synthesis was completed to select forest types and step-down priority birds within each Joint Venture's geography. This unique, shared, Joint Venture planning has created additional momentum for, and interest in, Western Forest conservation.

COASTAL WETLANDS PROGRAM DEVELOPMENT (Co-lead, 2020-current)

Co-leading development of Pacific Birds coastal wetland program. This includes strategic planning and facilitation with a subcommittee of experts from Alaska, British Columbia, Washington, Oregon, and California from across sectors. Additional review and synthesis of relevant coastal planning documents and resources. Development of Joint Venture Strategic Plan

PACIFIC BIRDS ACTION PLANS (Coastal Wetland and Oak and Prairie Co-Lead, 2020)

Led development of Pacific Birds Pacific Northwest Coastal Wetland and Oak and Prairie Action Plans including development of assessments, gathering and collating partner input, and developing strategies, actions, and measures of success.

PACIFIC BIRDS AND PEW JOINT COASTAL WETLAND LISTENING SESSIONS (Co-lead, 2019-2020)

Held small group meetings and one-on-one interviews during the fall and winter of 2019-20 to better understand the critical gaps in Pacific Northwest coastal conservation. Total participants equated to over 150 individuals. Four of the six small group meetings were co-hosted with Pew Charitable Trusts. Participants included representatives from multiple state and federal organizations, tribes, land trusts, granting agencies and foundations, and researchers and university staff.

NAWMP PLAN COMMITTEE REVIEW (Content and joint international presentation lead, 2019)

Developed presentation for North American Waterfowl Management Plan Committee's review of Pacific Birds. Developed content with Pacific Birds U.S. and Canada Coordinators. Built and formatted presentation including collating content from multiple technical team members and science coordinators from both the U.S. and Canada.

CANADA INTERMOUNTAIN JOINT VENTURE AND PACIFIC BIRDS CANADA STRATEGIC PLANNING (Co-lead 2018)

Led Open Standard based strategic planning workshop with Canada Intermountain Joint Venture and Pacific Birds Canada technical teams. Trained Canadian Wildlife staff on Open Standards methodology, provided online training for participants, and developed online threat assessment. Provided guidance and assistance in data analysis and workshop outcomes.

PRAIRIE, OAKS, AND PEOPLE: A CONSERVATION BUSINESS PLAN (Co-lead, co-investigator, and co-author 2016)

Pacific Birds, American Bird Conservancy, Klamath Bird Observatory, the Cascadia Prairie Oak Partnership, and Klamath Bird Observatory collaborated on an oak and prairie business plan to illustrate oak and prairie conservation needs. The plan addresses multiple species (birds, plants, invertebrates and mammals), most listed as threatened or endangered by the U.S. Fish and Wildlife Service and Pacific Northwest state agencies.

PARTNERS IN FLIGHT LANDBIRD CONSERVATION PLAN FOR THE U.S. AND CANADA (Contributing author 2016)

The Partners in Flight North American Landbird Conservation Plan provides a continental synthesis of priorities and objectives that guide landbird conservation actions at national and international scales. The Plan comprises an entire section that presents information on the Joint Ventures' roles and efforts in landbird conservation.

PACIFIC AMERICAS SHOREBIRD CONSERVATION STRATEGY (Participant 2016)

International effort to develop strategy using methods from the Open Standards for the Practice of Conservation with the goal of developing and maintaining a network of highly functioning conservation sites throughout the Pacific Flyway.

PACIFIC BIRDS HABITAT CONSERVATION PRIORITIES (Lead, investigator and author 2015)

An evaluation of numerous existing international, national and state bird conservation plans was undertaken by Pacific Birds Habitat Joint Venture (Pacific Birds) with a purpose of identifying key habitat conservation needs to assist in strategic conservation planning. Conservation plans under the North American Bird Conservation Initiative and State Wildlife Action Plans were reviewed with identified priorities summarized to determine high ranking needs within the Pacific Birds region. This process is dynamic and new information will be considered in Pacific Birds planning when it becomes available. Important habitat types were identified based on overall need emphasized by each plan, plus Pacific Birds partner input solicited at numerous scoping meetings.

COMMITTEES AND LEADERSHIP TEAMS

WESTERN FOREST WORKING GROUP - Leadership Team

PARTNERSHIP IN FLIGHT – National Executive Committee

WILLAMETTE WILDLIFE MITIGATION PROGRAM - Wildlife Advisory Committee

NATURAL RESOURCE CONSERVATION SERVICE - Oregon Technical Advisory Committee

NATURAL RESOURCE CONSERVATION SERVICE - Washington State Technical Advisory Committee

PACIFIC FLYWAY COUNCIL – Joint Venture Liaison

OREGON WILDLIFE FOUNDATION - Grant Review Team

PACIFIC BIRDS - Policy Committee

REGIONAL PARTNERSHIP LEADERSHIP

EAST CASCADES OAK PARTNERSHIP - Steering Committee

KLAMATH SISKIYOU OAK NETWORK - Steering Committee

UMPQUA OAK PARTNERSHIP - - Steering Committee

WILLAMETTE VALLEY OAK AND PRAIRIE - Steering Committee

INTERTWINE OAK AND PRAIRIE WORKING GROUP - Steering Committee

SOUTH SOUND PRAIRIES SENTINEL LANDSCAPES - Steering Committee

TEACHING EXPERIENCE

ORNITHOLOGY - FW311 (2011-2013)

Winter, spring and summer terms with average of 32 students per section. The goal of the course is to introduce students to the field of ornithology by providing an overview of the avian body plan, the biology of birds and the challenges faced when trying to conserve and manage birds in North America. Learning objectives are to learn vocabulary relevant to the structure, function and ecology of birds, understand the structure and function of parts of the body that are unique or specially adapted in birds and to understand key concepts about the biology and conservation of birds.

PUBLICATIONS AND TECHNICAL REPORTS

2020. Alexander, JD, Gillespie CR, Evans-Peters, S. Brown B. Klamath Siskiyou Oak Network strategic conservation action plan version 1.0. Klamath Siskiyou Oak Network and Klamath Bird Observatory, Ashland, OR.

2020. Krueger, J. Menske, C. and Evans-Peters, S. Willamette Valley Oak and Prairie Cooperative strategic action plan. Corvallis OR.

2018. The Intertwine Alliance Oak and Prairie Working Group Steering Committee. The Intertwine Alliance Oak and Prairie Strategic Action Plan. Portland OR.

2017. Altman, B., S. Evans-Peters, E. H. Kim, N. Maness, Stephens J. L., and B. Taylor. Prairie, oaks, and people: A conservation business plan to revitalize the prairie-oak habitats of the Pacific Northwest. Pacific Birds Habitat Joint Venture, Portland, Oregon.

2016. K. V. Rosenberg, J. A. Kennedy, R. Dettmers, R. P. Ford, D. Reynolds, J.D. Alexander, C. J. Beardmore, P. J. Blancher, R. E. Bogart, G. S. Butcher, A. F. Camfield, A. Couturier, D. W. Demarest, W. E. Easton, J.J. Giocomo, R.H. Keller, A. E. Mini, A. O. Panjabi, D. N. Pashley, T. D. Rich, J. M. Ruth, H. Stabins, J. Stanton, T. Will. 2016. Partners in Flight Landbird Conservation Plan: 2016 Revision for Canada and Continental United States. Partners in Flight Science Committee. 119 pp.

2016. Evans-Peters, S., K. Bierly, and T. Mielwald. Cascades to Coast Landscape Collaborative Conservation Plan Synthesis. Report for North Pacific LCC.

2015. Evans-Peters, S. T. Pacific Birds Habitat Conservation Priorities. Report for Pacific Birds Habitat Joint Venture.

2014. Evans-Peters, S. T., and B. B. Bales. Pacific Coast Joint Venture Operational Review Process and its Future in Bird Conservation. Report for Pacific Birds Habitat Joint Venture.

2011. Paroulek, S. T. Foraging Ecology and Seed Dispersal of Wild Turkeys (*Meleagris gallopavo*) in the Pacific Northwest. Annual Report to Oregon Department of Fish and Wildlife and Washington Department of Fish and Wildlife. 33pp.

2010. Paroulek, S. T. Diet and Seed Dispersal Capabilities of Wild Turkey (*Meleagris gallopavo*) in the Pacific Northwest. Annual Report to Oregon Department of Fish and Wildlife and Washington Department of Fish and Wildlife. 29pp.

Samuel A. Iverson, John Y. Takekawa, Steven Schwarzbach, Carol J. Cardona, Nils Warnock, Mary Anne Bishop, Greg A. Schirato, Sara Paroulek, Joshua T. Ackerman, Hon Ip, and Walter M. Boyce. 2008. Low Prevalence of Avian Influenza Virus in Shorebirds on the Pacific Coast of North America. Waterbirds 31: 602-610.

2008. Paroulek, S. T. Western Pond Turtle Head-Starting and Reintroduction at Goat Ranch Pond, WA. Progress Report for Washington Department of Fish and Wildlife. 8pp.

VOLUNTEER

BASKET SLOUGH NATIONAL WILDLIFE REFUGE YOUTH WATERFOWL HUNT (2017-2020)
Youth waterfowl hunt - assist with hunter check-out.

COLUMBIA LAND TRUST (2012)
Assisted with land steward program including wildlife and habitat site evaluations and project selection. Participated in conversations with landowners regarding acquisition and restoration options.

WA OUTDOOR WOMEN; INTRODUCTION TO WATERFOWL (2012)
Worked with Ducks Unlimited staff to teach other women about the tradition, techniques and ethics of hunting waterfowl with shotgun patterning, shooting moving clays, setting decoys, duck calling, the use of blinds, and the importance of dogs.

OREGON YOUTH OUTDOOR DAY (2011-2012)
Helped teach children ages 5-14 about conservation of habitat, hunting, fishing, camping and other outdoor activities.

NATIONAL WILD TURKEY FEDERATION (2011-2013)
Presented on wild turkey biology and assisted with activities at youth hunt day programs.

AMERICAN CANCER SOCIETY, CAMP UKANDU (2002-2012)
Lead counselor for camp of over 200 children affected by childhood cancer.

LOMAKATSI
RESTORATION PROJECT

RESTORING ECOSYSTEMS, **SUSTAINING** COMMUNITIES

October 31, 2022

Oregon Agricultural Heritage Program
ATTN: April Mack
Oregon Watershed Enhancement Board
775 Summer Street NE #360
Salem, Oregon 97301

I am writing this letter to offer Lomakatsi Restoration Project's support for Sara Evans-Peters to fill the seat on the Oregon Agricultural Heritage Commission representing natural resource issues. Lomakatsi has partnered with Pacific Birds for over a decade to address shared conservation concerns. Sara has a wide breath of understanding on natural resource issues across Oregon and works proactively with conservation partners across the state to strategically leverage resources and bring needed capacity to partnerships across Oregon. Pacific Birds programs extend far beyond birds, bringing a habitat-based all-species approach to conservation that thoughtfully incorporates the needs of farmers, ranchers, and other producers, while rooted in local community outcomes. We believe Sara has a local and landscape knowledge of natural resource concerns and issues and if selected, will work proactively as part of the Commission to move the program forward.

Sincerely,



Marko Bey | Executive Director
Lomakatsi Restoration Project
645 Washington St. Ashland OR 97520

WILLAMETTE PARTNERSHIP

October 31, 2022

Oregon Agricultural Heritage Program

ATTN: April Mack
Oregon Watershed Enhancement Board
775 Summer Street NE #360
Salem, Oregon 97301

RE: OAHC is Recruiting for a Commission Seat

I am writing this letter to offer Willamette Partnership's support for Sara Evans-Peters, U.S. Assistant Coordinator of Pacific Birds Habitat Joint Venture, to fill the seat on the Oregon Agricultural Heritage Commission to represent natural resource issues.

Pacific Birds (Pacific Birds) Habitat Joint Venture is a valued partner to Willamette Partnership's programs, working to advance habitat conservation for wildlife and people. Pacific Birds uses a ground-up approach to conservation that takes into consideration farmers, ranchers, and other producer needs, as well as local community outcomes. With Sara's leadership, Pacific Birds has incorporated working lands and producer needs into habitat conservation programs and priorities. As a member of the Commission, Sara would bring a perspective for natural resource concerns and issues, rooted in an awareness of the values of working lands and the people that depend on their resilience.

If selected, I have no doubt that Sara will work proactively as part of the Commission to move the program forward.

Thank you for your consideration,



Sara O'Brien
Executive Director

INTEREST FORM

Oregon Agricultural Heritage Commission

This form is used to obtain general information and qualifications of persons interested in serving on the Oregon Agricultural Heritage Commission. This information will be used by the Oregon boards and commissions that recommend applicants to the Oregon Watershed Enhancement Board (OWEB), and also by the OWEB Board, which will appoint the commissioners. Agencies are required to pay per diem compensation and expenses for "qualified members," defined as members who are (1) not in full-time public service, and (2) have an adjusted gross income for the previous tax year of less than $50,000, or less than $100,000 reported on a joint income tax return. The only exception to the requirement is if the qualified member declines compensation. The agency will reimburse board members for travel expenses.

Applicant Information

Name Russell Hoeflich

Affiliation Oregon Conservation leader since 1986

Occupation

X☐ Retired I have been retired since summer of 2021

Mailing address [redacted]

Town/City [redacted] **State** [redacted] **Zip Code** [redacted]

[redacted]

Phone Number **Cell or Alternate #** [redacted] **Fax Number**

Email [redacted]

Applicant Signature [redacted]

By signing above, you certify that:

- All of the information on this form is true;
- You are a legal citizen of Oregon and the United States of America;
- You will accept appointment to the Oregon Agricultural Heritage Commission if selected by the OWEB Board;
- You have an email address and are able and willing to check your email on a near-daily basis and conduct some commission business via email; and
- You will be able to attend scheduled meetings across the state.

Position Sought

Check the box next to each position for which you are currently applying. You may select multiple boxes. This information may be used to contact you for the Rules Advisory Committee or for future vacancies on the commission.

☐ **Farmer or Rancher** (recommended by the State Board of Agriculture)
☐ **Fish and Wildlife Habitat** (recommended by the State Fish and Wildlife Commission)
☐ **Agricultural Water Quality** (recommended by the State Board of Agriculture)

☐ **Conservation Easements and Similar Land Transfers** (recommended by the Land Conservation and Development Commission)

☐ **Indian Tribal Interests** (selected by the OWEB Board)

X **Natural Resource Value Interests** (selected by the OWEB Board)

Statement Of Interest

Use the space below to explain why you are interested in being a representative on the Oregon Agricultural Heritage Commission and why you will be a good commissioner.

My interest in this position goes deep into my lifelong commitment to conservation through service in the public and nonprofit sectors. With over 43 years as a conservation leader, I am deeply entrenched in all facets of water, land, and wildlife conservation. As National Vice President and Oregon Director of The Nature Conservancy I had the opportunity and honor to work with Senator Mark Hatfield as an original architect and financial lead behind the 1998 voter approved Measure 66 that created OWEB and passage of the 2010 Measure 76 which placed OWEB and its funding source into the Oregon Constitution. As the recent past Executive Director of 1000 Friends of Oregon, I was an active and persistent voice for the Oregon Agricultural Heritage Program and the growing need for a permanent funding source to meet the ever-increasing interest and need for this program.

I have developed a deep understanding of the state's unique land use laws and respect for those in the private sector who are a part of Oregon's working lands network. Over the years, I have developed a unique skillset and expertise in both the multitude of options available to mitigate the escalating pressures of generational transfers with specialty in the forest and agricultural sectors as well as the mitigation tools available to help abate the impacts to fish and wildlife from a changing climate. I have also worked with many of the NW tribes including the Klamath, Warm Springs and Burns Piute to collaborate on the acquisition and restoration of priority conservation areas and restore access to their homelands.

As a past member of the Governor's Global Warming Commission, board member of the World Forestry Center and most recently Governor Brown's Wildfire Response Council and chair of its Land Use Subcommittee, I have helped shape multiple policy and programs that are taking hold today. Throughout my career I have had to raise literally $100's of millions of dollars from multiple sources and work through the often-difficult challenge to prioritize projects that provide the most enduring impact.

On a personal note, I want to invest my time in retirement on issues that are vital to the future of our state. This position is in direct alignment with my values and career experiences on tangible and enduring outcomes. I want to focus in on efforts that will leave a legacy to our state that I can be proud of.

Experience/Involvement

Please describe any work experience and/or involvement that has provided you with knowledge, skills, or abilities to successfully represent the interests of the position(s) for which you are applying and to fulfill the duties of a member of the Oregon Agricultural Heritage Commission. Include any previous experience on boards or commissions.

You may attach a résumé and/or work history.

Education:

Bachelor degree in both Biology and Environmental Science Southampton College Stonybrook University and a Master's Degree in Environmental Management from Long Island University

Employment:

The Nature Conservancy-Founding Director South Fork Shelter Island Chapter, New York 1978-1986

The Nature Conservancy-National Vice President and Oregon Director 1986-2014

The Nature Conservancy- VP and Senior Policy Advisor of its Restoring Americas Forest Initiative 2014-2017

1000 Friends of Oregon- Executive Director 2017-2021

Recent relevant present/past Boards, Committee work:

Governor appointment to the Global Warming Commission

World Forestry Center Board member

Forest Bridges President's Council of Advisors

Governor Brown appointment to Wildfire Response Council and chair of its Land Use Subcommittee

I offer up the following specific aligned experiences which are central to my position qualifications:

- 43 years of national conservation experience with 35 years of high-level conservation contacts and relationships in Oregon
- Knowledge of the DC and State natural resource focused agencies, their leaders, partners and politics
- Board governance and collaboration team cohesion expertise

- Deep understanding of the Oregon land use laws and system including its 19 land use goals with a deep understanding of the underpinning natural resource laws
- Fire risks and mitigation expertise and working knowledge of the full suite of tools available to working lands owners
- Natural resource focused partner outreach capacity and more significantly, the time to do it well
- Comprehensive knowledge of the state and willingness and travel to project sites statewide
- Dual residency in both Portland and Lincoln City and history and understanding of the natural resource issues and politics of both geographies as well as working relationships in most counties of our state
- Experience in supporting State Legislative budgets and policies
- Unique working knowledge behind the full suite of natural resource focused private funders and supporting foundations and critical understanding of the network behind both here in Oregon and nationally
- Comprehensive knowledge of the public funding community network and relationships.
- Deep NGO partner, tribal and working lands sector relationships
- Comprehensive understanding of the operations of the Oregon legislature and all of its natural resource agencies

Supplemental Question

Describe what you believe to be the main issues facing the future of Oregon agriculture and the fish and wildlife habitat and other natural resources on Oregon's agricultural lands.

From the lens of natural resource value and interests; climate extremes, late frost, high winds, summer heat extremes, acidification of our oceans, sea level rise, loss of pollinators. Additionally, the expansion of number, duration and size of fire events and extreme variability of moisture events including an escalation of lightning strikes will rank among the dominant issues.

From a social perspective, global famine, national climate driven population movements (cimate refugees) to relatively resilient geographies, Oregon will be a focus. Its rich and diverse agricultural lands will become vital to the mitigation of global famine.

In the near term, the aging of the owners of Oregons family farms and the inherent challenges to generational transfer will dominate. The need to find solutions that keep the lands in production will become vital to the state, our nation and globally.

Lastly, the lack of a permanent conservation funding source to adress the full scale and scope of the problem must be priority number one for those who believe in the power of the Oregon Agricultural Heritage Program.

References

Please identify three references that may be contacted if you are selected as a top candidate. Individuals or representatives of associations/organizations are acceptable.

Letters of support from relevant staff, associations, or similar groups are encouraged; feel free to attach any such letters to your application.

Reference #1

Name Randy Labbe

Affiliation (if any) Past OWEB Board Chair

Mailing Address [redacted]

City/Town Portland

State [redacted]

Zip Code [redacted]

Phone Number [redacted]

Alternate # [redacted]

Fax #

Email [redacted]

Reference #2

Name Will Neuhauser

Affiliation (if any) Past OWEB Co-Chair

Mailing Address [redacted]

City/Town [redacted]

State [redacted]

Zip Code [redacted]

Phone Number [redacted]

Alternate # [redacted]

Fax #

Email [redacted]

Reference #3

Name Mark Bennett

Affiliation (if any) Past Oregon Agricultural Heritage Commission Member, rancher and Baker County Commissioner

Mailing Address [redacted]

City/Town [redacted]

State [redacted]

Zip Code [redacted]

Phone Number [redacted]

Alternate # [redacted]

Fax #

Email [redacted]

Please send your completed application via email to april.mack@oweb.oregon.gov or via mail to:

Oregon Agricultural Heritage Program

ATTN: April Mack

Oregon Watershed Enhancement Board

775 Summer Street NE #360

Salem, Oregon 97301

Applications must be sent via email or post-marked by Oct 26th, 2022 in order to be considered for a position.

Main Office • 133 SW 2nd Ave, Ste 201 • Portland, OR 97204
Willamette Valley Office • 454 Willamette St, Ste 213 • Eugene, OR 97401
Southern Oregon Office • PO Box 2442 • Grants Pass, OR 97528

October 7, 2022

Dear Oregon Watershed Enhancement Board of Directors:

1000 Friends of Oregon recommends Russ Hoeflich as the natural resource value interests appointment to the Oregon Agricultural Heritage Commission.

Russ has dedicated over four decades to creating inspiring initiatives to conserve iconic natural and working lands, diverse ecosystems, and prepare for more severe and frequent natural disasters. Russ has combined his ability to maneuver through politics with his passion for a better planet to realize new funding, partnerships, and conservation projects.

Most recently, Russ served as the fifth Executive Director for 1000 Friends of Oregon. Russ possesses strong working knowledge of the policies, programs, and people necessary to sustainably steward Oregon's natural and working lands. He understands the need to defend and enhance our state's special and unique land use planning program to prevent runaway sprawl and fragmentation of our farms, forests, and natural areas.

Russ also understands the importance of listening about new issues and learning from people different from him to better create policies and programs. He demonstrates his appreciation of community engagement, coalition building, and open lines of communication in order to find a solution.

During his tenure at 1000 Friends, he shared his knowledge and skillset with the Oregon Global Warming Commission and the Governor's Wildfire Task Force. 1000 Friends has no doubt that he would bring the same thoughtful, intentional, and strategic approach to the Oregon Agricultural Heritage Commission.

Thank you for your consideration of this recommendation and your service to our state.

Sincerely,



Sam Diaz, Executive Director
sam@friends.org
(503) 694-3892

From: mbennett@bakercounty.org
To: MACK April * OWEB
Cc: Russ Hoeflich
Subject: Reference for Russell Hoeflich , Applicant OAHC
Date: Friday, September 30, 2022 10:17:55 AM

I have had the distinct privilege to work with Russ the past several years while members of the Governor's Wild Fire Response Council.

As a rancher, former member of the OAHC and county commissioner I believe that he is uniquely qualified to fill the role of OAH Commissioner as his Natural Resource values and interests align with the goals and objectives set forth for the program.

In our often partisan climate Russ is able to work collaboratively across lines on issues of Natural Resources , with high levels of effectiveness with federal, state, county and tribal leaders. His experience in the Oregon land use programs would be invaluable to the Commission as he understands both the strengths and the vulnerabilities to the protection of and stability of the natural resources of our state. Because of his leadership skills and Land Use expertise, the governor had him lead the Land Use Subcommittee where he built a pragmatic hard-working team whose recommendations are being implemented today to aid in the reduction of catastrophic wildfire impacts.

A critical role of the commission to insure the next generation of farmers and ranchers are able to successfully transition on the land. He has experience in working on issues where he understands this and will be able to translate this into programs that not only aid and assist this goal but protect working lands where the operators are positive stewards of the lands.

He is known for his leadership in the conservation of agricultural, forest, rangeland and water issues facing Oregon, and has a heart for service to our state.

Russ will be a focused, engaged , well connected, results orientated member.

Mark Bennett, Commissioner
Baker County
Chair, Oregon Wildfire Programs Advisory Council
Office: 541.523.8200
Cell: 541.519.8421
Res: 541.446.3547

From: Randy Labbe
To: MACK April * OWEB
Cc: Russell Hoeflich
Subject: Reference for Russ Hoeflich
Date: Thursday, September 29, 2022 3:54:46 PM

Hi April,

It is fun to see my computer pop up your OWEB email address in its' proper place for I have missed your efficient and cheerful manner. I hope our paths will cross again now that in- person meetings are a part of the rotation. My mission today is to submit the following reference in support of Russell Hoeflich's expression of interest in the open seat on the Oregon Agricultural Heritage Commission:

TO: the Oregon Watershed Enhancement Board and Staff
FROM: Randy Labbe
Subject: Reference for the Application of Russell Hoeflich to serve on the Oregon Agricultural Heritage Commission

The OWEB Board and Staff are deserving of praise for the nurturing stewardship of OAHP and the patient and persevering effort to secure initial funding from the Oregon Legislature.
I served as a trustee of the Oregon Chapter of The Nature Conservancy during some of the eventful years of Russ's long tenure as Director of the Oregon Chapter and we worked closely together when I was Board Chair of the Chapter. I believe that his skill sets and background would be a perfect fit on the Commission for helping OAHP reach the next level of effectiveness and support.

The resume that Russ has submitted speaks loudly regarding his credentials and I can validate their accuracy but he would bring several strengths that I would like to highlight as particularly relevant to OAHP's current stage of development.

- Russ downplays his role in the 1998 passage of Measure 66 and the passage of Measure 76 in 2010 securing permanent funding for OWEB's work. I would argue that he was the driving force in 1998 for mobilizing TNC's lead role and securing private financial support for the Referendum. He has a proven track record as a master fundraiser in both the public and private sector. Similarly, in 2010 he was pivotal in securing TNC's authorization to take a lead role in the effort including incredible financial support. He used his people skills to persuade skeptics on his board that the timing was right to pass this Referendum in the face of a seemingly insurmountable economic downturn.
- Russ has a great ability to work "across the aisle" in both the public and private sector. He recognized the need to recruit TNC board members with diverse political beliefs in the same manner that gender, race, age, and economic diversity are a necessity. He understands the need to eliminate the so-called urban/rural divide and how to grow an apolitical culture in an organization.

Russ is a passionate conservationist who also understands that farmers and ranchers share the same passions. A strong and enduring agricultural and ranching community is a prerequisite for a healthy environment in Oregon.

Warm regards to all of my OWEB friends,

Randy

Randy Labbe
Director
Kerr Pacific Corporation
1211 SW Sixth Avenue
Portland, OR 97204-1001
503-221-1301 Office
503-702-3058 Cell
erlabbe@kerrpacific.com

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From:	Will Neuhauser
To:	MACK April * OWEB
Cc:	Russ Hoeflich
Subject:	OAHC Natural Resource Value Interests position recommendation for Russ Hoeflich
Date:	Saturday, October 8, 2022 12:18:44 PM

Oregon Agricultural Heritage Program
ATTN: April Mack
Oregon Watershed Enhancement Board
775 Summer Street NE #360
Salem, Oregon 97301
april.mack@oweb.oregon.gov

Re: Recommendation for Russ Hoeflich for the OAHC Natural Resource Value Interests position

I am a former at-large board representative and co-chair of the Oregon Watershed Enhancement Board (OWEB), served on the group that defined the Oregon Agricultural Heritage program, and was its initial OWEB liaison to the OAHC after it was created. I continue to follow its actions attentively. I am currently on the steering committee of the Willamette Valley Oak and Prairie Cooperative, and a board member of The Freshwater Trust, and on the Government Relations committee of the Coalition of Oregon Land Trusts, but am only speaking for myself.

I strongly recommend Russ Hoeflich for the upcoming OAHC Natural Resource Value Interests position on the OAHC board.

With its recent first funding under its belt, OAHC is in a key phase of implementing the funding and overseeing the easements and conservation plans vital to sustaining farm productivity and succession coupled with conservation values.

From his leadership with the Nature Conservancy and 1000 Friends of Oregon, Russ Hoelich brings a rich experience in working with all aspects of the challenges OAHC is engaged in: not only with the core mechanisms of restoration and of land preservation, but also with the intersection of land use with conservation and with farming, building coalitions with farmers and foresters, the importance of sustaining a strong farm economy in concert with land-use and conservation imperatives, and the climate impacts on water, people, and habitat.

As a former trustee with the Nature Conservancy in Oregon, I also saw how he lead the The Nature Conservancy in Oregon with his open, considerate and inclusive management style that led to the organization being named the #1 Nonprofit to Work for by Oregon Business Magazine in 2014.

At the Conservancy, he lead many land preservation agreements in Oregon and is intimately familiar with the challenges and creative solutions for constructing win-win arrangements for land owners and for conservation. I believe there is no one more qualified and capable to have a leading role working through the first sets of grants and ensuring OAHC's on-going effectiveness.

I recommend Russ Hoeflich for the OAHC Natural Resource Value Interests position because

he will bring broad expertise, openness and collaborative skills that will be valuable to OAHC.

I would be happy to chat anytime if that can be of assistance in reviewing his candidacy.

Thank-you,

Will Neuhauser
2333 NE Multnomah St
Portland, OR 97232
503/799-6639

- Will

Will Neuhauser
will@ThreeCedarSprings.com
503/799-6639 (c)

INTEREST FORM

Oregon Agricultural Heritage Commission

This form is used to obtain general information and qualifications of persons interested in serving on the Oregon Agricultural Heritage Commission. This information will be used by the Oregon boards and commissions that recommend applicants to the Oregon Watershed Enhancement Board (OWEB), and also by the OWEB Board, which will appoint the commissioners. Agencies are required to pay per diem compensation and expenses for "qualified members," defined as members who are (1) not in full-time public service, and (2) have an adjusted gross income for the previous tax year of less than $50,000, or less than $100,000 reported on a joint income tax return. The only exception to the requirement is if the qualified member declines compensation. The agency will reimburse board members for travel expenses.

Applicant Information

Name Chris Colson

Affiliation Ducks Unlimited

Occupation

☐ Retired Regional Biologist

Mailing address [redacted]

Town/City [redacted] **State** [redacted] **Zip Code** [redacted]

Phone Number [redacted] **Cell or Alternate #** **Fax Number**

Email [redacted]

Applicant Signature

By signing above, you certify that:

- All of the information on this form is true;
- You are a legal citizen of Oregon and the United States of America;
- You will accept appointment to the Oregon Agricultural Heritage Commission if selected by the OWEB Board;
- You have an email address and are able and willing to check your email on a near-daily basis and conduct some commission business via email; and
- You will be able to attend scheduled meetings across the state.

Position Sought

Check the box next to each position for which you are currently applying. You may select multiple boxes. This information may be used to contact you for the Rules Advisory Committee or for future vacancies on the commission.

☐ **Farmer or Rancher** (recommended by the State Board of Agriculture)
☐ **Fish and Wildlife Habitat** (recommended by the State Fish and Wildlife Commission)
☐ **Agricultural Water Quality** (recommended by the State Board of Agriculture)
☐ **Conservation Easements and Similar Land Transfers** (recommended by the Land Conservation and Development Commission)
☐ **Indian Tribal Interests** (selected by the OWEB Board)
☒ **Natural Resource Value Interests** (selected by the OWEB Board)

Statement Of Interest

Use the space below to explain why you are interested in being a representative on the Oregon Agricultural Heritage Commission and why you will be a good commissioner.

My professional experiences in eastern Oregon have afforded me an understanding of the conservation role and economic dynamics of agricultural easements in landscapes that are not necessarily experiencing traditional development pressure. In some cases, there may be no pressure, or the pressure may be associated with energy development (e.g. solar, wind, and geothermal) that is not well characterized in appraisals ultimately resulting in lowered values. Additionally, I've observed instances across the rural West where conservation easements can reduce the flexibility of a community and its agricultural landowners to maintain local ownership – under increasing property values, larger properties held intact by easements can become unaffordable for the local community, adversely affecting generational agricultural operations, beginning producers, and community resilience. My awareness and appreciation for these collective issues, among others, has been garnered through direct experiences and interactions with innumerous agricultural landowners

I would bring valuable experience and perspective to the Oregon Agricultural Heritage Program. During my professional career I have regularly worked with private agricultural landowners to facilitate easements for a variety of conservation and development actions. These easements have utilized traditional conservation easements, deed restrictions such as those executed for regulatory mitigation, and rights-of-way often established for industrial developments. These were undertaken with interests in conservation and/or economic return. And within each transaction, I have observed only broad trends among landowners, typically associated with a common interest in genuine conservation. Beyond that, economic interests in easements, even when combined with a conservation desire, can be initiated by boundless and evolving socioeconomic interests and values, and often enough by 'need'.

Throughout my career I have monitored numerous easements with regards to compliance of terms, whether it be a traditional conservation easement, mitigation, and even bond-release. I have gained considerable appreciation for easement terms applied to landowners that fail to appreciate limiting factors within their operation, are inconsistent with expectations established with the landowner, applied inconsistently across transitions of easement managers, or fail to satisfy the intent of the easement. These outcomes are regularly encountered in eastern Oregon where its conservative culture already distrusts conservation easements. Conservation in eastern Oregon is further confounded by the historical lack of funding and easement-holding interests. With the creation of the Oregon Agriculture Heritage Program, and the establishment and/or expansion of new regional land trusts, there is outstanding opportunity to increase conservation delivery in eastern Oregon, but it must be conducted strategically and with an adeptness for landowner values, interests, and socioeconomic trends.

I support coordination of the OAHP with Farm Bill easement programs. My long-standing experiences with those programs allow me to appreciate the significance of funding that can complement OAHP. However, all the conservation easements I have facilitated, have been executed with the use of North American Wetland Conservation Act federal funding. My experience with additional federal programs will increase the Commission's perspective.

Finally, my professional natural resource experiences have spanned 17 western and midwestern states, regularly in rural landscapes and private ownership scenarios. These experiences have all been natural resource focused within a variety of industries and conservation pursuits including energy and resource development, transportation, real estate development, private timber management, public lands management, and water and wildlife conservation. I have exposure and applied experience across the respective agricultural commodities and land uses, local socioeconomic values, and state statutory and regulatory frameworks.

My attached resume and subsequent responses will further demonstrate the value of my professional experiences and broad ranging perspectives I will bring to the Commission and the State of Oregon. I have developed deep and personal relationships with the landowners I have and will continue to work with. My experiential resources and value-based perspective will allow me to beneficially serve them and all Oregon agricultural producers on the OAHP Commission.

Experience/Involvement

Please describe any work experience and/or involvement that has provided you with knowledge, skills, or abilities to successfully represent the interests of the position(s) for which you are applying and to fulfill the duties of a member of the Oregon Agricultural Heritage Commission. Include any previous experience on boards or commissions.

You may attach a résumé and/or work history.

My academic background consists of a B.A. in Environmental Science and an M.S. in Forestry, where my research focused on wetland biogeochemical processes in managed timberlands. Following graduate school, I served as a contracted researcher for Boise Cascade conducting stream thermodynamic experiments on their industrial timberlands in Oregon (Ladd Creek and Little Catherine Creek – Union County) and Idaho. Following the completion of the research, I served as a term Botanist for the Boise District BLM. I then took a position as an environmental lobbyist for the non-profit Californians for Alternatives to Toxics. From there I moved on to natural resource consulting leading the Natural Resource Group of Tetra Tech's Boise Office. The company focused services in the hard rock mining and energy development and distribution industries. The latter, particularly wind farm development and linear energy distribution, involved considerable private lands engagement where landowners regularly exhibited a spectrum of interest and opposition to the proposed actions. I then transitioned to my current position with Ducks Unlimited where my roles and responsibilities include landowner engagement, project and funding development, regulatory compliance, collaborative/initiative representation and facilitation, public policy and advocacy, organizational member stewardship, and internal team management.

My career at Ducks Unlimited has included more than 10 years of direct conservation experience in Oregon almost wholly focused on working lands conservation. Collectively, I have overseen the delivery of, or am presently engaged in, 82 eastern Oregon projects and/or initiatives, with 73 being associated with private agricultural lands. Over the course of those 10 years, I have been personally responsible for the delivery of 4,987 acres of wetland conservation, restoration, and enhancement. I have authored four successful standard NAWCA grants, co-authored two successful RCPP grants, and served as a core contributor to the successful Harney Basin Wetlands OWEB FIP grant.

Throughout my tenure at Ducks Unlimited, I have advocated for and delivered conservation measures related to the restoration and conservation of historical wet meadows and floodplains, typically long-converted and now managed as flood-irrigated working wet meadows on private livestock ranches. The maintenance and improvement of this land use addresses proven habitat resources limitations to continental populations of Pacific Flyway birds. But it also upends common perceptions on the agricultural practice of flood-irrigation where it is viewed as an abusive use of water. Devotees of this perception overlook the surrogate role of flood-irrigation in floodplains where it mimics overbank flooding and associated floodplain functions and processes. Conversion away from this practice to sprinkler irrigation results in a direct loss of habitat and floodplain function, ultimately removing the hyporheic exchange of water between the floodplain and its stream, the primary driver of cool, late season flows. I only mention this dynamic of my profession to illustrate the regular position I undertake requiring tactful communication among supporters and opposers of this land use centered on the livelihood of agricultural private operations. Additionally, it demonstrates my regular immersion in the climate-driven ecological and socioeconomic considerations facing agricultural producers, particularly as it relates to water.

Also of note, I am currently enrolled and completing the Western Conservation Leadership Development Course. It is a rigorous 9-month residency and virtual leadership training program focused heavily on productive, high-pressure dialogue surrounding controversial issues, while placing profound weight on diversity, equity, inclusion, and justice. This will enhance my existing depth of experience serving in collaborative forums in various capacities as demonstrated on my attached resume.

Supplemental Question

Describe what you believe to be the main issues facing the future of Oregon agriculture and the fish and wildlife habitat and other natural resources on Oregon's agricultural lands.

Changing climate, specifically the availability and quality of water, will be the principal limiting ecological and economic factor for Oregon's agricultural producers. This will be further compounded by rising temperatures and increased climatic variability and frequency of extremes. These factors are expected to dramatically constrain the operational capacity, flexibility, resilience, and ultimately viability of Oregon's producers. The vitality of any individual producer will be maintained through the strength and collective stability of the community. Adaptively structuring OAHP to serve as a continuous support resource for agricultural communities, through strategic conservation inputs to individual landowners, will maximize the program's efficacy to the state's producers.

The respective terms of reserved agricultural rights within conservation easements will be challenged with protecting the intended natural resources while not limiting the management options to producers responding to a changing climate. The state of Oregon continues to broaden its awareness for the roles agricultural lands do and can serve in providing fish and wildlife habitat and maintaining ecological functions and processes. However, if easement terms prevent a producer's ability to adapt, through alternative commodities and/or land use, for instance, the cooperative balance of agricultural production and natural resource contributions can be upset. Awareness for and maintenance of this balance in OAHP is paramount to both Oregon's producers and natural resources.

With regards to water specifically, conservation easements and maintaining larger intact operations can contribute to basin-scale complementary water management and maximized water use. As parcels are broken up, collaborative efforts require more parties, more infrastructure, and increasingly complex adaptive approaches to water balance. Additionally, the economic inputs provided by OAHP can enable producers to implement adaptive measures, and these can be designed to provide benefit at a basin-scale and to adjacent producers. OAHP can provide the strategic vision to ensure these inputs are maximized at community levels.

As a restoration and conservation practitioner that focuses nearly exclusively on private agricultural lands, I employ an ever evolving and adaptive approach to the development and application of conservation-based resources to provide producers with the support they need to adapt to a changing climate. In my estimation, the State of Oregon continues to refine their understanding of how a changing climate is influencing the interdependence of agricultural operations and natural resources. Acknowledgment of this continuing education and applying OAHP inputs under this consideration will ensure state and federal resources are continuously applied with the greatest efficacy.

The nature and scope of my professional responsibilities place water balance at the daily forefront of my program planning. Increasing deficits of water quantity and quality and our understanding of historical ecological balance, require conservation actions based on long-term projections of climate, land use, and subsequent socioeconomic dynamics. My regular practice and application of these climate considerations will be a valuable input to Commission efforts.

References

Please identify three references that may be contacted if you are selected as a top candidate. Individuals or representatives of associations/organizations are acceptable.

Letters of support from relevant staff, associations, or similar groups are encouraged; feel free to attach any such letters to your application.

Reference #1

Name Kelley Beamer, Executive Director

Affiliation (if any) Coalition of Oregon Land Trusts

Mailing Address [redacted]

City/Town [redacted]

State [redacted]

Zip Code [redacted]

Phone Number [redacted]

Alternate #

Fax #

Email [redacted]

Reference #2

Name Nellie McAdams, Executive Director

Affiliation (if any) Oregon Agricultural Land Trust

Mailing Address [redacted]

City/Town [redacted]

State [redacted]

Zip Code [redacted]

Phone Number [redacted]

Alternate #

Fax #

Email [redacted]

Reference #3

Name Larry Maxwell, Owner and Board Member

Affiliation (if any) [redacted]

Mailing Address [redacted]

City/Town [redacted]

State [redacted]

Zip Code [redacted]

Phone Number [redacted]

Alternate #

Fax #

Email [redacted]

Please send your completed application via email to april.mack@oweb.oregon.gov or via mail to:

Oregon Agricultural Heritage Program

ATTN: April Mack

Oregon Watershed Enhancement Board

775 Summer Street NE #360

Salem, Oregon 97301

Applications must be sent via email or post-marked by Oct 26th, 2022 in order to be considered for a position.

Chris Colson

2533 North 26th Street
Boise, Idaho 83702
ccolson@ducks.org
208-608-2441

EDUCATION

B.A., Environmental Science, Catawba College, Salisbury, North Carolina, 1998.
M.S., Forestry (wetland biogeochemistry thesis research emphasis), Auburn University, Alabama, 2008.

EMPLOYMENT HISTORY

REGIONAL BIOLOGIST II, Ducks Unlimited, Boise, Idaho. July 2010 - present.
Deliver Ducks Unlimited's (DU) conservation program in eastern Oregon and southern Idaho, while also supporting program delivery in Utah, northern Idaho, eastern Washington, and western Oregon. Primary job responsibilities are to deliver a robust wetland conservation and restoration program while recovering most costs through public funding. Directly responsible for conducting landowner outreach and engagement to identify prospective projects consistent with science-based program goals and objectives, developing conceptual alternatives in coordination with engineering staff on restoration efforts, establishing effective collaboration with project partners and securing funds, negotiating and establishing acquisitions and/or easements, obtaining project permits, managing multi-million dollar complex budgets and grants, and conducting post-construction monitoring and reporting. Maintain stewardship and provide long-term management planning for completed projects on public and private working ownerships. Regularly conduct public education, outreach, advocacy, and policy efforts. Frequently provide formal presentations on program to a variety of audiences. Represent DU in numerous capacities across states, regionally, and nationally on technical committees, working groups, and collaborative partnership conservation initiatives. Program is chiefly focused on restoration of historical floodplain hydrology in priority conservation landscapes, primarily on flood-irrigated grass-based agricultural working lands. Currently manage and develop workload for two engineers, two Farm Bill partnership biologists, and shared workloads for several support specialists. Serve as conservation staff liaison to science, policy, fundraising, grassroots, and volunteership across program area. Typically oversee a $1 million annual budget composed of an allowable operating budget augmented by awarded public and private funds. Annually generate $400-700k in revenue from competitive funding programs and deliver ~500+ conserved wetland acres across program area.

For the past four years represented DU on DOI stakeholder coalitions in the Klamath Basin. From that collaborative, established and facilitated a formal working group comprised exclusively of Klamath Project stakeholders. Structured and co-authored an NRCS RCPP application that was recently awarded for $3.8 million.

ECOLOGIST / PROGRAM MANAGER, Tetra Tech, Inc., Boise, Idaho. June, 2004 – June, 2010.
Managed the Boise office's natural resources group and served as the company's technical lead for wetland and botany resources in the Intermountain West. Directly supervised five employees within the program. Independently generated approximately $100,000+ annually in proposal awards and maintained many long-term clients. Technical responsibilities included wetland delineation, assessment, permitting, mitigation design and monitoring, serving as discipline lead on NEPA documents and baseline data collection efforts, and regularly conducting rare plant surveys, vegetation mapping, vegetation monitoring and habitat characterization and assessment. Regularly worked on large-scale projects within an interdisciplinary team. Clients spanned a variety of disciplines including mining, forestry, energy production and distribution, residential and commercial development, and public land management.

PUBLIC LANDS PROGRAM MANAGER, Californians for Alternatives to Toxics, Eureka, California. October, 2003 – June, 2004.
As Program Manager, monitored all mission-related forestry and public land issues that occurred in the state of California. Submitted scientifically grounded public comment in response to NEPA documentation on national forests, state water quality declarations and private timber harvest plans. Represented the organization at public meetings and provided input to management and/or action plans that might affect the organization. On behalf of the organization, served on the North Coast Chapter of the California Native Plant Society Invasive Species Committee. Developed a database for monitoring national forest issues, maintained forestry and water quality library of scientific publications and developed and maintained a forestry-related pesticide alternatives webpage. Developed public outreach and education and collaborated on a non-toxic fuel reduction workshop and a reference text addressing plantation forestry.

BOTANIST, Bureau of Land Management, Four Rivers Field Office, Boise District, Boise, Idaho. April, 2002 - October, 2003.
Provided technical expertise and management recommendations in support of the botanical resources of the BLM Four Rivers Field Office as a contracted term employee. Wrote and reviewed NEPA documents, coordinated research projects, implemented management projects/objectives with respect to the district's first federally proposed plant species *Lepidium papilliferum* (slickspot peppergrass), developed species lists for project sites, identified BLM special status plants and Idaho state listed noxious weeds, reviewed past project actions for compliance, located viable populations of desired species for the international Seeds of Success program, monitored rare plant populations and Research Natural Areas, and evaluated impacts following fire events. Often worked within a team consisting of specialists in weeds, archaeology, wildlife, and range management.

CONTRACTED RESEARCH ECOLOGIST, Boise Cascade Corporation, Boise, Idaho. June, 2001 – March, 2003.
Contracted to assist with the design and implementation of a study investigating the effects of canopy shade on downstream temperature and its potential to regulate fish activity. Project utilized hemispherical photography and stream temperature data recorders that were deployed in forested mountain streams in western Idaho and eastern Oregon. Additional work included stream discharge measurements, electroshock and snorkeling fish surveys, and aquatic invertebrate sampling and habitat surveys. Also assisted with various tasks in support of watershed management and fisheries needs on Boise landholdings as

well as Threatened and Endangered species filtering for the benefit of Sustainable Forestry Initiative (SFI) audits. Designed and deployed stream temperature recorders to delineate perennial fish bearing stream segments in northeast Oregon and provided quality assurance/quality control of temperature recorders. Surveyed in-stream large woody debris and sediment check dams in support of the restoration of salmon spawning habitat following a catastrophic fire in southwest Oregon. Developed a comprehensive list identifying rare and endemic fauna, flora and ecological communities that occur within Alabama and Washington land holdings to support SFI audits. Research resulted in two peer-reviewed publications.

GRADUATE RESEARCH ASSISTANT, School of Forestry and Wildlife Sciences, Auburn University, Alabama. August, 1998 – May, 2001.
Designed and implemented a study to examine the influences of forest management (including best management practices) within riparian buffers on nutrient cycling and water quality. Utilized a paired watershed approach. Initially the study encompassed intensive water sampling of headwater intermittent streams following storm events. During a record drought year, the project was forced to adapt and exclusively scrutinize management effects on terrestrial indices of riparian biogeochemistry, primarily productivity and decomposition. Overall response variables included water quality (total suspended solids, total dissolved solids and nutrient analysis), stream volume and discharge, decomposition (mass loss and nutrient analysis), coarse woody debris (total biomass), litter fall (total biomass and nutrient analysis), herbaceous vegetation (total biomass and nutrient analysis), aboveground woody biomass, soil microbial biomass, soil temperature and rainfall. Also participated and contributed to other research projects within the graduate group and taught undergraduate Forest Ecology labs. Research resulted in three peer-reviewed publications.

BIOLOGICAL TECHNICIAN, Pee Dee National Wildlife Refuge, Wadesboro, North Carolina. June – August, 1997.
Performed wood duck, bluebird and red-cockaded woodpecker nesting box surveys and wood duck and neo-tropical migratory songbird banding. Assisted in completion of Pee Dee herbarium, white-tailed deer parasite study, timber marking, and several administrative and public outreach services. Supervised Youth Conservation Corps interns.

CURRENT STATE AND REGIONAL LEADERSHIP ROLES
Klamath Basin DOI Coalition of the Willing, DU representative
Tule Lake / Lower Klamath Lake Working Group, Facilitator
Harney Basin Wetlands Collaborative, Core Contributor
Harney Basin Place-based Water Planning, Participant
Coalition of Oregon Land Trusts, past *in lieu* Board Member
Idaho NRCS, State Technical Advisory Committee Member
Intermountain West Joint Venture, Idaho State Conservation Partnership Co-Chair
DU Ecological Goods and Services, National Water Replenishment Committee Member
Idaho Bird Conservation Partnership, Steering Committee

CONTINUING EDUCATION

Western Conservation Leadership Development Program, *ongoing*
DEIJ training –Intermountain West Joint Venture, 2021
Streambank Soil Bioengineering, Pendleton, Oregon, 2016
Wetland Ecology and Management, Gray's Lake, Idaho, 2013
Ducks University (Waterfowl Ecology), Bismarck, North Dakota, 2012
Grant Writing for Conservation, Boise, Idaho, 2011
Project Management 2 Training, Tetra Tech, Cincinnati, Ohio, 2009
Carex Identification Workshop, Boise, Idaho, 2009
Juncus Identification Workshop, Boise, Idaho, 2008
GIS Remote Sensing Short Course, Boise, Idaho, 2008
Project Management 1 Training, Tetra Tech, Boise, Idaho, 2007
Arid West Regional Supplement Wetland Delineation Training, Portland, Oregon, 2007
Northwest Herbaria Symposium, Boise, Idaho, 2007
Bryophyte and Lichen Identification, Opal Creek, Oregon, 2006
Biological Soil Crust Ecology and Management, Boise, Idaho, 2006
MSHA Part 48 Mine Safety Training, Elko, Nevada, 2005-2010
Rangeland Health Assessment Standards and Guides Training, Boise, Idaho, 2005
Prescription Grazing Management Training, Boise, Idaho, 2005

PUBLICATIONS

Danehy, R.J., **C.G. Colson**, and S. D. Duke. 2010. Winter Longitudinal Thermal Regime in Four Mountain Streams. Northwest Science. Volume 84, Number 1.

Cooper, D.J., E.C. Wolf, **C. Colson**, W. Vering, A. Grande, and M. Meyer. 2010. Alpine Peatlands of the Andes, Cajamarca, Peru. Arctic, Antarctic, and Alpine Research. Volume 42, Number 1.

Fritz, K.M., J.W. Feminella, **C. Colson**, B.G. Lockaby, R. Governo, and R.B. Rummer. 2006. Biomass and decay rates of roots and detritus in sediments of intermittent Coastal Plain streams. Hydrobiologia, Issue: 556.

Danehy, R. J., **C.G. Colson**, K.B. Parrett, and S.D. Duke. 2005. Patterns of thermal heterogeneity in small mountain streams in a forested setting. Forest Ecology & Management, Issue: 208.

B.G. Lockaby, R. Governo, B. Rummer, and **C. Colson**. 2004. Silvicultural management within streamside management zones of intermittent streams, effects on decomposition, productivity, nutrient cycling, and channel vegetation Southern Journal of Applied Forestry, Issue: 28.

COALITION OF OREGON LAND TRUSTS
511 SE MORRISON ST. PORTLAND, OR 97214 • 503-719-4732 • OREGONLANDTRUSTS.ORG

October 31, 2022

Oregon Watershed Enhancement Board
775 Summer St. NE #360
Salem, OR 97301

Re: Recommendation for Chris Colson as OWEB nominee to OAHP Commission

On behalf of the Coalition of Oregon Land Trusts (COLT), I am writing to offer strong support for the appointment of Chris Colson to the Oregon Agricultural Heritage Commission. COLT is a statewide coalition that works to serve and strengthen the land trust community of Oregon by increasing the effectiveness of land trusts, strengthening public policies and programs that are supportive of land conservation, and communicating to key audiences the value of conserving Oregon's natural heritage and the economic activities that depend on it.

Mr. Colson is a long-time conservation leader in Oregon whose career is devoted to supporting the conservation of wildlife and the vitality of rural communities. Mr. Colson is a regional biologist with Ducks Unlimited, whose mission is to *conserve, restore, and manage wetlands and associated habitats for North America's waterfowl*.

Chris has spent years building trusting relationships across Eastern Oregon where he works to support the management of wetland and waterfowl conservation areas. He is an active partner with the Harney Basin Wetlands Collaborative (HBWC) and in the Klamath Basin where he brings elements of science, planning, policy, education and outreach to strategies that span public and private lands.

Mr. Colson is uniquely suited to serve on the OAHP Commission and will bring the following:

- Expertise on federal conservation funding programs that align with OAHP
- Proven experience building trust and partnerships with private agricultural landowners
- Easement expertise and experience supporting private real estate transactions
- Insight into regional conditions that impact Oregon's working lands and strategies that benefit both agriculture and wildlife

I am confident that Mr. Colson will be an effective and valuable voice for Oregon's agricultural lands and the natural resources they provide. I urge the OWEB Board to consider him for this seat.

Sincerely,



Kelley Beamer
Executive Director for the Coalition of Oregon Land Trusts

Oregon Agricultural Heritage Program
ATTN: April Mack
Oregon Watershed Enhancement Board
775 Summer Street NE #360
Salem, Oregon 97301

Monday, October 31, 2022

RE: Letter of Recommendation for Chris Coleson on the Oregon Agricultural Heritage Commission

To Whom it May Concern:

I am writing on behalf of Oregon Agricultural Trust to express our strong recommendation for Chris Coleson on the Oregon Agricultural Heritage Commission. Oregon Agricultural Trust is a statewide agricultural land

I have known Chris in his capacity as Regional Biologist for Ducks Unlimited for many years. Chris has a deep knowledge of agriculture, conservation, and the nexus between these two activities on the landscape. He understands and works with farmers and ranchers, especially in Southern and Eastern Oregon. And he is well-versed in the funding streams that exist for agricultural land protection – especially the North American Wetlands Conservation Act. We have worked with Chris on a project utilizing these funds and matched with NRCS funding, and he was a dedicated partner – passionate about agriculture and conservation and dedicated to creating real outcomes.

Chris would be a great asset to the Oregon Agricultural Heritage Commission. He has deep knowledge on ecological concerns from water quality and quantity to associated habitat on agricultural lands. He is a collaborator and connector, and would serve the state well on this Commission.

Thank you for your consideration.

Best regards,

Nellie McAdams
Executive Director

oregonagtrust.org | 503.858.2683 | P.O. Box 7359, Salem, OR 97303

Maxwell Cattle, Inc.
23036 Maxwell Road
Lakeview, Oregon 97630

October 31, 2022

RE: Chris Colson's application to Oregon Agricultural Heritage Program Commission Seat

To Whom It May Concern:

This letter serves to demonstrate my support for Chris Colson's application for a seat on the Oregon Agricultural Heritage Program (OAHP) Commission. As the owner of Maxwell Cattle, Inc. in Lake County, Oregon, and a long-standing board member of the Northwest Rangeland Trust, I have known Mr. Colson personally and professionally for more than 10 years. In his capacity as a Ducks Unlimited Regional Biologist, he has supported the Maxwell Ranch with the implementation of multiple restoration treatments and two conservation easements. These conservation inputs to our family agricultural operation have enabled the expansion of the ranch to accommodate future generations, increased the water resilience and production of the ground, and reduced management burden while increasing capability and removing all fish passage barriers across the ranch.

Through our interactions, I am keenly aware of Mr. Colson's professional capabilities and the value and perspective he brings to natural resource issues. I can also attest to Mr. Colson's commitment to and consistent engagement with Oregon's producers. He has secured state and federal resources and specialized support to the benefit of our family operation and many of our neighbors in the Goose Lake Basin. I'm confident the OAHP and the State of Oregon will find him a dedicated asset on the Commission.

Thank you in advance for your consideration of Mr. Colson's application. Please feel free to contact me directly to discuss further.

Respectfully,

Larry Maxwell

Larry Maxwell
Owner, Maxwell Cattle, Inc.
Board Member, Northwest Rangeland Trust

INTEREST FORM

Oregon Agricultural Heritage Commission

This form is used to obtain general information and qualifications of persons interested in serving on the Oregon Agricultural Heritage Commission. This information will be used by the Oregon boards and commissions that recommend applicants to the Oregon Watershed Enhancement Board (OWEB), and also by the OWEB Board, which will appoint the commissioners. Agencies are required to pay per diem compensation and expenses for "qualified members," defined as members who are (1) not in full-time public service, and (2) have an adjusted gross income for the previous tax year of less than $50,000, or less than $100,000 reported on a joint income tax return. The only exception to the requirement is if the qualified member declines compensation. The agency will reimburse board members for travel expenses.

Applicant Information

Name Robin Vora

Affiliation

Occupation

☒ Retired Natural Resource Manager, Wildlife Biologist, Forester, Ecologist

Mailing address [redacted]

Town/City [redacted] **State** [redacted] **Zip Code** [redacted]

Phone Number [redacted] **Cell or Alternate #** [redacted] **Fax Number**

Email robinvora1@gmail.com

Applicant Signature /s/ *Robin Vora*

By signing above, you certify that:

- All of the information on this form is true;
- You are a legal citizen of Oregon and the United States of America;
- You will accept appointment to the Oregon Agricultural Heritage Commission if selected by the OWEB Board;
- You have an email address and are able and willing to check your email on a near-daily basis and conduct some commission business via email; and
- You will be able to attend scheduled meetings across the state.

Position Sought

Check the box next to each position for which you are currently applying. You may select multiple boxes. This information may be used to contact you for the Rules Advisory Committee or for future vacancies on the commission.

☐ **Farmer or Rancher** (recommended by the State Board of Agriculture)
☐ **Fish and Wildlife Habitat** (recommended by the State Fish and Wildlife Commission)
☐ **Agricultural Water Quality** (recommended by the State Board of Agriculture)
☐ **Conservation Easements and Similar Land Transfers** (recommended by the Land Conservation and Development Commission)
☐ **Indian Tribal Interests** (selected by the OWEB Board)
☒ **Natural Resource Value Interests** (selected by the OWEB Board)

Statement Of Interest

Use the space below to explain why you are interested in being a representative on the Oregon Agricultural Heritage Commission and why you will be a good commissioner.

I have long been interested in working farms and ranches that also maintain fish and wildlife habitat, and to some extent native natural communities. My mother's side of my family in Mississippi grew cotton dating back to the 1830s and later raised cattle while maintaining some native forest that provided the seed source for the forest there today, some of which I inherited. As a wildlife biologist with the U.S. Fish & Wildlife Service I worked with Farmers Home Administration to delineate important wetlands to be maintained on operational farms. I have submitted letters or emails to state governments developing policies on riparian buffers, hedge rows and conservation reserves. I presently serve on the Deschutes Soil and Water Conservation District Board and am in my 3rd elected term.

I also have an interest in history, am a member of the Deschutes Historical Society, and often participate in local history presentations. I served on the Bend Historic Landmarks Commission for 10 years. I was founder and President of the Mesabi Heritage Society in Aurora, Minnesota.

I am familiar with committee and Oregon State meeting procedures, and working within a committee to achieve common objectives. I have good analytical skills. I have worked on many teams, committees, commissions and boards as a volunteer with local government and in my professional career at work. I understand the need to work collaboratively on a committee, reaching consensus if possible and if time permits, and to develop viable recommendations. I recognize that reaching a consensus may mean not getting everything an individual committee member might want in a recommendation. I am soft spoken and try to listen to what others, including the public, are saying. I believe public involvement is important in developing good recommendations.

Experience/Involvement

Please describe any work experience and/or involvement that has provided you with knowledge, skills, or abilities to successfully represent the interests of the position(s) for which you are applying and to fulfill the duties of a member of the Oregon Agricultural Heritage Commission. Include any previous experience on boards or commissions.

You may attach a résumé and/or work history.

I have participated in local land use policy development and planning everywhere I have lived as an adult and in my professional work. I had substantial natural resource management experience with the U.S. Forest Service and U.S. Fish & Wildlife Service over a total of 39 years in seven U.S. states, and completed short-term natural resource planning assignments in seven other countries. I worked as a manager, forester, wildlife biologist, ecologist and hydrologic technician. I published 30 technical articles in peer-reviewed journals on subjects such as applied ecology, ecological restoration, ecological classification, land use planning, timber harvest effects, wildlife habitat & populations, climate change effects and adaptation, and watershed management. I made several presentations at national and regional meetings, public meetings and workshops, and to college classes. I have Masters degrees in wildlife and forestry from the University of Idaho, and a Bachelors degrees in natural resource management from the University of California at Berkeley. I graduated with honors from both universities.

I have served on several city of Bend committees, boards or commissions over the past 15 years: historic landmarks commission, core area urban renewal and earlier central area planning, urban growth area expansion, transportation, public transit, parks and recreation citizens advisory committee, and my local neighborhood association (Vice President). As I mentioned, I am presently serving in my third term on the Deschutes Soil and Water Conservation District (SWCD) Board. I led the development of the Deschutes SWCD Long Range Plan. I have been involved with local conservation groups everywhere I've lived.

Supplemental Question

Describe what you believe to be the main issues facing the future of Oregon agriculture and the fish and wildlife habitat and other natural resources on Oregon's agricultural lands.

As the owners of farms, ranches and forests age, and younger generations move elsewhere for other kinds of work, the state (and nation) is in danger of losing this important family heritage, its contribution to meeting the nation's resource needs, and the local community. Many of these properties that are larger or in key locations maintain fish and wildlife habitat and other natural resource values. Fragmentation of the properties for other purposes, such as residential or other urban development, reduces their natural resource values. Many farms provide habitats in floodplains or along rivers that are not well represented on National Forest, Bureau of Land Management or other public lands. Local communities may lose when family farms, ranches and forests are sold to national or regional corporate interests.

References

Please identify three references that may be contacted if you are selected as a top candidate. Individuals or representatives of associations/organizations are acceptable.

Letters of support from relevant staff, associations, or similar groups are encouraged; feel free to attach any such letters to your application.

Reference #1

Name Heidi Kennedy

Affiliation (if any) Senior Planner with Landmarks Commission, City Bend,

Mailing Address [redacted]

City/Town [redacted]

State [redacted]

Zip Code [redacted]

Phone Number [redacted]

Alternate #

Fax #

Email [redacted]

Reference #2

Name Jerry Sebestyen

Affiliation (if any) Chair Bend Landmarks Commission and former La Grande City Councilor

Mailing Address [redacted]

City/Town [redacted]

State [redacted]

Zip Code [redacted]

Phone Number [redacted]

Alternate #

Fax #

Email jsebestyen@eoni.com

Reference #3

Name Glen Ardt

Affiliation (if any) Oregon Dept. Fish & Wildlife, wildlife biologist, retired

Mailing Address [redacted]

City/Town [redacted]

State [redacted]

Zip Code [redacted]

Phone Number [redacted]

Alternate #

Fax #

Email ardtglen@gmail.com

Please send your completed application via email to april.mack@oweb.oregon.gov or via mail to:

Oregon Agricultural Heritage Program

ATTN: April Mack

Oregon Watershed Enhancement Board

775 Summer Street NE #360

Salem, Oregon 97301

Applications must be sent via email or post-marked by Oct 26th, 2022 in order to be considered for a position.

Oregon
Tina Kotek, Governor

OREGON WATERSHED ENHANCEMENT BOARD

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Agenda Item G supports all of OWEB's Strategic Plan priorities.

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Lisa Charpilloz-Hanson, Executive Director
Stephanie Page, Deputy Director
Eric Hartstein, Board and Legislative Policy Coordinator

SUBJECT: Agenda Item G –Legislative and Budget Update
January 24-25, 2023, Board Meeting

I. Introduction

This report provides an update on the agency budget and the 2023 legislative session.

II. Background

The Oregon Legislature approves budgets for state agencies on a biennial basis. First, each agency submits a requested budget. The Governor then releases a recommended budget, and the Oregon Legislature approves a final budget.

Agencies must specifically request additions to the base budget and justify the need for each addition. The requested additions to an agency's base budget are called Policy Option Packages (POPs).

The board approved OWEB's 2023-2025 POPs at the July 2022 meeting. The POPs focus on OWEB's agency structure and request the resources needed to continue existing work, launch new programs, and address board and state priorities, including climate change, inclusive engagement, and the protection of farm and ranch lands. These POPs were included in OWEB's Agency Request Budget (ARB) that was submitted in August 2022.

OWEB does not have any agency legislative concepts that would be addressed in bills separate from the agency budget. OWEB will be tracking other concepts that may affect the agency. The 2023 legislative session will begin on January 17, with a target ending date of June 15 (see Attachment A for the full legislative session calendar).

III. Budget

Governor Kotek is expected to release her budget for state agencies in early February. This is the Governor's Recommended Budget (GRB) and is the starting point for agency budget discussions at legislative hearings. During the legislative session, agencies may only advocate for POPs that are included in the GRB.

When the GRB is released, OWEB will update the agency's 2023-2025 budget documents. OWEB will also present the agency budget during legislative hearings between February and early April. Staff will update the board as OWEB's budget progresses through the legislative budgeting process.

IV. Policy Legislation

In addition to the agency budget, staff are tracking other legislation that may affect OWEB or its partners. At the time of writing this staff report, known legislative concepts that staff are tracking include:

- The creation of an Oregon Soil Health Initiative to promote and support farming and ranching systems, and to improve soil health by collaborating on voluntary incentive-based soil health strategies. The legislative concept includes an appropriation to OWEB to fund voluntary soil health practices, and associated technical assistance, through the Oregon Agricultural Heritage Program.
- Directing OWEB to establish a grant program for the removal of western juniper, and appropriating funding to the agency for that purpose.
- The establishment of state policy regarding natural climate solutions. The legislative concept includes an appropriation to OWEB for a Watershed Natural Climate Solutions Fund to develop a grant program to provide incentives to help landowners, land managers, and environmental justice communities adopt practices that support natural climate solutions.

At the January board meeting, staff will update the board on updates to these legislative concepts and any others that may affect OWEB.

V. Recommendation

This is an information item only.

Attachments

A. 2023 Oregon Legislative Session Calendar

2023 Session Calendar

JANUARY

S	M	T	W	T	F	S
1	2 New Years Day Obs.	3	4	5	6	7
8	9 Org. Days - Swearing in	10 Trainings	11 Trainings	12 Trainings	13 LC Draft Request Deadline	14
15	16 MLK Day	17 Session Begins	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

FEBRUARY

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17 LC returns drafts	18
19	20 President's Day	21 Measure Intro Deadline	22 Revenue Forecast	23	24	25
26	27	28				

MARCH

S	M	T	W	T	F	S
			1	2	3	4
5	6 Begin Daily Floor	7	8	9	10	11
12	13	14	15	16	17 Post Work Session	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

APRIL

S	M	T	W	T	F	S
						1
2	3	4 1st Chamber WS Deadline	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23/30	24	25	26	27	28	29

MAY

S	M	T	W	T	F	S
	1	2	3	4	5 Post work session	6
7	8	9	10	11	12	13
14	15	16	17 Revenue Forecast	18	19 2nd Chamber WS	20
21	22	23	24	25	26	27
28	29 Mem. Day	30	31			

JUNE

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15 Target Sine Die	16	17
18	19 Juneteenth Holiday	20	21	22	23	24
25 Constitutional Sine Die	26	27	28	29	30	

Dates subject to the adoption of CR (2023 Regular Session)

Organizational Day	Member swearing in; organization; and first reading of pre-session filed bills
Training Days	Member and staff trainings
Leg. Counsel Deadlines	Deadlines for bills to be requested, returned by LC, and introduced (after these deadlines, subsequent drafts and intros count against per legislator limits. See SR 13.15(2); HR 12.35
State Holiday	Holiday
Important Session Dates	Deadlines do not apply to Rules, Revenue, or Joint Committees. Joint Transporation and Joint Gambling Regulation adhere to the second chamber deadline only.
Floor Sessions	Senate and House floor sessions will be annouced by the Senate President or House Speaker. Daily floor sessions begin on Monday, March 6th, 2023.

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Agenda Item H supports OWEB's Strategic Plan priority #3: Community capacity and strategic partnerships achieve healthy watersheds and priority #7: Bold and innovative actions to achieve health in Oregon's watersheds.

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Courtney Shaff, Monitoring and Reporting Manager
Katie Duzik, North Coast Program Representative
Liz Redon, Willamette Valley Program Representative
Denise Hoffert, Partnerships Coordinator
Jillian McCarthy, Partnerships Coordinator
Eric Hartstein, Board and Legislative Policy Coordinator

SUBJECT: Agenda Item H – OWEB 101-Focused Investment Partnership and Council Capacity Grant Programs
January 24-25, 2023, Board Meeting

I. Introduction

Recently, the OWEB Board experienced member turnover that has led to the inclusion of 'OWEB 101' topics at board meetings. At the January 2023 meeting, staff will provide an 'OWEB 101' presentation highlighting the Focused Investment Partnership (FIP) and Council Capacity grant programs.

II. Background

In 2013, the board adopted a Long-Term Investment Strategy (Attachment A) to guide its investments over time. The emphasis of the strategy is on grant programs focusing on Open Solicitation, Effectiveness Monitoring, Operating Capacity, and Focused Investments. These programs also inform the broad categories of the board's core spending plan, with effectiveness monitoring woven throughout the spending plan. All are also featured prominently in the Oregon Watershed Enhancement Board's 2018 Strategic Plan.

III. Focused Investment Partnership Program

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

FIP funding supports partnerships in pursuing conservation initiatives with board awards of up to $12 million over six years. In the past, the board has supported focused investments accounting for ~ 25% of the biennial board spending plan. Attachment B is a FIP Fact Sheet that provides additional details on the program.

IV. Council Capacity

Council capacity grants fall within the Operating Capacity category of OWEB's Board adopted spending plan and help support the operating costs of effective watershed councils. OWEB has provided council capacity grants to watershed councils for more than 20 years. OWEB does not create or oversee watershed councils; they are locally designated but may provide grants to councils in support of those actions described in Measure 76.

Council capacity grants are awarded biennially. These grants support watershed council community engagement to encourage community participation in collaborative, voluntary restoration projects to protect or restore native fish or wildlife habitats and watershed functions to improve water quality or stream flows.

V. Recommendation

This is an information item only. At the January 2023 meeting, staff will provide interactive presentations with the board on the FIP and Council Capacity grant programs.

Attachments

A. Long-Term Investment Strategy
B. FIP Fact Sheet

OWEB Strategic Direction and Principles

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!**

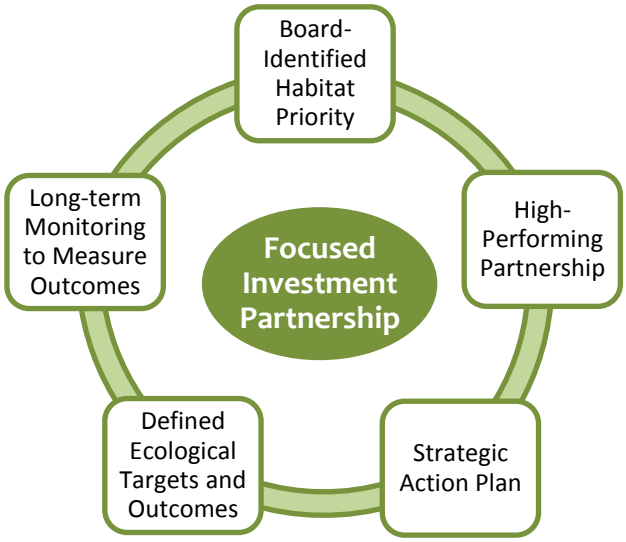
Oregon Watershed Enhancement Board

Focused Investment Partnerships Grant Program

About

The OWEB Board established the Focused Investment Partnerships (FIP) grant program in January 2016 with an initial $13.7 million commitment for the 2015-2017 biennium. Since then, the OWEB board has awarded an additional $13.3 million to support partnerships with both implementation and development grants. The OWEB Board approves funds for partnerships for 6 years of funding, and each biennium those funds are reviewed and approved as part of the spending plan.

The OWEB Board created the FIP grant program to invest in a conservation approach that strategizes restoration actions among partners and measures ecological outcomes. In the Open Solicitation grant program, measuring ecological and social benefits can be difficult as projects typically do not include coordinated monitoring in a watershed context. The FIP grant program encourages local partners to collaborate, plan, prioritize, implement, and monitor projects around a common purpose and monitoring framework.



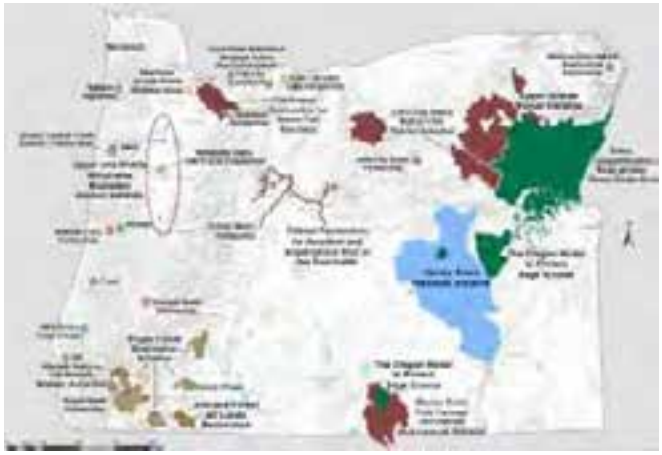
A FIP is an OWEB investment that addresses a board-identified ecological priority, achieves clear and measurable outcomes, uses integrated and results-oriented approaches identified in a strategic action plan, and is implemented by a high-performing partnership with a formal decision-making process.

FIP Implementation grants provide up to $12 million over 6 years for high-performing partnerships that have an existing strategic action plan and are ready to implement projects.

Board-Identified Ecological Priorities for Oregon

The Board approved the following ecological priorities of significance to the State in 2015, and updated these priorities in 2019. They require Board approval at least every 5 years and are determined with public input and scientific rigor.

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



FIP Investments 2015-2021

Rationale

Strategic Action Plan

Each FIP also holds, or develops, a Strategic Action Plan that identifies goals and activities for collaborative work and coordinated action over the long term (10+ years). It outlines a monitoring framework to measure near- and long-term outcomes. Key components of the plan include:

- Definition of goals and outcomes
- Identification of conservation strategies, metrics, milestones, and benchmarks
- A communication strategy that includes non-profit, agency, private landowner, and community partners

High-Performing Partnerships

A fundamental aspect of the FIP program is the support for high-performing partnerships that have a formal governance structure and leverage additional resources beyond OWEB funding. When organizations work together collaboratively, rather than individually, they achieve more. To be eligible for FIP funding, high-performing partnerships must have:

- Defined relationships that outline roles and responsibilities of each partner.
- Capacity to operate under a common vision, implement work at a scale larger than a single project, and realistically achieve identified ecological outcomes.
- A clear link that shows how outcomes relate to each organization's mission and scope.
- A strong record of conservation achievement by partners individually and collectively.

Measuring Progress Towards Goals

To measure progress in achieving goals, each FIP develops a theory of change and results chain within their Strategic Action Plan. The theory of change is a description of the logical causal relationships among a strategic approach. It outlines a step-by-step process for how the partnership intends to achieve their goals. A results chain is a diagram or graphic representation of a theory of change.

Strategic Action Plan
Outlines collaborative actions among partners to achieve and measure the desired impact

Strategies
Strategies to reduce the threat and restore conditions for species/habitats to thrive

Outputs
Collaborative actions based on strategies and monitoring metrics

Ecological Results
Includes near-term and long-term outcomes and outlines the response of target habitat or species

Desired Ecological Impact
Conditions are now improved for Ecological Priority

This diagram is based on Conservation Action Planning/Open Standards planning approach and provides a generic example of the process and core components of a results chain.

Programmatic Lessons Learned

Resources to Support Partnerships

Partnerships are dynamic and require time and resources to grow. This collaborative work often takes more time than expected by partners and requires financial and technical support. Professional facilitators play a role in fostering relationships and ensuring contributions by all partners are recognized. Memorandums of Understanding provide decision-making processes and address partner needs more formally. Engaging landowners in strategic action planning is challenging due to time constraints and diverse business models.

Time to Develop a Monitoring Plan

Strategic action planning allows for the development of a shared monitoring framework among partners to measure trends over time. As they get to know each other's work, it takes time for partnerships to develop an appropriate monitoring plan that accounts for all the different types of restoration projects in a FIP. To measure effectiveness, monitoring must take place before and after project implementation.

Measuring Ecological Outcomes May Take Decades

Ecological outcomes take time to achieve; it could take 20 or more years to see tangible results. For example, it requires decades for tree planting projects to mature and achieve measurable stream-shading benefits. A large financial investment in monitoring over a decade or more is required across a portfolio of projects in a watershed to put indicators in place that detect environmental trends. These challenges are partly due to the inherent variability of natural systems. This variability makes it difficult to find true differences – often many things are changing at once.







Tina Kotek, Governor

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

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Audrey Hatch, Conservation Outcomes Coordinator

SUBJECT: Agenda Item I-1 – Quantifying Conservation Outputs and Outcomes Funding Request – Telling the Restoration Story
January 24-25, 2023, Board Meeting

I. Introduction

OWEB's Quantifying Conservation Outputs and Outcomes (Quantifying Outcomes) investments evaluate specific types of restoration actions within large areas and/or duration of time through targeted funding. Quantifying Outcomes are targeted investments that are identified and developed collaboratively by staff and local partners. Quantifying Outcomes is the title for the previously named Programmatic Effectiveness Monitoring line item in OWEB's spending plan.

II. Background

Beginning in 2016, the board expressed strong interest in a measurable approach to 'tell the story' of the agency's restoration investments. In response, staff analyzed OWEB's restoration investments for geographic and restoration action diversity, considered historical and possible approaches, and then identified relevant data for selected locations and identified areas of 'high potential' for pairing restoration information and monitoring data to tell the restoration story. Staff then explored the need and opportunity to offer targeted funding to help the board and grantees better communicate the ecological outcomes of restoration funded by the agency.

Telling the Restoration Story grants support compilation, analysis, and/or interpretation of existing data from a watershed restoration project or projects, and the production of outreach materials that describe outcomes from that work. Outreach products typically include fact sheets, videos, and online content such as StoryMaps. The audience includes board members and legislators. Each grantee also identifies a specific audience, so the materials developed can be used to communicate with landowners, restoration practitioners, and natural resource managers working to restore similar landscapes in Oregon.

Nine projects have been completed under this offering so far, with project highlights presented at several Board meetings and available on OWEB's website. In addition, three 'Telling the Restoration Story' projects are currently funded. These projects are actively compiling data and

developing outreach products focused on: (1) pollinator habitat in the Zumwalt Prairie acquisition; (2) fish recovery improvements under the collaborative Lostine flow agreement in Wallowa County; (3) and bull trout restoration in Sun Creek, located in the Klamath Basin.

III. Overview of the Funding Request

Monitoring staff engages with each Regional Program Representative regularly to identify potential new projects. Currently, staff has three projects poised to submit applications by early 2023 (Ni-les'tun on the Oregon Coast; Little Butte/Bear creeks in the Rogue watershed; and Sandy River Basin near Portland). In addition, at least three more projects are currently under exploration to determine the timing of available data and partner roles to advise on the outreach products.

Telling the Restoration Story grantees are typically offered up to $30,000 for project completion. Additional funding is needed to provide the offering to new potential grantees. Staff presented an overview of this proposal to the board's Grant Committee, where support was expressed for advancing the request for consideration by the full board.

IV. Recommendation

Staff recommends the board allocate up to $150,000 in support of Telling the Restoration Story with funds from the Quantifying Conservation Outputs and Outcomes line item of the OWEB spending plan, and delegate to the Executive Director the authority to distribute the funds through appropriate agreements with an award date of January 24, 2023.

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

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Ken Fetcho, Effectiveness Monitoring Coordinator

SUBJECT: Agenda Item I -2 - Quantifying Conservation Outputs and Outcomes Funding Request – Carbon and Riparian Condition Monitoring of Riparian Reforestation Projects
January 24-25, 2023, Board Meeting

I. Introduction

OWEB's Quantifying Conservation Outputs and Outcomes (Quantifying Outcomes) investments evaluate specific types of restoration actions within large geographic areas and/or over-time through targeted funding. Quantifying Outcomes are targeted investments that are identified and developed collaboratively by staff and local partners. Quantifying Outcomes is the title for the previously named Programmatic Effectiveness Monitoring line item in OWEB's spending plan.

II. Background

Streamside revegetation efforts can lead to large increases in carbon sequestration and storage per acre. These types of restoration actions are common activities within OWEB grants. In a recent journal article, Dr. Rose Graves and her colleagues reported that at the state scale, replanting forests in habitats alongside streams and rivers has the second-highest climate mitigation benefit of the 12 activities that were evaluated.

Despite many ongoing streamside restoration and reforestation efforts around the state, there is a lack of data from on-the-ground projects which can inform estimates of long-term carbon mitigation potential and support the development of climate mitigation and co-benefit targets and metrics associated with streamside reforestation projects. To address this immediate need, The Nature Conservancy (TNC) is partnering with the University of Oregon, Clean Water Services, OWEB, and others to evaluate carbon storage resulting from streamside revegetation projects across a range of project conditions and ages.

This information will help develop better estimates of climate benefits from OWEB-funded streamside reforestation projects and guidance for our applicants who are interested in implementing these projects. The project directly informs the Oregon Global Warming

Commission's recommendation for carbon sequestration on the states' natural and working lands. Along with the state departments of Agriculture and Forestry, OWEB is a partner in efforts to better quantify carbon sequestration throughout the state, as called for in the recommendation by the Oregon Global Warming Commission.

III. Overview of the Funding Request

OWEB is working with TNC to support a new statewide monitoring project to assess the effectiveness of streamside revegetation projects for restoring riparian function and evaluate what project characteristics and management practices lead to climate benefits as well as restored riparian function.

The primary objectives include the following:

- Evaluate streamside conditions resulting from revegetation projects across a range of conditions.
- Evaluate carbon storage from streamside revegetation projects and evaluate how carbon storage varies with project age and across site characteristics

Using a combination of field data collection and statistical modeling, this effort will lead to updated estimates of carbon accumulation over time in reforested streamside areas. The study will include rapid stream site condition assessment. The aim is to demonstrate the effectiveness of streamside reforestation as a natural climate solution and explore the relationship between streamside site conditions and carbon storage.

Staff presented an overview of this proposal to the board's Grant and Water and Climate Committees, and both committees expressed support for bringing this funding request to the full board for consideration.

IV. Recommendation

Staff recommends the board award up to $100,000 for monitoring of carbon and riparian condition of riparian planting restoration projects with funds from the Quantifying Conservation Outputs and Outcomes line item of the OWEB spending plan, and delegate to the Executive Director the authority to distribute the funds through appropriate agreements with an award date of January 24, 2023.

Attachment

A. Overview of Carbon and Riparian Condition Monitoring Project

Monitoring the Effectiveness of Riparian Reforestation for Carbon Storage and Conservation Outcomes

The proposed study will evaluate the effectiveness of riparian reforestation projects in providing carbon storage and climate mitigation benefits and restoring functioning riparian conditions across the state of Oregon. Using a combination of field data collection and statistical modeling, the study will lead to updated estimates of carbon accumulation over time in revegetated riparian areas, updated evaluation of the riparian condition outcomes, and insights into the management practices that lead to successful restoration of riparian function and carbon storage. The proposed study will be conducted in partnership between The Nature Conservancy, University of Oregon, and Clean Water Services. The resulting data will support ongoing efforts by the Oregon Watershed Enhancement Board (OWEB) to evaluate the efficacy of riparian revegetation programs and to estimate the climate impacts of OWEB programs. In addition, the resulting data will support the Water Quality and Nonpoint Source Programs of the Oregon Department of Environmental Quality (DEQ).

Project Lead: Dr. Rose Graves, Natural Climate Solutions Scientist, The Nature Conservancy, rose.graves@tnc.org

Partners: Dr. Lucas Silva, University of Oregon; Clean Water Services; Oregon Watershed Enhancement Board; Oregon Department of Environmental Quality

Background

Climate change is a huge challenge for humankind and meeting that challenge requires immediate and urgent action to reduce fossil fuel emissions and reduce greenhouse gases (GHG) in the atmosphere. Natural climate solutions (NCS) -- restoring, conserving, and managing natural and working lands in ways that sequester and store more carbon -- provide an opportunity to drive progress toward GHG reduction goals alongside reductions in fossil fuel emissions in other sectors. Oregon's Global Warming Commission (OGWC) recently recommended that the State adopt a goal to increase net carbon sequestration from natural and working lands by 5 MMT CO2e per year by 2030 and 9.5 MMT CO2e per year by 2050[1]. In addition, OWEB recently passed a Climate Resolution which identifies climate mitigation and adaptation as priorities for the agency moving forward.

Riparian revegetation is a common riparian restoration tactic in Oregon, with more than 22,0000 acres of revegetation occurring on 2809 project sites between 1995 and 2020, according to OWEB's Oregon Watershed Restoration Inventory (OWRI). Riparian revegetation, specifically re-establishing woody vegetation in habitats beside streams and rivers, can lead to large increases in carbon sequestration and storage per acre and is a critical pathway toward reaching the ambitious goals set by the OGWC. At the state scale, replanting forests in habitats alongside streams and rivers is estimated to have the second highest climate mitigation benefit of 12 evaluated NCS activities[2].

Despite many ongoing riparian reforestation efforts around the state, we lack data from on-the-ground riparian reforestation projects which can inform estimates of long-term carbon mitigation potential[3] and support the development of climate mitigation targets and metrics associated with riparian reforestation projects[4,5]. To address this immediate need, TNC is partnering with the University of Oregon and Clean Water Services to evaluate carbon storage resulting from riparian revegetation projects across a range of project conditions and ages. Simultaneously, this study will assess the effectiveness of riparian revegetation projects for restoring riparian function and evaluate what project characteristics and management practices lead to climate benefits as well as restored riparian function.

Primary Objectives:

1) Evaluate carbon storage from riparian revegetation projects and evaluate how carbon storage varies with project age and across site characteristics.

2) Evaluate riparian conditions resulting from riparian revegetation projects across a range of conditions.

Key monitoring questions addressed by this project are:

1) How do carbon stocks in restored riparian forests vary with time since establishment?
2) How does carbon storage and riparian site condition vary with species composition, management history, and across biophysical and climatic gradients?
3) How do riparian carbon stocks and riparian site conditions vary among restored riparian forests and between restored sites and control sites?

Proposed Methods

The study follows an extensive posttreatment (EPT) approach wherein several treatment and control sites are sampled to evaluate revegetation program effectiveness[6]. The study design, sample size, site selection, and protocols for this study are informed by published literature[3,7,8], regional EMAP protocols[9], prior OWEB monitoring projects, and the Washington Department of Ecology stream shade and canopy monitoring protocols.

Site Selection

All study sites will be located within the 20-year floodplain of a river or streams[10]. To determine the impact of riparian revegetation efforts on carbon storage and riparian condition, data will be collected at treatment and control (i.e., untreated) sites with a target ratio of 5:1 treated to untreated sites. Reference (relatively undisturbed riparian areas) sites will also be sampled to compare treated site characteristics to reference conditions. Due to logistical constraints, the study will sample unpaired (i.e., in different streams and reaches) treatment, control, and reference sites.

Treatment sites will be selected from existing riparian revegetation projects ranging from 5 to 25 years post-planting. Sites less than 1.0 ha will be excluded. Site selection will follow a stratified random sampling design. Stratification criteria may include stream size/classification (McManamay and DeRolph 2019), gSSURGO soil texture and pH, climate water balance (as a measure of droughtiness), and time since planting. Reference and control sites will be selected from within the same sampling strata as the treatment sites.

As our database of potential sites is compiled, we will consider using management variables (e.g., site prep or maintenance) and local slope in site selection but anticipate that these will become covariates in our analysis. Project area boundaries will be compiled from Oregon Watershed Restoration Inventory (OWRI), Conservation Reserve Enhancement Program (CREP), and partner reporting. For CREP projects, sites will be considered only if the contract is currently active.

Field Data Collection, Laboratory, and Statistical Analysis

Data collection is anticipated from May to October 2023. Data collected will include the indicators shown in Table 1. Specific sampling methodologies are to be developed in partnership with collaborators and reviewed by outside experts. Laboratory and statistical analysis are expected to occur from October 2023 - December 2022.

Deliverables

This project is anticipated to result in several deliverables. These include an initial results presentation (Fall/Winter 2023) and a publication submitted to a peer-reviewed outlet by April 2024. This study will also result in a publicly available dataset (with all confidential information and landowner identifiers removed) and will aid in the development of a carbon calculator for use by restoration practitioners to estimate the climate benefit of their riparian reforestation work. We anticipate several additional presentations to share results with interested groups and land managers.

Table 1. Attributes and associated metrics/indicators to be collected at riparian revegetation project sites, control, and reference sites during spring and summer of 2023.

Objective	Attribute	Metric/Indicator
Assess carbon storage at riparian revegetation sites and evaluate how carbon storage varies with time and among sites	Carbon storage	Carbon stock in tree, shrub, woody debris, and soil pools measured at sample plots (see methods for detailed description of field measurements)
Assess the efficacy of riparian revegetation for restoring healthy riparian vegetation and restored riparian function	Vegetation structure and diversity	Percent cover of each vegetation layer and by species; stem density by species; herb, shrub, and tree diversity indices
	Canopy cover and streamside canopy overhang	Plot center, stream edge, and where possible mid-channel hemispherical photos
	Invasive species presence and cover	Visual estimate of % cover of invasive species
	Plant condition and vigor	Average height of each species and estimated plant vigor based on the percent healthy foliage using the following percent categories: 0 = <5%, 1 = 5-25%, 2 = 26-50%, 3 = 51-80%, 4 = > 80%
	Bank stability	Percent of each reach transect with actively eroding banks
	Livestock exclusion	Evidence of livestock presence (yes/no); fencing intact (yes/no)

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9. Peck, D. V, Lazorchak, J. M. & Klemm, D. J. *Environmental Monitoring and Assessment Program-Surface Waters: Western Pilot Study Field Operations Manual for Wadeable Streams*. (2001).

10. Wing, O. E. J. *et al.* Validation of a 30 m resolution flood hazard model of the conterminous United States. *Water Resour. Res.* **53**, 7968–7986 (2017).

Oregon
Tina Kotek, 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
Jillian McCarthy, Partnerships Coordinator
Denise Hoffert, Partnerships Coordinator
Audrey Hatch, Conservation Outcomes Coordinator
Eric Hartstein, Board and Legislative Policy Coordinator

SUBJECT: Agenda Item K – FIP Biennial Progress Reporting
January 24-25, 2023, Board Meeting

I. Introduction

This report provides an update on Cohort 2 and 3 Focused Investment Partnership (FIP) initiatives and helps fulfill biennial reporting requirements to the board. For the Cohort 2 FIP initiatives, staff will introduce the biennial reporting and partnerships, and partners will report on their FIP initiative progress. For the Cohort 3 FIP initiatives, staff will update the board on progress made since the partnerships were awarded in July 2022.

II. Background

In January 2019, the board selected five partnerships for FIP funding beginning in the 2019-2021 biennium. They comprise OWEB's second cohort of FIP initiatives. In July 2022, the board selected five additional partnerships for FIP funding beginning in the 2021-2023 biennium, which is the third cohort of FIP initiatives.

Attachment A includes a table of Cohort 2 and 3 FIP initiatives and the biennial funding associated with each partnership. Attachment B is a map displaying the initiatives, as well as the FIP priority they are implementing.

FIP administrative rules in OAR 695-047-0130(4) require a report to the board on the progress of initiatives at the end of each biennium. Staff and the FIP partnerships will update the board at the January 2023 meeting on progress made in the initiatives, as well as provide budget and work plan updates at the April 2023 meeting.

III. FIP Progress Reporting

The Cohort 2 FIP initiatives have worked with staff to develop Progress Tracking Reports (Attachment C) that provide a written and visual account of each partnership's progress in implementing their initiatives. Progress Tracking Reports are the primary tool to communicate with the board about the progress and evolution of each FIP initiative as they proceed with strategic action plan implementation, outcomes monitoring, and adaptive management of the partnership. The reports summarize each partnership's work and synthesize actions to provide a high-level portrait of progress. In addition, at the January 2023 board meeting, partners from each of the Cohort 2 FIP initiatives will present a progress update to the board.

As the Cohort 3 FIP initiatives were awarded funding by the board in July 2022, FIP progress has been mainly organizational and includes the development of a Partnership Technical Assistance grant that will help provide for partnership capacity to implement their FIP initiative in the first biennium, executing a partnership agreement with OWEB that outlines roles, responsibilities, and expectations for each FIP, meeting with OWEB staff, and helping establish technical review teams to evaluate project-level grant applications that each partnership will submit as the biennium progresses. Some Cohort 3 FIP initiatives have begun developing these project-level applications. Attachment D provides a table displaying the progress of each Cohort 3 FIP.

IV. Recommendation

This is an information item only. At the April 2023 meeting, staff provide the board with updated work plans and budgets for each FIP initiative as a part of the broader 2023-2025 Spending Plan discussion.

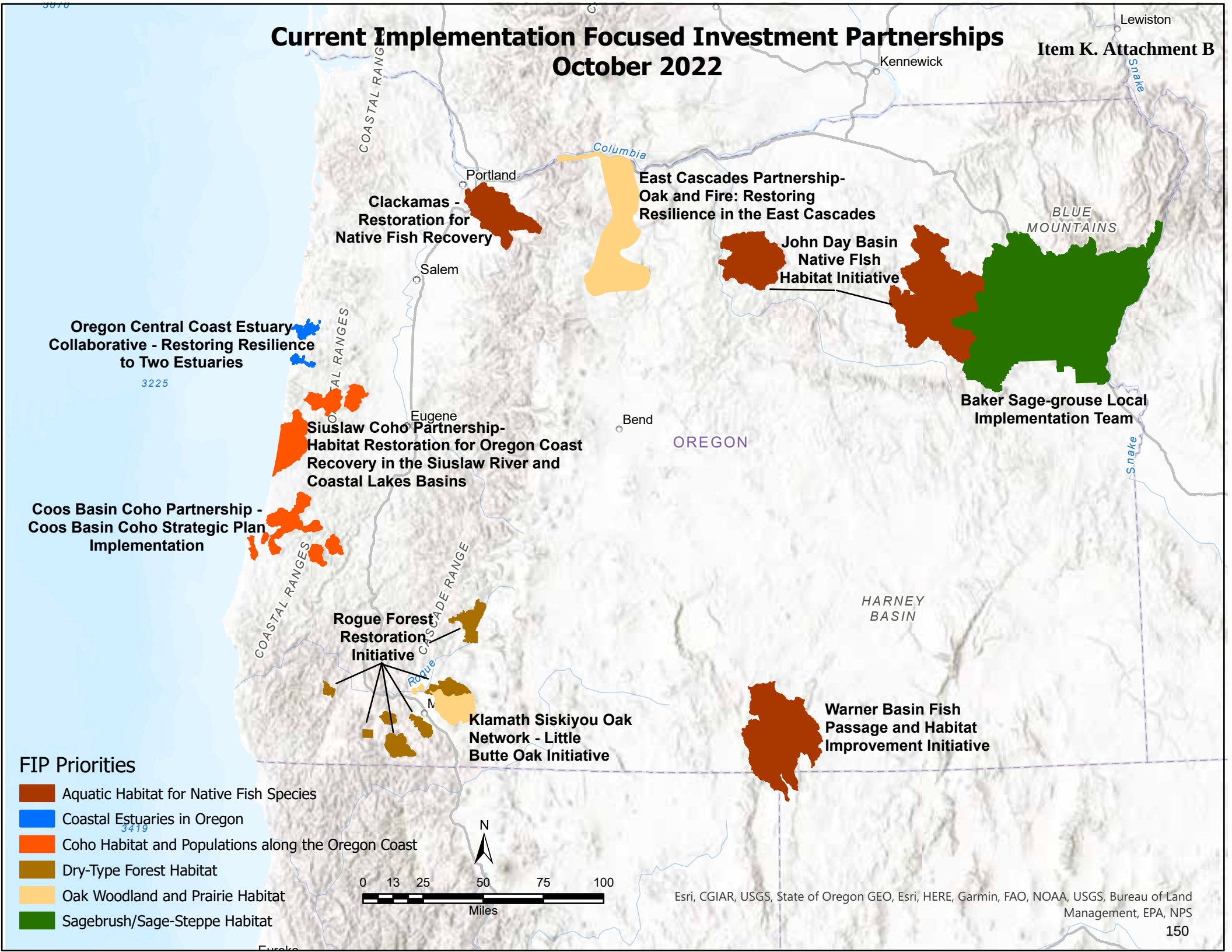
Attachments

A. FIP Cohort 2 and 3 Initiatives
B. FIP Initiatives Map
C. FIP Cohort 2 Progress Tracking Reports
D. FIP Cohort 3 Progress

FIP Cohort 2 and 3 Funding

FIP Partnership	FIP Cohort	2021-2023 Award Amount	2023-2025 Requested Amount
Baker Sage-Grouse Local Implementation Team	2	$2,435,000	$2,347,620
Clackamas Partnership	2	$3,082,000	$2,309,000
John Day Basin Partnership	2	$4,000,000	$4,000,000
Rogue Forest Partnership	2	$2,700,000	$1,800,000
Warner Basin Aquatic Habitat Partnership	2	$2,293,000	$1,857,000
Cohort 2 Subtotal		***$14,510,000***	***$12,313,620***
Klamath Siskiyou Oak Network	3	$1,373,266	$2,714,735
East Cascades Oak Partnership	3	$2,544,000	$2,433,000
Siuslaw Coho Partnership	3	$4,000,000	$4,000,000
Oregon Central Coast Estuary Collaborative	3	$1,523,000	$3,921,700
Coos Basin Coho Partnership	3	$3,469,614	$3,858,971
Cohort 3 Subtotal		***$12,909,880***	***$16,928,406***
Grand Total		**$27,419,880**	**$29,242,026**

Current Implementation Focused Investment Partnerships
October 2022



OWEB FOCUSED INVESTMENT PARTNERSHIP
CUMULATIVE PROGRESS REPORT 2023
COVERING BIENNIA 1-2



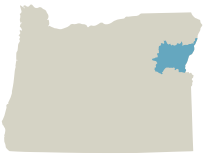
Baker Sage-grouse

Local Implementation Team

Baker Comprehensive Sage-grouse Threat Reduction

SAGEBRUSH/SAGE-STEPPE HABITAT

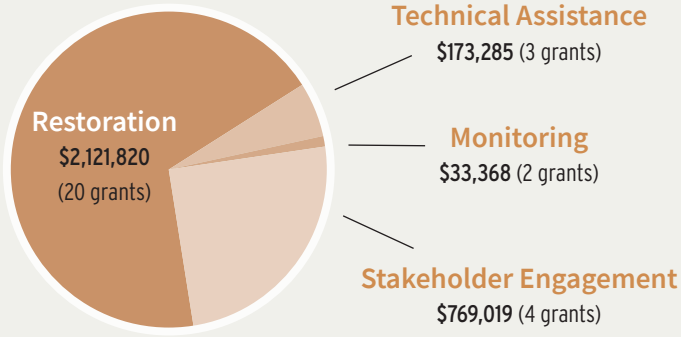
The Baker Local Implementation Team (LIT) is working collaboratively with private landowners and managers to enhance sage-grouse habitat within Baker and Union Counties to reverse local sage-grouse population declines.



The Baker Priority Area of Conservation is considered to be the most strategically important area for sage-grouse conservation in Baker and Union Counties and is the primary location of restoration efforts. Efforts also expand into general sage-grouse habitat throughout Baker County where restoration can help support thriving leks and habitat corridors.

Funding

OWEB awarded $3,097,492 in funding that leveraged $3,678,169 in matching funds.



Benefits

- *Improvement to sage-grouse habitat quality and quantity*
- *Promoting wildfire prevention and restoration activities*
- *Improved understanding of sage-grouse threats including West Nile virus, raven predation, and more*
- *Grazing and land management to promote healthy sage-brush ecosystems*

ABOUT THIS REPORT

The Focused Investment Partnership (FIP) grant program supports high-performing partnerships to implement strategic restoration actions and measure ecological outcomes through coordinated monitoring. In January 2019, the Oregon Watershed Enhancement Board (OWEB) awarded a FIP grant to the Baker Sage-grouse Local Implementation Team (LIT). This report documents cumulative progress since the FIP was initiated in 2019. Work completed under the FIP grant program is part of a much larger on-going collaborative effort of federal, state and local agencies, tribes, private landowners, and non-governmental organizations in Baker LIT Planning Area. Accomplishments included in the report only reflect actions completed with OWEB FIP funding, with some additional information described on page 3.

PARTNERS

Core Partners: Oregon Department of Fish and Wildlife, US Fish and Wildlife Service, Natural Resources Conservation Service, Baker County, Tri-County Cooperative Weed Management Area, Bureau of Land Management, Powder Basin Watershed Council, Private Landowners

Supporting Partners: Oregon State University Extension, Confederated Tribes of the Umatilla Indian Reservation, The Nature Conservancy, Baker Valley Vector Control, Institute for Natural Resources, Agricultural Research Service, Rural Landowners, United States Geological Survey

GOAL

Increase the quality and quantity of sage-grouse habitat and ultimately increase the Baker sage-grouse population.

STRATEGIES

- Promote awareness and enrollment in voluntary habitat conservation programs
- Prevent, treat, and adaptively manage invasive annual grasses and other noxious weeds
- Protect, enhance, and expand extent and connectivity of areas with adequate sagebrush cover
- Address key information gaps

IMPLEMENTATION

Program Enrollment

51 LAND OWNERS ENROLLED IN HABITAT PROGRAMS

2 LANDOWNERS ENROLLED IN THE BAKER SAGE-GROUSE PROGRAMMATIC CCAA PROGRAM

Weed Treatment & Prevention

1 OHV WASH STATION PRELIMINARY PLAN COMPLETED + PORTABLE OHV WASH STATION OBTAINED

Fill Information Gaps

2 YEARS OF RAVEN NEST REMOVAL COMPLETED

1 MESIC HABITAT MAP DEVELOPED SHOWING SAGE-GROUSE BROOD HABITAT

7 ALTERNATIVE FORAGE OPTION ANALYSIS MEETINGS HELD

17 WEST NILE VIRUS SITES SAMPLED ACROSS 3 YEARS

Restoration & Planning

3 STRATEGIC FUEL BREAK PLANNING MEETINGS

4 LETTERS OF INTENT FOR CCAA ENROLLMENT

1 COOPERATIVELY SHARED SEED DRILL + OHV HERBICIDE SPRAYER OBTAINED

1 UNDERSTORY ENHANCEMENT PROJECT UNDERWAY

1 SAGE-GROUSE COMPATIBLE GRAZING ANALYSIS COMPLETED

OUTCOMES

Near Term 0-5 YEARS

- Extent and abundance of invasive annual grasses and other noxious weeds is reduced
- Sagebrush/sage steppe plant communities including native bunchgrass and forb diversity and abundance are suitable to support all life history stages of sage-grouse

Mid-Term 5-10 YEARS

- Sage-grouse nest success increases

Long Term 10+ YEARS

- Sage-grouse population is stable or increases



FIP Initiative Progress, Biennia 1-2

Progress on metrics shown below represents actions completed through OWEB grants.

STRATEGY	PROGRESS	OBJECTIVE
Treatment of annual grasses	**4,310** non-overlapping acres	**25,000** acres
Treatment of noxious weeds	**2,811** non-overlapping acres	**25,000** acres
Acres seeded	**955** acres seeded	**5,000** acres

The Natural Resource Conservation Service (NRCS) is a key organization contributing to this restoration work, and has provided significant in-kind contributions towards the restoration strategies:

ESTIMATED NRCS IN-KIND CONTRIBUTION

Treatment of annual grasses and noxious weeds **2,420 acres**

Seeding **1,870 acres**



Monitoring Approach

Baker LIT is using standard sage-grouse habitat monitoring methods to ensure consistency with ongoing data collection efforts already underway in Oregon. Baker LIT is proposing to work with Oregon State University, Oregon Department of Fish and Wildlife, and the United States Geological Survey to evaluate biological and habitat datasets along with tracking sagebrush restoration. The project would help track restoration, including pre- and post- treatment data, in a manner that is compatible with Oregon's Threat-based Ecostate Models and the Bureau of Land Management monitoring so that metrics can be integrated at a landscape scale and inform Oregon's Sage-grouse Action Plan. In addition, the Baker LIT has incorporated a new Rapid Ocular Photo Assessment field protocol to provide supplemental data and increase overall rigor of the data collected.

Adaptive Management

Restoration

CHALLENGES

Implementing restoration actions required adaptations to shifting climate impacts under drought conditions, and local contractor capacity constraints.

Establishing a permanent Off-highway Vehicle (OHV) Wash Station included some unforeseen challenges in navigating the environmental review process on federal lands.

LESSONS LEARNED

Baker LIT partners remained flexible to plan and adapt to challenges under drought conditions and limited local contractor capacity.

Baker LIT learned about the federal permitting process and implications for the location and logistics for establishing an OHV Wash Station. These lessons will help if future objectives require federal permitting.

ADAPTATIONS

Recalibrating project deadlines and exploring potential budget modifications helps maintain project deliverables and goals.

Baker LIT has included more adaptive management strategies in each restoration grant.

Monitoring

CHALLENGES

Although the Baker LIT collects quantitative pre and post-treatment data, it has been challenging to analyze these data to develop a comprehensive understanding of the progress of the LIT towards achieving its overarching ecological goal.

LESSONS LEARNED

The Baker LIT learned that supplemental data and additional expertise and capacity was necessary to comprehensively evaluate its effectiveness in improving sagebrush habitat and increasing sage-grouse populations.

ADAPTATIONS

The Baker LIT is collaborating with the U.S. Geological Survey (USGS) to develop and implement a rapid visual ocular assessment. The USGS will also assisting in analyzing all monitoring data collected pre/post restoration treatments.

Engagement

CHALLENGES

The Baker LIT experienced turnover in the coordinator role, as well as in some of its member organizations. This delayed some FIP projects.

Some private landowners were hesitant to work with the entire Baker LIT partnership.

LESSONS LEARNED

A thoughtful approach to maintain and delegate tasks among members maintained stakeholder participation and continue progress on key projects.

Hesitant landowners will benefit from clearer information about the purpose, goals, and collaborative nature of the Baker LIT and the role of each member organization.

ADAPTATIONS

The Baker LIT re-hired a coordinator to manage FIP projects, maintain working relationships, and increase collaboration. The partnership has worked hard to maintain structure and function to facilitate the transition of leadership roles.

The Baker LIT is revising its landowner agreement to better explain the role and contribution of each member organizations. This, along with continued landowner meetings, will be extremely valuable in overcoming landowner hesitation to engage in restoration.

Clackamas Partnership

Restoration for Native Fish Recovery



Over-wintering habitat for Coho Salmon in Abernethy Creek

AQUATIC HABITAT FOR NATIVE FISH SPECIES

The Clackamas Partnership's Restoration for Native Fish initiative is built on the Lower Columbia River Conservation and Recovery Plan for Oregon Populations of Salmon and Steelhead (2010) and contributes to the goals and objectives associated with the Clackamas Population area.

The Clackamas Partnership collaborates on coordinated aquatic, riparian and floodplain restoration, conservation, and habitat protection actions to enhance watershed health, support the recovery and sustainability of native fish populations, and contribute to the region's economic and social vitality.

Upper Clackamas River and Floodplain Reach:
Clackamas River headwaters downstream to Oak Grove Fork *(31.7 miles)*

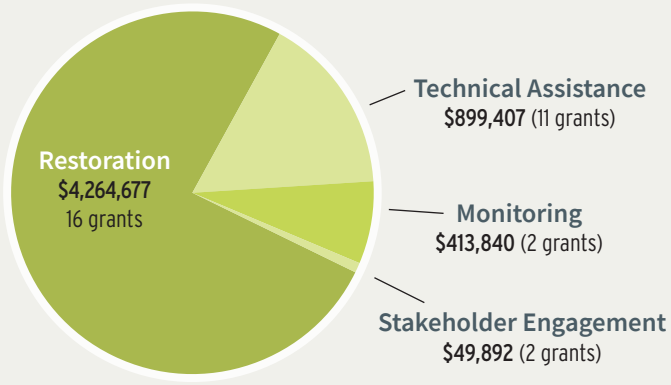
Middle Clackamas River and Floodplain Reach:
Confluence of Oak Grove Fork downstream to River Mill dam *(29.3 miles)*

Lower Clackamas River and Floodplain Reach:
River Mill Dam downstream to the confluence of the Willamette River *(23.3 miles)*

Lower Willamette River and Floodplain Reach:
Willamette Falls downstream to and including the confluence of Johnson Creek *(9.2 miles)*

Funding

OWEB awarded $5,627,516 in funding that leveraged $4,727,326 in matching funds



Benefits

- *Fish rearing and migratory habitat complexity and water quality in river corridors – channel floodplain, off channel, and tributary junctions improves*
- *Survival of downstream juvenile migrants increases*
- *Core native fish population performance at freshwater life stages improves*
- *Increase habitat diversity and salmon population resilience in the face of climate change*

ABOUT THIS REPORT

The Focused Investment Partnership (FIP) grant program supports high-performing partnerships to implement strategic restoration actions and measure ecological outcomes through coordinated monitoring. In January 2019, the Oregon Watershed Enhancement Board (OWEB) awarded a FIP grant to the Clackamas Partnership. This report documents cumulative progress since the FIP was initiated in 2019. Work completed under the FIP grant program is part of a much larger on-going collaborative effort of federal, state and local agencies, tribes, private landowners, and non-governmental organizations in the Clackamas River Basin. Accomplishments included in the report only reflect actions completed with OWEB FIP funding.

CORE PARTNERS

Clackamas River Basin Council • Greater Oregon City Watershed Council • North Clackamas Watersheds Council • Johnson Creek Watershed Council • Clackamas Soil and Water Conservation District • Metro

OTHER PARTNERS

Clackamas Water Environment Services • Clackamas River Water Providers • Confederated Tribes of Warm Springs • North Clackamas Parks & Recreation • Oregon Department of Environmental Quality • Oregon Department of Fish & Wildlife • Oregon Parks & Recreation Department • Portland General Electric • USFS – Mt Hood, Clackamas Ranger District • Oregon Parks & Recreation Department

GOAL

The goal of the initiative is to achieve targets specified by the Lower Columbia River Conservation & Recovery Plan by increasing rearing and migratory habitat complexity and improving water quality in the river corridors.

STRATEGIES

The Partnership's actions fall within three main integrated strategic programs:

1. Habitat Restoration
2. Habitat Protection
3. Promoting Land Use and Landowner BMPs

IMPLEMENTATION

Restoration

- **182** LARGE WOOD STRUCTURES PLACED
- **11.91** TOTAL MILES TREATED WITH LARGE WOOD
- **65** POOLS CREATED
- **5.15** ACRES OF WETLAND HABITAT CONNECTED
- **110** RIPARIAN ACRES TREATED
- **98,780** STEMS PLANTED

Monitoring

- **100.7** STREAM MILES MONITORED
- **32.2** MILES OF IMPROVED SIDE CHANNEL HABITAT SNORKEL-SURVEYED

Outreach & Engagement

- **346** LANDOWNERS/ LAND MANAGERS CONTACTED ABOUT RESTORATION
- **1** STAKEHOLDER PLAN COMPLETED
- **1** VIDEO TO ENCOURAGE LANDOWNERS' PARTICIPATION
- **33** IN-PERSON WORKSHOPS/ TRAINING EVENTS

Technical Assistance

- **2** WATERSHED ACTION PLANS CREATED
- **1** PROJECT TRACKER DATABASE DEVELOPED FOR USE
- **44** HABITAT IMPROVEMENT PROJECTS IDENTIFIED

OUTCOMES

Near Term 0-10+ YEARS

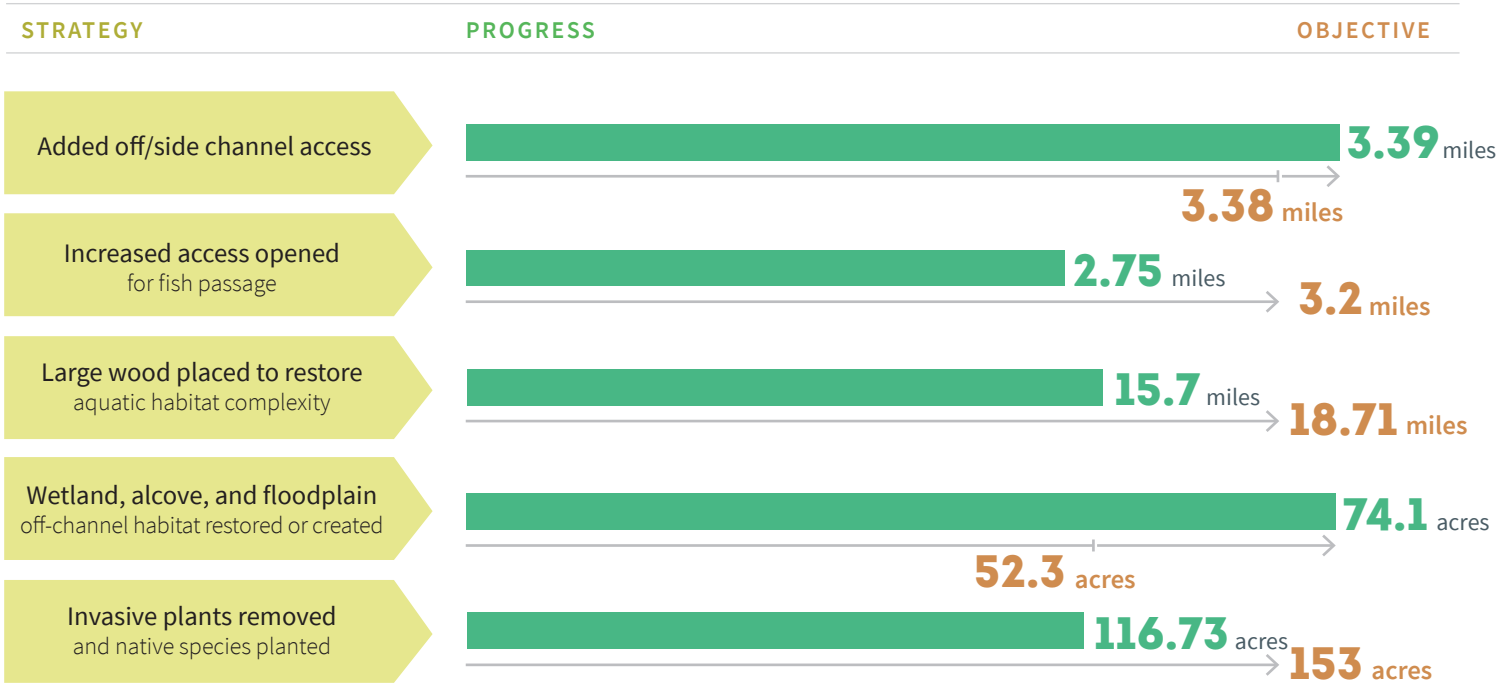
- Increased accessible habitat through enhanced passage at road crossings, small dams, and diversions
- Channel structure and complexity including large wood is improved
- Reconnection of side and off-channel habitats
- Reduction of invasive plant species in riparian and upland habitats

Long Term 20+ YEARS

- Floodplain connectivity and function increases
- Increased large wood recruitment
- Enhance climate resilience of native habitats

FIP Initiative Progress, Biennia 1-2

Progress on metrics includes actions completed as well as actions proposed through obligated OWEB grants. Progress reflects implementation supported by OWEB funding, and does not represent all progress achieved via other funding sources.



Monitoring Approach

The Partnership's restoration and conservation project outputs are tracked through established measures (e.g., volume of large wood placed, area planted with native vegetation). Implemented restoration project outputs, also called performance measures, are documented in the Clackamas Project Tracker database.

ODFW and the Johnson Creek Watershed Council are leading effectiveness monitoring efforts to understand how restoration actions are improving fish habitat and macroinvertebrate communities. To further help the Partnership understand habitat conditions, a contractor developed a macroinvertebrate sampling design, data collection approach, and data analysis methods.

The Partnership plans to monitor restoration sites beyond 1 year after the project is completed. The plan is to evaluate the monitoring protocol for the final year of the FIP and consider several options to accomplish monitoring sites longer-term, beyond one year post-restoration.



Macroinvertebrate monitoring



Christmas tree installation event



North Newell large wood helicopter placement

Adaptive Management

Restoration

CHALLENGES	LESSONS LEARNED	ADAPTATIONS
Wildfires in 2020 and 2021 impacted progress. The anticipated use of salvage logs was delayed.	Government agencies held meetings to address hazard/danger trees, generating opportunities for salvage log use for restoration projects.	Identified a point of contact to work with agencies for use of salvage logs in future restoration projects.
Partnership capacity was a challenge (e.g., 2 organizations did not have a Project Manager).	There will be turnover in staff positions and our organizations need to build succession planning into our project management.	FIP funding increased capacity. Facilitation assistance through contracting was helpful.
Turnover and capacity in partnering agencies slowed processes.	New staff learned from the collective expertise from the Partnership while attending meetings, participating on tours, and reviewing project proposals as part of the Technical Advisory Committee.	A return to project tours with the technical review team presented learning opportunities when observing other partners' projects and hearing reviewers' comments. Contracting with consultants also helped adjust capacity issues.
Additional permitting requirements and rising application fees.	It is important to continually be aware of permitting requirements, changes, and fees.	Reducing other expenses or identifying funding from other sources needed to make up the gap presented by increases in permitting requirements.
		Information about new fees was added to new project proposals.

Engagement

CHALLENGES	LESSONS LEARNED	ADAPTATIONS
Reaching landowners during the pandemic and wildfires was challenging.	Creative meeting and communication arrangements.	Arranging outdoor tours and meetings helped to provide safe social distancing.
Multiple owners for single tax lots require more engagement .	Planning for appropriate amount of time and staff attention for areas with multiple owners.	Build on established relationships.
Landowner skepticism of external attention to property use (e.g., government intrusion).	Building trust through landowner relationships led to incorporating landowner interests in project planning.	Maps and graphic displays used to clarify project scope and incorporation of landowner interests. Providing access to initial agreements during the design and assessment phase helped with landowner acceptance prior to a completed project agreement.

Adaptive Management

Monitoring

CHALLENGES	LESSONS LEARNED	ADAPTATIONS
Changes in monitoring plans occur when projects are delayed, cancelled, or altered significantly and lead to inefficient use of monitoring funds.	Unpredictability exists in restoration projects from concept to implementation. For example, post-fire emergence of cultural artifacts changed a project site, requiring a new approach for pre-project monitoring.	Identified potential source for additional monitoring funding.
Monitoring reporting requirements were time consuming to learn.	Learning curve for required reporting was steep, but the partners hit their stride in second biennium.	Considered new approaches to pre-project monitoring.
Different definitions for large wood habitat installations exist.	Differences in ODFW monitoring protocols compared with other guidance for habitat structure installation are better understood.	Adjusted reporting per requirements.
First post-project monitoring occurred during the 2021 Heat Dome.	Multiple years of monitoring are needed to show more accurate ecological response over time.	Using the ODFW benchmark for large wood volume for prioritizing Biennium 3 projects
Land access restrictions occurred due to the Covid pandemic and 2020 wildfire, delaying monitoring activities.	Flexibility in timing of monitoring was required, including contract arrangements.	Anticipate additional post-project monitoring.
		Adapted monitoring schedules.

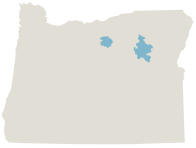
Partnership

CHALLENGES	LESSONS LEARNED	ADAPTATIONS
Integrating projects identified from biennium 1 Technical Assistance grants.	Unanticipated new projects were identified.	Project prioritization process was reviewed and refined to determine biennium 2 and 3 work plans.
The full suite of identified projects required additional sources of funds to implement proposed work plans.	As designs progressed, a greater detail of project costs became apparent.	The Partnership worked to expand funding opportunities for restoration projects identified by partners, resulting in more on-the-ground projects.
Partnership processes were incomplete in addressing emerging issues.	Partnership governance documents needed review and updating to include input from new members.	Improvements to project prioritization and governance procedures were developed with a contracted facilitator.


Phipps Meadow

John Day Basin
Fish Habitat Initiative

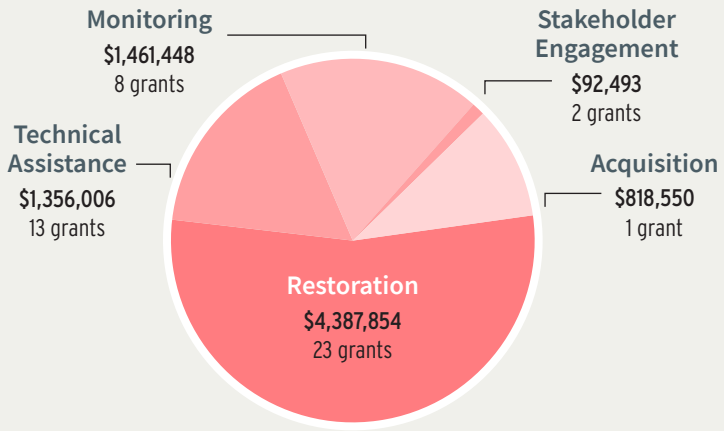
AQUATIC HABITAT FOR NATIVE FISH SPECIES



The John Day Basin Partnership (JDBP) is focusing its FIP-supported native fish habitat initiative in three priority subwatersheds of the larger 8,100 sq. mi. John Day River Basin. These priority areas include Butte-Thirtymile Creeks in the Lower Mainstem John Day; North Fork John Day Headwaters; and the mid-upper Middle Fork John Day. Historic and present-day land and water use practices and a changing climate have altered the condition of aquatic habitat contributing to the reduction in productivity and abundance of native fish populations.

Funding

OWEB awarded $7,998,053 in funding that leveraged $12,013,117 in matching funds.



Benefits

- *Protection of high-quality upland and aquatic habitat*
- *Increased stream flow during low water periods*
- *Increased connectivity and quantity of floodplain habitat*
- *Enhanced surface and ground water connections*
- *Improved juvenile salmonid rearing and overwintering survival*
- *Improved water quality*
- *Improved native plant communities in riparian areas*
- *Reduced erosion and sediment inputs*
- *Improved spawning gravel quality and spawning success*
- *Increased complexity of aquatic habitat*

ABOUT THIS REPORT

The Focused Investment Partnership (FIP) grant program supports high-performing partnerships to implement strategic restoration actions and measure ecological outcomes through coordinated monitoring. In January 2019, the Oregon Watershed Enhancement Board (OWEB) awarded a FIP grant to the JDBP. This report documents cumulative progress since the FIP was initiated in 2019. Work completed under the FIP grant program is part of a much larger on-going collaborative effort of federal, state and local agencies, tribes, private landowners, and non-governmental organizations in the John Day Basin. Accomplishments included in the report only reflect actions completed with OWEB FIP funding.

PARTNERS

Blue Mountain Forest Partners • Blue Mountain Land Trust • Bonneville Power Administration • Bureau of Land Management • Bureau of Reclamation • Burns Paiute Tribe • Confederated Tribes of the Umatilla Indian Reservation • Confederated Tribes of the Warm Springs Reservation of Oregon • Gilliam County Soil & Water Conservation District • Gilliam East John Day Watershed Council • Grant Soil & Water Conservation District • Mid John Day-Bridge Creek Watershed Council • Monument Soil & Water Conservation District • Morrow County Soil & Water Conservation District • North Fork John Day Watershed Council • Oregon Department of Agriculture • Oregon Department of Fish & Wildlife • Oregon Department of Parks & Recreation • Ritter Land Management Team • Sherman County Soil & Water Conservation District • South Fork John Day Watershed Council • Sustainable Northwest • The Freshwater Trust • Trout Unlimited • United States Forest Service: Malheur National Forest, Umatilla National Forest Wallow-Whitman National Forest • USDA: Natural Resource Conservation Service • U.S. Department of Interior, Fish & Wildlife Service • Wheeler County Soil & Water Conservation District

GOAL

A John Day Basin with clean water and healthy watersheds sufficient to provide for the sustainable ecological, economic, and cultural well-being of the basin.

STRATEGIES

- Dedicate land and water to restoration and preservation of stream habitat
- Reconnect floodplains
- Riparian restoration and management
- Channel modifications and side-channel/ off-channel restoration
- Install large woody debris structures and rock weirs
- Fish passage restoration
- Water quality and water quantity impacts

IMPLEMENTATION

Restoration

46 MILES OF STREAM CONNECTED AND IMPROVED

1,399 STRUCTURES INSTALLED TO PROMOTE HABITAT COMPLEXITY

1 MILE OF RAILROAD GRADE REMOVED + HISTORIC PLACER MINE TAILINGS FROM 9.8 ACRES OF FLOODPLAIN REMOVED

210 FLOODPLAIN ACRES RECONNECTED

20.83 MILES OF STREAM TREATED TO INCREASE RIPARIAN PLANT COMMUNITIES

251 POOLS + **51** RIFFLES CREATED TO PROMOTE HABITAT COMPLEXITY

1 MILE SPAWNING GRAVEL PLACED

1 EASEMENT/ ACQUISITION

0.5 MILES MADE ACCESSIBLE TO NEW HABITAT

2 BARRIERS REMOVED/ SCREENED

275 ACRES OF RIPARIAN HABITAT PROTECTED AND IMPROVED BY EXCLUDING LIVESTOCK

Monitoring

1 HYDROLOGICAL ASSESSMENT OF PERENNIAL STREAMS IN THIRTYMILE MAPPED

284 MILES MONITORED

Outreach & Engagement

9,000 NEWSLETTERS DISTRIBUTED

8 COMMUNITY EVENTS

25 LANDOWNERS IN PRIORITY RESTORATION REACHES ENGAGED

OUTCOMES

Near Term 0-10 YEARS

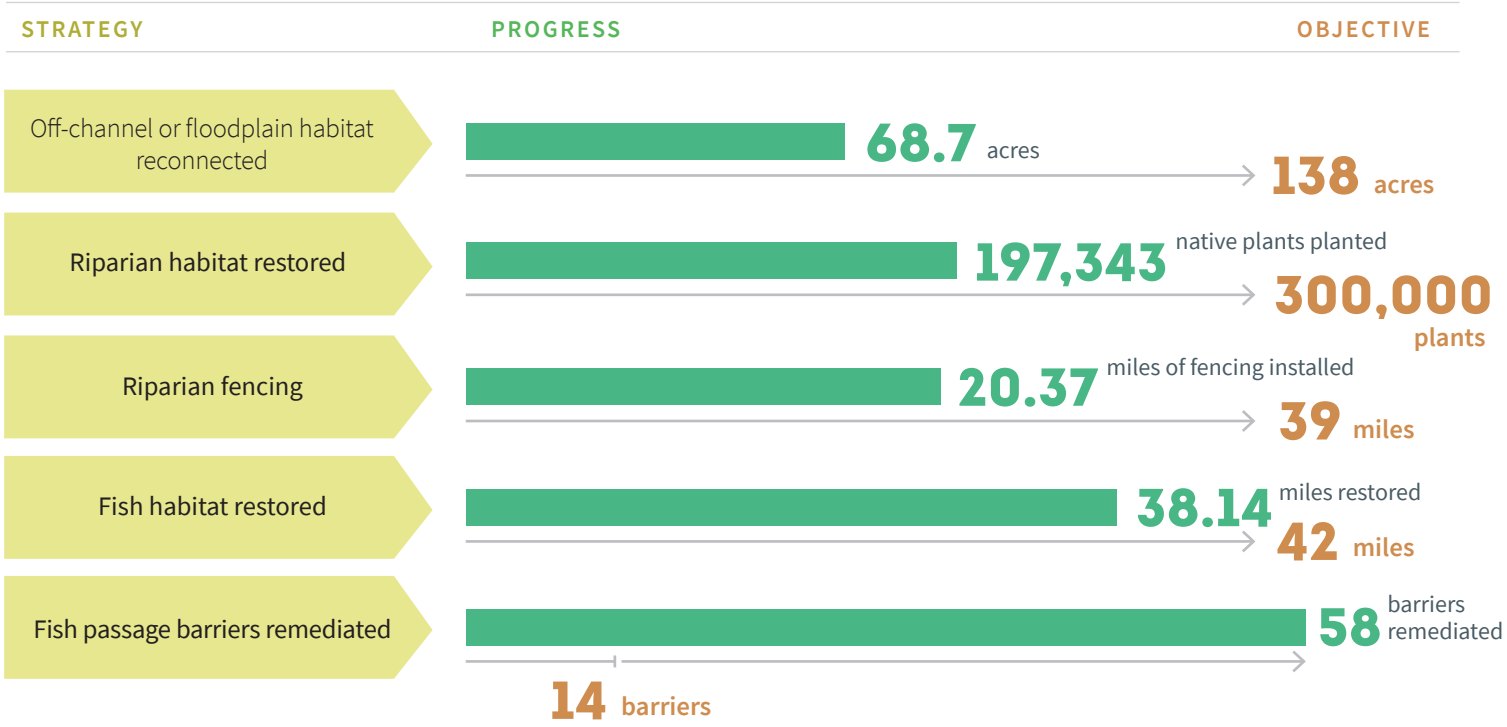
- Decreasing trend in summer instream water temperature
- Increasing trend in summer instream flow
- Improved habitat diversity index
- Increase in woody species density and stream shade potential
- Increasing trend in summer steelhead and spring Chinook freshwater productivity

Long Term 10+ YEARS

- Sustained increased productivity in summer steelhead and spring Chinook freshwater productivity

FIP Initiative Progress, Biennia 1-2

Progress on metrics includes actions completed as well as actions proposed through obligated OWEB grants. Progress reflects implementation supported by OWEB funding, and does not represent all progress achieved via other funding sources.



Monitoring Approach

To evaluate progress, the Partnership is using an integrated restoration-monitoring approach based in an adaptive management context. To establish baseline conditions and evaluate progress, the Partnership is using existing data, new monitoring, and well-documented professional judgment (e.g., through the BPA Atlas process).

The Partnership is grouping projects into three different monitoring tiers, with variable levels of monitoring effort for each tier. Communication between monitoring and restoration partners continues to be instrumental to ensure the appropriate monitoring tiers and targets are applied to each project. Appropriate milestones are set for each project to allow for cost effective monitoring which provides an assessment of progress and the ability to adapt subsequent implementation years if needed.

Yearly changes in Partnership operation and plan implementation will be undertaken based on compliance with milestones and any ancillary consideration, with a reevaluation of the Strategic Action Plan every two years.



Juvenile Steelhead in Thirtymile

Adaptive Management

Restoration

CHALLENGES

A major challenge has been the lack of available qualified contractors: large projects require large bonds. Additional challenges include delays due to permitting and cultural clearance processes.

LESSONS LEARNED

Full project readiness takes time to achieve. Steps that require time include: permitting; cultural clearances; ensuring available equipment and contractors; and landowner support.

ADAPTATIONS

The Partnership has developed a more defined lens for considering new projects, asking questions to determine whether a project is 'shovel ready' to determine whether partners have all required permits and funding to implement within their deadline, if approved.

Monitoring

CHALLENGES

The initial implementation and initiative of repeat monitoring at the Tier 2 level remains a challenge for many restoration projects. This monitoring is essential to understand whether a project is making progress toward objectives.

Several factors may be contributing to this difficulty including: a lack of Tier 2 project effectiveness monitoring methods that can be applied economically and with little training; and a need to link monitoring methods to clearly defined indicators of project effectiveness that can be followed through time.

LESSONS LEARNED

In contrast to Tier 2 monitoring and reporting, much has been learned about implementation of restoration actions as well as the ecological benefits of specific projects through Tier 1 and Tier 3 actions. This is evident in the specification and reporting of implementation objectives at the Tier 1 level within the Project Tracker.

Work in the Middle Fork John Day River Intensively Monitored Watershed (IMW) continues to inform restoration work being implemented by the Partnership. The IMW includes in-depth research on restoration outcomes and fish habitat relationships.

ADAPTATIONS

Partnership members continue to populate the Project Tracker with resources that support project monitoring. Emphasis has also been put on practitioners engaging with the Project Tracker's features for recording project outcomes and progress toward specified metric thresholds.

More emphasis should be placed on associating specific project types with accessible indicator metrics, making sure these metrics and associated survey methods are documented within the Project Tracker, and providing resources for practitioners to complete this work.

Adaptive Management

Engagement

CHALLENGES

The Partnership experienced low event/landowner tour turnout due to COVID 19 concerns and scheduling difficulties. It was especially challenging to engage with everyone in a virtual format, and to plan in-person meetings in 2021 as conditions changed.

There still is not widespread local community understanding about the need for and benefits of local conservation efforts in the John Day Basin, and there have been challenges disseminating information about the Partnership throughout the greater community.

LESSONS LEARNED

The Partnership needs to build a base level of understanding of who we are, emphasizing local practitioners, landowners, and contractors implementing projects within the basin. With this understanding, the Partnership can meet the community where they are in terms of understanding watershed health and restoration success achieved so far.

Partners find great value from in-person meetings.

ADAPTATIONS

An in-person Partnership meeting paired with lunch and site tour demonstrated excellent attendance. As a follow up, the Partnership will plan to host 1-2 in-person meetings a year, pairing spring meetings with a site tour to showcase on-the-ground restoration projects and facilitate discussions to share ideas around other projects.

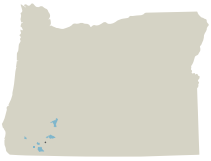
Partners are planning to use Stakeholder Engagement grant funds to develop a more robust social media calendar and outreach plan to develop an annual “impact report” to disseminate to the community. The report will include metrics about restoration work completed and financial benefits of this work for local communities.


Applegate Fairbanks

Rogue Forest *Partners*

Rogue Forest Restoration Initiative

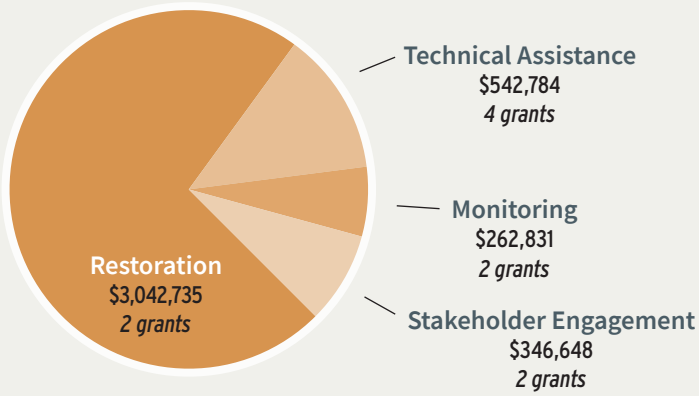
DRY-TYPE FOREST HABITAT
OAK WOODLAND AND PRAIRIE HABITAT
AQUATIC HABITAT FOR NATIVE FISH SPECIES



The Rogue Forest Partners are strategically implementing ecological thinning and prescribed fire in the Rogue River basin to restore forest species composition, reduce tree density and surface and ladder fuels, and prepare stands for fires that sustain forest biodiversity and ecosystem services. Disrupted fire regimes, historical clearcut timber harvest, land conversion, and recent severe wildfires have reduced old forest habitats, needed by northern spotted owls and other species, and have led to excessively dense and homogenous forests. This altered landscape is at high risk from uncharacteristically severe wildfire, insects, and disease and these conditions are made worse by climate change.

Funding

OWEB awarded $1,499,998 in funding that leveraged $969,926 in matching funds.



Benefits

- *Social conditions for using ecological thinning and prescribed fires to restore forest landscapes are improved*
- *Fire suppression effectiveness and safety are improved, along with increased options for managed fire*
- *Frequency and severity of fire and other disturbances are shifted toward the desired range of variability*
- *Threats of abrupt forest degradation and fragmentation catalyzed by climate change are reduced*

ABOUT THIS REPORT

The Focused Investment Partnership (FIP) grant program supports high-performing partnerships to implement strategic restoration actions and measure ecological outcomes through coordinated monitoring. In January 2019, the Oregon Watershed Enhancement Board awarded a FIP grant to the Rogue Forest Partners (Rogue Forest Restoration Initiative, RFRI). This report documents cumulative progress since the FIP was initiated in 2019. Work completed under the FIP grant program is part of a much larger on-going collaborative effort of federal, state and local agencies, private landowners, and non-governmental organizations in the Rogue Basin. Accomplishments included in the report only reflect actions completed with OWEB FIP funding.

ROGUE FOREST PARTNERS

Implementation Review Team: Confederated Tribes of the Grand Ronde,Confederated Tribes of the Siletz Indians,Tolowa Dee-ni' Nation, Illinois Valley Fuels Resource Operations Group, Applegate Partnership Watershed Council, Klamath Siskiyou Wildlands, Oregon Dept. of Fish & Wildlife, Sustainable Northwest, American Forest Resources Council.

Monitoring Advisory Committee: Oregon State University, Southern Oregon University, Humboldt State University, retired - PSW Research Station, National Park Service, PNW Research Station

GOAL

The Rogue Forest Restoration Initiative strategic action plan identifies five strategic goals:

Improve landscape climate resilience by restoring natural range of variability in seral structural states + *Reduce wildfire risk to people and nature* + *Increase public support for restoration thinning and beneficial fire* + *Increase the pace of restoration treatments in the Rogue Basin* + *Provide economic outputs and develop a skilled workforce*

STRATEGIES

- Apply forest treatments
- Deepen partnerships among public and private land managers, tribes, local governments, and communities
- Foster development of engaged citizenry
- Improve socioeconomic conditions and workforce capacity

IMPLEMENTATION

Restoration

22,947
LEGACY TREES RESTORED

3,899
ACRES OF MIXED CONIFER/ HARDWOOD FOREST AND WOODLANDS TREATED TO RESTORE OPEN HABITAT

Monitoring

6,933
ACRES MONITORED TO EVALUATE RESTORATION OUTCOMES

1
MULTIPARTY MONITORING PLAN, SUPPORTED BY MONITORING ADVISORY COMMITTEE

Economic Benefits

11.7
FULL TIME EQUIVALENT POSITIONS HIRED AS RESTORATION WORKFORCE

1
MISSION + VISION STATEMENT

74
PRIVATE LANDOWNERS ENGAGED

Stakeholder Engagement

194
ACRES OF PRIVATELY-OWNED LAND TREATED

1
CHALLENGE COST SHARE AGREEMENT WITH USFS
+
COLLABORATIVE MASTER STEWARDSHIP AGREEMENT
+
NEW PROJECT AREA IN WEST BEAR WITH 68 LANDOWNER AGREEMENTS

474
CONTACTS IN MEETINGS WORKSHOPS AND MONITORING EVENTS

OUTCOMES

Near Term 0-10+ YEARS

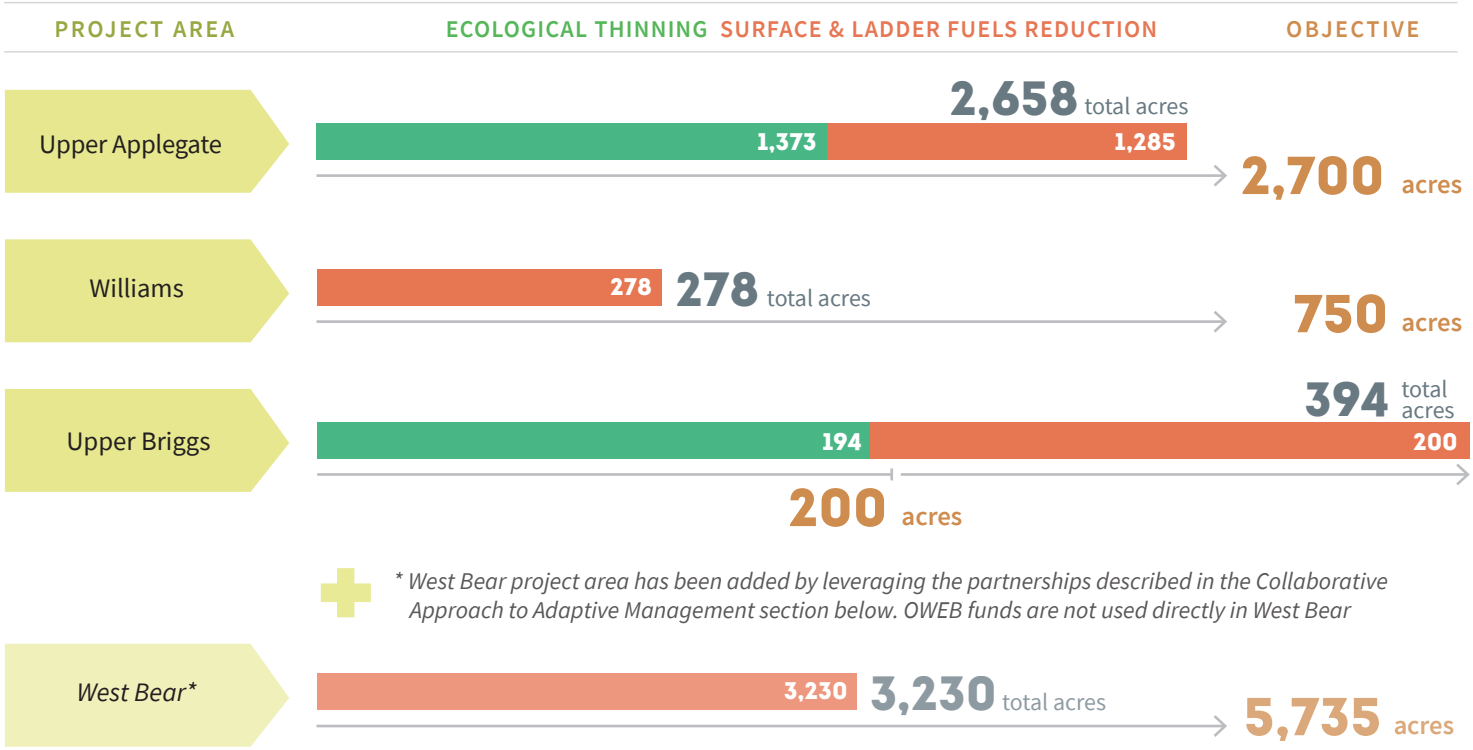
- Social conditions for using ecological thinning and prescribed fires are improved
- Density of smaller ingrowth and encroachment is reduced
- Stand proportion and vigor of fire-resistant species is restored and maintained
- Songbird indicator species shift, consistent with the planned changes in seral structural states
- Future legacy trees are promoted by growing under more open environment
- Nonnative species are reduced
- Oak habitat is restored
- Meadows are opened and maintained
- Wildfire hazard is reduced

Long Term 10+ YEARS

- Wildfire risks to forests and communities are reduced
- Risk from severe fire to critical late-successional habitat for critical species is reduced
- The proportion of open seral structural states is increased, consistent with adaptive range of variability
- Fire suppression effectiveness and safety are improved, increasing options for managed fire

FIP Initiative Progress, Biennia 1-2

Progress on metrics includes actions completed as well as actions proposed through obligated OWEB grants. Progress reflects implementation supported by OWEB funding, and does not represent all progress achieved via other funding sources.



Collaborative Approach to Adaptive Management

Progress toward achieving ecological and social outcomes is being determined by evaluating progress toward shorter-term goals and objectives. Treatment effects are quantified in OWEB funded units where partners collect data to quantify changes in forest structure, composition, and fuel characteristics. Originally, RFRI envisioned that the Upper Applegate Watershed (UAW) was most likely to be completely implemented at the end of biennium three, and therefore envisioned that effectiveness would primarily be assessed within this planning area. Through Biennium 2, RFRI's ability to complete the Upper Applegate Watershed (UAW) project has been leveraged through the Rogue Basin Collaborative Forest Landscape Restoration Program (USFS CFLRP) and state funding through the SB-762 Landscape Resiliency program totaling an additional $1.5 million. BLM has also treated additional acres than originally planned.

As a result, RFRI is achieving the goal of fully implementing UAW at the landscape scale and developing the West Bear planning area into a landscape level project. This project has garnered $11 million in leverage for mostly private land treatments. By the end of 2025, an additional RFRI project area may be developed into a landscape scale project.

In addition to ecological outcomes, RFRI continues to evaluate social outcomes throughout the life of the project.





Adaptive Management

Restoration

CHALLENGES

Challenges including pandemic-related delays and burnout make it difficult to accomplish collaborative goals. Partners are concerned about sustaining their broad collaboratively-developed goals beyond the FIP initiative.

LESSONS LEARNED

Grounding projects in strong rationale rather than opportunity results in more sustainable outcomes. Generally, the public is supportive of RFRI's work.

There is a strong need to clearly identify objectives and deliverables from meetings. Regularly scheduled meetings don't always have the urgency-and aren't always well-prepared for. However, regular meetings do enhance accountability and maintain progress.

Internal review within RFRI is as critical as external review.

Without specific funding, partners may not be as committed.

When working in fire prone landscapes it is important to think about the spatial arrangement of the landscape, to buffer communities and utilize PODS.

ADAPTATIONS

Prioritize workload and opportunities.

Define realistic objectives and timelines.

Hold meetings with clear agendas and purpose.

Add capacity for managing projects.

Assign roles and responsibilities to be effective at expanded workloads.

Monitoring

CHALLENGES

Geodatabase design: All RFRI partners engage in similar projects that could benefit from a common database and tracking system, but trying to create and use a database at the same time is challenging and time-consuming. No partner has the exact skillset to design an easy-to-use geodatabase. The task is highly complex.

LESSONS LEARNED

RFRI partners are finding ways to talk about complex issues and complex solutions. They are using data dictionaries, clear definitions, identifying source material and other metrics to solve this problem.

Having a written monitoring plan connecting goals and metrics to desired outcomes. A table that clearly links restoration objectives to metrics and indicators has been critical for communication within RFRI and externally.

When you have a thoughtful rationale for monitoring metrics, it is easy to recruit partners who want to use the protocol. Documentation of clearly articulated objectives and progress towards those objectives drive accountability and creates momentum towards those objectives. It articulates and demonstrates achievements.

ADAPTATIONS

Invest future funding in geodatabase support, design and dashboards.

Form agreements with university partners for help with design, using student help, and storage.

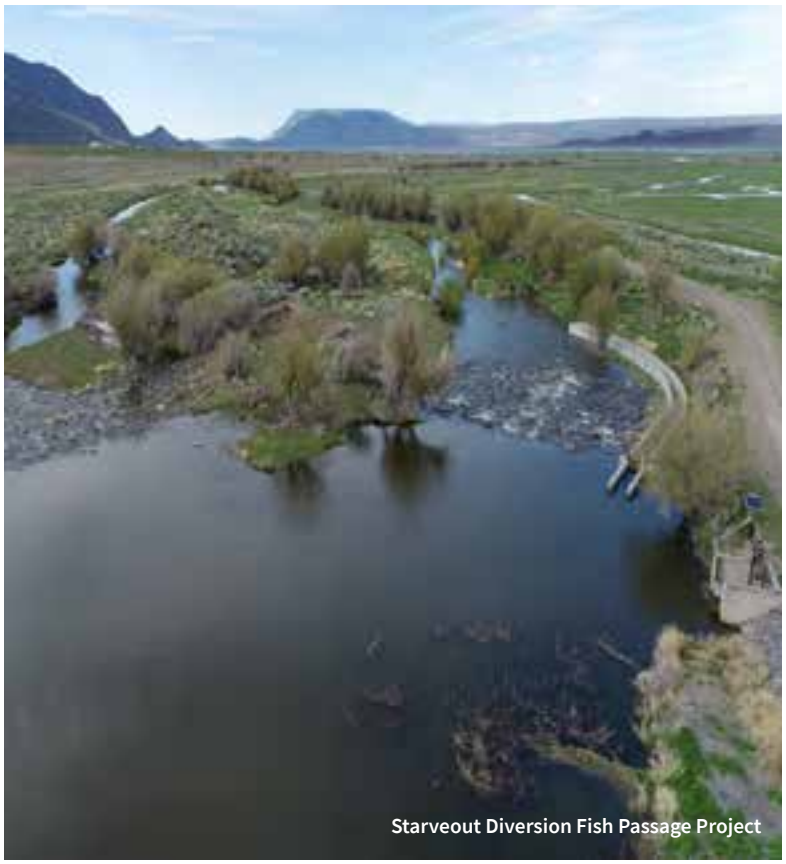
Adaptive Management

Engagement

CHALLENGES	LESSONS LEARNED	ADAPTATIONS
Having multiple partners makes arriving at consensus time-consuming yet rewarding. Staying faithful to RFRI's communications plan is a regular challenge because of emerging opportunities and demands.	Engagement drives future implementation by providing community perspectives. Engagement informs the community, so they are aware of ongoing activities. It prepares the communities for anticipated changes such as smoke, logging trucks, change in forest structure. This helps maintain support. Engagement builds overall support for future project development and maintenance of future projects. Engagement also brings the public and partners together. The website is key to clear communication. Starting the website development sooner would have helped recruit participation. The website highlights accomplishments and provides information and tools. Partners use the website to find up-to-date maps, blog articles and background material.	Additional funding for engagement in Biennium 2. Communication guidelines are referred to in addition to the communication plan to provide a consistent approach to outreach and media engagement. Meet monthly and discuss the RFRI approach and priorities. Develop online maps and information about projects.

Partnership

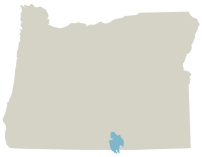
CHALLENGES	LESSONS LEARNED	ADAPTATIONS
Insufficient internal review of projects has challenged implementation and has caused some delays in project implementation. RFRI helped write a Collaborative Forest Landscape Restoration Program (CFLRP) proposal and it was awarded by the U.S. Forest Service in 2022. RFRI is working with the Rogue River Siskiyou National Forest to implement this 10-year project, but lack of agency capacity and a business as usual attitude is impacting implementation.	Clear workplanning is essential to success. RFRI needs to review their original purpose, strategic goals and objectives. This will help ensure the right incentives for participation are present, and will help with prioritizing project work, planning new projects, tracking accomplishments and uncertainty about the future workload. The CFLRP is serving as leverage to RFRI projects and will augment ecological outcomes for the high priority project areas.	Reviewing past accomplishments helped to assess and prepare for the future. Surveys have been helpful. Consistency in the survey design allows for comparison and evaluating progress and changes in partner concerns.


Starveout Diversion Fish Passage Project

Warner Basin

Aquatic Habitat Partnership

AQUATIC HABITAT FOR NATIVE FISH SPECIES

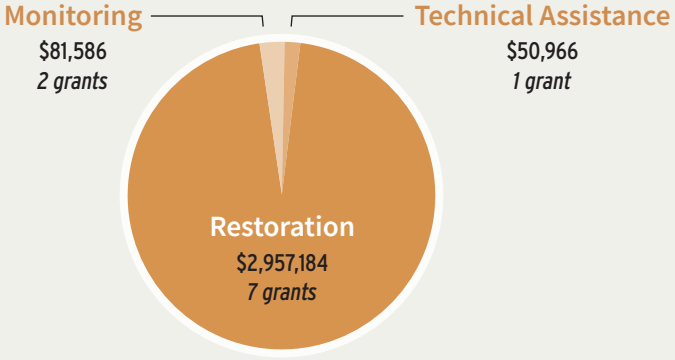


The initiative is focused on the three main tributaries (Twentymile Creek, Deep Creek, and Honey Creek) that support Warner Sucker and Warner Lakes Redband Trout, as well as Pelican, Crump, and Hart Lakes. The three tributaries represent over 45 miles of Warner Sucker designated critical habitat and the primary stream habitat for the two species.

Addressing existing limiting factors will require a collaborative effort among WBAHP members, the local community, landowners, and water users. Recovery of Warner Sucker and Warner Lakes Redband Trout will preserve and ensure the continued existence of the valued fish community that is unique to the Warner Basin.

Funding

OWEB awarded $3,089,736 in funding that leveraged $1,408,339 in matching funds



Benefits

- *Access to higher quality spawning, rearing, and refuge habitats for native fish species is improved*
- *Individual populations of native fishes become self-sustaining and function as a self-sustaining metapopulation*
- *Irrigation infrastructure is improved and enhances assurance of water availability for all needs*

ABOUT THIS REPORT

The Focused Investment Partnership (FIP) grant program supports high-performing partnerships to implement strategic restoration actions and measure ecological outcomes through coordinated monitoring. In January 2019, the Oregon Watershed Enhancement Board (OWEB) awarded a FIP grant to the Warner Basin Aquatic Habitat Partnership (WBAHP). This report documents cumulative progress since the FIP was initiated in 2019. Work completed under the FIP grant program is part of a much larger on-going collaborative effort of federal, state and local agencies, private landowners, and non-governmental organizations in the Warner Basin. Accomplishments included in the report only reflect actions completed with OWEB FIP funding.

PARTNERS

Lake County Umbrella Watershed Council, Lakeview Soil and Water Conservation District, Oregon Department of Fish and Wildlife, US Fish and Wildlife Service, US Bureau of Land Management, US Forest Service, River Design Group

GOAL

Streams and lakes in the Warner Basin are connected, providing access to the high-quality spawning, rearing, and adult holding habitats that are necessary for Warner Sucker and Warner Lakes Redband trout to complete their diverse life-history strategies.

STRATEGIES

- Restore fish passage
- Screen unscreened diversions
- Increase the assurance of water availability
- Reduce non-native fish populations

IMPLEMENTATION ACTIONS

Habitat Restoration

3
ACRES
OF RIPARIAN
ENHANCEMENT

Planning

8
PARTNERSHIP
MEETINGS

Outreach

4
PUBLIC
PRESENTATIONS

Monitoring

2
MILES
MONITORED

OUTCOMES

Near Term 0-10 YEARS

- Habitat connectivity and accessibility for native fish is restored
- Availability of water supplies is assured

Long Term 20+ YEARS

- Multiple age-classes including adults, juveniles, and young-of-year, are represented and approximate normal frequency distributions
- Population sizes of native fishes are stable or increasing

FIP Initiative Progress, Biennia 1-2

Progress on metrics includes actions completed as well as actions proposed through obligated OWEB grants. Progress reflects implementation supported by OWEB funding, and does not represent all progress achieved via other funding sources.

STRATEGY	UPDATED PROGRESS	OBJECTIVE
Fish passage projects	5 projects completed with monitoring	12 projects
Riparian enhancement projects associated with fish passage projects	3 projects completed	10 projects
Fish screen installations	3 screens installed	4 screens installed
Meetings with community members and irrigators	17 outreach meetings held	18 meetings
Irrigation infrastructure reviews	7 reviews conducted	10 reviews

Monitoring Approach

WBAHP's monitoring approach includes annual evaluations at the project level and biennial evaluation at the Plan level. Long-term monitoring will be completed at 3-yr and 5-yr post-project periods. Long-term monitoring beyond the life of the FIP will be funded by WBAHP's member organizations.

Project-level monitoring is envisioned to include:

1. As-built survey and project completion documentation to ensure the project was built as designed.
2. Out-year monitoring including site visits and repeated photo points to see how the project site has changed.
3. Biological monitoring to be coordinated with ODFW, which may include documentation of fish passage.

Plan-level monitoring would leverage monitoring networks and studies typically administered by USFWS, BLM, and ODFW. The long-term monitoring would be used to assess how goals and objectives are being met and if native fish recovery and conservation is on-track.

The first biennium of work identified a top-priority data gap to inform habitat management for the Warner Sucker. WBAHP observed unintended consequences of providing fish passage at the diversions. Non-native fish species were able to move upstream. Also, Warner Suckers were going down the irrigation canal and unable to return to Deep Creek during high flows. WBAHP has submitted an OWEB Technical Assistance proposal to help better understand the situation and inform management options.





Adaptive Management

CHALLENGES

Warner Basin has continually fluctuating stream flows and uncertain water availability. It is challenging to meet water user irrigation needs and fish passage goals in this environment.

WBAHP partners have concerns with the management of diversions to ensure fish passage goals. Water users have concerns about the constraints associated with water management for fish passage at the diversions as flows fluctuate.

Very low flows in 2020 and 2021 affected willow cutting survival and fish passage. Revegetation efforts as part of fish passage projects have also been given a lower priority when the project areas are grazed.

At the Deep Creek Town Diversion, providing passage has resulted in an increase in Warner Suckers entering the irrigation network which may impact populations over time, increasing the need for screening.

Other challenges include the ability to acquire materials for construction; increases in supply cost; and time constraints. These challenges result in difficulty budgeting into next projects.

LESSONS LEARNED

WBAHP partners have learned about the daily fluctuations in flows in a flashier desert system driven by snow melt. These flows fluctuations can be drastic throughout the day/week/season.

WBAHP partners have learned about the different types of fish passage designs, water rights, and water law. Additionally, they have learned about and water user operations, needs, and concerns within this network.

ADAPTATIONS

WBAHP has remained consistent with internal communications and meetings, completing on-the-ground work and meeting fish passage objectives. WBAHP has learned to plan contract implementation work with sufficient time to secure materials prior to work being implemented.

WBAHP partners have shown flexibility throughout the biennium as challenges arise, maintaining an open dialogue with the private landowners and irrigators who we are working with in the basin. When projects have not been managed for fish passage, WBAHP members reach out to the irrigators to discuss management concerns.

These discussions resulted in common ground whereby the irrigators are able to deliver the water requested by their patrons while also meeting WBAHP's fish passage goals.

WBAHP has prepared operations manuals for the diversions and fish passage structures so that there is a clear understanding of how the fish passage structures are to be used.

Adaptive Management

Monitoring

CHALLENGES

Low-water drought conditions interfered with our ability to monitor passage success at several diversions due to lack of water through passage routes.

The Deep Creek Town Ditch network has presented monitoring challenges as there is lack of understanding on how sucker and trout travel through the irrigation network.

To date, monitoring has been site specific and not at the basin scale.

LESSONS LEARNED

The monitoring approach must include flexibility to respond to factors outside partners' control, such as drought.

ADAPTATIONS

Biological monitoring was extended for another season at some projects (Deep Cr) to provide more robust information on passage success under more typical flow conditions.

One unintended consequence of providing fish passage at the diversion is the possibility of Warner Suckers moving through the irrigation canal and then being unable to return to Deep Creek during periods of high flow.

WBAHP partners have gained deeper understanding about water issues in the Basin, including water law and water rights, operations, management needs and concerns. Partners have also learned about different types of fish passage designs.

Engagement

CHALLENGES

ODFW proposed In-Stream Water Right Filings have raised concerns with water users in the Warner Basin and throughout Lake County, resulting in uncertainty about the next level of project work.

WBAHP is working to ensure that information is passed through the proper communication channels with all stakeholders (funders, water users, partnership, community), discussing how to accommodate all water users needs on the same system with one design plan.

LESSONS LEARNED

The Warner Basin is very dynamic. Flows are drastically different each season, and it is important to understand how each water structure is operated. Regular and consistent communication with all stakeholders is necessary.

This approach has begun to improve fish passage, water users' infrastructure, and the community's understanding of native fish species in the Warner Basin.

ADAPTATIONS

Partners have continued to meet annually as a whole group (WBAHP and water users) to discuss status of work, objectives achieved, monitoring results to date, and gather feedback.

This open communication approach provides involvement in the planning process to reduce the likelihood of last-minute changes to project designs. WBAHP continues quarterly meeting and site visits, while working to be flexible to meet water users' requests and reach fish passage and screening objectives.

Table 1. Biennium 1 Accomplishments for Focused Investment Partnership (FIP) Cohort 3 Initiatives

Cohort 3 FIP Initiative	**Name of Partnership**	**Participated with OWEB FIP Kick-off Orientation Meeting**	**Submitted signed Partnership Agreement**	**Fully executed Partnership TA grant for biennium 1**	**Recruited project level Technical Review Team**	**Participated with OWEB monitoring and PTR tracking meeting**	**Scheduled first project-level grant cycle**
Little Butte Oak Initiative	*Klamath Siskiyou Oak Network*						
Oak and Fire: Restoring Resilience in the East Cascades	*East Cascades Oak Partnership*						
Coos Basin Coho Strategic Action Plan Implementation	*Coos Basin Coho Partnership*						
Oregon Coast Coho Recovery in the Siuslaw River & Coastal Lakes Basins	*Siuslaw Coho Partnership*						
Restoring Resilience to Two Estuaries	*Oregon Central Coast Estuary Collaborative*						

(Note: Green indicates that a milestone has been achieved. Yellow indicates that the milestone is in progress.)

Oregon
Tina Kotek, Governor

OREGON WATERSHED ENHANCEMENT BOARD

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Salem OR 97301-1290
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(503) 986-0178

Agenda Item L supports all OWEB Strategic Plan priorities.

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Eric Williams, Grant Program Manager
Eric Hartstein, Board, and Legislative Policy Coordinator

SUBJECT: Agenda Item L – OWEB Grant Program Rulemaking
January 24-25, 2023, Board Meeting

I. Introduction

This report seeks board approval of proposed administrative rule revisions for the OWEB Grant Program (Division 5).

II. Background

The OWEB Grant Program (Division 5) administrative rules generally govern the acceptance and consideration of grant applications. While these rules apply to all OWEB grant programs, specific grant types, such as restoration and technical assistance, are governed by separate rule divisions that supplement Division 5. The rules were last updated in 2017.

At the January 2022 meeting, the board authorized staff to initiate rulemaking in the OWEB Grant Program administrative rules. A rulemaking advisory committee (RAC) was established to assist staff in revising the OWEB Grant Program rules. A list of the RAC members is found in Attachment A. The RAC convened virtually on two occasions over the summer, reviewing each section of the rules and discussing how proposed revisions would affect them as applicants, grantees, and grant reviewers.

III. Summary of Proposed Changes

In addition to minor technical changes, the proposed revisions to the OWEB Grant Program administrative rules include clarifying:

- The roles of OWEB and the board throughout the administrative rules division;
- The purpose of the rules is to better reflect current OWEB grant programs;
- Language to reflect that technical review teams are used across OWEB grant programs;
- Match requirements, including the removal of the blanket 25% match requirement for all grant programs and removing the requirement that pending match on grants be secured within 12 months of the date of the grant award;

- That grant applications are to be submitted in the most current format, and eliminating certain detailed requirements of each application;
- That information provided to OWEB is a public record;
- That public colleges and universities outside Oregon are not eligible grant applicants;
- That grant applications are considered complete when submitted and that new information can be provided only at the request of OWEB during the evaluation process;
- The process for grantees to demonstrate that necessary permits or licenses have been secured, landowner commitments for landowners to provide access to a project, and how long grantees must maintain a project;
- The process requirements and content for landowner cooperative agreements that must be submitted to OWEB, and the role of public agencies where public land is involved;
- When grant funding can be released on projects that require permits or licenses.

IV. Comment on Proposed OWEB Grant Program Administrative Rule Revisions

OWEB released draft rules for public comment on November 18, 2022. The public comment period was open until December 30th with a virtual public hearing on December 21st. A summary of the comments, and OWEB staff response, are provided in Attachment B. The two written comments that were received during the public comment period are provided in Attachment C. There were no verbal comments provided at the public hearing.

OWEB solicited tribal comments from the nine federally recognized tribes in Oregon and the Nez Perce Tribe on the draft rule revisions. No tribal comments were received.

The rules are provided as Attachments D-1 and D-2 to the staff report. During the board meeting, staff will walk through changes with the board. At the January meeting, the board may only receive public comment on the revisions to the proposed rules that have occurred since the close of the public comment period.

V. Recommendation

Staff recommends the board approve the OWEB Grant Program administrative rules found in Attachment D.

Attachments

A. Rules Advisory Committee Members
B. Staff Summary and Response to Public Comments
C. Public Comments
D-1. Proposed Monitoring Grants Rules – Redline
D-2. Proposed Monitoring Grants Rules - Clean

DIVISION 5 RULEMAKING

Rulemaking Advisory Committee

NAME	ORGANIZATION
Amanda Gilbert	Coast Fork Willamette WC
Amy Horstman	U.S. Fish and Wildlife Service
Shane Jimerfield	Lomakatsi Restoration Project
Jason Kesling	Harney SWCD
Haley Lutz	Coos WA
Scott McEwen	Tualatin River WC
Brian Quick	Klamath SWCD
Sarah Reif	ODFW
Amanda Whitman	Sherman SWCD
Sarah Zwissler	Trout Unlimited

Summary of Public Comments: OWEB Grant Program (Division 5)

Rules: 695-005-0040(2), Application Processing			
Commenter(s)	**Comments**	**Response**	**Rule Change**
Jan Lee, Executive Director, Oregon Association of Conservation Districts	Concern around the word "institution" in the term "not-for-profit institution" as a part of the eligible entities for OWEB grants.	Replaced "institution" with "corporation", resulting in reference to a "not-for-profit organization".	Yes

Rule: 695-005-0060(3)			
Commenter(s)	**Comments**	**Response**	**Rule Change**
April Snell, Executive Director, Oregon Water Resources Congress	Concern that "easement holder" language included in section 3 of the rule does not clearly carry through to the subsequent subsections (a)-(e) of the rule.	Revised the language in subsections (a)-(e) so that it is clear that the "easement holder" language carries through to these subsections.	Yes

Agenda Item L. OWEB Grant Making Program Rulemaking

Attachment C. Public Comment

From:	jan.lee@oacd.org
To:	HARTSTEIN Eric * OWEB
Subject:	Grant Rules
Date:	Friday, November 25, 2022 6:35:20 PM

Eric, I think the proposed rules are more streamlined and easier to follow.

I just have one question: how do you define “not for profit institution”. OACD is not a 501(c)(3) but a 501(c)(6) and as such is a nonprofit entity. Does the rule at 695-005-0040(2) clearly include all forms on nonprofits. I had not thought of our organization as an institution before, but if the intent is there to include trade associations then no issue.



JAN LEE
Executive Director

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http://oacd.org

Oregon Water Resources Congress

795 Winter St. NE | Salem, OR 97301 | Phone: 503-363-0121 | Fax: 503-371-4926 | www.owrc.org

December 30, 2022

Eric Harstein
Oregon Watershed Enhancement Board
775 Summer St NE #360
Salem, OR 97301
Submitted electronically

RE: Proposed Revisions to OWEB Grant Program Rules, OAR Chapter 695, Division 5

On behalf of the Oregon Water Resources Congress (OWRC), I am submitting comments on the proposed revisions to the Oregon Watershed Enhancement Board's (OWEB) Grant Program Rules under OAR Chapter 695, Division 5. We appreciate the opportunity to provide public comment on these rules.

OWRC is a nonprofit trade association representing irrigation districts, water control districts, drainage districts, water improvement districts, and other local government entities delivering agricultural water supplies throughout Oregon. The water stewards we represent operate complex water management systems, including water supply reservoirs, canals, pipelines, and hydropower facilities. OWRC's members deliver water to nearly 600,000 acres of farmland in Oregon, which is over one-third of all the irrigated land in Oregon.

Many of our members are planning or implementing canal lining, piping, and other related irrigation modernization and infrastructure improvement projects that are eligible for federal funding. These types of projects have multiple benefits, including improved water conservation, water efficiency, water quality, and drought resilience. Our members are actively seeking match funding for these types of projects, including through OWEB's grant programs, and it is crucial that available funding programs can efficiently and timely disburse funds. Delays in disbursement of match funding could cause significant impacts to these projects, including increased costs, schedule delays or postponement. Irrigation districts and similar entities have a narrow window to complete construction of projects, generally outside of irrigation season and during winter weather conditions.

We previously provided comment prior to the August 30 RAC meeting and appreciate the inclusion of proposed language under OAR 695-005-0060 that would allow for easement holders to provide the necessary documentation when private land is involved. We are supportive of the inclusion of "easement holder where the property interest demonstrates sufficient control to accomplish the proposed action…" under section (3) of OAR 695-005-0060. However, it is also important to ensure that the intent of this provision carries through the subsequent subsections 3(a) to 3(e) and easement holders can successfully satisfy these requirements.

As the subsequent language only refers to “landowner” and we want to reiterate the importance of providing a pathway for easement holders to satisfy the requirements under OAR 695-005-0060. OWRC members (irrigation districts and similar entities), along with most other types of water conveyance entities in Oregon, hold easements, or utilize easements held by others (such as the U.S. Bureau of Reclamation), to convey water to patrons, often across a patchwork of private and public lands. Pursuant to these easements, districts are already authorized to perform work (and maintain and operate) within the easement areas, consistent with the terms and conditions of the easements and applicable case law.

To the extent that districts are awarded grant funds by OWEB that are subject to the Division 5 rules, districts should not be required to provide individual landowner certifications or agreements that expressly allow each to carry out the work and maintain the OWEB-funded projects where the individual district holds easements for the areas in which the work will occur. Rather, the easements already provide districts with the very authorities that would otherwise be obtained through the certifications and agreements. Given that district piping projects within district-held easements often involve dozens if not hundreds or even thousands of landowners (as even single properties often involve multiple joint owners that are often difficult to locate), to require certifications and authorizations with every landowner is both unnecessary and impractical.

This issue has arisen with other funding programs and has been resolved by the district providing evidence that the district has the authority to perform the work, through an easement covering the private land involved or other landowner agreement. As an example, a recent grant agreement between the Oregon Water Resources Department (OWRD) and the Deschutes Basin Board of Control (Grantee) for funding from the Water Supply Development Account. The language from that agreement is provided below as an example of how this issue can be addressed without creating unintended roadblocks to infrastructure modernization projects.

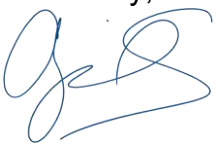
> “For Project tasks that take place on private land(s), Grantee has submitted to the Grantor:
> “1) Evidence that landowner(s) are aware of and agree to the task. Evidence shall include, but is not limited to: (i) landowner(s) certification that the landowner owns the land where the work will be carried out, (ii) landowner’s agreement to allow Grantee to carry out the work, or a portion of the work on the Landowner’s property, and (iii) evidence that landowner(s) are aware that monitoring information associated with the Project is a public record; or
> “2) Evidence documenting legal easement on all lands where the work will be carried out. Evidence shall include, but is not limited to (i) documentation of easement, (ii) [servient estate(s)’] agreement to allow Grantee to carry out the work, or a portion of the work on the servient estate[(s)], and (iii) evidence that [the servient estate(s)] are aware that monitoring information associated with the Project is a public record.” (Water Supply Development Account, Grant Agreement #WPG-D-0003-21, section 2.05(g), at p. 4).

The documentation described in paragraph (2) above should also be sufficient to address OWEB's concerns around notification and authorization for construction and maintenance projects funded by OWEB. We respectfully request that OWEB further revise the rules or clarify that easement holders can provide the documentation described in paragraph (2) above, as an alternative to the currently described landowner certifications and agreements.

Thank you for the opportunity to provide comment on the proposed OWEB Grant program rules, under OAR Chapter 695, Division 5. We look forward to further discussions about how districts can successfully access OWEB funding to help modernize irrigation systems and increase drought resilience statewide.

Please contact me if you need additional information or to discuss further.

Sincerely,



April Snell
Executive Director

DIVISION 5 - OWEB GRANT PROGRAM

695-005-0010

Purpose

These rules guide the Oregon Watershed Enhancement Board in accepting applications and considering grant proposals for funding under the provisions of ORS 541.890, et seq. The Board grant program includes grants described in Chapter 695, Divisions 10-47~~695-005-0020 et seq.~~ for watershed restoration, technical assistance, monitoring, ~~watershed assessment and action planning, watershed council support~~operating capacity, ~~watershed education and outreach~~stakeholder engagement, land and water acquisition, ~~and~~ small grants, and other grant programs initiated by the Board. ~~In addition, the Board may from time to time, as funds are available, request proposals for technical assistance and research.~~

Statutory/Other Authority: ORS 541.906 *Statutes/Other Implemented:* ORS 541.890 - 541.969 *History:*

OWEB 1-2017, f. & cert. ef. 5-2-17 OWEB 4-2004, f. 11-2-04, cert. ef. 2-1-05

695-005-0020

Definitions

(1) "Board" means the Oregon Watershed Enhancement Board created under ORS 541.900.

(2) "Director" means the Executive Director of the Oregon Watershed Enhancement Board or the Executive Director's designee.

(3) "Grant Agreement" is the legally binding contract between the Board and the grant recipient. 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.

(4) "Technical~~Regional~~ Review Team" is a team~~, appointed by the Director,~~ of designated persons~~personnel~~ with ~~regional knowledge and~~ interdisciplinary expertise drawn from agencies represented on the Board and other entities to evaluate ~~regional~~ grant applications based on evaluation criteria. ~~The Director may change the composition of regional review teams.~~

(5) "Partners" are non-governmental or governmental persons or entities that have committed funding, expertise, materials, labor, or other assistance to a proposed project.

(6) "Match" is any contribution to a project that is non-Board funds. Match may include:

(a) Cash on hand or cash that is pledged to be on hand prior to commencement of the project;

(b) Secured funding commitments from other sources;

(c) Pending commitments of funding from other sources. In such instances, Board funding will not be released prior to secured commitment of the other funds~~. Pending commitments of the funding must be secured within 12 months from the date of the award~~; or

(d) The value of in-kind labor, equipment rental and materials essential to the project, based on local market rates.

(7) "OWEB" means the Oregon Watershed Enhancement Board state agency.

Statutory/Other Authority: ORS 541.906 *Statutes/Other Implemented:* ORS 541.890 - 541.969 *History:*

OWEB 3-2008, f. 11-14-08, cert. ef. 1-1-09

OWEB 4-2004, f. 11-2-04, cert. ef. 2-1-05

695-005-0030

Application Requirements

(1) Applications must be submitted on the most current format prescribed by OWEB~~the Board~~. ~~Current applications are 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, and the required attachments, an applicant may submit additional information that will aid the Board in evaluating the project.~~

~~(2) All applicants for Board 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 involved landowner(s);~~

~~The name and location of the proposed project. The location shall be described in reference to the public land survey, latitude and longitude using decimal degrees, North American Datum 1983, county, watershed, and stream mile, if appropriate;~~

~~(c) Estimated line item budget for the project using the most current budget form prescribed by the Board. Current budget forms are available on the OWEB website;~~

~~(d) Identification of specific project elements for which Board funds will be used;~~

~~(e)A list of any non-Board funds, services or materials available or secured for the project and any conditions which may affect the completion of the project;~~

~~(f) If the project is part of a multi-year project, and a new funding request continues a previously Board-funded activity, a description of the previous project accomplishments and results as well as an accounting of past expenditures and revenues for the project;~~

~~(g) Identification of volunteers and partners and the contribution they will make to the project;~~

~~(h) A project schedule including times of project beginning and completion; and~~

~~(i) Any information requested that is necessary to evaluate the project based on the evaluation criteria for that project type.~~

~~(3)~~(2) All applicants shall demonstrate a matching contribution ~~t least 25% match~~ is ~~being sought~~ at the time of application, ~~on a form prescribed by the Board,~~ based on the total Board grant request, at the time of application. Match requirements will be included in the announcement for each grant offering. Match requirements shall not exceed 25% of the application request.

~~(4)~~(3) All applications that involve physical changes or monitoring on private land must include certification from the applicant that the applicant has informed all landowners involved of the existence of the application and has also advised all landowners that all monitoring information obtained on their property and submitted to OWEB is a public record. If contact with all landowners was not possible at the time of application, explain why.

~~(5)~~(1) ~~Applications will be considered complete as submitted. Clarification of information may be sought by OWEB from the applicant during the evaluation process but additional, new information not requested by OWEB will not be accepted after the application deadline.~~

~~(6) (6) Applicants are encouraged to submit requests for up to $10,000 for watershed restoration projects to the Small Grant Team in their Small Grant Area, unless the project is not eligible for funding under the~~

~~Small Grant Program or the Small Grant Program has no funds available at the time of application. Applicants may not submit the same proposal to both the Board and the Small Grant Team.~~

Statutory/Other Authority: ORS 541.906 *Statutes/Other Implemented:* ORS 541.890 - 541.969 *History:*

OWEB 1-2017, f. & cert. ef. 5-2-17

OWEB 3-2008, f. 11-14-08, cert. ef. 1-1-09

OWEB 4-2004, f. 11-2-04, cert. ef. 2-1-05

695-005-0040

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) A ~~regular~~ grant applicant may be any tribe, watershed council, soil and water conservation district, not-for-profit ~~institution~~corporation, school, Oregon ~~community college, state~~ institution of higher education, independent not-for-profit institution of higher education, or political subdivision of this state that is not a state agency. A state agency or federal agency may partner with an eligible entity~~apply for funding under this section only as a co-applicant with one of the other eligible entities~~. ~~Any of these applicants or co-applicants may also serve as a fiscal agent for grants.~~

~~(3) The Board may require additional information to aid in evaluating and considering a proposed watershed project.~~

(3) The Board and OWEB may use a ~~regional~~ technical review team ~~or other technical team~~ to review grant applications and make ~~funding~~ recommendations to the staff or Board.

(4) Applications will be considered complete as submitted. Clarification of information may be sought by OWEB from the applicant during the evaluation process, but additional, new information not requested by OWEB will not be accepted after the application deadline.

~~(4) The Board may rank projects in selecting projects for funding.~~

Statutory/Other Authority: ORS 541.906 *Statutes/Other Implemented:* ORS 541.890 - 541.969 *History:*

OWEB 1-2017, f. & cert. ef. 5-2-17 OWEB 4-2004, f. 11-2-04, cert. ef. 2-1-05

695-005-0050

Grant Agreement Conditions

(1) ~~The Board~~OWEB ~~-~~will enter into new 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 or Director approval, funding shall be terminated. The money allocated to the grant shall be available for reallocation by the Board or Director.

(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 done under the agreement.

(5) All project activities must demonstrate, to the extent possible, consistency with local community workforce and economic development plans and policies.

(6) Following project completion, equipment purchased with Board funds shall reside with the Grantee or another approved entity. These entities will make the equipment available to others at no cost, other than nominal operation and maintenance costs.

(7) 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.

(8) The Grantee will account for funds distributed by the Board, using project expense forms provided.

(9) The Grantee will obtain the necessary permits or licenses from local, state or federal agencies or governing bodies and provide to OWEB ~~a copy~~satisfactory evidence that the necessary permits or licenses have been granted~~of such permits or licenses to the Board~~OWEB~~.~~.

(10) ~~The Board~~OWEB may place additional conditions in the Grant Agreement as necessary to carry out the purpose of the watershed enhancement program. Such conditions ~~may~~ include, but are not limited to:

(a) A commitment by the landowner for continued access for monitoring the project after completion, not to exceed five years following OWEB approval of a final project completion report;

(b) A commitment by the Grantee to maintain the project for a period of time as deemed appropriate ~~by the Board~~for the project elements, ~~-~~ or goals, ~~practice~~ to be effective;

(c) A commitment to supply future reports on the project as required; and

(d) Such other conditions as ~~the Board~~OWEB deems appropriate to the particular circumstances of the project.

Statutory/Other Authority: ORS 541.906 *Statutes/Other Implemented:* ORS 541.890 - 541.969 *History:*

OWEB 1-2017, f. & cert. ef. 5-2-17

OWEB 3-2008, f. 11-14-08, cert. ef. 1-1-09

OWEB 4-2004, f. 11-2-04, cert. ef. 2-1-05

695-005-0060

Distribution of Funds

(1) The Director may withhold payments to a Grantee in a situation where there are significant and persistent difficulties with satisfying ~~Board~~ OWEB requirements.

(2) Prior to disbursement of Board funds, the Grantee must provide proof that the ~~25%~~ required match, ~~-~~ based on the total Board award, has been secured.

(3) Prior to disbursement of Board funds for projects involving a private property~~private lands~~, ~~the Board~~OWEB must receive ~~certification from the Grantee that they will obtain, prior to expending Board funds on a property,~~ a cooperative agreement from the landowner, or easement holder where the property interest demonstrates sufficient control to accomplish the proposed action, that, at a minimum, includes:

~~(a) Permission to access the private land, at times agreeable to the landowner, to implement the project, inspect the project, track the status of the project, or perform repairs or maintenance;~~

~~(b) Permission for the Board or its representatives to access the private land for inspection and evaluation of the project; and~~

(a) ~~Identification of the party responsible for repairs and maintenance of the project.~~Landowner's ~~-~~

Ceertification that the landowner owns the land, or the easement holder demonstrates sufficient control to accomplish the proposed action where the work will be carried out;

(b) AnLandowner's agreement to allow Grantee to carry out the work, or a portion of the work on the lLandowner's property;

(c) Landowner's An agreement to maintain the Project, or allow maintenance of the Project, over a time period consistent with the grant application;

(d) AnLandowner's agreement to allow the OWEB Board and its representatives access to the site where the work is being carried out for inspection and evaluation; and

(c)(e) Landowner's or the easement holder's aacknowledgment that they are aware of the application to OWEB and that information relating to the work, including effectiveness monitoring data, is a public record.

(4) Prior to disbursement of Board funds for projects involving a public property OWEB must receive evidence from the public agency that it concurs with the project.

(4)(5) Funds shall not be disbursed on project elements that require permits or licenses until the Board OWEB receives satisfactory evidence that the necessary permits or and licenses have been granted and documents required by the Board have been submitted.

(5)(6) Funds will be released upon receipt of a completed requestpresentation of a completed fund release request form, as prescribed by OWEB, 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.

(6)(7) 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 Board. 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.

(7)(8) All grant agreements authorized by the Board shall have a clause that requires the retention of up to 10% ten percent of project funds until the final report, as required in the grant agreement, has been approved. Final reports are due within 60 days of project completion. Any unexpended Board funds must be returned to the Board with the final report. Upon receipt of the final report, the Board 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.

(8)(9) All Grantees shall account for at least the required 25% in actual match, on a form prescribed by the Board, based on the total Board grant expenditures, upon project conclusion and final reporting.

Statutory/Other Authority: ORS 541.906 *Statutes/Other Implemented:* ORS 541.890 - 541.969 *History:*

OWEB 1-2017, f. & cert. ef. 5-2-17

OWEB 3-2008, f. 11-14-08, cert. ef. 1-1-09

OWEB 4-2004, f. 11-2-04, cert. ef. 2-1-05

695-005-0070

Waiver of Rules

The Director may waive the requirements of Ddivision 5, unless they are required by statute, for

individual grants, when doing so will result in more efficient or effective implementation of the Board's grant program. Any waiver granted shall be in writing and included in the permanent file of the individual grant for which the waiver was granted.

Statutory/Other Authority: ORS 541.906 *Statutes/Other Implemented:* ORS 541.890 - 541.969 *History:*

OWEB 3-2008, f. 11-14-08, cert. ef. 1-1-09

OWEB 4-2004, f. 11-2-04, cert. ef. 2-1-05

695-005-0080

Periodic Rules Review and Program Evaluation

OWEB and ~~The~~the Board shall review the grant program and rules at least once every five years and make changes as needed to carry out a high quality and effective program.

Statutory/Other Authority: ORS 541.906 *Statutes/Other Implemented:* ORS 541.890 - 541.969 *History:*

OWEB 4-2004, f. 11-2-04, cert. ef. 2-1-05

DIVISION 5 - OWEB GRANT PROGRAM

695-005-0010

Purpose

These rules guide the Oregon Watershed Enhancement Board in accepting applications and considering grant proposals for funding under the provisions of ORS 541.890, et seq. The Board grant program includes grants described in Chapter 695, Divisions 10-47 for watershed restoration, technical assistance, monitoring, operating capacity, stakeholder engagement, land and water acquisition, small grants, and other grant programs initiated by the Board.

Statutory/Other Authority: ORS 541.906 *Statutes/Other Implemented:* ORS 541.890 - 541.969 *History:*

OWEB 1-2017, f. & cert. ef. 5-2-17 OWEB 4-2004, f. 11-2-04, cert. ef. 2-1-05

695-005-0020

Definitions

(1) "Board" means the Oregon Watershed Enhancement Board created under ORS 541.900.

(2) "Director" means the Executive Director of the Oregon Watershed Enhancement Board or the Executive Director's designee.

(3) "Grant Agreement" is the legally binding contract between the Board and the grant recipient. 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.

(4) "Technical Review Team" is a team of designated persons with interdisciplinary expertise drawn from agencies represented on the Board and other entities to evaluate grant applications based on evaluation criteria.

(5) "Partners" are non-governmental or governmental persons or entities that have committed funding, expertise, materials, labor, or other assistance to a proposed project.

(6) "Match" is any contribution to a project that is non-Board funds. Match may include:

(a) Cash on hand or cash that is pledged to be on hand prior to commencement of the project;

(b) Secured funding commitments from other sources;

(c) Pending commitments of funding from other sources. In such instances, Board funding will not be released prior to secured commitment of the other funds; or

(d) The value of in-kind labor, equipment rental, and materials essential to the project, based on local market rates.

(7) "OWEB" means the Oregon Watershed Enhancement Board state agency.

Statutory/Other Authority: ORS 541.906 *Statutes/Other Implemented:* ORS 541.890 - 541.969 *History:*

OWEB 3-2008, f. 11-14-08, cert. ef. 1-1-09

OWEB 4-2004, f. 11-2-04, cert. ef. 2-1-05

695-005-0030

Application Requirements

(1) Applications must be submitted in the most current format prescribed by OWEB. An explanation

must accompany the application if any of the information required on the application cannot be provided.

(2) All applicants shall demonstrate a matching contribution is being sought at the time of application, based on the total Board grant request, at the time of application. Match requirements will be included in the announcement for each grant offering. Match requirements shall not exceed 25% of the application request.

(3) All applications that involve physical changes or monitoring on private land must include certification from the applicant that the applicant has informed all landowners involved of the existence of the application and has also advised all landowners that all monitoring information obtained on their property and submitted to OWEB is a public record. If contact with all landowners was not possible at the time of application, explain why.

Statutory/Other Authority: ORS 541.906 *Statutes/Other Implemented:* ORS 541.890 - 541.969 *History:*

OWEB 1-2017, f. & cert. ef. 5-2-17

OWEB 3-2008, f. 11-14-08, cert. ef. 1-1-09

OWEB 4-2004, f. 11-2-04, cert. ef. 2-1-05

695-005-0040

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) A grant applicant may be any tribe, watershed council, soil and water conservation district, not-for-profit corporation, school, Oregon institution of higher education, independent not-for-profit institution of higher education, or political subdivision of this state that is not a state agency. A state agency or federal agency may partner with an eligible entity.

(3) The Board and OWEB may use a technical review team to review grant applications and make recommendations to the staff or Board.

(4) Applications will be considered complete as submitted. Clarification of information may be sought by OWEB from the applicant during the evaluation process, but additional, new information not requested by OWEB will not be accepted after the application deadline.

Statutory/Other Authority: ORS 541.906 *Statutes/Other Implemented:* ORS 541.890 - 541.969 *History:*

OWEB 1-2017, f. & cert. ef. 5-2-17 OWEB 4-2004, f. 11-2-04, cert. ef. 2-1-05

695-005-0050

Grant Agreement Conditions

(1) OWEB will enter into new 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 or Director approval, funding shall be terminated. The money allocated to the grant shall be available for reallocation by the Board or Director.

(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 done under the agreement.

(5) All project activities must demonstrate, to the extent possible, consistency with local community workforce and economic development plans and policies.

(6) Following project completion, equipment purchased with Board funds shall reside with the Grantee or another approved entity. These entities will make the equipment available to others at no cost, other than nominal operation and maintenance costs.

(7) 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.

(8) The Grantee will account for funds distributed by the Board, using project expense forms provided.

(9) The Grantee will obtain the necessary permits or licenses from local, state, or federal agencies or governing bodies and provide to OWEB satisfactory evidence that the necessary permits or licenses have been granted.

(10) OWEB may place additional conditions in the Grant Agreement as necessary to carry out the purpose of the watershed enhancement program. Such conditions include, but are not limited to:

(a) A commitment by the landowner for continued access for monitoring the project after completion, not to exceed five years following OWEB approval of a final project completion report;

(b) A commitment by the Grantee to maintain the project for a period of time as deemed appropriate for the project elements, or goals, to be effective;

(c) A commitment to supply future reports on the project as required; and

(d) Such other conditions as OWEB deems appropriate to the particular circumstances of the project.

Statutory/Other Authority: ORS 541.906 *Statutes/Other Implemented:* ORS 541.890 - 541.969 *History:*

OWEB 1-2017, f. & cert. ef. 5-2-17

OWEB 3-2008, f. 11-14-08, cert. ef. 1-1-09

OWEB 4-2004, f. 11-2-04, cert. ef. 2-1-05

695-005-0060

Distribution of Funds

(1) The Director may withhold payments to a Grantee in a situation where there are significant and persistent difficulties with satisfying OWEB requirements.

(2) Prior to disbursement of Board funds, the Grantee must provide proof that the required match, based on the total Board award, has been secured.

(3) Prior to disbursement of Board funds for projects involving a private property, OWEB must receive a cooperative agreement from the landowner, or easement holder where the property interest demonstrates sufficient control to accomplish the proposed action, that, at a minimum, includes:

(a) Certification that the landowner owns the land, or the easement holder demonstrates sufficient control to accomplish the proposed action where the work will be carried out;

(b) An agreement to allow Grantee to carry out the work, or a portion of the work on the property;

(c) An agreement to maintain the Project, or allow maintenance of the Project, over a time

period consistent with the grant application;

(d) An agreement to allow the OWEB Board and its representatives access to the site where the work is being carried out for inspection and evaluation; and

(e) Landowner's or the easement holder's acknowledgment that they are aware of the application to OWEB and that information relating to the work, including effectiveness monitoring data, is a public record.

(4) Prior to disbursement of Board funds for projects involving a public property OWEB must receive evidence from the public agency that it concurs with the project.

(5) Funds shall not be disbursed on project elements that require permits or licenses until OWEB receives satisfactory evidence that the necessary permits or licenses have been granted and documents required by the Board have been submitted.

(6) Funds will be released upon receipt of a completed request, as prescribed by OWEB, 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.

(7) 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 Board. 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.

(8) All grant agreements authorized by the Board shall have a clause that requires the retention of up to 10% of project funds until the final report, as required in the grant agreement, has been approved. Final reports are due within 60 days of project completion. Any unexpended Board funds must be returned to the Board with the final report. Upon receipt of the final report, the Board 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.

(9) All Grantees shall account for at least the required match, based on the total Board grant expenditures upon project conclusion and final reporting.

Statutory/Other Authority: ORS 541.906 *Statutes/Other Implemented:* ORS 541.890 - 541.969 *History:*

OWEB 1-2017, f. & cert. ef. 5-2-17

OWEB 3-2008, f. 11-14-08, cert. ef. 1-1-09

OWEB 4-2004, f. 11-2-04, cert. ef. 2-1-05

695-005-0070

Waiver of Rules

The Director may waive the requirements of Division 5, unless they are required by statute, for individual grants, when doing so will result in more efficient or effective implementation of the Board's grant program. Any waiver granted shall be in writing and included in the permanent file of the individual grant for which the waiver was granted.

Statutory/Other Authority: ORS 541.906 *Statutes/Other Implemented:* ORS 541.890 - 541.969 *History:*

OWEB 3-2008, f. 11-14-08, cert. ef. 1-1-09

OWEB 4-2004, f. 11-2-04, cert. ef. 2-1-05

695-005-0080

Periodic Rules Review and Program Evaluation

OWEB and the Board shall review the grant program and rules at least once every five years and make changes as needed to carry out a high-quality and effective program.

Statutory/Other Authority: ORS 541.906 *Statutes/Other Implemented:* ORS 541.890 - 541.969 *History:*

OWEB 4-2004, f. 11-2-04, cert. ef. 2-1-05

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OREGON WATERSHED ENHANCEMENT BOARD

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Agenda Item M supports OWEB's Strategic Plan priority # 1: Broad awareness of the relationship between people and watersheds.

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Eric Hartstein, Board and Legislative Policy Coordinator

SUBJECT: Agenda Item M – Board Meeting Schedule Format
January 24-25, 2023, Board Meeting

I. Introduction

This report provides an update about in-person and virtual options for future board meetings. The board will be asked to approve a format for meeting in 2023 and beyond.

II. Background

The board generally meets quarterly. Prior to COVID-19 pandemic restrictions, meetings were all held in person and were rotated across the OWEB regions. With the onset of the pandemic, the board transitioned to virtual meetings exclusively.

As the pandemic restrictions eased, the board discussed future meeting formats in October 2021 and in January 2022. At both meetings, there was broad support that all January board meetings be held virtually as the weather and travel at that time can be hazardous.

At the January 2022 meeting, the board adopted a meeting format for the year that included virtual-only meetings in January and April, and hybrid meetings in July and October. The board also wished to revisit the meeting format at the January 2023 meeting to discuss options moving forward.

III. Discussion

During the October 2021 and January 2022 meetings, board members weighed the costs and benefits of holding either one or two virtual-only meetings during the year. One important consideration discussed by the board with having two virtual-only board meetings per year is that financial and environmental costs associated with travel are reduced. In support of having one virtual-only board meeting per year, board members noted the importance of engaging in person at meetings, tours, and events with agency partners and community members.

At the January 2023 meeting, the board will decide on the meeting format moving forward.

IV. Staff Recommendation

Staff does not have a recommendation for the board.

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Agenda Item N supports OWEB's all of OWEB's Strategic Plan priorities, with a particular focus on priority #3: Community capacity and strategic partnerships achieve healthy watersheds, and Strategic Plan priority #4: Watershed organizations have access to a diverse and stable funding portfolio.

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Renee Davis, OWEB Fire, Klamath, and Drought Programs Manager
Nathan Beckman, Strategic Planning Coordinator, Oregon Department of Forestry (ODF)

SUBJECT: Agenda Item N – Shared Stewardship and the 20-Year Strategic Plan
January 24-25, 2023, Board Meeting

I. Introduction

Oregon's 20-year strategic plan, as outlined in Senate Bill (SB) 762 and a Memorandum of Understanding (MOU) on Shared Stewardship, will be used to prioritize restoration actions and geographies to reduce the risk of catastrophic wildfires and guide federal, state, and private investments in these actions. Combined with a functioning governance structure and engagement with tribes, stakeholders, and local collaboratives and partnerships, state and federal agencies will advance and support the implementation of shared priorities and coordinated investments to achieve a common vision of healthy and resilient landscapes.

This staff report prepares the OWEB Board for a presentation by State Forester Cal Mukumoto and Strategic Planning Coordinator Nathan Beckman, along with OWEB staff, at the January meeting.

II. Background

On August 13, 2019, an MOU on Shared Stewardship was signed by state and federal officials to document the commitment of the State and the U.S. Forest Service (USFS) to work collaboratively to create a shared stewardship approach for implementing land management activities in the state of Oregon.

Subsequently, on July 19, 2021, Governor Brown signed SB 762. Sections 18-20 of SB 762 focus on the reduction of wildfire risk and direct the ODF to design and implement a program to reduce wildfire risk. This program aims to restore landscape resilience and reduce hazardous fuels in public and private forestlands and rangelands and in communities near homes and critical infrastructure. SB 762 also directs ODF to develop a 20-year strategic plan, as described

in the Shared Stewardship Agreement signed in 2019, which prioritizes restoration actions and geographies for wildfire risk reduction that will be used to guide federal, state, and private investments in a tangible way. Both the MOU and SB 762 point to the long-term vision of healthy and resilient forested ecosystems, vibrant local economies, healthy watersheds with functional aquatic habitats, and quality outdoor opportunities for all Oregonians.

III. Implementing Shared Stewardship in Oregon

Currently, each state and federal agency establishes its priorities and investments largely independently of one another. The MOU and SB 762 direct federal and state agencies to develop shared priorities and coordinate actions and investments. There are two key components that achieve this: the 20-year strategic plan and Shared Stewardship governance. The strategic plan will articulate shared priorities among state and federal agencies to achieve the vision noted above. A Shared Stewardship governance structure provides forums for consultation and coordination among agencies, Tribes, and stakeholders, and decision-making among state and federal agency leaders. Thus, the strategic plan and the governance structure are the mechanisms for implementing Shared Stewardship in Oregon (Attachment A). By creating shared stewardship governance, developing a 20-year strategic plan shared by federal and state agencies, and jointly implementing that plan over time, it is hoped that Oregon can transform how landscape-level challenges are addressed and realize the MOU's vision of healthy and resilient forests, ecosystems, and landscapes.

ODF has convened a Strategic Leadership Group to inform the development of the strategic plan. Executives from the following agencies participate in this group: ODF, OWEB, Oregon Department of Fish and Wildlife, USFS, Bureau of Land Management, Natural Resources Conservation Service, and Bureau of Indian Affairs.

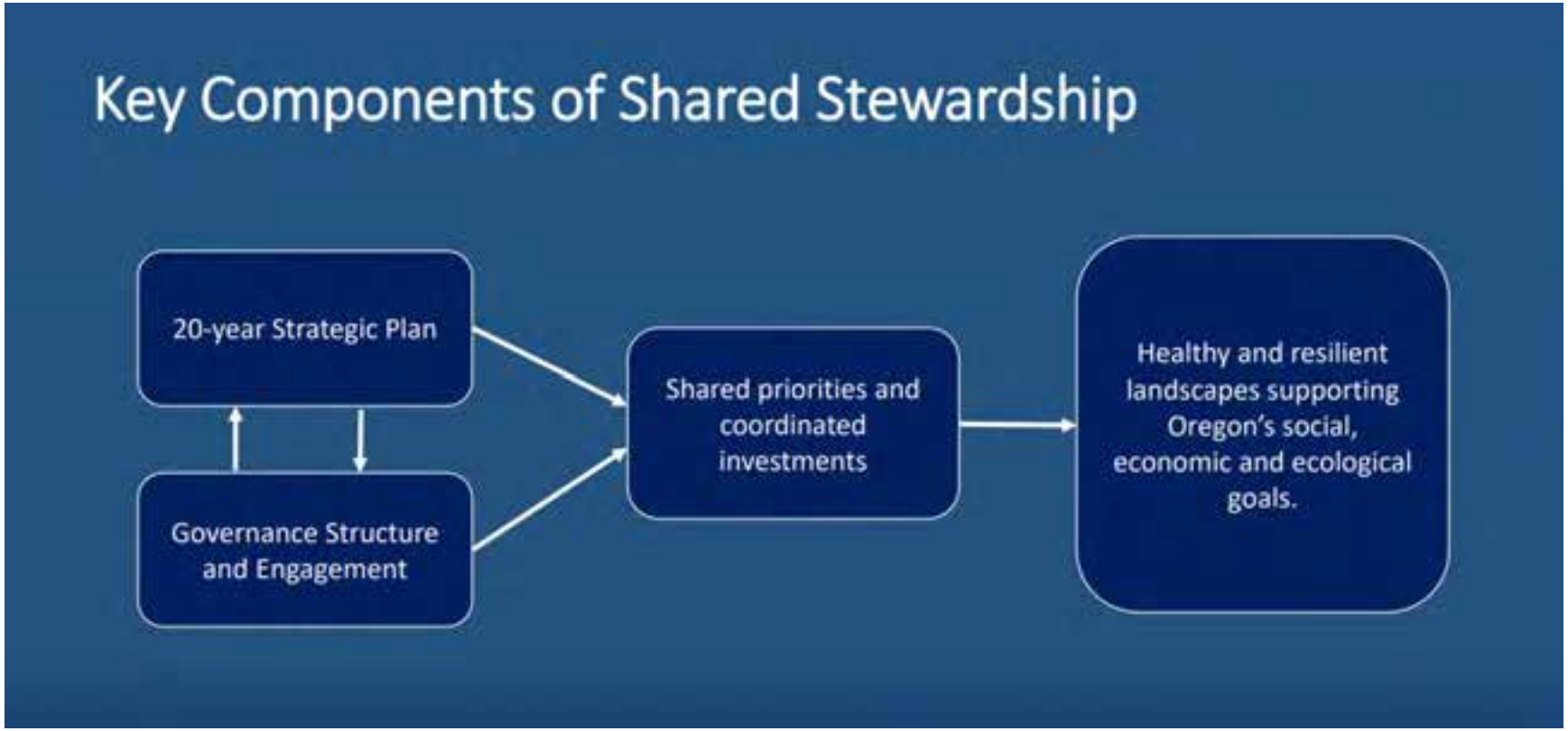
A framework for the 20-year strategic plan is being developed and will address how state and federal agencies plan to implement the directives and intentions of the MOU and SB 762. (For more information, see https://www.oregon.gov/odf/fire/pages/strategic-plan.aspx.) This framework is part overview and part workplan: creating alignment among interested parties and describing the work needed to develop the strategic plan. It includes a proposed governance structure, proposed mechanisms for Tribal and stakeholder consultation and engagement, and proposed processes and approaches for developing the 20-year Strategic Plan. Attachment B describes the timeline for developing the 20-year strategic plan.

IV. Recommendation

This is an information item only.

Attachments

A. Key Components of Shared Stewardship
B. Timeline for Developing the 20-Year Strategic Plan


Key Components of Shared Stewardship
20-year Strategic Plan
Governance Structure and Engagement
Shared priorities and coordinated investments
Healthy and resilient landscapes supporting Oregon's social, economic and ecological goals.

Timeline

To develop the 20-year Strategic Plan (Plan), four general phases of work are identified below. These phases are intended as conceptual guides rather than distinct categories. since specific activities will evolve over time and possibly occur earlier or later than specified. Consultations with Tribes, stakeholders, and agencies will continue throughout on a consistent basis via the governance structure as processes and products are designed and produced.

Phase 1: Build the Foundation: Jan 2022 - July 2022

- Designate ODF Lead
- Develop governance structure and engage federal and state agencies
- Initiate consultations with Tribes and stakeholders
- Draft framework for plan development

Phase 2: Compile Information: July - Dec 2022

- Identify and gather reports, maps, data, etc.
- Produce supporting materials (priority maps, capacity & readiness assessment, etc.)
- Develop goals and targets and Identify steps to achieve goals
- Develop metrics and accountability mechanisms
- Consult with Tribes, stakeholders, and agencies on a consistent basis through the governance structure

Phase 3: Draft the Plan: Jan - Jun 2023

- Produce draft 20-year Strategic Plan
- Review Plan with Tribes, stakeholders, and agencies through the governance structure
- Finalize the Plan with endorsement from the Strategic Leadership Group
- Publish the 20-year Strategic Plan

Phase 4: Implement the Plan: July 2023 →

- Publicize the Plan
- Implement near-term action steps with Tribes, stakeholders, agencies, and others
- Consult with Tribes, stakeholders, and agencies on a consistent basis through the governance structure
- Conduct and publicize accountability reviews
- Adapt goals, actions and governance as needed

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Agenda Item O supports all of OWEB's Strategic Plan Priorities

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Lisa Charpilloz-Hanson, Executive Director
Eric Williams, Grant Program Manager

SUBJECT: Agenda Item O – 2023-2025 Spending Plan
January 24-25, 2023, Board Meeting

I. Introduction

This report updates the board on the timeline for the upcoming approval of the 2023-2025 spending plan. Staff will request the board provide general direction in terms of major spending plan categories. Staff will also ask for feedback to determine if there are questions about current spending plan line items or other recommendations for additional spending plan line items to be addressed in April. This is an informational item only.

II. Spending Plan Process

After the Oregon Legislature approves OWEB's next biennial budget, 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, salmon license plate revenues, and other miscellaneous funds as these are available. The bulk of funding for OWEB's spending plan is 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 2021 meeting, the board adopted a 2021-2023 Spending Plan totaling $142.9 million. In January 2022, the board added $10.8 million to the spending plan for general fund drought programs authorized by the December 2021 special legislative session. In April 2022, the board added $19.1 million to the spending plan for 2021 post-fire recovery, Oregon Agricultural Heritage Program, and water acquisition grants authorized by the 2022 legislative session. In July 2022, the board added $14.3 million to the spending plan to include additional PCSRF funding and recapture funds. The total adopted 2021-2023 spending plan amount is $187.1 million.

III. 2023-2025 Spending Plan Timeline

The 2023-2025 Spending Plan will be approved by the board in July 2023. In preparation for that approval, the following steps will occur:

- In January 2023, the board will provide an indication of the estimated amounts it would like to include for the spending plan categories and identify any questions they have related to specific spending plan line items that warrant further conversation in April 2023.
- Between the January and April meetings, staff, in consultation with board committees as needed, will discuss funding options for specific grant types within each category.
- In April 2023, staff will present to the board information about the line items within each category of the spending plan and propose an investment amount for each line item. The board will provide feedback on the funding amounts for each grant type.
- In July 2023, staff will present 2023-2025 spending plan recommendations for board approval, using final revenue numbers for the 2023-2025 biennium.
- In July 2024, the board will consider additional funds for the spending plan from PCSRF and recaptured grant funding, similar to the approval at the July 2022 board meeting.

IV. Initial Recommendation for Spending Plan Categories

Initial recommendations for board consideration to allocate funds among the Open Solicitation, Focused Investments, Operating Capacity, and Other categories are provided in Table 1. Legislatively directed programs, such as wildfire recovery and the Oregon Agricultural Heritage Program, are not included here since the board does not have the discretion to program those funds in the same manner as lottery and PCSRF dollars. The spending plan designates board-directed line items as "Core Programs." Table 1 applies to Core Program spending. Any additional funds appropriated in the legislatively adopted 2023-2025 budget will be included in the July 2023 spending plan agenda item for board approval.

Table 1 – Spending Plan Categories (amounts in millions)

Spending Plan Category	**2021-2023 amount July 2021**	**2021-2023 amount July 2022**	**2021-2023 amount October 2022**	**Proposed 2023-2025 amount (in millions)***
Open Solicitation	$58.8	$63.5	$63.5	$58.8
Focused Investments	$29.1	$32.4	$32.4	$38.2
Operating Capacity	$17.3	$19.7	$19.7	$19.7
Other – including Klamath River post-dam removal watershed restoration	$3.9	$3.9	$7.9	$14.9
Total	$109.1	$119.5	$123.5	$131.6

*Based on an estimate of available funds, including recapture from the current biennium.

V. Spending Plan Categories

The current spending plan is included in the board book 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 A provides a brief description of each Core Program spending plan category.

VI. Recommendation

This is an information item only.

Attachments

A. Spending Plan Category Summaries

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 aid 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 currently capped at $75,000 per grant; however, staff will propose to remove the cap for 2023-2025. 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 the 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 the 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, water rights leases and transfers, and contractually protected instream flow.

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.

Quantifying Outputs and Outcomes

Quantifying Conservation Outputs and Outcomes is the new title for the previous Programmatic Effectiveness Monitoring line item in OWEB's spending plan. This item includes OWEB-led initiatives that evaluate specific types of restoration actions at a larger geographic and temporal scale, rather than at the project scale. This program-level monitoring and evaluation that is supported through targeted investments is different from open solicitation monitoring grants, which are conceptualized by local partners and considered through OWEB's responsive grant 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 Effectiveness Monitoring

The approach employed by Focused Investment Partnerships (FIPs) provides an opportunity to learn about the progress and outcomes possible under six-year investments. Focused Investment Effectiveness Monitoring (EM) evaluates the dedicated FIP funding to help board, staff, and stakeholders to adaptively manage partnership investments in the future.

Capacity Grants (WC/SWCD)

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 (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:

8) *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.
9) *District Operations Fund* supports the capacity of the SWCDs to comply with Oregon Revised Statute (ORS) requirements, conduct business, and help 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.

Statewide Organizational Partnership Support

The Conservation 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-groundwork. 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).

Partnership Technical Assistance

Oregon is a leader in collaborative approaches to restoration. After offering three biennia of grants to support partnership development and development of a strategic action plan, there is now a diversity of partnerships operating in Oregon working collaboratively on ecological outcomes. Some of those partnerships are a direct result of receiving a Capacity Building or Development FIP and are now high-performing partnerships with strategic action plans. Some are just forming and might be future applicants to the program.

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.

Klamath Post-dam Removal Watershed Restoration—Contingency

In October 2022, the board added funds to the spending plan to address the need for restoration resulting from removal of the JC Boyle dam on the Klamath River to meet a state commitment for contingency funding as part of the federal approval for the project. The board also committed to a total of up to $15 in restoration funds across multiple biennia.

Strategic Implementation Areas (SIA) program

The Oregon Department of Agriculture's (ODA) Agricultural Water Quality Management Program is leading the "Strategic Implementation Area" (SIA) program, where select areas around the state will receive focused stakeholder engagement, technical assistance, and monitoring to address priority non-point source water quality concerns in agriculturally influenced areas. 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.

OREGON
WATERSHED
ENHANCEMENT BOARD

Hybrid Board Meeting

Keizer, Oregon

April 25-26, 2023

Oregon Watershed Enhancement Board Meeting Agenda

April 25 & 26, 2023

Business Meeting:	**Tuesday, Apr 25, 8:00 am**	**Wednesday, Apr 26, 8:00 am**

The public is welcome to listen to the virtual meeting through the following methods:

- **YouTube Streaming**: https://www.youtube.com/channel/UC0dl-TOwLt4Sp--i1KEa_OA. Please note that there may be a slight delay when streaming the meeting content
- **Phone**:
- **April 25:** Dial 669 900 6833, when prompted, enter ID 891 8212 7210 and passcode: 631142
- **April 26:** Dial 669 900 6833, when prompted, enter ID 826 0760 3574 and passcode: 513270
- The board book (eBook) is available at: https://www.oregon.gov/oweb/about-us/Pages/board/meetings.aspx
- For each agenda item, the time listed is approximate. Anyone interested in a particular agenda item is encouraged to give ample time and listen in to the meeting at least 30 minutes before the approximate agenda item time.

Public comment

OWEB encourages written or verbal public comment on any agenda item. All comment requests should be sent to Nicole.Bettinardi@OWEB.oregon.gov **no later than 4:00 pm Thursday, April 20**.

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

Verbal comments:

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

Tuesday, April 25, 2023

A. Board Member Comments (8:05 am)
Board representatives from state and federal agencies will provide updates on issues related to the natural resource agency they represent. This is also an opportunity for public and tribal board members to report on their recent activities and share information and comments on a variety of watershed enhancement and community conservation-related topics. *Information item*.

B. Review and Approval of Minutes (9:35 am)
The minutes of the January 24 & 25, 2023, meeting will be presented for board approval. *Action item*.

C. Directors Updates (9:40 am)
Executive Director Lisa Charpilloz Hanson and staff will update the board on agency business. *Information item.*

D. Committee Updates (10:35 am)
Representatives from board committees will provide written updates on committee topics to the full board. *Information item*.

E. General Public Comment (10:35 am)
This time is reserved for the board to hear general public comments and review the written public comment submitted for the meeting. *Information item*.

F. Land Acquisition Grant Awards and Time Extension Request (10:50 am)
NOTE: Verbal public comment specific to this agenda item will be heard at approximately 11:05 am

Staff Presentation
Grant Program Manager Eric Williams and Acquisitions Coordinator Miriam Forney will provide an overview of the September 2022 Land Acquisition grant offering and outline staff recommendations for a grant award.

Public Comment
This time is reserved for public comment on the September 2022 Land Acquisition grant offering. Only comments about this specific item will be accepted during this portion of the meeting. Any written comments about this agenda item must be received by OWEB staff by the **April 20, 2023, deadline** to be provided to the board in advance of the meeting. **Verbal comments should be limited to three minutes.**

Land Acquisition Grant Board Deliberations – September 2022 Awards and Grant #211-9903-19500 Time Extension Request
The board will consider grant applications submitted through the September 2022 Land Acquisition grant offering. Applications, supporting materials, and funding recommendations will be discussed and acted on by the board. In addition, the board will consider an extension request for OWEB Grant # 221-9903-19500. *Action Item.*

G. Climate-Related Evaluation Criteria Rulemaking Update (11:45 am)
Board and Legislative Policy Coordinator Eric Hartstein and Water and Climate Programs Coordinator Jessi Kershner will update the board on the climate criteria rulemaking process,

including providing an overview of draft climate evaluation criteria, definitions, and guidance. *Information item.*

H. Fall Open Solicitation Grant Offering Board Awards (1:00 pm)

NOTE: Verbal public comment specific to this agenda item will be heard at approximately 2:20 pm

Staff Presentation

Grant Program Manager Eric Williams and Regional Program Representatives will review the Fall 2022 Open Solicitation Grant Offering and funding recommendations.

Public Comment

This time is reserved for public comment on the Fall 2022 Open Solicitation Grant Offering and funding recommendations. Only comments about this specific item will be accepted during this portion of the meeting. Any written comments about this agenda item must be received by OWEB staff by the **April 20, 2023, deadline** to be provided to the board in advance of the meeting. **Verbal comments should be limited to three minutes.**

Fall Open Solicitation Grant Offering Board Deliberation and Awards

The board will consider grant applications submitted through the Fall 2022 Open Solicitation Grant Offering. Applications, supporting materials, and funding recommendations will be discussed and acted on by the board. *Action Item.*

I. Stage 0 Effectiveness Monitoring Funding Request (3:30 pm)

Monitoring and Reporting Manager Courtney Shaff, Effectiveness Monitoring Coordinator Ken Fetcho, McKenzie Watershed Council Executive Director Jared Weybright, and Upper Deschutes Watershed Council Monitoring Program Manager Lauren Mork will provide an update on the progress made to date and describe further details on monitoring proposals to request continuing effectiveness monitoring for Stage 0 restoration efforts in Whychus Creek and the South Fork McKenzie River. *Action item.*

J. Partnership Technical Assistance Grant Awards (4:15 pm)

NOTE: Verbal public comment specific to this agenda item will be heard at approximately 4:30 pm

Staff Presentation

Monitoring and Reporting Manager Courtney Shaff and Drought Programs Specialist Theresa DeBardelaben will provide an overview of the 2022 Partnership Technical Assistance grant offering and funding recommendations. *Action item.*

Public Comment

This time is reserved for public comment on the 2022 Partnership TA grant offering and funding recommendations. Only comments about this specific item will be accepted during this portion of the meeting. Any written comments about this agenda item must be received by OWEB staff by the **April 20, 2023, deadline** to be provided to the board in advance of the meeting. **Verbal comments should be limited to three minutes.**

Partnership Technical Assistance Grants Board Deliberations and Awards
The board will consider grant applications submitted through the 2022 Partnership TA grant offering. Applications, supporting materials, and funding recommendations will be discussed and acted on by the board. *Action Item.*

Wednesday, April 26, 2023

K. General Public Comment (8:05 am)
This time is reserved for the board to hear general public comments and review the written public comment submitted for the meeting. *Information item*.

L. Approval of Focused Investment Partnerships Carry-Forward Funding (8:20 am)
Grant Program Manager Eric Williams will request board approval to carry over existing Focused Investment Partnership initiative funding to the 2023-2025 biennium.
Action item.

M. Oregon Agricultural Heritage Program (OAHP) Grant Awards (8:35 am)
NOTE: Verbal public comment specific to this agenda item will be heard at approximately 9:05 am

Presentation
Grant Program Manager Eric Williams, Oregon Agricultural Heritage Program Coordinator Taylor Larson, and Conservation Easement Specialist Robin Meacher will provide an overview of the 2022 OAHP grant offerings and funding recommendations. Staff will request the board approve the funding recommendations from the Oregon Agricultural Heritage Commission outlined in Attachment E to the staff report.

Public Comment
This time is reserved for public comment on the Oregon Agricultural Heritage Program grant awards and funding recommendations. Only comments about this specific item will be accepted during this portion of the meeting. Any written comments about this agenda item must be received by OWEB staff by the **April 20, 2023, deadline** to be provided to the board in advance of the meeting. **Verbal comments should be limited to three minutes.**

Board Discussion of the Oregon Agricultural Heritage Program Grant Awards
The board will consider grant applications submitted through the 2022 Oregon Agricultural Heritage Program grant offering. Applications, supporting materials, and funding recommendations will be discussed and acted on by the board. *Action Item.*

N. Spending Plan (10:05 am)
NOTE: Verbal public comment specific to this agenda item will be heard at approximately 10:25 am

Executive Director Lisa Charpilloz Hanson and Grant Program Manager Eric Williams will provide updates to the board on OWEB's 2023-2025 Spending Plan. The board will be asked to provide direction for staff moving forward with final options for the July 2023 meeting. *Information item*

O. Other Business (4:05 pm)
This item is reserved for other matters that may come before the board. *Information item.*

Meeting Rules and Procedures

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

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

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

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

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

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

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

More Information
If you have any questions about this agenda or the Board's procedures, please call Nicole Bettinardi, OWEB Board Assistant, at 503-428-1804 or send an e-mail to Nicole.Bettinardi @OWEB.oregon.gov. If special physical, language or other accommodations are needed for this meeting, please advise Nicole Bettinardi as soon as possible, and at least 48 hours in advance of the meeting.

Oregon Watershed Enhancement Board Membership

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

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

Contact Information
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Salem, Oregon 97301-1290
Tel: 503-986-0178
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www.oregon.gov/OWEB

OWEB Executive Director – Lisa Charpilloz Hanson
Lisa.Charpilloz.Hanson@OWEB.oregon.gov

OWEB Assistant to Executive Director and Board – Nicole Bettinardi
Nicole.Bettinardi@OWEB.oregon.gov
503-428-1804

2023 Board Meeting Schedule
July 25 & 26 – Sisters/Hybrid
October 24 & 25 – Klamath Falls/Hybrid

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

The Approach We Take

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

Our work is characterized by…

Involving stakeholders broadly and in partnership

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



Using best available science supported by local knowledge

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



Investing collaboratively with long-term outcomes in mind

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

Demonstrating impact through meaningful monitoring and evaluation

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



Reaching and involving underrepresented populations

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



OWEB Staff Culture Statement

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

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

April 2023 Board Meeting

	GRANTS	2022 Spending Plan	April 2023 Changes	2022 Spending Plan	TOTAL Awards To-Date	April 2023 Proposed Board Awards	TOTAL Awards To-Date & Proposed Awards	Remaining Spending Plan after Awards To-Date
1	**Open Solicitation:**							
2	Restoration	33.500	0.621	34.121	22.939	11.182	34.121	-
3	Technical Assistance							
4	Restoration TA	5.500	(0.621)	4.879	3.175	1.314	4.489	0.390
5	CREP TA	1.200		1.200	1.200		1.200	-
6	Stakeholder Engagement	2.750		2.750	1.236	0.531	1.767	0.983
7	Monitoring grants	4.750		4.750	4.579		4.579	0.171
8	Land and Water Acquisition	8.500		8.500	3.079	2.875	5.954	2.546
9	Weed Grants	3.250		3.250	3.250		3.250	-
10	Small Grants	2.800		2.800	2.800		2.800	-
11	Quantifying Outputs and Outcomes	1.250		1.250	0.513	0.470	0.983	0.267
12	**TOTAL**	**63.500**	**-**	**63.500**	**42.771**	**16.372**	**59.143**	**4.357**
13	**% of Total Core Programs**	**51.42%**		**51.42%**				
14	**% of OWEB Spending Plan total**	**37.56%**		**37.56%**				
15	**Focused Investments:**							
16	Deschutes	1.915		1.915	1.915		1.915	-
17	Willamette Mainstem Anchor Habitat	1.400		1.400	1.400		1.400	-
18	Harney Basin Wetlands	0.100		0.100	0.100		0.100	-
19	Upper Grande Ronde	0.466		0.466	0.466		0.466	-
20	John Day Partnership	4.000		4.000	4.000		4.000	-
21	Baker Sage Grouse	2.435		2.435	2.435		2.435	-
22	Warner Aquatic Habitat	2.293		2.293	2.293		2.293	-
23	Rogue Forest Rest. Ptnrshp	2.700		2.700	2.700		2.700	-
24	Clackamas Partnership	3.082		3.082	3.082		3.082	-
25	New FIP Solicitation	13.000		13.000	12.910		12.910	0.090
26	FI Effectiveness Monitoring	1.000		1.000	0.750		0.750	0.250
27	**TOTAL**	**32.391**	**-**	**32.391**	**32.051**	**-**	**32.051**	**0.340**
28	**% of Total Core Programs**	**26.23%**		**26.23%**				
29	**% of OWEB Spending Plan total**	**19.16%**		**19.16%**				
30	**Operating Capacity:**							
31	Capacity grants (WC/SWCD)	17.021		17.021	15.121		15.121	1.900
32	Statewide org partnership support	0.450		0.450	0.450		0.450	-
33	Organizational Collaboration	0.700		0.700	0.442		0.442	0.258
34	Partnership Technical Assistance	1.500		1.500	0.797	0.639	1.436	0.064
35	**TOTAL**	**19.671**	**-**	**19.671**	**16.810**	**0.639**	**17.449**	**2.222**
36	**% of Total Core Programs**	**15.93%**		**15.93%**				
37	**% of OWEB Spending Plan total**	**11.63%**		**11.63%**				
38	**Other:**							
39	CREP	0.750		0.750	0.750		0.750	-
40	Governor's Priorities	0.947		0.947	0.947		0.947	-
41	Klamath Post Dam Removal Watershed Restoration/KRRC-Contingency	4.053		4.053	4.053		4.053	-
42	Strategic Implementation Areas	1.500		1.500	1.500		1.500	-
43	Gov. directed-Lower Columbia Estuary Partnership	0.330		0.330	0.330		0.330	-
44	Gov. directed-Sage Grouse Conservation Partnership	0.350		0.350	0.350		0.350	-
45	**TOTAL**	**7.930**	**-**	**7.930**	**7.930**	**-**	**7.930**	**0.000**
46	**% of Total Core Programs**	**6.42%**		**6.42%**				
47	**% of OWEB Spending Plan total**	**4.69%**		**4.69%**				
48	**TOTAL Core Programs**	**123.492**	**-**	**123.492**	**99.562**	**17.011**	**116.573**	**6.919**
49	**General or Other Funds:**							
50	2020 Fire Recovery & Restoration							
51	Riparian/upland rest. & water quality	10.750		10.750	10.750		10.750	-
52	Floodplain restoration & reconnection	5.000		5.000	5.000		5.000	-
53	2021 Fire Recovery & Restoration	5.000		5.000	5.000		5.000	-
54	2021 Drought Resiliency						-	
55	Irrigation District Grants	1.551		1.551	1.551		1.551	-
56	Irrigation District Grants - N Unit	1.906		1.906	1.906		1.906	-
57	Jefferson Co Resiliency Grants	0.852		0.852	0.852		0.852	-
58	Klamath Livestock Wells & off channel const grants	2.733		2.733	2.733		2.733	-
59	Klamath Co Resiliency Grants	0.731		0.731	0.731		0.731	-
60	Jefferson SWCD Soil Conservation Grants	3.000		3.000	3.000		3.000	-
61	Oregon Agricultural Heritage Program (OAHP)							
62	OAHP Conservation Easements*	4.315		4.315	-	4.134	4.134	0.181
63	OAHP Conservation Management Plans*	0.150		0.150	-	0.066	0.066	0.084
64	Water Acquisitions	9.596		9.596	-		-	9.596
65	**TOTAL**	**45.584**	**-**	**45.584**	**31.523**	**4.200**	**35.723**	**9.861**
66	**% of OWEB Spending Plan total**	**26.96%**		**26.96%**				
67	**TOTAL OWEB Spending Plan**	**169.076**	**-**	**169.076**	**131.085**	**21.211**	**152.296**	**16.780**
68	**Funds transferred from/to other agencies**							
69	Transfer to ODFW - PCSRF	12.884		12.884	12.884		12.884	-
70	Transfer to Eugene Water & Electric Board - GF	4.000		4.000	4.000		4.000	-
71	Transfer from ODF for Forest Health Collaboratives-OF	0.500		0.500			-	0.500
72	Transfer from PSMFC - IMW - OF	0.600		0.600			-	0.600
73	Transfer from NRCS - Farm Bill technical support - FF	-		-	-		-	-
74	**TOTAL**	**17.984**	**-**	**17.984**	**16.884**	**-**	**16.884**	**1.100**
75	**OWEB Spending Plan & Other Directed Funds**	**187.060**	**-**	**187.060**	**147.969**	**21.211**	**169.180**	**17.880**

Agenda Item A

Board Member Comments

Board Meeting April 25-26, 2023

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item B

Board Meeting Minutes

Board Meeting April 25-26, 2023

MINUTES ARE NOT FINAL UNTIL APPROVED BY THE BOARD

Oregon Watershed Enhancement Board (OWEB)
January 24 & 25, 2023, Board Meeting

Virtual Board Meeting

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

OWEB MEMBERS PRESENT

Addington, Greg
Agpaoa, Elizabeth
Allen, Chris
Boyer, Barbara
Brandt, Stephen
Brown, Dan (1/25 only)
Buckmaster, Bruce
Coates, Kelly
Curtis, Aaron
Labhart, Mark
Marshall, Gary
McAlister, Liza Jane
McClary, Lindsay
McLeod-Skinner, Jamie
Murray, Eric
Owens, Cory
Reeves, Meg
Shively, Dan

OWEB STAFF PRESENT

Charpilloz Hanson, Lisa
Davis, Renee
Duzik, Katie
Fetcho, Ken
Hartstein, Eric
Hatch, Audrey
Hoffert, Denise
Larson, Taylor
Mack, April
McCarthy, Jillian
Page, Stephanie
Redon, Liz
Repplinger, Linda
Shaff, Courtney
Williams, Eric

OTHER

Beckman, Nathan
Bey Marko
Brandt, Troy
Fairbanks, Terry
Gordon, Ryan
Kelly, Stefan
Latzo, Hannah
McGinnis, Cheryl
Monzyk, Fred
Mukumoto, Cal
Neider, Brandi
Newberry, Daniel
Solomon, Morgan
Tattam, Ian
Tyrrell, Emmy
Walz, Kristen
Winters, Herb
Zettle, Shanda

Tuesday, January 24, 2023

The meeting was called to order at 8:02 a.m. by Liza Jane McAlister

A. Board Member Comments (Audio = 0:13:25)

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

B. Review and Approval of Minutes (Audio = 1:41:56)

The minutes of the October 25 & 26, 2022 meeting was presented for board approval. *Action item*.

Jamie McLeod-Skinner moved the board to approve the minutes from the October 25 & 26, 2022 hybrid meeting. Meg Reeves seconded. The motion passed unanimously.

C. Directors Updates (Audio = 1:42:52)

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

D. Committee Updates (Audio = 2:59:38)

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

E. General Public Comment (Audio = 2:19:17)

This time was reserved for the board to hear general public comments and review the written public comment submitted for the meeting. *Information item*.

- Oregon Association of Conservation Districts – Jan Lee
- Coalition of Oregon Land Trusts – Kelley Beamer
- Network of Oregon Watershed Councils - Vanessa Green
- Oregon Conservation and Education Assistance Network - Cynthia Warnock
- Luckiamute Watershed Council - Kristen Larson
- Lower Rogue Watershed Council – Kelly Timchak
- Written public comments available on the OWEB public comments page

F. Oregon Agricultural Heritage Commission (OAHC) Appointments (Audio = 3:10:21)

Grant Program Manager Eric Williams and Oregon Agricultural Heritage Program Coordinator Taylor Larson recommended the OWEB Board appoint Laura Masterson, Eduardo Contreras, and Russ Hoeflich to the Oregon Agricultural Heritage Commission. *Action item*

Bruce Buckmaster moved the board appoint Laura Masterson, Eduardo Contreras, and Russ Hoeflich to the Oregon Agricultural Heritage Commission. Mark Labhart seconded. The motion passed unanimously.

G. Budget and Legislative Update (Audio = 3:25:11)

Executive Director Lisa Charpilloz Hanson, Deputy Director Stephanie Page, and Board and Legislative Policy Coordinator Eric Hartstein provided an update on the agency budget and the 2023 legislative session. *Information item.*

H. OWEB 101 – Focused Investment Partnership (FIP) and Council Capacity (Audio = 4:48:52)

Grant Program Manager Eric Williams, Monitoring and Reporting Manager Courtney Shaff, North Coast Program Representative Katie Duzik, Willamette Valley Program Representative Liz Redon, Partnerships Coordinator Denise Hoffert, Partnerships Coordinator Jillian McCarthy, and Board and Legislative Policy Coordinator Eric Hartstein provided an 'OWEB 101' presentation highlighting the Focused Investment Partnership and Council Capacity grant programs. *Information Item.*

I. Quantifying Conservation Outputs and Outcomes Funding Requests (Audio = 6:28:21)

Conservation Outcomes Coordination Audrey Hatch and Effectiveness Monitoring Coordinator Ken Fetcho requested the board provide funding for the 'Telling the Restoration Story' grant program and a Carbon and Riparian Condition Monitoring Project. *Action Item.*

Telling the Restoration Story – ongoing funding support request

Jamie McLeod-Skinner moved the board allocate up to $150,000 in support of Telling the Restoration Story with funds from the Quantifying Conservation Outputs and Outcomes line item of the OWEB spending plan, and delegate to the Executive Director the authority to distribute the funds through appropriate agreements with an award date of January 24, 2023. Meg Reeves seconded. The motion passed unanimously.

Riparian Reforestation Carbon Monitoring Funding Request

Meg Reeves moved the board award up to $100,000 for monitoring of carbon and riparian conditions associated with riparian planting restoration projects with funds from the Quantifying Conservation Outputs and Outcomes line item of the OWEB spending plan, and delegate to the Executive Director the authority to distribute the funds through appropriate agreements with an award date of January 24, 2023. Elizabeth Agpaoa seconded. The motion passed unanimously.

The meeting was adjourned at 3:39 by co-chair Barbara Boyer.

Wednesday, January 25, 2023

The meeting was called to order at 8:00 by Barbara Boyer

J. General Public Comment (Audio = 0:04:30)

This time was reserved for the board to hear general public comments. *Information item*.

- South Santiam Watershed Council – Shannon Richardson
- Mary's River Watershed Council – Holly Purpura
- Oregon State University – Alex Dye
- Pacific Forest Trust – Arian Dehnow

K. FIP 2021-2023 Reporting (Audio = 0:23:27)

Grant Program Manager Eric Williams, Partnership Coordinators Jillian McCarthy and Denise Hoffert, Conservation Outcomes Coordinator Audrey Hatch, and Board and Legislative Policy Coordinator Eric Hartstein provided an update on Cohorts 2 and 3 Focused Investment Partnership (FIP) initiatives' progress. Representatives from each of the five Cohort 2 initiatives then updated the board on progress made in the 2021-2023 biennium. *Information item*.

L. OWEB Grant Program Rulemaking (Audio = 00:5:39)

Grant Program Manager Eric Williams and Board and Legislative Policy Coordinator Eric Hartstein requested the board approve proposed administrative rule revisions for the Grant Program. *Action Item.*

Barbara Boyer moved the board approve the OWEB Grant Program administrative rules found in Attachment D. Mark Labhart seconded. The motion passed unanimously.

Amended Motion:

Barbara Boyer moved the board approve the OWEB Grant Program administrative rules found in Attachment D, as revised at this meeting replacing the word "complete" with the word "final" in ORA 695-005-0040 Subsection 4. Meg Reeves seconded the motion. The motion passed unanimously.

M. Revisit In-Person vs. Virtual Board Meetings (Audio = 2:52:16)

Board and Legislative Coordinator Eric Hartstein provided an update about in-person and virtual options for future meetings. The board indicated three hybrid meetings and one virtual meeting in 2023. *Information Item.*

N. Shared Stewardship and the 20-Year Strategic Plan (Audio = 1:10:22)

OWEB Fire, Klamath, and Drought Programs Manager Renee Davis, Oregon Department of Forestry State Forester Cal Mukumoto, Strategic Planning Coordinator Nathan Beckman, and Planning Branch Director Ryan Gordon presented information about Oregon's 20-year strategic plan as outlined in the state-federal Memorandum of Understanding on Shared Stewardship and Senate Bill 762 (2021). *Information Item.*

O. 2023-2025 Spending Plan (Audio = 2:08:50)

Executive Director Lisa Charpilloz Hanson and Grant Program Manager Eric Williams updated the OWEB Board on the 2023-2025 spending plan timeline and presented recommendations for major spending plan category percentages. *Information Item.*

P. Other Business (Audio = 2:48:43)

This item is reserved for other matters that may come before the board. *Information item.*

The meeting was adjourned at 3:12 by co-chair Liza Jane McAlister.

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item C

Director's Updates

Board Meeting April 25-26, 2023

April 25-26, 2023 OWEB Board Meeting
Executive Director Update C-2: Budget and Legislative

This report provides the board an update about the legislative budgeting process and the 2023 Legislative Session.

Background

The Oregon Legislature approves budgets for state agencies on a biennial basis. First, each agency submits a requested budget. The Governor then releases a recommended budget, and the Oregon Legislature approves a final budget.

Agencies must specifically request additions to the base budget and justify the need for each addition. The requested additions to an agency's base budget are called Policy Option Packages (POPs).

The board approved OWEB's POPs in July of 2022 and these were included in OWEB's Agency Request Budget that was submitted in August 2022. The Governor's Budget (GB) was released in February 2023 and the full document was submitted by OWEB in late March.

The Legislative Budgeting Process

The GB is the starting point for agency budget discussions at legislative hearings. During the legislative session, agencies must support the Governor's Budget. OWEB's current service level did not take any reductions in the GB. The budget includes provisions for reclassifying certain positions to partially establish the necessary organization structure at the agency.

The GB provides for position authority and existing funds for staff to continue administration of the Oregon Agricultural Heritage Program (OAHP) but does not include new investments in the program. The GB includes modest new investment in drought resiliency ($2 million). It does not include continued funding to meet our obligations to Drought and Fire Disaster relief grantees awarded in this biennium but not expected to have fully expended grant funds. However, OWEB has been advised this issue will be addressed through the agency's budget bill when it is considered by the legislature. For more details on the 2023-2025 GRB, see Attachment A.

OWEB's budget was heard by the Natural Resources Subcommittee of the Joint Committee on Ways and Means on April 12-13. Day 1 was a presentation of the agency's budget by OWEB leadership, and Day 2 was reserved for public comment. Work sessions with the Natural Resources Subcommittee of the Ways and Means Committee may occur any time after agency budget hearings are completed.

Policy Legislation

In addition to the agency budget, staff are tracking other legislation that may affect OWEB or its partners. Nearly 3,000 bills have been introduced during the session thus far. Currently, OWEB is tracking ~30 bills in the agency's top two tiers of priorities. Examples of Priority 1 bills that OWEB is tracking include (but are not limited to):

- HB 3366, which would appropriate funding to OWEB for OAHP.
- HB 2998, which would create the Oregon Soil Health Initiative to promote and support farming and ranching systems, and to improve soil health by collaborating on voluntary incentive-based soil health strategies. The bill includes an appropriation to OWEB to fund voluntary soil health practices, and associated technical assistance, through OAHP.

- HB 2813, which directs OWEB to establish a grant program to provide grants to water suppliers to protect sources of drinking water.
- HB 3124, which includes the Bipartisan Drought Relief and Water Security Package, with several potential appropriations of funding to OWEB.
- SB 530, which establishes state policy regarding natural climate solutions, and designates OWEB as the fiscal agent for distributing funds to state agencies to implement programs related to natural climate solutions, as directed by the Oregon Global Warming Commission.

At the April board meeting, staff will update the board about any changes that have the potential to affect OWEB.

Staff Contact

If you have questions or need additional information, contact Stephanie Page, Deputy Director at stephanie.page@oweb.oregon.gov /971-345-7004 or Eric Hartstein, Board and Legislative Policy Coordinator at eric.hartstein@oweb.oregon.gov /503-910-6201.

Attachment

A. OWEB 2023-2025 Governor's Budget – 2 Page Summary

OREGON WATERSHED ENHANCEMENT BOARD

2023-25 Governor's Budget

	2021-23 Legislatively Adopted Budget	2023-25 Current Service Level	2023-25 Governor's Budget
Lottery Fund	$94,776,334	$106,626,707	$106,674,689
Federal Funds	$48,251,444	$34,812,700	$53,398,495
Other Funds	$29,863,984	$2,359,071	$23,992,654
General Fund	$52,526,718	--	$2,000,000
Total Funds	$225,418,480	$143,798,478	$186,065,838
Positions	46	30	39
Full-Time Equivalent (FTE)	42.57	30.00	39.00

2023-25 Significant Changes

Overview

- OWEB's recommended policy packages add to the agency's organizational structure to partially fulfill OWEB's needs.
- The Oregon Agricultural Heritage Program packages provide position authority and existing funds for staff to continue administration of previously allocated farm and ranch land protection grants. They do not include new investments.
- The recommended budget includes additional modest drought resiliency investments. The recommended budget does not provide all the necessary funding to complete the allocation of the Drought and Fire Disaster relief grants, but OWEB has been advised this issue will be addressed in the agency's budget bill.
- The recommended packages allow OWEB to accept federal funds to comply with federal historic and cultural resource requirements and provide technical support for tide gate replacement planning, and accept other funds to administer grants to support water quality and salmon habitat improvements.
- The recommended budget assumes a change in Measure 76 lottery funds allocation from 65% grants/35% operations to 70% grants/30% operations, consistent with constitutional direction when lottery revenue transfers reach 150% of the 2009-2011 amounts.

Additional Analyst Adjustments – Package 091

- Emergency response programs (GF): Recommends modest new general funds allocated to grant programs for off-channel livestock water facilities ($304,121) and irrigation modernization grants ($1,000,000) in areas affected by the 2021 drought, plus $695,879 in operating funds to support ongoing work. $2,000,000. The GRB does not provide all the necessary funding to complete the allocation of the Drought and Fire Disaster relief grants. OWEB has been working closely with the Governor's Office, the Oregon Department of Administrative Services Budget and Management section, and the Legislative Fiscal Office to assure program continuity into the next biennium and has been advised that the issue will be addressed in the agency's budget bill.

Recommended Policy Packages - Grants Budget

200 - Standard Grant Program Continuity (FF/OF): This package allows OWEB to spend non-lottery fund grants that have been awarded and continue to be active (FF $18M, OF $572,864) as carry-forward. $18,572,864

215 - Oregon Ag Heritage Program (OF): Allows OWEB to award and spend existing grant funds allocated to the Oregon Agricultural Heritage Fund during the February 2022 special legislative session. No new funds are included. $3,664,553

245 – Water Acquisition grant funds continuity (OF): Allows OWEB to continue spending existing grant funds appropriated through the GF in 2021-23 biennium and deposited into the Flexible Incentive Account (OF). $9,214,020

280 - Additional Other Funds (OF): Recommends $7M additional OF limitation to be able to receive and expend OF grant funds beyond OWEB's current service level budget. This includes potential OF from PacifiCorp to support water quality improvements in the Upper Klamath Basin as part of the upcoming dam removal process and from Idaho Power for water quality and salmon habitat improvements related to the relicensing of the Hells Canyon Dam complex. $7,000,000

Recommended Policy Packages - Operations Budget

100 - Agency reorganization and capacity building: Re-classifies 2 existing management positions and re-classifies 1 staff position to a management position to partially establish the necessary organization structure for OWEB. Funding recommended: $102,665 ($6,253 FF, $96,412 LF).

115 – Oregon Agricultural Heritage Program Continuation: Extends position authority for 3 FTE (limited duration) positions to administer the OAHP. $800,000 in funding for the operational costs was reclassified from existing grant funds appropriated in the 2022 regular legislative session. No new funds were added (100% OF).

145 - Water Acquisitions Continuation: Extends 1 limited duration position to operate the water acquisitions program. Funding recommended: $382,146 (100% OF).

160 - Program continuity: Recommends extending 1 limited duration Federal Fund position to support tide gate work. Funding recommended: $327,864 (100% FF).

165 - National Historic Preservation Act compliance: Recommends a new limited duration Federal Fund position to assure compliance with new National Historic Preservation Act requirements associated with Pacific Coastal Salmon Recovery funding. Funding recommended: $251,678 (100% FF).

Fund Source key:
LF = Lottery Funds
FF = Federal Funds
GF = General Funds
OF = Other Funds

April, 25-26 2023, OWEB Board Meeting

Executive Director Update C-3 Strategic Plan Update

This report provides the board updates on the implementation progress of the 2018-2028 strategic plan. In addition, this report shares OWEB's current thinking on a timeline and process for an update to the strategic plan, in accordance with Governor Kotek's expectations of state agencies.

Background

In June 2018, the board approved a new, ten-year strategic plan. Beginning with the July 2022 board meeting, staff developed a new template to track quarterly progress on strategic plan priorities and report out to the board and stakeholders.

Attached is the latest update of actions related to the strategic plan between January 2023 and April 2023.

During this quarter, OWEB met with additional new groups to discuss watershed health throughout Oregon. The Drought program helped to leverage significant federal funds into Oregon for irrigation modernization projects, and recipients of Drought grants engaged in public outreach about the benefits of the program. The Post-fire Recovery program aided working agriculture, timber lands, and communities. OWEB made grant-making more accessible for Oregonians by adopting general grant program rules that eliminate some barriers to prospective applicants. OWEB also put out the annual Oregon Watershed Restoration Inventory (OWRI) Call for Data and has over 20,000 total restoration projects reported in Oregon to date.

Upon taking office in January 2023, Governor Kotek shared a list of expectations for state agencies related to operational excellence. One of the expectations is that agencies with strategic plans older than 36 months will update those plans by June 1, 2024.

OWEB is exploring options for a facilitator to lead the agency and board through an update and refresh to the strategic plan. We anticipate this update will occur over approximately the next year.

Staff Contact

If you have questions or need additional information, contact Courtney Shaff, Monitoring and Reporting Program Manager, at **Courtney.Shaff@oweb.oregon.gov or 971-345-7012**

Attachments

A. OWEB Strategic Plan Report April 2023

OREGON Watershed Enhancement Board



Wildflowers, Columbia Gorge: Linda Repplinger

2018-2028 Strategic Plan

Quarterly Report to the Board | April, 2023

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

Priority 1

Broad awareness of the relationship between people and watersheds



Follow the Water is an outreach program of Clean Rivers Coalition.



Off-Channel Livestock and Soil Conservation grant handouts.

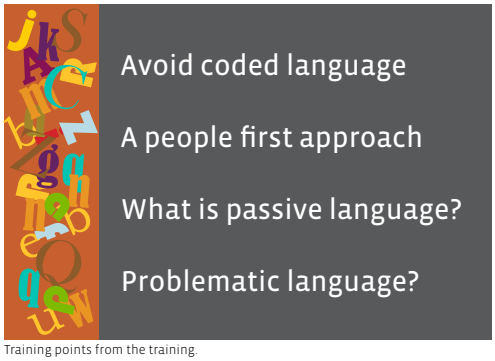
OWEB leadership **met with three organizations** active in building coalitions to foster watershed health.

- The Clean Rivers Coalition focuses on community engagement around water and includes representatives from watershed councils, SWCDs and local city/regional governments.
- Columbia Riverkeeper works to restore and protect the water quality of the Columbia River.
- The Intertwine Alliance focus on preserving and nurturing a healthy regional system of parks, trails, and natural areas.
- OWEB leadership continues regular meetings with other partner organizations and groups, including the Oregon Conservation Partnership, organic agriculture organizations, agriculture and conservation organizations.

The recipients of the Jefferson County Soil Conservation grant **highlighted the community and watershed benefit of the program.** Informational sheets describing community successes were distributed for Klamath Off-Channel Livestock Watering and Jefferson County Soil Conservation grant offerings. These fact sheets were also distributed at the Jefferson Soil and Water Conservation Board meeting.

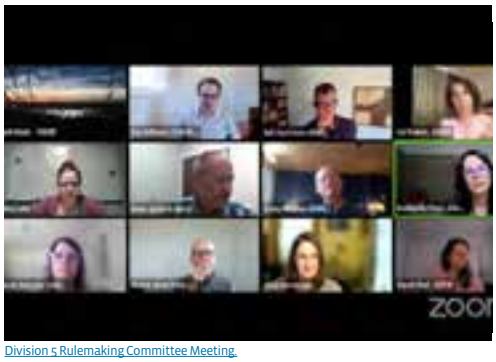
Priority 2

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



Training points from the training.

All OWEB staff continue to **participate in dynamic sessions** led by EcoNorthwest to reflect **on diversity, equity and inclusion values** in the work of the agency. 2023 discussions explored the importance of language and communications.



Division 5 Rulemaking Committee Meeting.

OWEB **conducted Division 5 rulemaking** for OWEB grant program's over-arching rules. The rulemaking will:

- Provide better clarity for OWEB applicants and grantees.
- Remove blanket match requirements that have been noted as an equity concern.
- Make OWEB grant-making more accessible.

Rules were approved by the board at their January 2023 meeting, and are now in effect.

Priority 3

Community capacity and strategic partnerships achieve healthy watersheds



Continued compliance items include areas to be restored, cleaned up, and management plan approvals. BLM photo.

As part of OWEB's responsibility as a land acquisition funder, the agency **continued working with land trust partners to ensure that habitat values are sustained** on properties acquired with OWEB funding. OWEB either holds an easement or retains a third party right of enforcement on all acquisitions that OWEB funds. Continued stewardship is part of this responsibility.



Post-2020 Fire Riparian Restoration project on the North Santiam River, August 2022.

Post-fire Recovery grant programs provide assistance for restoration implementation, technical assistance, and stakeholder engagement activities related to fire recovery in eligible areas.

- **2020 Post-Fire Recovery grants** closed a fourth cycle in January. Initial funding decisions were determined later that month.
- **2021 Post-Fire Recovery grants** opened a second offering in January 2023 and closed in February 2023.
- **2022 Wildfire Recovery Immediate Response grants** opened and are ongoing.

Priority 4

Watershed organizations have access to a diverse and stable funding portfolio



Restoration and ecological opportunities to provide avian habitat after post-fire logging.

The post-fire recovery and drought-relief programs **utilized general funds from the Oregon Legislature to support locally driven projects.** These projects complement investments made under OWEB's traditional Measure 76, PCSRF, and other investments.



Headworks diversion gates to be updated at Sheirbon Hill Water Conservation Project.

The Drought Program **helped to leverage significant federal funds**—such as those available through Natural Resources Conservation Service's Public Law 566 program—by providing non-federal match to support irrigation modernization projects.

Priority 5

The value of working lands is fully integrated into watershed health



The OSU Extension Small Farms Program includes farming recourses for dry farming, organic farming, farm tourism, beginner farmers, and farm management.

OWEB leadership continued meetings with agricultural stakeholders. In February 2023, leadership **met with the Oregon State University (OSU) Extension Small Farms Program** and discussed opportunities for small farms to benefit from some of the grant programs recently funded at OWEB, including drought resiliency grants and Oregon Agricultural Heritage Program grants.



Salvage logging underway on industrial timberland affected by the Riverside fire. Photo by Samuel Leininger, Clackamas SWCD.

The Post-fire Recovery program provided grants to **support on-the-ground natural resource recovery of working agricultural and timber lands** following the 2020 and 2021 wildfire seasons. OWEB staff's continued work to operate these grant programs and project-managing the grants includes:

- Convene technical review team
- Prepare grant award documents and grant agreements
- Review and approve requests for reimbursement
- Review project status reports and completion reports
- Issue payments

Priority 6

Coordinated monitoring and shared learning to advance watershed restoration effectiveness



Call for Data announcement. OWRI now has over 20,000 projects reported.

In early 2023, OWEB opened the annual **Oregon Watershed Restoration Inventory (OWRI) Call for Data**. OWEB also completed the annual export of OWRI data to the Oregon Explorer online platform.

Stories of on-the-ground watershed restoration projects are continuously updated and synthesized. This information informs policymakers about the economics, measurable outcomes, and community successes of restoration.



Middle Fork John Day River Intensively Monitored Watershed.

OWEB continues to **participate in the Pacific Northwest Aquatic Monitoring Partnership** (PNAMP)–a forum for tribal, state and federal agency partners who work throughout the Columbia Basin to coordinate science-based, aquatic monitoring and identify areas of shared learning.

In the first quarter of 2023, OWEB participated in the PNAMP Steering Committee meeting. The meeting outlined PNAMP priorities for the year, including continued progress on Intensively Monitored Watersheds and updated monitoring resources online.

Priority 7

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



Aslhand Dry-type Forest Priority FIP.

Staff are actively engaged in opportunities for **continuous improvement with the Focused Investment Partnerships** (FIPs) grant program. The program is now entering its 4th biennium.

In early 2023, OWEB leadership and staff re-engaged with the Bonneville Environmental Foundation for a full-day retreat to reflect on the evolution of FIPs. This discussion–and public input from recent board and committee meetings–identified many short-and-long-term opportunities to adapt the program.



Brochure about the Emerald Ash Borer from ODA. Additional ODA resources.

The Water/Climate committee invited the Oregon Department of Forestry (ODA) to give a presentation about the recent discovery of the **Emerald Ash Borer in Oregon**. This invasive species damages and destroys ash trees, which threatens wetland and riparian habitats throughout the state. The committee discussed the potential impacts, policy considerations, and next steps.

Strategies Chart July 2022 - April 2023

accomplishments
highlighted in quarterly update

		July	October	January	April
1	**Broad awareness of the relationship between people and watersheds**				
1.1	Develop and implement broad awareness campaigns and highlight personal stories to tell the economic, restoration, and community successes of watershed investments.	●	●	●	●
1.2	Increase involvement of non-traditional partners in strategic watershed approaches.		●	●	●
2	**Leaders at all levels of watershed work reflect the diversity of Oregonians**				
2.1	Listen, learn and gather information about diverse populations.	●	●	●	●
2.2	Create new opportunities to expand the conservation table.	●		●	
2.3	Develop funding strategies with a lens toward diversity, equity and inclusion (DEI)		●	●	●
3	**Community capacity and strategic partnerships achieve healthy watersheds**				
3.1	Evaluate and identify lessons learned from OWEB's past capacity funding.	●	●	●	
3.2	Champion best approaches to build organizational, community and partnership capacity.		●	●	●
3.3	Accelerate state/federal agency participation in partnerships.	●		●	●
4	**Watershed organizations have access to a diverse and stable funding portfolio**				
4.1	Increase coordination of public restoration investments and develop funding vision.	●	●	●	●
4.2	Align common investment areas with private foundations.	●	●		●
4.3	Explore creative funding opportunities and partnerships with the private sector.			●	
4.4	Partner to design strategies for complex conservation issues that can only be solved by seeking new and creative funding sources.	●	●	●	
5	**The value of working lands is fully integrated into watershed health**				
5.1	Implement the Oregon Agricultural Heritage Program.	●	●	●	
5.2	Strengthen engagement with a broad base of working landowners.	●	●	●	●
5.3	Enhance the work of partners to increase working lands projects on farm, ranch and forestlands.		●	●	●
5.4	Support technical assistance to work with owners/managers of working lands.				
5.5	Develop engagement strategies for owners and managers of working lands who may not currently work with local organizations.			●	●
6	**Coordinated monitoring and shared learning to advance watershed restoration effectiveness**				
6.1	Broadly communicate restoration outcomes and impacts.		●	●	●
6.2	Invest in monitoring over the long term.	●		●	
6.3	Develop guidance and technical support for monitoring.	●	●	●	●
6.4	Increase communication between and among scientists and practitioners.			●	●
6.5	Define monitoring priorities.	●	●		
6.6	Develop and promote a monitoring framework.		●	●	
7	**Bold and innovative actions to achieve health in Oregon's watersheds**				
7.1	Invest in landscape restoration over the long term.	●	●	●	●
7.2	Develop investment approaches in conservation that support healthy communities and strong economics.	●	●	●	●
7.3	Foster experimentation that aligns with OWEB's mission.	●	●	●	●

Executive Director Update C-4, Klamath River Post-Dam Removal Watershed Restoration Update

This report provides the board with an update on the status of OWEB's investment in Klamath River Post-Dam Removal Watershed Restoration costs associated with work by the Klamath River Renewal Corporation.

Background

The states of Oregon and California have been working together with PacifiCorp and federal regulatory agencies to plan and implement the removal of four hydroelectric dams on the Klamath River. PacifiCorp previously owned and operated these dams, three in California and one in Oregon (J.C. Boyle dam). PacifiCorp determined that it is in the best interest of the company and its customers to stop operating the dams rather than spending substantial amounts on improvements needed if they were to continue generating power.

The Klamath River Renewal Corporation (KRRC) is a private, independent nonprofit organization formed by signatories of the amended Klamath Hydroelectric Settlement Agreement (KHSA). Signatories of the amended KHSA, including the States of Oregon and California, local governments, Tribal nations, PacifiCorp, irrigators, and several conservation and fishing groups, appointed KRRC to take ownership and oversee the removal of the four Klamath River dams.

PacifiCorp agreed to transfer ownership of the dams to KRRC, which is working with multiple contractors to remove the dams and restore the river to a free-flowing condition. Funding in the amount of $450 million for removal and watershed restoration is committed.

As KRRC implements the dam removal, former reservoir areas will become exposed and require restoration and stabilization of bare sediment deposits for long-term water quality, long-term ecological benefits, and restoration of natural river functions and processes. Additional restoration work will be needed at upland sites (where dredged material generated by regrading of slopes will be deposited) and at the mouths of creeks entering the former reservoir pools. KRRC submitted a Reservoir Area Management Plan (RAMP) to the Federal Energy Regulatory Commission (FERC), the responsible entity for principal federal regulatory review of the project. The RAMP describes measures for restoration, monitoring, and adaptive management of the former reservoir areas and high-priority tributaries, including actions specifically planned for the former reservoir area upstream of J.C. Boyle dam, the section of the project located in Oregon.

During the FERC review, a question was raised about whether existing contingencies and risk tools provide a high enough level of certainty that the work will be completed on time and within budget. In response to this concern, the states and PacifiCorp agreed to provide up to $45 million in additional financial support for the project, divided equally among the three entities.

On August 26, 2022, FERC released a Final Environmental Impact Statement and recommended approval of the proposed license surrender, decommissioning, and removal of the four Klamath River dams.

On October 26, 2022, the OWEB Board committed $15 million over a period of 3-5 years for Klamath River post-dam removal restoration watershed restoration contingency costs incurred by KRRC. The funding is consistent with OWEB's constitutional and statutory authority to fund projects that address habitat needs for native fish and wildlife, along with water quality. Multiple funding sources administered by OWEB will be utilized for this commitment. The initial grant award made by the board is $4.053 million, which was delegated to the OWEB Executive

Director for distribution. The remaining $10.947 million will be included in the OWEB Board's spending plans for future biennia, beginning in 2023-2025.

Status Update

The final License Surrender Order from FERC approving the decommissioning and removal of the dams was issued on November 17, 2022. Ownership of the four dams on the mainstem Klamath River previously owned by PacifiCorp was transferred to KRRC effective December 1, 2022. The removal of the J.C. Boyle facility located in Oregon is expected to occur in 2024. Following the October 2022 board meeting, OWEB and KRRC finalized a partnership agreement that affirms the intent of OWEB's investment in Klamath River post-dam removal watershed restoration and describes the framework, scope, tasks, and timeline for the overarching $15 million in funding. In addition, the States of Oregon and California, PacifiCorp, and KRRC finalized a Memorandum of Agreement regarding the Supplemental Contingency Funding Implementation.

Since the January 2023 board meeting, OWEB opened a grant cycle for this KRRC-specific grant offering that includes a project-level grant application and associated guidance documents for use by KRRC to propose specific activities that would utilize the OWEB's post-dam removal watershed restoration funding. Grant applications submitted by KRRC will mirror the restoration actions for the J.C. Boyle area as outlined in the RAMP and will adhere to minor additional requirements included in FERC's final order. KRRC expects to submit a grant application for OWEB funding in September 2023. Actions that are likely to be proposed to OWEB for funding include but are not limited to, tributary restoration, floodplain reconnection, fish-passage barrier removal, instream large-wood placement, revegetation, and treatment of invasive species.

Regarding the anticipated timeline for dam removal and subsequent watershed restoration, pre-drawdown activities, such as road improvements, building removal, and pre-deconstruction monitoring, have begun. In June, KRRC expects to construct improvements at two of the dams in preparation for drawdown and deconstruction work. Beginning in September 2023, Copco No. 2 Dam in California will be removed. In 2024, the remaining three dams—including J.C. Boyle—will be removed, and restoration activities, which will continue for several years, will begin.

OWEB staff stay in regular communication with KRRC about implementation progress for post-dam removal restoration. Quarterly reports will be provided to the board at each meeting.

Staff Contact

If you have questions or need additional information, contact Renee Davis, Fire, Klamath, and Drought Programs Manager, at renee.davis@oweb.oregon.gov or 971-345-7231.

This report provides the board with an update on the status of OWEB's Post-Fire Recovery and Drought Relief grant programs.

Background

During the 2021 and 2022 Legislative sessions, OWEB received General Fund support for post-fire recovery grant-making. Allocations included $19.75 million in grant funding to address impacts of the 2020 wildfire season and $5 million in grant funding to address impacts of the 2021 wildfire season (in addition to program administration funding to OWEB). During the 2nd Special Session in December of 2021, OWEB received $11.627 million in General Funds to support drought relief grants and grant program administration.

Post-Fire Recovery Grants

Following is a status update for each of the 2020 post-fire recovery allocations:

- $10.75 million for riparian and upland replanting: Four grant cycles have been completed. More than $9.6 million have been awarded or are pending in 17 grants. These grants address priority post-fire recovery needs in 10 2020 fire areas: 242, Almeda, Beachie Creek, Brattain, Echo Mountain, Holiday Farm, Riverside, Slater, South Obenchain, and White River. As an example of progress made under this program, in one project, over 3,000 acres of upland area have been reseeded since receiving grant funding in the Fall of 2022. An additional 500 acres of reseeding is planned for the Spring of 2023, following very beneficial winter precipitation conditions that have allowed for increased natural regeneration and successful plant establishment.
- $5 million for floodplain restoration and reconnection: Four grant cycles have been completed. Approximately $3.9 million have been awarded or are pending in seven grants. These grants address priority post-fire recovery needs in five 2020 fire areas: Almeda, Beachie Creek, Brattain, Holiday Farm, and Indian Creek. As an example of progress made under this grant funding, in one project, riparian site preparation is currently underway to allow for equipment staging and post-implementation replanting. Following completion of final design and permitting, which is expected to occur in the Fall of 2023, instream work to add large wood on over 3 miles of stream is planned for implementation in spring 2024.
- $4 million for restoration and targeted land acquisition to Eugene Water and Electric Board (EWEB): OWEB staff are working with EWEB and local partners such as McKenzie Watershed Council and McKenzie River Trust (MRT), for post-fire restoration and acquisition grant applications, respectively, in the Holiday Farm fire area. One restoration grant cycle has been completed and a $3 million grant awarded. EWEB and MRT currently are completing due diligence for one land acquisition project to reduce post-fire impacts on riparian and floodplain areas.

For the 2021 post-fire recovery funding, two grant cycles have been completed. Just over $4 million have been awarded or are pending in two grants. These grants address priority post-fire recovery needs in three 2021 fire areas: Bootleg, Cougar Peak, and Patton Meadow. Both projects are still in the planning and design phase due to uncertainty in funding extension into the 2023-25 biennium; however, plans for implementation are to occur during the Spring-Summer of 2023.

Drought Relief Grants

General funds provided to OWEB support six categories of drought relief funding. These categories, the total grant funding allocated to each program, and status updates about the programs follow.

- Jefferson County Soil and Water Conservation District (SWCD) received $3,000,000 in grant funding to support stewardship practices on irrigated land that is at high risk for erosion and soil degradation, and to limit proliferation of noxious and invasive weeds. The SWCD held an open application cycle for agricultural producers to apply to receive reimbursement for soil conservation practices that were implemented during July 2021-June 2022. This funding enabled the SWCD to assist agricultural producers who were forced to fallow irrigated agricultural fields due to drought. In September 2022, $2,870,649 was reimbursed to 87 producers; the remainder of the funds went to the Jefferson SWCD for program support. The grant is complete. As a landowner-specific example of program outputs, one producer implemented soil conservation practices such as fallowing, conservation cover, and herbaceous weed treatment on 501 acres. Because this landowner was proactive in implementing soil conservation practices, that producer was reimbursed $71,157.
- The Klamath off-channel livestock watering grant program makes available $2,733,500 to support grants for livestock watering wells and the construction of off-channel water facilities in Klamath County. Three grant cycles are complete, and four grants totaling $2.07 million have been awarded. Access to well drillers continue to be a limiting factor for local partners utilizing this grant program. As an example of how the program supports drought relief, in some of the projects, completing off-channel livestock watering wells is a first step by landowners in addressing additional restoration actions, such as improving irrigation management that will promote drought relief, as well as improving instream and riparian habitat conditions. This funding also complements grants under the Klamath County drought resilience program (see below), through which local stakeholders are hosting quarterly outreach events to inform landowners on potential opportunities to assist with natural resource needs.
- A $1,906,325 grant to North Unit Irrigation District (NUID) supports investments in irrigation modernization projects within the NUID boundary in Jefferson County. This state funding provides non-federal match funding for the longer-term watershed plan developed by NUID for the federal PL 83-566 funding program with the USDA Natural Resources Conservation Service (NRCS). As an example of progress under this grant, final approval by the NRCS Chief of NUID's watershed plan is imminent. Canal lining and piping for the three locations subject to this project are in the planning/design phases and materials are being purchased.
- The Statewide Irrigation Modernization (IM) grant program makes available $1,550,752 to irrigation districts for matching grants to support IM investments. Three grants—two to the Arnold Irrigation District in the Deschutes Basin and one to the East Fork Irrigation District (EFID) in the Hood River Valley—have been awarded, utilizing the full funding allocation. As an example of progress under these grants, the majority of the EFID IM project is completed; installation of pressurized pipe and flow meter has been implemented, and design for the Supervisory Control and Data Acquisition (SCADA) system is anticipated to be installed in March.
- Three grants totaling $850,984 have been awarded under this targeted offering for Drought Resilience Technical Assistance Projects in Jefferson County. The grants support work by NUID, Deschutes River Conservancy, and Jefferson SWCD. Under this funding,

OWEB also developed an agreement with Central Oregon Intergovernmental Council to support coordination and technical activities for the Deschutes Basin Water Collaborative. As an example of progress under these grants, Jefferson SWCD has facilitated five meetings of the project working group in support of developing the long-range plan for drought resiliency. The working group comprises 50+ members including agricultural producers, landowners, irrigation districts, and local, state, and federal agencies. Thus far, more than 30 actions to help lessen drought impacts have been identified, and web-based and video resources are being developed to describe opportunities for agricultural stewardship actions.

- OWEB created two grant offerings for Drought Resiliency Projects in Klamath County: one focusing on Technical Assistance (TA) and Stakeholder Engagement, and a second focusing on on-the-ground "Restoration" activities for drought resilience and water-use reduction. The full funding allocation of $930,770 has been awarded in six grants—three TA and stakeholder engagement and three on-the-ground restoration projects. As two examples of progress under these grants: 1) the Upper Klamath Basin Ag Collaborative (UKBAC) has met with numerous landowners to discuss challenges they have faced under drought conditions. There is an ongoing dialogue between the UKBAC and the Klamath Tribes about how to move forward in unison with restoration projects. Although specific projects have yet to be agreed upon, groundwork for a positive relationship and potential collaboration is being established. 2) The Duncan Hay & Livestock Irrigation Infrastructure project has enabled purchase of two LEPA/LESA pivots and a flowmeter from a local retailer to replace existing wheel lines, and installation is underway. Their grant is serving as a demonstration project at the local Upper Klamath Basin producer listening sessions—hosted by Sustainable Northwest—to inform other producers that support for irrigation efficiency projects is available. In addition, the Energy Trust of Oregon showcased the project as a model of energy and water efficiency in an online article.

Staff Contact

If you have questions or need additional information, contact Renee Davis, Fire, Klamath, and Drought Programs Manager, at Renee.DAVIS@oweb.oregon.gov or 971-345-7231.

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item D

Committee Updates

Board Meeting April 25-26, 2023

April 25-26, 2023, OWEB Board Meeting

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

Committee Members

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

Meeting Summary

OWEB staff updated the committee on its efforts to reach out to non-traditional partners. Staff has committed to engaging with three new non-traditional partners each quarter.

During the last quarter, OWEB staff have connected with the following organizations:

- The Intertwine
- Clean Rivers Collation
- Columbia Riverkeeper
- OSU Center for Small Farms and Community Food Systems
- Albina Vision Trust

Board members discussed the keywords and definitions to be used in the equity statement. OWEB staff will revise the equity statement based on the discussion and share a revised statement with the committee at its next meeting.

OWEB staff updated the committee on the agency's efforts to make the language in OWEB's communication and resources accessible to all Oregonians. Activities include:

- Training for all staff on language from EcoNW
- Plain language document developed by OWEB's Publications Specialist and provided to OWEB staff
- Highlighting definitions and plain language through social media posts
- Regular review of our website and other documents to improve language accessibility

No written or public comment was submitted to the committee.

To Be Presented at the April 2023 Board Meeting by:

Dan Shively

Staff Contact

Courtney Shaff, Monitoring and Reporting Program Manager
courtney.shaff@oweb.oregon.gov or 971-345-7012

April 25-26, 2023, OWEB Board Meeting
Water and Climate Committee Update

Committee Members

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

Meeting Summary

The Water and Climate Committee met on March 15, 2023. Committee co-chair Bruce Buckmaster presented to the committee on voluntary carbon markets. The presentation included an overview of the voluntary carbon market concept and the process of enrolling property in a carbon market, examples of project types, and a summary of program standards, credibility issues and abuses, and emerging developments. Committee members had many questions (e.g., about voluntary carbon markets in general as well as the agency's approach to engagement in these markets) and agreed to continue the discussion on this topic at the next committee meeting.

Board and Legislative Policy Coordinator Eric Hartstein updated the committee on the 2023 Legislative Session, including providing an overview of several bills that have implications for OWEB. Deputy Director Stephanie Page provided an overview of where the agency is at in the budgeting process, including OWEB's planned budget hearing in mid-April.

Board and Legislative Policy Coordinator Eric Hartstein and Water and Climate Programs Coordinator Jessi Kershner updated the committee on the rulemaking process to implement the climate resolution. The rules advisory committee consists of 12 members representing applicants, grantees, review team members, and non-traditional partners. The third rules advisory committee meeting convened on February 10th to review draft climate evaluation criteria, definitions, and grant application guidance. A fourth rules advisory committee meeting was held on April 11th.

Committee members briefly discussed cross-cutting topics from other board committees. The Diversity, Equity, and Inclusion and Environmental Justice Committee discussed the importance of accessibility, and Water and Climate Committee members agreed to add an agenda item to an upcoming meeting on this topic.

Two public comments were received and sent to committee members prior to the meeting; one verbal public comment was shared during the committee meeting.

To Be Presented at the April 2023 Board Meeting by:

Bruce Buckmaster and Jamie McLeod-Skinner

Staff Contact

Stephanie Page, Deputy Director
Stephanie.Page@oweb.oregon.gov or 971-345-7004

April 25-26, 2023, OWEB Board Meeting
Grants Committee Update

Committee Members

Barbara Boyer and Dan Brown (co-chairs), Molly Kile, Liz Agpaoa, Chris Allen, Mark Labhart, Liza Jane McAllister, Lindsay McClary

Meeting Summary

The Grants Committee met on February 6, 2023, and March 21, 2023.

The February 6 meeting was dedicated to addressing the approach to land acquisition grant projects within Focused Investment Partnership (FIP) initiatives. Previous board discussions and outreach with the land trust community focused on addressing land acquisition project reviews for projects that are not included in approved FIP work plans. The land trust community would like the flexibility to take advantage of opportunities for land acquisition that arise unexpectedly within FIP geographies. Like any proposed FIP project, OWEB staff need to confirm that the project aligns with the approved FIP actions within the FIP geography. OWEB also needs to plan for adequate staff and contractor resources to service all applications in a timely manner.

Based on a suggestion from the land trust community, the committee recommended that any proposed land acquisition projects that were not included in approved biennial work plans be vetted by the FIP initiatives technical review team (TRT) to determine whether the proposed project aligns with FIP actions in the approved geography. If the TRT affirms the consistency of the proposed project with FIP actions and geography, then the application would be processed in the same manner as all land acquisition applications. Staff will develop guidance for this process and incorporate the guidance in the Cohort 4 FIP solicitation planned for April 2023.

The March 21 meeting previewed grant programs and awards proposed for discussion at the April board meeting, including:

- Council and District Operating Capacity Funding
- Stage 0 Effectiveness Monitoring
- Oregon Agricultural Heritage Program grants
- Open Solicitation grants

To Be Presented at the October 2022 Board Meeting by:

Dan Brown and Barbara Boyer

Staff Contact

Eric Williams, Grant Program Manager
eric.williams@oweb.oregon.gov or 971-345-7014

OREGON
WATERSHED
ENHANCEMENT BOARD

Agenda Items E and K

General Public Comment

Board Meeting April 25-26, 2023

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March 13th, 2023

To the current office of OWEB Board of Directors,

The North Coast Watersheds Partnership (NCWP) is a collaborative agreement between five north coast Watershed Councils (Lower Nehalem (LNWC), Upper Nehalem (UNWC), Necanicum (NWC), North Coast (NCWA), Nestucca-Neskowin-Sand Lake (NNSLWC)) and the Tillamook Estuaries Partnership (TEP). The NCWP has recently become aware of questions pertaining to the relevance or importance that OWEB's Council Capacity grants carry with respect to restoration activities in the state of Oregon which were posed by OWEB Board Directors at the January OWEB Board Meeting.

This letter is respectfully presented to the OWEB Board of Directors , on behalf of this collaborative partnership, concerning the critical importance of Council Capacity funding.

Watershed Councils are essential organizations that are able to bridge industrial, socioeconomic, cultural, and strategic divides within their very focussed geographic areas. Watershed Councils are able to invest dollars directly into the local economy, build core partnerships with tribal and other Justice, Equity, Diversity and Inclusion centric demographics and foster dynamic partnerships aimed at increasing ecological and economic resiliency as a whole. With funding for operational capacity, Watershed Councils are able to invest time and effort into building restoration programming that can improve conditions for our most underserved and vulnerable communities. *Restoration is a comprehensive effort that takes not only technical planning and project implementation, but community engagement, especially in rural Oregon.*

The Watershed Council system that Oregon utilizes allows for hyper-localized approaches to habitat enhancement and restoration. As Directors of Watershed Councils, and organizations that provide substantial support to watershed restoration efforts, such as TEP, the ability to operate with fine resolution at a community level is of the utmost importance, not just to restoration itself, but to ensuring that ***community*** is invested in long-term restorative efforts. Council Capacity funding allows Watershed Council Directors to commit vital time to strengthening partnerships with local landowners - in turn leading to more restored habitat, crafting restoration projects throughout each basin - completing boots-on-the-ground habitat enhancements and ensuring that the organizational ***foundation*** necessary to take on restoration projects is on sound footing - allowing Watershed Councils to effectively plan restoration efforts for multi-year periods.

It is without question that OWEB Council Capacity funding has *direct* and *observable* impacts on the ground. An absence of Council Capacity dollars to support administration, management, and project development would instigate a cascading effect downward within these small non-profit organizations that already struggle immensely with internal operational capacity. It is as simple as this: *OWEB's Council Capacity grants are what allows Watershed Councils to put pen to paper on planning restoration*. As a

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collaborative unit, we see *no* upside to reducing or pulling Council Capacity grants. In fact, we'd strongly recommend increasing the available dollars for Capacity funding to allow organizations to reach the internal operational capacity necessary to address restoration needs throughout the state.

We thank you for your time and efforts in helping us to nurture an ecologically and economically sound future upon which all Oregonians may rely.

Sincerely,

Zac Mallon
Lower Nehalem Watershed Council

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Maggie Peyton
Upper Nehalem Watershed Council

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Maggie Peyton
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Noah Dolinajec
Necanicum Watershed Council

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Graham Klag
North Coast Watershed Association

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Dave Shively
Nestucca, Neskowin and Sand Lake Watershed Council

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Dave Shively
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Kristi Foster
Tillamook Estuaries Partnership

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OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item F

Land Acquisition Grant Awards

Public Comment

Board Meeting April 25-26, 2023

BETTINARDI Nicole * OWEB

From: Duane Grant
Sent: Friday, April 14, 2023 5:10 PM
To: BETTINARDI Nicole * OWEB
Subject: Comment regarding Oregon Desert Land Trust (ODLT) working relation with PMLC

Follow Up Flag: Follow up
Flag Status: Flagged

Dear OWEB,

We are writing as we understand Oregon Desert Land Trust (ODLT) has an application currently pending for OWEB funding. Please accept this comment regarding ODLT.

We are owners and operators of Pueblo Mountain Land Company, LLC (PMLC) and its operating entity, Pueblo Mountain Farm and Ranch LLC. We have owned and operated farm and ranch property in the Fields, OR area since 2014.

PMLC sold its “Trout Creek Ranch” to the Oregon Desert Land Trust in July 2021. We retained farm property adjoining Trout Creek Ranch, and remain a neighbor to the property. We also hold water rights for flows derived from the Trout Creek stream for diversion and use downstream from the area of the proposed OWEB conservation easement.

Our dealings with the Oregon Desert Land Trust, both on the sales transaction and then as neighbors with ongoing business, have been transparent, cordial and professional. In our experience, ODLT has been clear about its goals and has always done what it said it would do.

We understand that ODLT's plans for improving wildlife habitat in Trout Creek Ranch's wet meadows will be fleshed out over the next 1-2 years. The exact implications of any similar proposal may be challenging to predict with precise certainty, and it seems likely that incremental plan modifications may need to be made as thinking matures. But despite the uncertainty regarding their restoration plans, based on our past relationship and ODLT’s commitment to the viability of the Trout Creek basin, we're confident ODLT will continue to work closely with us to identify and address any potential impacts their plans might have on our water rights.

Thank you for accepting this comment, and we would be happy to discuss our perspective via the phone if needed. I may be reached at 208-431-0006.

GRANT 4D FARMS
Duane R. Grant | President
c: 208.431.0006
o: 208.531.5149
e: duane@grant4dfarms.com

From:
To: WILLIAMS Eric * OWEB
Subject: Property SE of Fields
Date: Saturday, October 29, 2022 7:17:41 PM

Attn: Eric Williams,

I am heartily in favor of a grant to Oregon Desert Land Trust to promote ability and action to restore some of this degraded land to have value for wildlife.

Please consider the history they have with desert lands and the work they do with locals in a partnership for the land. I would be strongly in favor of restoration without any presence of cows, cattle, heavy grazing.

Thank you for inviting comment. I am a birdwatcher and find that area to be very special. I have experienced the changes in that area related to drought and warming climate. Enhancing the watershed is an excellent action to support for wildlife in the area.

Judy Meredith, 63460 Bridle Lane, Bend, Oregon, 97703.

BETTINARDI Nicole * OWEB

From:
Sent: Friday, April 14, 2023 11:53 AM
To: BETTINARDI Nicole * OWEB
Subject: ODLT comment and support

Dear OWEB,

I'm writing to comment on the Oregon Desert Land Trust's application for OWEB funding for Trout Creek Ranch.

My family homesteaded in Harney County and I still maintain the original homestead which my husband and I restored in 2000. I am currently a member of the board of Leupold & Stevens Inc. and active in the area through various organizations such as the Harney County Arts in Education Foundation and the Friends of Malheur Refuge.

I am familiar with the ranch property and the natural resources of the Trout Creek and Pueblo Mountains and the Pueblo Valley. This is an area of remarkable diversity for plants and wildlife and some of the most undisturbed habitat in Oregon. It is also an important stop for many birds using the Pacific Flyway. I am excited about the Land Trust's plans to work with ranchers, Tribes and others to protect, restore, and enhance these resources.

Thank you for allowing me to comment on the Trout Creek Ranch project.

Linda Neale
PO Box 3015
Princeton, OR

Harney County Watershed Council

242 Hwy 20 South
PO Box 1289
Hines, OR 97738

Phone: 541-573-2000
email: HCwatershedcouncil@gmail.com
website: hcwatershedcouncil.com

March, 21, 2023

OWEB board and Staff

RE: Trout Creek Meadows Land Acquisition Easement application by Oregon Desert Land Trust

The Harney County Watershed Council would like to submit these comments in regard to the proposed application #223-9900-22451 Trout Creek Meadows Land Acquisition application.

The Oregon Desert Land Trust i(OLDT) is embarking on a very large project with good intentions of protecting and restoring a large area for wildlife habitat. While they have great aspirations and intentions, it is a very large undertaking to which they admit that they have little experience.

Trout Creek Ranch/Trout Creek Meadows, has been in their possession for one and one half years, but within the application they state that they have yet to complete inventory or monitoring for required plans of this application. At the time of the application, ODLT has not yet established a stewardship fund as required by the Acquisition program. The applicant does not have a succession strategy for the future and has a very new policy and procedures document. Development of a strategic plan and an accompanying conservation plan to replace the Principles and Guidelines has not been started "as of yet". They have no established record of conservation success at this location.

The grant application also suggests greater endorsement for ODLT Trout Creek from local ranches than may actually be the case. "We believe we have strong support in the local community", however, very little evidence is provided in the grant application to support this claim, other than by those who are participating through leases.

Council members expressed concern and suggested caution at this early stage for a significant investment, Harney County Watershed Council members feel it may be prudent to postpone this investment until these plans are further developed, or perhaps this would better fit with the Oregon Agricultural Heritage program. Assuring that meadows stay in a "working" state would do much to alleviate fears of the local community.

At this point in time, we believe that ODLT's intentions are good, but would like to see more established plans before an investment is made.

Sincerely,

Karen Moon

Harney County Watershed Council

BETTINARDI Nicole * OWEB

From: Bob Bourland
Sent: Wednesday, April 19, 2023 11:46 AM
To: BETTINARDI Nicole * OWEB
Cc: Brent Fenty; riley@archerypast.com
Subject: Oregon Desert Land Trust Application for OWEB funding

Dear OWEB,
I'm writing to comment on the Oregon Desert Land Trust's application for OWEB funding for Trout Creek Ranch.

I have been in communication with the Oregon Desert Land Trust about their Trout Creek Ranch project. The public lands in this area are important to hunters in Oregon. They are extremely important to us as Traditional Bowhunters who have this area set aside as a primitive archery area. Changes in private land ownership can sometimes make surrounding public lands less accessible to hunters and other recreationists. I am excited about ODLT's commitment to protecting public access while not encouraging improvements or uses that would degrade the wildness and solitude that makes this area special. I also look forward to habitat improvements that will benefit both game and non-game wildlife in the area, including improving habitat in the lower Trout Creek Meadows in connection with OWEB.

Thank you for the opportunity to comment.
Bob Bourland
Field Governor-Traditional Archers of Oregon
Hunt Committee Chairman-Compton Traditional Bowhunters

BETTINARDI Nicole * OWEB

From: Carol Dunten
Sent: Friday, April 7, 2023 3:52 PM
To: WILLIAMS Eric * OWEB
Subject: OWEB grant to ODLT to purchase Trout CreekRanch

Dear Mr. Williams,

As a Harney County landowners, we do not support OWEB's plan to grant money to the Oregon Desert Land Trust to purchase part of the Trout Creek Ranch on the Trout Creek drainage.

As we stated to Representative Mark Owens, we do not support granting public funds to ODLT to purchase land in competition with private citizens. If a private citizen needs funds to purchase land, one must take out a loan and repay it with interest. Any entity, including ODLT and ONDA should have to do the same. It is unfair to Oregonians that Lottery funds would be granted to non-profit groups to buy land, especially considering this is such a huge tract of land.

As stated in the ODLT project summary, ODLT would be giving OWEB a conservation easement to make wildlife habitat the driving consideration in management of the property's wet meadows and five miles of Trout Creek. This would impact all irrigators on Trout Creek. In our high desert, water is our source of livelihood. This could be adding to the expense and difficulty of survival for the neighboring ranchers.

Have the social and economic impacts on this community and Harney County been thoroughly studied on this project? Even though ODLT states the plan incorporates "working lands practices", this land will not produce agricultural commodities that support the food supply of our country as it has historically done. The Nature Conservancy has changed the definition of "working lands" with a shift toward selling carbon credits, hunting, solar power and recreation to produce a return for investors. These are not all bad, but the plan may be a bit deceiving.

An interesting sidelight by one of the proponents of the project at the Fields hearing was that she would be happy to see the land "returned to a natural wetland". Has the lack of water in the Fields/Andrews area been considered in presenting the plan to the public for support? Where could ODLT/ ONDA get the water to "restore" a wetland and fill Alvord Lake?

Thank you for inviting and reviewing public comments.

Respectfully,

Turen A. Dunten
Carol A. Dunten

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item H

Open Solicitation Grant Awards

Public Comment

Board Meeting April 25-26, 2023

Cerro Gordo Land Conservancy
P.O. Box 192
Cottage Grove, OR 97424

April 17th, 2023

Lisa Charpilloz Hanson, Eric Williams, & The OWEB Board of Directors
775 Summer Street NE, #360
Salem, OR 97301

OWEB Grant Application #223-3003-22519; "Cerro Gordo Prairie and Oak Restoration Phase 1"

Dear Ms. Charpilloz Hanson, Mr. Williams, and Members of the Board,

Thank you for the opportunity to offer further comments in support of our application to perform meaningful and timely upland oak and prairie restoration at Cerro Gordo. We are pleased that the OWEB Review Team and Staff have recommended full funding of our project.

Since 1974, the community at Cerro Gordo has diligently worked to steward over 979 acres of oak, prairie, and conifer habitat. These efforts resulted in 532 acres becoming permanently protected by a WWMP easement held by McKenzie River Trust in 2019. Cerro Gordo hosts an uncharacteristically high number of native species, including several rare and threatened species. Almost half of the documented plants on the property are associated with oak and prairie habitats. This OWEB grant would fund the 157-acre first phase project of work to remove encroaching conifer from critical prairie and oak habitat, restore connectivity between prairie systems, treat primarily non-native blackberries in the understory, and serve as a crucial stepping stone to reintroducing fire as a maintenance tool at Cerro Gordo.

Through the project development process, we have carefully assembled a strategic coalition of partners, supporters, and practitioners to provide match funding (in addition to what Cerro Gordo Land Conservancy has already committed) and undertake the work. This group has coalesced around our OWEB application now, which is the crucial linchpin to our success. Following the proposed OWEB-funded restoration, maintenance of the restored habitat will be supported by secured WWMP stewardship funds.

We thank you in advance for your time and consideration, and hope that you will join our efforts to restore at-risk habitat of the southern Willamette Valley at Cerro Gordo.

Sincerely,

Jim Stevenson
Board President, Cerro Gordo Land Conservancy

Shane Hetzler, MF
Project Manager, Trout Mountain Forestry

Glenn and Gibson Creeks Watershed Council 2308 Ptarmigan St. NW, Salem, OR 97304

April 13, 2023

Oregon Watershed Enhancement Board
775 Summer St NE #360
Salem OR 97301

RE: Grant Application 223-3013-22518

Dear Board Members:

The application submitted by the Glenn Gibson Creek Watershed Council in cooperation with the City of Salem is not recommended for funding. The council will continue working with the City of Salem to revise and resubmit an application that addresses the review comments. There were essentially three concerns identified by the review committee, budget clarification, data acquisition clarification, and adoption of the plan by the City of Salem City Council.

Budget allocation concerns
The review has raised concern about the amount of time and cost associated with GIS services. We will clarify the budget and have been working to focus on the costs for effective development of the plan and other products in a resubmittal. The review comments on this element are well considered.

Data development

The question about data to be included will be better specified. A list of GIS data layers and use of the data can be specified. The review suggested including the Oregon Conservation Strategy. The Salem area is partially within Conservation Opportunity Area 60 (Middle Willamette Floodplain) that covers the Willamette River area from Albany to Newberg. This area and the strategy species and strategy habitats are too general to be useful in a Floodplain Species Assessment. Additionally, the COA 60 does not include the floodplains of the tributary streams to the Willamette through Salem.

The Floodplain Species Assessment proposal is to identify specific locations within the City of Salem floodplains that support sensitive species. The Oregon Conservation Strategy is at a statewide scale and does not provide anything but a broad context for the more detailed work proposed. This concern can easily be clarified in a resubmittal.

City Adoption

The most concerning comment is: "uncertain that the Floodplain Species Assessment and Natural Floodplain Functions Plan will be adopted and used by the City of Salem". During the conversation with the review team both the applicant and the City of Salem staff were clear that while the project was supported by senior staff and supported by funding from the City, it was inappropriate to promise what an independent elected body might do. We did explain that the current City Council was very favorably

inclined to address environmental issues. We can describe the advantage to the City and flood insurance rates that can be gained from plan adoption as well as how Community Rating System credits (the federal approach to set flood insurance rates based on local government actions) can be received for some of the products even without City Council adopting the Plan.

If the criteria for approval of funding requires a commitment from an elected body to approve of an undeveloped plan, there is no need to apply. We need clarity on whether assurance of adoption of an unwritten plan is a necessary precondition for funding. We can not overcome the "uncertainty of adoption" that seems to be a major issue. We believe it is an impossible hurdle. I am sure the OWEB Board would not commit to approve a funding plan that staff has not developed yet.

If we can get clarity on the review standard for attempting to develop a tool for Salem that has not been attempted by any other community in Oregon we would be willing to address other concerns, but if the standard remains that certainty about adoption by an elected body is required we can not proceed in good faith.

It is with a sense of irony that at the same time this application review was prepared and developed FEMA published a Notice of Intent to Prepare an Environmental Impact Statement for Oregon for the implementation of the plan for National Flood Insurance Program (NFIP)—Endangered Species Act (ESA) Integration in Oregon (March 6, 2023). The proposed EIS will consider the adoption of standards for local communities **to be required** to address the ESA listed species in flood zones. The proposed development of a Floodplain Species Assessment and Natural Floodplain Functions Plan for Salem would demonstrate a voluntary approach that could be a model for other communities.

Thank you for your consideration. We would appreciate a clear response about the expectations for approval by the City before we are able to determine if it is advisable to resubmit a revised application.

Sincerely,

Kenneth F. Bierly

Kenneth Bierly, Chair

c. Jennifer Mongolo, City of Salem

LONG TOM
WATERSHED COUNCIL

Action
Through
Understanding

Board of Directors

Jamie Newsome, *Co-Chair*
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Amanda Reinholtz

33 E 27th Ave
Eugene, OR 97405
541-654-8965
www.longtom.org

April 20, 2023

Lisa Charpilloz-Hanson, Eric Williams, and OWEB Directors
775 Summer St NE. Suite 360
Salem, OR 97301

RE: Pending Restoration Applications **#223-3012** (Lower Upper Long Tom Oak-Prairie Ecocultural Restoration) **and #223-3009** (Cassidy Ranch Oak Restoration and Stream Enhancement)

Dear Lisa, Eric, and Members of the Board,

Thank you for the opportunity to comment on the importance and potential funding of two LTWC pending open solicitation restoration project applications. We are respectfully submitting this letter in support of OWEB staff's decision to shift OWEB funding from other grant categories to restoration in order to fund our Lower Upper Long Tom Eco-Cultural Oak-Prairie Restoration Project (#223-3012). Additionally, we would also like to request that the Board and Staff consider shifting additional end-of-biennium funds to the restoration grant category, so that our other project, the Cassidy Ranch Oak Restoration and Stream Enhancement (#223-3009) receives funding.

Lower Upper Long Tom Oak-Prairie Ecocultural Restoration (#223-3012)

We thank OWEB staff for considering shifting funds from other grant categories to restoration in order for this important project to receive funds, and strongly encourage the board to approve this shift. This project is a high priority for LTWC for a variety of reasons. It is located in an ODFW conservation opportunity area, in a hub of other interested landowners adjacent to the Oregon Country Fair site, and will benefit a wide variety of Oregon Conservation Strategy species. The landowner is a long-time watershed council member who has successfully implemented smaller habitat restoration projects on his property and is highly motivated to implement large-scale habitat restoration as part of the proposed project. The 276-acre property, in the fourth generation of his family's ownership, has largely been managed for grazing and forestry, but the landowner is now retired and strongly desires converting and managing significant areas of the property for important oak, prairie, and floodplain habitat. The restoration project is aligned with a pending, companion TA proposal (#223-3015) that is recommended for funding and will explore exciting, process-based, floodplain restoration on the property; the

combined project has significant secured match from the Bureau of Land Management's Secure Rural Schools Title II program. The pending restoration application successfully addressed concerns raised by the RRT from its original submittal in spring 2022, and LTWC has been developing the proposed work with the landowner for 5+ years. If we cannot secure these funds for restoration on the property now we will lose momentum with the landowner and we risk him losing faith in our ability to bring resources to priority projects in our watershed in a timely fashion. Finally, and most importantly, this project is located in an area of extremely high importance to native Kalapuya people and will prioritize reconnecting members of the Tribal community to the land through the return of cultural fire (as part of the Willamette Valley Fire Collaboration) as well as through developing a plan for Tribal members to resume harvesting activities on the land. This component of the project will help develop a process for similar Tribal involvement in other restoration projects in the Long Tom Watershed. We urge you to support OWEB staff's recommendation to provide funding for this project.

Cassidy Ranch Oak Restoration and Stream Enhancement (#223-3009)

The application was selected for funding by the RRT but is the first one below the current staff recommended funding line. We have the utmost respect for the tough decisions OWEB staff and regional review teams have to make in their evaluation of applications and subsequent rankings, but are writing with the hope that the board considers moving additional funding remaining at the end of the biennium in other categories to restoration so that this important, cost-effective, highly leveraged project can be implemented in a timely manner. While this project didn't rank at the top of the list for the RRT, it is a high priority for LTWC in our service area, and will accomplish a wide variety of important, local, ecological goals in this part of the Long Tom Watershed, in the spirit of the Oregon Plan for Salmon and Watersheds.

The application would fund oak, prairie, and stream restoration on private property in the Coyote Creek Sub-watershed. The project site builds on and adds to the impact of similar, significant work that was funded by OWEB (#214-3058) and completed by LTWC on an adjacent private property. That site is home to the southernmost population of ESA-listed Kincaid's lupine in the Willamette Valley, and the proposed work could help expand the range of that population over time. The landowner is extremely motivated and has enrolled in the Natural Resource Conservation Service (NRCS) Environmental Quality Incentive Program (EQIP), which will provide significant match for the requested OWEB funds. Importantly, the landowner has an active EQIP contract, and the work under that contract must be completed over the next two years, amplifying the need for OWEB funds to be awarded to the project now.

Also of note, the project will help build the body of knowledge of using alternatives to herbicide in oak and prairie habitat restoration, as the landowner desires to not use any herbicides on the property. The use of goats and sheep as a management tool for non-native, invasive plants in oak and prairie habitat will be explored and monitored in partnership with Oregon State University and with the support of an NRCS Conservation Innovation Grant. There is a sharply increasing movement among landowners in the Long Tom Watershed to develop non-herbicide habitat

restoration techniques, and monitoring the effectiveness of and refining these techniques will increase equity and bring more landowners to the watershed restoration table. Connecting a highly motivated landowner interested in environmentally-friendly restoration techniques with rigorous monitoring will help leverage OWEB funds to move forward the standards of practice in oak and prairie restoration. Additionally, the project will utilize low-tech, process-based stream restoration techniques to improve stream habitat and reconnect Jackson Creek to its floodplain. Similar to the alternatives to herbicide proposed to be used in the oak restoration components of the project, these techniques will offer a unique opportunity to demonstrate effective, newer methodologies that LTWC and other landowners in this part of the watershed will be able to learn from and use to expand the restoration toolbox and increase landowner participation moving forward. We strongly encourage the Board to consider shifting some of the $1.5M in remaining 21-23 biennium funds from other grant categories to restoration so this important local project can be funded.

Thank you for considering our requests. Please feel free to contact us with any questions.

Stephen Dear
Executive Director
coordinator@longtom.org

Abby Colehour
Uplands Program Manager
abby@longtom.org

Rob Hoshaw
Operations Director
operations@longtom.org

National Forest Foundation

Building 27, Suite 3, Fort Missoula Road
Missoula, Montana 59804
TEL 406.542.2805
nationalforests.org

April 18, 2023

OWEB Board
Attention: Nicole Bettinardi
Oregon Watershed Enhancement Board
775 Summer St. NE Suite 360
Salem, OR 97301

RE: 223-2005-22534 Copeland Creek Priority Watershed Protection

Dear OWEB Board Members,

Thank you for the opportunity to provide comment to the Board. I am writing to you about the National Forest Foundation's restoration application for Copeland Creek Priority Watershed Protection (223-2005-22534). I am the project manager for this project and would like to encourage you to fund this project. The project is ready to go with completed NEPA and secured match.

Protecting the water quality of Copeland Creek and the North Umpqua River via hydrologic storage and closure of 12 miles of roads is extremely urgent. These roads have not been properly maintained in years and the culverts are undersized and in poor condition. The roads and culverts within the project area are basically ticking sediment time bombs in the Copeland Creek Priority Watershed. It is extremely important that we address these issues before road-associated landslides occur and before the culverts clog and blow out, sending high sediment loads into Copeland Creek and then downstream into the North Umpqua River. This work is especially urgent now that much of the steep North Umpqua River canyon burned in 2020 and 2021 during the Archie Creek and Jack Fires. Those burned areas are now more prone to landslides, thus adding more potential sediment sources to the North Umpqua River.

Copeland Creek provides critical habitat to Oregon Coast coho salmon (federally threatened), spring Chinook (state sensitive species), summer steelhead (federal species of concern), winter steelhead, cutthroat trout, Pacific lamprey (federal species of concern), and other native fish and aquatic species. The North Umpqua provides drinking water to Glide, Roseburg, and many other smaller drinking water providers and rural residents.

Please let me know if you have any questions about this project. Thank you for considering this request.

Sincerely,

Audrey Squires
Umpqua Restoration Program Coordinator
National Forest Foundation
asquires@nationalforests.org

CONFEDERATED TRIBES OF
COOS LOWER UMPQUA AND SIUSLAW INDIANS
TRIBAL GOVERNMENT OFFICES
1245 Fulton Ave. • Coos Bay, OR 97420 • (541) 888-9577•1-888-280-0726
General Office Fax: (541) 888-2853 • Administration Fax: (541) 888-0302

April 17, 2023

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

RE: OWEB Restoration Application #223-2000-22482
Project Title: Benson Creek Wetland Restoration

Dear Oregon Watershed Enhancement Board members:

The Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians ("CTCLUSI") strongly supports the Tenmile Lakes Basin Partnership's ("TLBP") grant application for restoration of the freshwater emergent wetlands in Benson Creek. The proposal addresses multiple habitat and water quality priorities to help protect and restore beneficial uses such as habitat for aquatic organisms, domestic water supply, and water contact recreation. TLBP have dedicated significant time and effort to date in development of a restoration design and have the expertise to successfully manage these projects in collaboration with CTCLUSI and other partners. TLBP's application reflects this experience and we support this proposal.

Specifically, the project will restore 16-acres of degraded wetlands back to high-functioning freshwater emergent habitat for aquatic species, pollinators and other wildlife. Due to short-sighted land use practices of the 19th and 20th centuries, quality riparian wetlands are exceedingly rare in the tributaries flowing into Tenmile Lakes such as Benson Creek. Furthermore, today Benson Creek yields exceedingly high sediment loads to the lake, which exacerbates the Harmful Algal Blooms that threaten people and animals who have relied on this natural resource for thousands of years.

CTCLUSI supports the TLBP's long-term goal of Tribal leadership in restoration, maintenance and monitoring efforts on this and other wetland restoration projects in Tenmile Lakes Basin. We have great interest in participating in the restoration of these landscapes in the CTCLUSI Ancestral Territory in order to protect salmon and lamprey, and the wetland plant species traditionally utilized for food, fiber, and medicine.

The TLBP is one of CTCLUSI's primary local partners in the Tenmile Lakes Basin and continues to successfully implement a wide variety of water quality monitoring and watershed enhancement projects. The ecological uplift generated from this work will be vital in restoring habitat and water quality conditions in relation to Oregon's and CTCLUSI's water quality criteria, the Oregon Plan for Salmon and Watersheds, and the CTCLUSI Wetlands Plan and Tribal Environmental Plan. The TLBP's exceptional work reflects the organization's expertise and leadership in implementing watershed improvement projects.

Sincerely,



Brad Kneaper, Chair
Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians

cc: Dennis Sargent, Vice-Chair
Tenmile Lakes Basin Partnership

BOARD OF COMMISSIONERS
225 N. Adams Street, Coquille, Oregon 97423

(541) 396-7535
FAX (541) 396-1010 / TDD (800) 735-2900
E-mail: bbrooks@co.coos.or.us

ROBERT "BOB" MAIN JOHN SWEET ROD TAYLOR

April 18, 2023

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

RE: OWEB Restoration Application #223-2000-22482
Project Title: Benson Creek Wetland Restoration

Dear Oregon Watershed Enhancement Board members,

We are writing to you in support of the Benson Creek Wetland Restoration Project and why it's important to fund and complete this important native fishery and water quality restoration project now.

With the Benson Creek Project, sixteen acres of agricultural land will be restored to a functioning wetland, improving water quality and habitat for native fish and wildlife species. Wetland ecosystems are now exceedingly rare in the Tenmile watershed, with less than 1% remaining. Restoring wetland habitat in places like Benson Creek is a high priority for achieving TMDL and Watershed Restoration plan goals in Tenmile basin. A diversity of partners supports the project, including Coos County, Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians (CTCLUSI), Oregon Department of Fish and Wildlife, the Department of Environmental Quality, Porior Engineering, and Lone Rock Timber. A long-term goal is to give CTCLUSI a leadership role in future management of restoration and monitoring efforts.

The OWER Review Team has limited concerns with our engineered channels and planting plan. Those concerns have been addressed. We urge the Board to find funding and to help Partners implement The Benson Creek Wetland Restoration Project.

The Benson Creek Wetland Restoration project has:
1) Match Funding from OOFQ, ODFW, and National Fish and Wildlife Foundation is secured.
2) Long term Landowner Agreement and commitments with Lone Rock Resources is completed.
3) Project Partner commitments are completed.
4) Benson Creek Wetland Restoration Project is shovel ready.
5) Delays will result in cost over runs with construction of project.

Sincerely,

Robert "Bob" Main
Chair

John W. Sweet
Commissioner

Rod Taylor
Commissioner

Coos County is an Affirmative Action/Equal Opportunity Employer and complies with section 504 of the Rehabilitation Act of 1973

Oregon
Tina Kotek, Governor

Department of Land Conservation and Development
Oregon Coastal Management Program
810 SW Alder Street, Suite B
Newport, OR 97365
www.oregon.gov/LCD

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

RE: **OWEB Restoration Application #223-2000-22482**
Project Title: Benson Creek Wetland Restoration

Dear Oregon Watershed Enhancement Board Members,

I write you in strong support of the Benson Creek Wetland Restoration Project. I implore you to fund the completion of this critical native fishery and water quality restoration project, as wetland ecosystems are becoming exceedingly rare in the Tenmile watershed with less than 1% remaining.

With the Benson Creek Project, sixteen acres of agricultural land will be restored to a functioning wetland, improving water quality and habitat for native fish and wildlife species. Restoring wetland habitat in places like Benson Creek is a high priority for achieving TMDL and Watershed Restoration plan goals in Tenmile basin. In addition, the downstream City of Lakeside will benefit during flood events from more flood storage with functioning wetlands upstream along Benson Creek.

A diversity of partners supports the project, including Coos County, Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians (CTCLUSI), Oregon Department of Fish and Wildlife, the Department of Environmental Quality, Department of Land Conservation and Development, Porior Engineering, and Lone Rock Timber. A long-term goal is for CTCLUSI to be the lead in future management of restoration and monitoring efforts.

I urge the Board to allocate funding and help Partners implement the Benson Creek Wetland Restoration Project. Funding is necessary now as this project has:

1) Secured Match Funding from ODEQ, ODFW, and National Fish and Wildlife Foundation.
2) Completed Long term Landowner Agreement and commitments with Lone Rock Resources.
3) Completed Project Partner commitments.
4) Shovel-ready Benson Creek Wetland Restoration Project.

Without OWEB's funding, delays will result in cost over runs for the construction portion of the project.

Pretty please?

Respectfully Submitted,

Hui Rodomsky
South Coast Regional Representative
Oregon Department of Land Conservation and Development

Oregon
Tina Kotek, Governor

Department of Fish and Wildlife
Charleston Field Office
63538 Boat Basin Road
Charleston, OR 97420
Phone (541)-888-5515
FAX (541) 888-6860

4-14-2023

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

RE: OWEB Restoration Application #223-2000-22482
Project Title: Benson Creek Wetland Restoration

To the Oregon Watershed Enhancement Board:

I am writing to you in support of the Benson Creek Wetland Restoration Project and why it's important to fund and complete this important native fishery and water quality restoration project now.

With the Benson Creek Project, sixteen acres of agricultural land will be restored to a functioning wetland, improving water quality and habitat for native fish and wildlife species. Historically, most of the wetlands at the confluence of the Tenmile Lake arms and the streams entering the lakes were converted to pastureland, often disconnecting the stream from its lower floodplain. Wetland ecosystems are now exceedingly rare in the Tenmile watershed with less than 1% remaining. Restoring wetland habitat in places like Benson Creek is a high priority for achieving TMDL and Watershed Restoration Plan goals in Tenmile Basin. A diversity of partners support the project, including Coos County; Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians (CTCLUSI); Oregon Department of Fish and Wildlife; the Department of Environmental Quality; Porior Engineering; and the landowner—Lone Rock Timber. A long-term goal is to give CTCLUSI a leadership role in future management of restoration and monitoring efforts.

OWEB Review Team concerns with channel design will be addressed after topographic surveys more accurately delineate elevations. Likewise, the planting plan will be adaptive to native flora and fauna resources.

Although the project fell below the staff-recommended funding line, based on available funds at the time of review, it is our understanding that additional funds may have been located to put into Restoration Category projects. I urge the Board to find funding and help partners implement the Benson Creek Wetland Restoration Project. Funding at this time will help leverage secured match funding, solidify commitments and avoid additional costs:

1) Match Funding from ODEQ, ODFW, and National Fish and Wildlife Foundation are secured.
2) Long-term Landowner Agreement and commitments from Lone Rock Resources are completed.
3) Project Partner commitments are completed.
4) Benson Creek Wetland Restoration Project is shovel ready.
5) Delays will result in cost over-runs with construction of project.

Oregon
Tina Kotek, Governor

Department of Fish and Wildlife
Charleston Field Office
63538 Boat Basin Road
Charleston, OR 97420
Phone (541)-888-5515
FAX (541) 888-6860

Thank you for consideration of this request.

Respectfully Submitted,

Michael E. Gray
District Fish Biologist
Coos-Coquille-Tenmile Fish District

Cc: Mike Mader, Executive Director/TLBP
Sara Gregory, ODFW/Umpqua Watershed District Manager/Roseburg
Ed Hughes, ODFW/Western OR Stream Restoration Biologist/Charleston

4-11-2023

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

RE: OWEB Restoration Application #223-2000-22482
Project Title: Benson Creek Wetland Restoration

Dear Oregon Watershed Enhancement Boardmembers.

I am the President of the Tenmile Lakes Association which represents the 440 Lakefront Owners on the shores of Tenmile Lakes. I writing to you in support of the Benson Creek Wetland Restoration Project. Combined, North and South Lake are the 5th most used Lakes in Oregon. The Lakes have toxic algae blooms and excessive weed growth, impacting our use of the Lakes. Our current science points out that restoring wetlands adjacent to the Lakes will make dramatic improvements to our water quality and native Coho salmon runs.

With the TLBP Benson Creek Project, sixteen acres of agricultural land will be restored to a functioning wetland, improving water quality and habitat for native fish and wildlife species. Wetland ecosystems are now exceedingly rare in the Tenmile watershed with less than 1% remaining. Restoring wetland habitat in places like Benson Creek is a high priority for achieving TMDL and Watershed Restoration plan goals in Tenmile basin. A diversity of partners supports the project, including Coos County, Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians (CTCLUSI), Oregon Department of Fish and Wildlife, the Department of Environmental Quality, Porior Engineering, and Lone Rock Timber. A long-term goal is to give CTCLUSI a leadership role in future management of restoration and monitoring efforts.

I urge the Board to find funding and help our Partners implement the Benson Creek Wetland Restoration Project. Funding will make long term improvements to our beautiful Lake system here in Lakeside Oregon.

Respectfully Submitted,

Alan Whitney
Tenmile Lakes Association, President

WILLAMETTE PARTNERSHIP

Oregon Watershed Enhancement Board
Restoration Grants Selection Committee

Dear OWEB Members,

It's my distinct pleasure to recommend and fully support Tenmile Lakes Basin Partnership's (TLBP) application for the Benson Creek Watershed Restoration Project.

Willamette Partnership has been working alongside TLBP and partners in the Tenmile Lakes area for close to two years now. This unique landscape provides a myriad of benefits, from premiere juvenile coho salmon habitat and filtration wetlands, to drinking water and recreational opportunities for nearby communities. The Lakes are also of utmost importance to the Confederated Tribes of the Coos, Lower Umpqua, and Siuslaw Indians (CTCLUSI), who are close partners in this restoration project.

TLBP has spent years building authentic, trust-based relationships with the variety of partners required to collaboratively implement this project, and we're especially excited that CTCLUSI will benefit not just from the restoration of a culturally important landscape, but also from inheriting the management and monitoring of this place. The 16 acres of restored wetlands will provide myriad health, environmental and economic benefits to the Tribe and surrounding community, and this is an important first step toward a full-scale restoration of the watershed to ensure that coho, humans, and more can enjoy the Lakes for generations to come.

I wholeheartedly recommend that OWEB support this grant request and promise that WP will continue to be involved partners as the effort moves forward.

Sincerely,



Barton Robison, Program Director
Willamette Partnership
robison@willamettepartnership.org

TENMILE LAKES' BASIN PARTNERSHIP
200 North 8th St.*LAKESIDE, OR 97449 * 541.260.0914
tenmilewatershed.com /tlbp@presys.com

4-17-2023

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

RE: OWEB Restoration Application #223-2000-22482
Project Title: Benson Creek Wetland Restoration

Dear Oregon Watershed Enhancement Boardmembers,

I am writing to you in support of the Benson Creek Wetland Restoration Project and why it is important to fund and complete this important native fishery and water quality restoration project now.

With our Benson Creek Project, sixteen acres of agricultural land will be restored to a functioning wetland, improving water quality and habitat for native fish and wildlife species. Wetland ecosystems are now exceedingly rare in the Tenmile watershed with less than 1% remaining. Restoring wetland habitat in places like Benson Creek is a high priority for achieving TMDL and Watershed Restoration plan goals in Tenmile basin. A diversity of partners supports the project, including Coos County, Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians (CTCLUSI), Oregon Department of Fish and Wildlife, the Department of Environmental Quality, Porior Engineering, and Lone Rock Timber. A long-term goal is to give CTCLUSI a leadership role in future management of restoration and monitoring efforts.

The OWEB Review Team limited concerns with our engineered channels and planting plan have been addressed with our Project Team and Partners.

I urge the Board to find funding and help Partners implement The Benson Creek Wetland Restoration Project.

Respectfully Submitted,

Mike Mader
TLBP Watershed Coordinator

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item M

OAHP Grant Awards

Public Comment

Board Meeting April 25-26, 2023

From: Bryan Ibach
To: MACK April * OWEB
Subject: Wahl ranch
Date: Thursday, March 2, 2023 4:12:39 PM

Dear OAHP Commission,
My name is Bryan Ibach, and I live in the Coquille area. I'm interested in the preservation of the Wahl Ranch on Oregon's Dark Coast because I believe in healthy communities and healthy watersheds. As a member of the local community, I understand how important the protection of agricultural lands is for preserving the natural resources, open spaces and economy that makes our area so special.
The Wahl Ranch is a vital part of our community, providing both economic benefits through its contribution to our local agricultural industry and ecological benefits through its preservation of important habitat for fish and wildlife. The Wahl Ranch has been a model for outstanding agricultural practices in our region and is widely recognized for their success in sustainable and regenerative pasture management.
I urge you to take action to protect The Wahl Ranch by recommending the Wild Rivers Land Trust's application for funding to the Oregon Watershed Enhancement Board. By taking this step, we can ensure that the Wahl Ranch will continue to provide these important benefits to our community for generations to come.
Thank you for your service on the OAHP commission,
Sincerely,
Bryan Ibach

WILLIAMS Eric * OWEB

From: kammie lorraine <kamlorraine@gmail.com>
Sent: Thursday, April 13, 2023 1:07 PM
To: WILLIAMS Eric * OWEB
Cc: LARSON Taylor * OWEB; Kelley Beamer
Subject: Comments on OAHP

Hi Eric,

First off, I want to express gratitude to the staff of OWEB for your herculean effort to put the mechanisms and staff in place to administer the Oregon Agricultural Heritage Program (OAHP), once it was funded. You did a lot in a relatively short amount of time and while I'm sure the program and process will evolve, from my perspective your agency did a fine job. However, I am really disappointed in the OAHP Commission funding recommendation and have decided the most constructive way to express my concerns is through this message to you, with a copy to program coordinator Taylor Larsen and COLT Director Kelley Beamer. It's important these comments are not construed as representing the thoughts or opinions of the Wild Rivers Land Trust (WRLT) or its Board, of which I am a member. I submitted a letter of support to the Commission for WRLT's application for the Wahl Ranch in Curry County and am very hesitant to go on the record with a letter to the OWEB Board for fear it might be interpreted as coming from WRLT.

As a former grants manager who worked for the Recreation and Conservation Office in Washington, and worked closely with stakeholders and policy staff on that state's farmland preservation program development, I've been curious to watch OAHP unfold. I've listened in on OAHP Commission meetings and Coalition of Oregon Land Trust (COLT) webinars about the program, and like all of us, been excited to participate in the program and hope for increased funding in coming budgets. I was a minor part of the WRLT team who worked on the OAHP application. Once the application deadline hit, I made a point to read through the completed Wahl Ranch application and every other application in the system (at the time, the Trout Ck Meadows application appeared to be in the mix). My own review, based solely on written applications, noted three applications that stood out as having long-term agricultural viability and a really good fit with program goals, specifically Pitchfork T, Aspen Valley, and Wahl Ranch. The OKeefie Ranch was also compelling.

It was no surprise to me the panel of OWEB staff and regional agricultural experts who evaluated the applications determined the highest ranked project to be the Wahl Ranch, given threat of fragmentation and how well the family has already meshed habitat conservation with exceptionally high agriculturally productivity. I recall when WRLT applied

for “traditional” OWEB grant funds for the ranch, the OWEB Board chose not to fund because it had too high a ratio of working lands to habitat and was deemed not a good fit for the fund source. The Board lamented the lack of OAHP funds and how the Wahl Ranch was the perfect example of OAHP goals to preserve agricultural lands that meld high quality ag and habitat values. So again, not a surprise the Wahl Ranch ranked highest of the applications, but I was surprised to see staff’s funding recommendation. While i applaud the integrity that recommendation showed, I think it also had the unintended consequence of the Commission “over-correcting” in their funding recommendation to the Board.

The Commission recommendation to fund all OAHP applications has in effect, placed the Wahl Ranch in last place, rather than first. Understandably, they didn’t want to “put all the eggs in one basket” and wanted to spread funding in order to garner greater program interest and support for future program funding. While a couple stated their own ranked order of projects differed from the evaluators, none of them suggested re-ranking the list and at least a couple clearly stated they did not want to second guess the process and ranking, but supported funding more than one project. I think we can all agree there is a huge difference in the quality of agricultural value between the Wahl Ranch and the lowest ranked application (which in my opinion would be a better fit for traditional funding). By funding the lowest ranked projects ahead of the Wahl Ranch, I think the Commission deminishes program value/reputation, rather than enhancing it. If WRLT had not submitted thier application, this program would have been woefully under-subscribed, and while this may be a reflection of first year hesitancy, it would have sent a message to the Legislature that additional program funding levels were not needed.

WRLT knew it was a long-shot to apply for those “traditional” habitat conservation funds years ago, but we were diligently seeking match for our existing NRCS ACEP-ALE grant of $5 million. Now that the state has funded OAHP, it’s sad to see those funds go toward projects that could be funded with other sources. There are no other state funds available to match the federal grant, and the Wahl Ranch really is a model of what OAHP can achieve. The application team struggled with how we might “phase” our project so as to apply for a lower grant amount. But, where would we draw the line? The ranch is an integration of excellent habitat and ag productivity. Which phase would we put the substantional ag infrastructure in? Which phase would we put a reserved homesite? What if phase two was not a strong enough contender in a future grant round? What would happen to the federal funding? We did not submit our application lightly; the fact it ranked on top reinforces the integrity of this ranch as a whole.

Going forward, if the intention is to spread the funds around the state, the Board can save substantial staff and volunteer time by simply allocating those funds at the onset and let pre-determined regions decide what their highest priority project will be. Instead, I hope

the Board will revisit the staff and Commision funding recommendations and most importantly the merits of each project. I don't expect the Board would dismiss the Commission's desire to spread funds to more than one project, but wouldn't it be better for the program to fund just those proposals that represent the very best fit with program goals? This would mean some projects are not funded…but isn't that a better way to demonstrate program integrity and the need for additional funds? That sends a clear message that the program will favor those projects demonstrating long-term agricultural viability, while also providing critical habitat.

Since my name can be tied to WRLT, I am hesitant to submit these comments in writing for the official Board record. I believe WRLT is submitting comments related to our capacity and project readiness, which was brought up in the Commission meeting. All I will say regarding that is the Commission commented we are a "young" organization, but then recommended funding for three projects sponsored by a much younger (and not accredited) organization. To be clear, I think OAT has the potential to be the pre-eminent ag land trust in Oregon, but to use organizational capacity as some jusitication for reduced funding for the Wahl Ranch does not reflect well on the deliberative process. The other, and more justified concern is the fact they want to fund more than one project. That is understandable, but for the Commission to specifically question WRLT's capacity as a way to fully fund all the other projects doesn't strike me as well-reasoned. I'm hopeful the Board might show some course-correction at their funding meeting.

Please know these comments are submitted in good faith and that I appreciate OWEB staff, the Commission, Board, COLT, OAT, all the applicants and everyone who has advocated for OAHP. Growing pains are to be expected, and lessons learned along the way. Respectfully,

Kammie Bunes
Bandon, Oregon

Oregon Association of Conservation Districts

April 19, 2023

To OWEB Board

From: Oregon Association of Conservation Districts

Re: Item M – Oregon Agricultural Heritage Program (OAHP)

Co-Chairs Barbara Boyer and Liza Jane McAlister, Board Members and Staff

The Oregon Association of Conservation Districts (OACD) representing Oregon's 45 Soil and Water Conservation Districts (SWCDs), is a strong supporter of the Oregon Agricultural Heritage Program. The districts are one of the entities authorized to carry out conservation easement programs and several of our districts have programs to do so. In 2021 OACD developed a guidebook to lead districts in this work.

As chair of the Working Lands Committee of the Clackamas Soil and Water Conservation District, the OAHP program is of particular interest to me as it supports our committee's work in acquisitions and easements, and I know Chair Boyer's district was a forerunner in this important work.

As one of the original association supporters back in 2017 when the legislation was first enacted, we are pleased to see the investment made last year and we are part of a group supporting the additional investment envisioned in OWEB's POPs 215 and 115 and HB 3366 before the legislature.

If the $10.8 million or a major portion of that is approved, we understand the program can be expanded to provide grants for project implementation. This will be a good tool for carbon sequestration and soil health projects and we hope the OAHP commission can move forward with a plan accordingly. We continue to have requests for providing technical assistance in these areas and districts as applicants to the OAHP program could follow through with grants for landowners and managers under the program to help mitigate climate impacts.

Thank you for making the decision today to grant the projects affirmed by the Commission. We look forward to future expansion of the program to help support the work the OWEB Climate and Water Committee supports.

Jan Lee

Jan Lee, Executive Director
Oregon Association of Conservation Districts
jan.lee@oacd.org (503) 545-9420

P.O. Box 1809, Sandy, OR 97301

WILD RIVERS LAND TRUST

April 6, 2023

Re: Wahl Ranch Application to the Oregon Agricultural Heritage Program

Dear Oregon Watershed Enhancement Board of Directors

Wild Rivers Land Trust is a regional land trust based on the southern Oregon coast. We hold both fee properties and conservation easements. We submitted an application through the Oregon Agricultural Heritage Program to fund the creation of an easement on the Wahl Ranch on the Elk River. Our application is recommended for funding by the Oregon Agricultural Heritage Commission in the amount of $2.6 million, which is approximately 65% of our requested amount.

To the extent that the deliberations of the OAHC weigh on the full OWEB board's decision at the April 25 - 26 meeting, we would like to take an opportunity to provide clarifying information to the board in response to several issues raised regarding our application at the March 16 OAHC meeting.

Organizational Capacity

WRLT is an accredited by the Land Trust Accreditation Commission, a program of the Land Trust Alliance, which is the national coalition of land trusts across the nation. Accreditation is awarded to land trusts meeting the highest national standards for excellence and conservation permanence. We were first accredited in 2018 after a rigorous review process. This distinction not only means that we have committed ourselves to the highest standards of implementing land protection, but that our accreditation is reviewed every five years to ensure that we continue to meet these standards into the future. In the OWEB online application process, several questions related to governance and financial management are not required for accredited organizations since these standards are so high.

WRLT has been in operation since 2000, when we incorporated as the Elk River Land Trust. Since then, our service area has expanded with our growing capacity and expertise and now covers a 2.3 million-acre area stretching from the California boarder to the Tenmile Lakes north of Coos Bay. We own 243 acres of land in fee and protect an additional 436 acres of land through easement or lease. We have also acquired and transferred 380 acres of land into public or tribal ownership. While we are learning along with many land trusts in the state about the specific needs of agricultural easements, we are well versed in protecting and restoring the lands and waters of the southern Oregon coast.

Understanding that this is a new direction for us, and a large and complex real estate transaction, we have been working on protecting the Wahl Ranch in partnership with The Conservation Fund. TCF is a national organization that has worked extensively on protecting agricultural lands in the west, and their expertise in this field will help to ensure that we are living up to our intentions in this transaction.

TCF is leading the negotiations and transactional aspects of the protection of the Wahl Ranch, in part due to their expertise in putting together deals like this, but also in part because two of the owners of the Wahl Ranch have been on WRLT's board in the past.

The Conservation Fund and Wild Rivers Land Trust have secured $5,000,000 in matching funds for the protection of the Wahl Ranch from the Natural Resources Conservation Service through the Agricultural Conservation Easement Program – Agricultural Lands Easement program (ACEP-ALE). This allocation demonstrates that our partnership and project have passed the review of the NRCS and they believe, as we do, that our project is ready to succeed. Funding granted through the Oregon Agricultural Heritage Program to our project will be matched 1:1 with this federal funding.

Due Diligence Issues

We have begun to work on due diligence in advance of our application to the OAHP in coordination with OWEB and NRCS staff, and our efforts to date were summarized as a part of our application. There was one title issue that was brought up during the March 16 meeting, dealing with the issue of an unmarked grave site on the property. The few records we have been able to find related to this gravesite indicate that the burial likely took place over 100 years ago and has narrowed the range of possible locations to the western portion of the property. While we and OWEB and NRCS staff have brainstormed potential ways to address this issue, we will need the Oregon Department of Justice and NRCS's legal staff to weigh in on our potential solutions. This is contemplated in our application and we have included the necessary cost to resolve all title issues with our budget. The existence of this grave site is not necessarily contrary to the conservation or agricultural goals of the proposed easement.

Easement Cost and Appraisal

There were also issues raised around our estimation of the property's value at the March 16th meeting. At this stage of a large and complex property transaction, it is common to have a working estimate of the property's value, as evidenced by several other applicants that also do not have values established by appraisal. The Conservation Fund's staff worked with the Wahl family and consulted experts familiar with land use regulations to develop our working estimate of the property's value. All parties understand that this figure is an estimate, and that a qualified appraiser will ultimately set the value of the easement to be purchased from the Wahl family.

This appraisal work has started with an expert in mineral resources evaluating the potential contribution of the surface gravel resource to the value of the property. TCF and the Wahl family are working with both the mineral resources expert and a qualified appraiser to ensure that our approach to determining value is thorough and done to the highest standards. Some of the costs to complete this appraisal work are included in our application.

Thank you,

Scott Fogarty, Executive Director
Wild Rivers Land Trust

OREGON
WATERSHED
ENHANCEMENT BOARD

Agenda Item N

Spending Plan

Public Comment

Board Meeting April 25-26, 2023

APPLEGATE PARTNERSHIP, INC.
dba Applegate Partnership & Watershed Council
P.O. Box 899 | Jacksonville, OR 97530 | 541) 899-9982
janelle@apwc.info | www.apwc.info
a 501 (c)(3) Nonprofit Organization, EIN# 93-1151372

April 20, 2023

Oregon Watershed Enhancement Board
775 Summer Street, Northeast #360
Salem, Oregon 9730

RE: 2023-2025 COUNCIL CAPACITY COMMENTS

OWEB Board of Directors and Staff,

Thank you for taking the time to read this comment letter. I have been the Executive Director for the Applegate Partnership & Watershed Council since 2010 and I work in one of the Rogue River Basin's main tributaries, the Applegate River. This watershed traverses 2 states (California and Oregon), 3 counties (Siskiyou-California, Jackson and Josephine-Oregon), 2 soil and water conservation districts (SWCD), multiple federal agency field offices, multiple school districts, and no major municipalities. Our board of directors is primarily local landowners with interests in natural resources, but we do have a couple of retired professionals that worked in the Applegate watershed and sit on our board. We are very rural and do not have opportunities to create partnerships like those watershed councils in urban areas.

We work closely with the SWCDs (Jackson and Two Rivers) when our projects align with their priority areas or when they have time to assist on non-priority projects. However, these two SWCDs are extremely different in staff expertise and resources because Jackson has a tax-base to assist them, and Two Rivers relies only on their capacity funding as an SWCD. We have found that we provide different services for both SWCDs. We provide more of a local presence when partnering with Jackson SWCD and they provide technical assistance and engineering. On the other hand, we often provide technical assistance to Two Rivers SWCD because they do not have the same level of expertise on their staff as we have on ours or JSWCDs.

The APWC fills a niche in our area that helps the SWCDs, agencies and landowners in a way that just supporting SWCDs and agencies could not because they have boundaries and they all function on different capacity levels. As stated by Vanessa Green, Chris Gannen and Liz Redon at the March 9th grant committee meeting, watershed councils and their grass root ties are essential to moving projects and outreach that provide ecological uplift to rural Oregon. Without council capacity many of the rural watershed councils that are not able to partner with larger entities, or that are in counties that have high quality project areas throughout the watersheds will not be able to continue developing projects and conducting the general outreach necessary to build trust and relationships within the community.

I appreciate your time.

Sincerely,

Janelle Dunlevy
Executive Directo

April 20, 2023

OWEB Board of Directors

Via email

RE: Comments on Council Capacity funding and grants

Dear Board members,

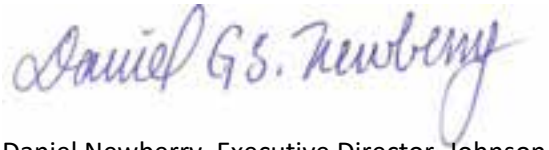
Thank you for funding council capacity grants for the past twenty-five or so years. This funding has allowed many councils to build capacity and grow from small, volunteer-managed groups that do a few planting events per year to organizations that restore wetlands, create instream log jams for fish habitat, and remove culverts and dams to restore salmonid passage.

For the past eight years I have been the Executive Director of the Johnson Creek Watershed Council and also held the same position from 2001 to 2005 at the Applegate River Watershed Council. Neither council would have been able to fund a full-time coordinator without Council Capacity funding.

For councils to be truly effective, they must have professional staff. To hire and retain professional staff takes a source of funding a council can count on. Certainly, project-based grants will fund a fixed number of hours to work on a project after the grant award. However, much work must be completed in advance in order to be able to get to the grant award stage: negotiating with landowners and agencies, building coalitions, writing grants. If a council's coordinator is not spending huge amounts of time applying for funding project planning, they can focus on developing those projects.

Councils need offices, phones, utilities, insurance, and other organization essentials. These are nearly impossible to fund through grants except for indirect expenses, which also need to fund bookkeeping, IT, and other similar infrastructure needs. Council capacity grants often help councils with these expenses as well. A well-functioning council requires sources of non-restricted funding. OWEB Council Capacity grants are critical in this regard.

Ultimately, you get what you pay for. If you want councils to have professional coordinators with the experience to put restoration projects on the ground, then you will need a long-term source of funding--at a competitive salary--for that council.



Daniel Newberry, Executive Director, Johnson Creek Watershed Council

WALLA WALLA BASIN
WATERSHED COUNCIL

Walla Walla Basin Watershed Council
810 S. Main St
Milton-Freewater, OR 97862

4/19/2023

Oregon Watershed Enhancement Board
Board of Directors
775 Summer St NE, Suite 360
Salem, OR 97301

Subject: Support for OWEB Staff and Grant Committee Recommendation to Increase Council Capacity Funds (Agenda Item N)

Dear OWEB Board and Staff,

On behalf of the Walla Walla Basin Watershed Council and other watershed councils across the state, we respectfully submit this letter to emphasize the critical importance of Council Capacity funding for our organizations and the valuable work we carry out in our respective communities. We aim to highlight these grants' essential role in supporting our work and the significant accomplishments we achieve by leveraging these investments.

Watershed councils are vital organizations that bridge industrial, socioeconomic, cultural, and strategic divides within focused geographic areas. By investing directly in local economies, building core partnerships with tribal and other diverse groups, and fostering dynamic collaborations, we contribute to enhancing ecological and economic resilience across the state.

In the case of the Walla Basin Watershed Council, located in rural eastern Oregon, the Council Capacity grants enable watershed councils to invest time and effort into building robust restoration programs that improve conditions for underserved and vulnerable communities. The hyper-localized approach facilitated by Oregon's watershed council system allows for tailored habitat enhancement and restoration strategies that address specific community needs.

OWEB's Council Capacity grants have tangible and evident on-the-ground outcomes. Increasing Council Capacity funds and adjusting their allocation, as recommended by the OWEB staff and the OWEB Grants Committee, would significantly benefit our watershed council's ongoing efforts to enhance and protect the natural resources in our region. This investment will enable us to continue our valuable partnerships, support non-grant-funded activities vital to our mission, such as continued participation in the basin-wide bi-state Walla Walla Water 2050 Strategic Planning and Implementation, and respond effectively to natural disasters and emerging issues in the Walla

Walla River Basin. The WWBWC was crucial in the 2020 Walla Walla River flood response. Council Capacity funds will enable us to maintain a robust and agile approach to addressing natural disasters and other emerging challenges across the basin.

Increased funding would also enable watershed councils to dedicate essential time to strengthening partnerships with local landowners, leading to more restored habitats, developing restoration projects throughout the basin, and ensuring organizational foundations are in place for effective multi-year restoration efforts. Furthermore, it would allow councils to leverage additional resources to maximize restoration impacts on the ground and engage in statewide policy discussions to advocate for our council's and partners' needs.

In conclusion, we urge the OWEB Board of Directors to recognize the value and importance of Council Capacity funding for Oregon's continued success in watershed restoration. By investing in our organizations and the work we do, you are investing in a brighter, more ecologically and economically sound future for all Oregonians.

Thank you for your time and consideration. We appreciate your ongoing support and dedication to Oregon's natural resources and communities.

Sincerely,

Troy W. Baker
Executive Director
Walla Walla Basin Watershed Council

April 17, 2023

Oregon Watershed Enhancement Board
775 Summer St NE #360
Salem OR 97301

RE: Agenda Item N Spending Plan – Subject Watershed Council Support

Dear Board Members:

I would like to provide a deeper perspective about watershed councils, their origin and funding.

Founding Concept
Watershed Councils and other place-based approaches to addressing natural resource management conflicts and issues are well summarized in the writings of Daniel Kemmis, author of *Community and the Politics of Place, This Sovereign Land: A New Vision for Governing the West, and Collaboration and the Ecology of Democracy*. The power of "citizen-driven problem solving across deep ideological and interest group divides" was seen as "an important, but still emerging form of democracy." Watershed Councils, with no regulatory authority but access to resources to assist local community members solve natural resource problems, is seen as a critical interface with private landowners and public land managers and regulatory agencies. Providing basic support for the community-based catalysts was a critical element of the entire watershed management approach now embodied in Oregon Law.

History of Watershed Councils in Oregon
The concept for watershed councils in Oregon came out of a conference sponsored by the Strategic Water Management Group (a creation of the 1983 Legislature) in 1992. The conference was organized to develop a framework for watershed management in Oregon. The report called for a "Stage 1 Watershed Assessment" as a "reconnaissance-type assessment of the state's 18 major basins". The report listed criteria that included watershed health, public interest, and likelihood of success. ***The report went on to describe the ideal membership, duties and responsibilities for watershed councils and outlined a process for program development and implementation along with key elements of an action plan for each watershed group*** (Attachment A). This happened at the same time that the Bonneville Power Administration was funding "model watersheds" throughout the Pacific Northwest to address watershed conditions affecting listed salmon species. Two model watersheds were organized in Oregon, the Grande Ronde[1] and the McKenzie.

The 1993 Legislature created the Oregon Watershed Health Program in the Oregon Department of Water Resources and provided funding for the establishment of watershed councils and funding for watershed restoration in southwest Oregon and northeast Oregon. The program established 12 watershed councils in southwest Oregon and used the Grande Ronde Model Watershed in the northeast. The 1995 Legislative assembly codified what a watershed council was, developed a framework for watershed councils, and centralized the funding for councils and restoration work in the Governor's Watershed Enhancement Board that was created in 1987. The 1995 legislation eliminated the state role in approving watershed councils and staffing in state agencies to support councils.

[1] Duncan, Angus. 1998. History, Science, the Law, and Watershed Recovery in the Grande Ronde: A Case Study. OSU Sea Grant ORESU-G-97-001. 82 p.

Between 1995 and 1999 the Governor's Watershed Enhancement Board assisted in the development of watershed councils and with assistance of other entities. Watershed councils were encouraged to form along watershed boundaries and allowed to self-form. Many of the watershed councils in Oregon were organized at this time. To date some 60+ watershed councils have formed and vary in size.

In 1998 the first "Parks and Salmon" ballot initiative was passed which dedicated 15% of Oregon Lottery receipts to be split between Oregon State Parks Department and "a single agency to be administered as a natural resource grant program." The 1999 Oregon Legislature created the Oregon Watershed Enhancement Board (OWEB) to be that single agency with the responsibility of funding watershed councils and watershed protection and restoration. During the legislative discussions there were common messages from a number of interest groups to continue "base funding" for watershed councils and soil and water conservation districts. The legislation establishing OWEB in 1999 was explicit that watershed councils had no regulatory authority.

Funding Expectations

After the Watershed Health Program ended in 1995, the role of watershed councils was broadly discussed. They were seen as a critical element of a state program for watershed improvement with expectations of them developing watershed assessments, action plans, implementing restoration actions, and monitoring results. Watershed Councils were identified as a very important element of the Oregon Plan for Salmon and Watersheds, the state cooperative approach to addressing the habitat needs for listed salmon and steelhead and to address water quality concerns throughout the state. This rather high expectation was tempered by the limited funding available from the state for their operation and actions. With funding availability from OWEB, the issue of parity between soil and water conservation districts and watershed councils was widely deliberated. There are many similarities and significant differences between watershed councils and soil and water conservation districts.

Soil and Water Conservation Districts

Districts have a long history and were initially a local arm of the Soil Conservation Service to help implement conservation practices following the Dust Bowl of the 1930's. The Soil Conservation Service was established by Congress in 1935. To extend the reach of conservation activities it was determined that establishing democratically organized soil conservation districts to lead the conservation planning effort at the local level would help to expand the effort. President Franklin Delano Roosevelt recommended the Standard State Soil Conservation Districts Act be signed into law by all state governors. This act gave states a step-by-step guide to create conservation districts and listing their powers and responsibilities, thus districts would be created by state authority. In 1939, the Oregon Legislature passed legislation to establish conservation districts in Oregon. The authority of Districts is currently specified in state statutes at ORS Chapter 568. Conservation Districts are charged with directing programs to protect local renewable natural resources in their county. Today there are 45 districts that typically follow county boundaries. Districts have the authority to levy taxes to support their operations and to date some 13 districts have established a tax base. Districts have a quasi-regulatory role in the implementation and enforcement of Oregon's Agricultural Water Quality Plans (ORS 568.900 – 568.933).

Current Funding for 2021-2023 Biennium

Currently, funding for Districts is distributed by the Oregon Department of Agriculture (ODA) from pass-through funds from OWEB. Each district receives funding from ODA. The distribution of funds to Oregon Department of Agriculture amounts to nearly $168,000/biennium/district. On the other hand, not all councils receive funding from OWEB. From a high of 63 in the 2009-2011 biennium to the current 56 in

the 2021-2023 biennium, council support is based on a competitive and "merit based" system. The current allocation amounts to some $135,000/biennium/council. It should be noted that the annual funding for councils and districts is significantly below the typical $250,000 -$290,000/per biennium[2] for the OWEB staff that watershed councils typically interact with.

Funding Proposal for 2023-2025 Biennium

The proposed 2023-2025 biennium budget attempts to adjust the difference in support by a slight increase in the allocation to watershed councils to narrow the gap in organizational funding.

The proposed approach in the 2023-2025 spending plan is in the spirit of the effort to have some form of equity and to have a robust support for Oregon's experiment in community-based conservation that has proven itself over the past two decades. The total amount of funding allocated to the support of community-based organizations statewide (proposed $17.8 million) pales in comparison with the level of funding to other state-wide organizational efforts.

It is critical that the OWEB Board remember that conservation does not occur spontaneously, it requires dedicated focus by people in the community that have the time and expertise to make it happen. The staff at watershed councils and soil and water conservation districts provide that critical interface and expertise. OWEB funding comes with strings, other funding required for match also comes with strings and most people with other responsibilities simply do not have the time and expertise to plan, communicate, contract, manage contracts, apply, and manage grant funding, etc. for conservation projects. The funding of watershed councils and soil and water conservation districts is a small investment in Oregon's local communities but critical if community-based conservation is to remain successful.

One of the lessons learned working with Meyer Memorial Trust on their Willamette Initiative was that by supporting local capacity in a robust manner, more can be expected and accomplished. Meyer invested significantly in local capacity and worked with the local groups to develop significant expectations over a long time period. The resulting outcomes were beyond initial expectations.

While the staff and Board of OWEB have changed over time, it is important to be aware of the history and foundations upon which you stand. Your recognition that additional investment in capacity at the community level is applauded. Thank you.

Sincerely,

Kenneth F. Bierly

Kenneth F. Bierly

[2] Figures from OWEB 2021-2023 Adopted Budget document pages 302-303

PROPOSAL: A WATERSHED MANAGEMENT STRATEGY FOR OREGON

SUMMARY REPORT
OF THE
SWMG POLICY WORK GROUP

Submitted To:

The Strategic Water Management Group
State of Oregon
August 11, 1992

SWMG Policy Work Group

Martha Pagel, Co-Chair, Department of Water Resources
Beth Patrino, Co-Chair, Department of Water Resources
Louise Bilheimer, Oregon Rivers Council
Jan Boettcher, Oregon Water Resources Congress
Larry Cauble, Oregon Cattlemen's Association
Jeff Curtis, Department of Fish and Wildlife
Dave Duncan, US Bureau of Reclamation
Liz Frenkel, Sierra Club
Roger Hamilton, Parks and Recreation Commission
Bob Hummel, US Soil Conservation Service
Earle Johnson, Division of State Lands
Jim Knight, Department of Land Conservation and Development
Dave Leland, Health Division
David Moon, Water for Life
Doug Myers, WaterWatch of Oregon
Jim Myron, WaterWatch of Oregon
Representative Chuck Norris, Chair, House Water Policy Committee
Tom O'Connor, Oregon Municipal Electric Utilities
Gil Riddell, Association of Oregon Counties
Fred Robinson, Department of Forestry
Susan Schneider, League of Cities
Ginny VanLoo, Marine Board
Phil Ward, Department of Agriculture
Roger Wood, Department of Environmental Quality

I. Introduction

In February 1992, the Strategic Water Management Group appointed a Policy Work Group to address water policy issues and priorities that had been discussed at a workshop held at the Menucha Retreat and Conference Center in January. The work group has developed a proposal for a watershed management strategy. The cornerstone of the strategy is the establishment of watershed partnerships among local residents, state and federal agency staff, and other citizens interested in the improved management of a particular watershed. Underlying the strategy is the basic belief that improved coordination, integration and implementation of existing local, state and federal programs, rather than the creation of new programs, can protect, enhance and restore the state's watersheds.

II. Summary Proposal: A Watershed Management Strategy For Oregon

The Strategic Water Management Group (SWMG) is identified as the lead state entity for implementing the watershed management strategy for Oregon. This choice reflects the need for a coordinating body to facilitate the participation of state agencies in the development of local solutions to resource management issues and needs. ORS 536.108 establishes SWMG's authority to coordinate "agency activities insofar as those activities are related to the water resources of this state." The boards and commissions of the individual resource agencies will continue to serve as policy-making bodies for the agencies; SWMG will coordinate the implementation of these policies for the purposes of the watershed management strategy.

The proposed watershed management strategy has four major components: (1) a goal statement and listing of objectives and principles; (2) criteria for identifying watersheds in need of enhancement, restoration or protection; (3) a flexible process to guide planning and implementation activities at the watershed level; and (4) a set of watershed management "tools." Taken together, these components provide the framework for the proposed watershed management strategy. The cornerstone of the strategy is the establishment of watershed partnerships among local residents, state and federal agency staff, and other citizens interested in the improved management of a particular watershed. In order to implement the strategy, each partner will retain current authorities and responsibilities; the strategy does not, for example, involve a shift in responsibility for state programs or regulatory authorities to a local body. Instead, a watershed partnership will serve as a vehicle to improve communication among state, local and federal resource managers and local citizens. These partnerships will promote the implementation of policies and programs in ways that are complementary and protect natural resources while meeting the needs of the local community. Underlying the strategy is the basic belief that improved coordination, integration and implementation of existing local, state and federal programs, rather than the creation of new programs, can protect, enhance, and restore the state's watersheds.

III. Proposed Goal Statement, Objectives and Principles

1. Goal Statement:

> *Implement a consistent and integrated process to guide watershed-based resource planning and management to protect, enhance and restore the state's watershed ecosystems in order to optimize the natural resources of the state for all beneficial economic, environmental and social uses. The process will involve local, state, federal and private land and water managers and interested citizens in the development, implementation and monitoring of watershed action programs.*

2. Objectives: The objectives of the watershed management strategy are:

- Identify high priority watersheds.
- Prepare watershed action programs for high priority watersheds, including well-defined goals and objectives.
- Implement innovative watershed management programs in high priority watersheds to achieve program goals and objectives. Programs to include coordinated and integrated local, state and federal agency planning; data bases; and actions to improve the effectiveness and efficiency of resource management.
- Identify and coordinate funding for action program development and implementation.

3. Principles: The following principles will apply to the implementation of the watershed management strategy:

- Watershed action program development and implementation (state resources) should be targeted to high priority watersheds. High priority watersheds should be identified on the basis of specific criteria.
- Participants should not plan to plan; they should plan to make things happen. The process should not result in a document on what needs to be done, followed by lengthy efforts to figure out how to put the plan into action. The process should result in action and show progress early. As problems are identified and solutions are found, participants should work aggressively to determine implementation steps and act on them wherever possible.
- Action programs should make use of the full range of available management tools tailored to specific watershed conditions.
- Problem identification and solutions should be based on the best available scientific information.
- Citizen involvement is essential. All parties with an interest in a watershed (both within and outside) should have an opportunity to participate in the analysis of problems and the creation and implementation of solutions. The public should be involved early and fully.
- Programs should be on-going and self-sustaining, including monitoring and evaluation of progress toward achieving goals and necessary program updating. Participants should be encouraged to share information with participants in other watersheds and learn from each other's successes and failures.

IV. Proposed Criteria for Identifying High Priority Watersheds

The first step in the watershed management strategy is the identification of high priority watersheds by the Strategic Water Management Group (SWMG). In Stage 1, an interagency team of state and federal agency staff will conduct a reconnaissance-type assessment of the state's 18 major basins. The team will apply the criteria listed below using existing information that is readily accessible to state and federal resource agencies. A high priority watershed may be a unit that is much smaller than a basin; in fact, in most cases, the work group recommends that sub-basins be identified as high priority watershed whenever possible.

STAGE 1 WATERSHED ASSESSMENT CRITERIA

Criteria A: Watershed Health

- Water quality (point and non-point source)
- Sensitive, threatened or endangered species
- Water availability limitations (both instream and out-of-stream)
- Probability of additional degradation if no action is taken

Criteria B: Public Interest

- State Scenic Waterway or Federal Wild and Scenic River
- Evidence of conflict between land use plans and water needs
- Existing/impending economic loss/development
- Timeliness of program development (i.e., probability that expenditures now will save spending more money later)
- Variety of resource issues/conflict present in watershed
- Other evidence of both local and statewide values related to watershed management
- Agency priorities

Criteria C: Likelihood of Success

- Evidence of local support for program, including land owners and local government representatives
- Opportunities to integrate on-going watershed planning or management activities - existing active involvement of state and/or federal agencies
- Availability of funding; opportunities for cost-sharing
- Availability of data needed for program development or the possibility of obtaining it quickly

V. Local Watershed Council's: Proposed Membership; Duties and Responsibilities

The establishment or designation of a Local Watershed Council in each high priority watershed is a critical element of the watershed strategy. A council will provide an opportunity for watershed residents to not only participate in the management of their watershed, but also play a significant role in resolving critical resource management issues and shaping the future of the watershed.

1. Local Watershed Council - Membership

A majority of members shall be local citizens, including local officials. A Local Watershed Council may be a new or existing organization or combination of existing organizations which represent a balance of interested and affected persons within the watershed and which can ensure a high level of citizen involvement in the development and implementation of a watershed action program. Local Watershed Council members shall be appointed by an appropriate local government (ex., council of governments, county commission, or city council(s)). The local government shall submit a list of council appointments to SWMG. SWMG shall concur if the membership criteria described above are met.

Local Watershed Council members may include:

- Representatives of (1) local government, (2) non-government organizations, and (3) private citizens, including but not limited to:

√ Representatives of local and regional boards, commissions, and agencies;
√ Indian tribes;
√ Public interest group representatives;
√ Private landowners;
√ Industry representatives; and

√ Academic, scientific and professional community.

- Representatives of state and federal agencies.

2. Local Watershed Council - Duties and Responsibilities

- Foster communication and cooperation among all interests within a watershed
- Provide a forum for conflict resolution and decision-making
- Ensure a high level of citizen involvement in all aspects of decision-making
- Prepare and implement a Watershed Action Program
- Monitor program implementation and success
- Seek funding
- Conduct all meetings as open public meetings

VI. Process for Program Development and Implementation

In order to develop and implement a watershed action program, a local watershed council and SWMG will follow the steps outlined below. These steps provide a generic process that can be tailored to fit the needs of a particular high priority watershed.

This process will begin after SWMG has identified a high priority watershed on the basis of a Stage 1 assessment. SWMG agency staff will hold discussions with local government representatives in the watershed to determine whether there is interest in forming a watershed management partnership between a local body (a watershed council) and the state, local and federal resource management agencies. If interest exists, an appropriate local government (e.g., a council of governments, county commission, city council or some combination agreed upon by all the parties) will appoint a local watershed council or identify an appropriate existing organization to serve in this capacity.

After a watershed partnership has been developed, a Stage 2 assessment of each high priority watershed will be conducted by an interdisciplinary team of local, state and federal agency staff appointed jointly by SWMG and a local watershed council. The purpose of a Stage 2 assessment will be to further characterize the condition of the high priority watershed and to provide the information necessary for the preparation of a watershed action program. Depending on the results of the Stage 1 assessment, it may be possible to narrow the scope of a Stage 2 assessment to a particular sub-basin within the watershed.

Following the Stage 2 assessment, the local watershed council will work toward the development, implementation and monitoring of an action program for the watershed with the cooperation and assistance of the SWMG agencies as described below.

PROPOSED PROCESS:

PROGRAM DEVELOPMENT AND IMPLEMENTATION

For each high priority watershed in which the state and local representatives have agreed to pursue a partnership, SWMG shall:

1. Identify state goals for each high priority watershed (i.e., identify the conditions necessary to optimize the natural resources of the watershed for all beneficial uses).
2. Meet with local representatives in each high priority watershed to discuss local interest in entering into a partnership with the state to develop and implement a watershed action program.
3. Promote funding assistance for both state and local activities under this program using all available opportunities, including the state agency budget process and the biennial water management program.
4. Coordinate state and federal agency participation, including interagency communication and conflict resolution.
5. Provide opportunities for public input to SWMG decision-making.
6. Provide policy oversight during program development and implementation.
7. To the extent possible, coordinate assistance to local watershed councils in other (non-priority) watersheds to develop and implement watershed action programs.

For each high priority watershed in which the state and local representatives have agreed to pursue a partnership:

1. A Local Watershed Council shall be established (see description of council membership, appointments, and duties and responsibilities on page 7).
2. SWMG shall coordinate the appointment of a facilitating agency. The facilitating agency may be a state, federal, or local agency, as appropriate. This agency will be responsible for agency coordination and will report to SWMG.
3. The Local Watershed Council shall appoint a Watershed Coordinator. The Watershed Coordinator will report to the Local Watershed Council. The coordinator's duties include: providing staff support to the local watershed council, facilitating program development, serving as the watershed program liaison with state and federal agencies, and actively seeking funding for action program development and implementation.
4. SWMG and the Local Watershed Council shall jointly coordinate the appointment of a Technical Advisory Team for each high priority watershed. The team will include state, federal, and local agency staff to conduct a Stage 2 watershed assessment and provide technical support to the local watershed council.

A Local Watershed Council shall:

1. Prepare a Watershed Action Program (see program description on page 8).
2. Distribute draft program as appropriate for public review and comment. Hold public hearings in local area.
3. Revise draft program as appropriate in response to comments. Adopt program.
4. Submit Watershed Action Program to SWMG for review and adoption.
5. Implement, evaluate, and monitor Watershed Action Program.
6. Update program periodically.

VII. Watershed Action Programs - Key Elements

A Watershed Action Program will serve to coordinate and integrate state, federal and local watershed management activities within a high priority watershed. Key program elements are outlined on page 6.

WATERSHED ACTION PROGRAM - KEY ELEMENTS

I. Purpose and Goal
- •Identification of critical issues and current and anticipated problems
- •Overview of long and short-range goals and objectives in high priority watershed

II. Summary - Description of the Watershed
- •Location and general environment including water resources
- •History of uses, factors contributing to problems, and past corrective actions
- •Current ownership and jurisdictions in the watershed
- •Identification of existing local, state and federal laws and policies affecting watershed

III. Assessment of Watershed Condition
- •Review of available and pertinent data on watershed
- •Identification of information gaps/additional baseline data required and collect the information.

IV. Limiting Factors from a Watershed Perspective

V. Watershed Action Program Development
- •Define sub-basin management units, considering basin hydrology, physiographic and political boundaries, problem areas and critical issues
- •Identification of existing agency programs and activities; identify gaps
- •Identification and evaluation of potential program elements
- •Assess obstacles to implementation
- •Select course of action

VI. Public Involvement and Education Program

VII. Program Implementation
- •Monitoring
- •Maintenance
- •Funding
- •Evaluation criteria
- •Timetable

VIII. Watershed Management Tools

1. Existing Tools

The work group developed a list of existing state, local, federal and private watershed management tools. The work group also identified 28 existing policy statements in Oregon law that may be considered to pertain to watershed management. These are provided in the full report.

2. Proposed Tools

After developing the list of existing tools, the work group brainstormed a list of new watershed management tools that members believed would either be useful or necessary additions for the successful implementation of the watershed management strategy. The list of proposed tools can be broken into five categories:

- Organizational Tools - "Building Partnerships"
- Descriptive and Analytical Tools - "Understanding the Resource"
- Implementation Tools - "Optimizing the Resource"
- Protection Tools
- Funding Tools

The work group identified the highest priorities among the list of proposed tools for development in the near future. These are listed below.

PROPOSED WATERSHED MANAGEMENT TOOLS:

HIGH PRIORITY FOR DEVELOPMENT

A. Organizational Tools - Building Partnerships

- √ Improved coordination across agencies and interests
- √ Establishment of local watershed councils
- √ Volunteer programs

B. Descriptive and Analytical Tools - Understanding the Resource

- √ Establish clearinghouse to facilitate data management by watershed; clearinghouse to be located in the watershed
- √ Co-location of agency field staff
- √ Increase use of the Geographic Information System (StateService Center)
- √ Measurement (including water use and reporting) in areas where such information is needed
- √ Monitoring (including gauging stations); begin in critical basins and continue over the long term
  - •temperature, flows and turbidity
- √ Watershed condition assessment

C. Implementation Tools - Optimizing the Resource

- √ Improve water use efficiency by reducing waste and inefficient practices
- √ Water right transfers
  - •Require a public interest determination
  - •Allocate a percentage of transferred water to instream flow
  - •Water marketing
  - •Establish a mitigation process for water transfers
- √ Enhance water supplies
  - •Increase surface storage
  - •Better understand groundwater resource and use to optimize flows and temperatures
- √ Riparian Management
  - •Expand current authorities under existing watershed management tools
  - •Facilitate voluntary conservation easements
  - •Link quality of land and water management by individuals to benefits received (for example,grazing leases)
  - •Ease permitting process for livestock watering ponds

D. Protection Tools

- √ Enforcement - develop a mechanism to protect instream flows through a river system or protected river reach, as appropriate (shepherding)
- √ Education, including involvement of local school districts and the Department of Education in the development of watershed management curriculum

E. Funding for the Watershed Strategy

For a copy of the full report, write or call
Oregon Water Resources Department
3850 Portland Road NE
Salem, OR 97310
(503) 378-3741

BETTINARDI Nicole * OWEB

From: Amanda Zander <Amanda.Zander@malheurco.org>
Sent: Tuesday, April 18, 2023 1:40 PM
To: BETTINARDI Nicole * OWEB
Cc: BERG Tristen * ODA
Subject: ODA Weed Grants

I want to express my appreciating for the grant funding that has been made available through ODA to conduct noxious weed work. Without this funding Malheur County Weed Department would not be able to sufficiently treat their A list weeds let alone work on any B listers.
In the past couple years it seems that more recognition is being placed on the hazards of invasive annual grasses. These grasses provide unbelievable fuel to wildfires significantly increasing their intensity and spread. Devastating the landscapes that they burn destroying wildlife habitat, aesthetic beauty and creating economic hardships that last for years for those who depend on the forage and plant production of these areas. Until a few years ago there weren't too many options for chemically combating these grasses, and it was viewed by most as a losing battle. With some new chemicals, and a push to work in this area of the noxious weed spectrum more money is needed to do just that. Cover broader landscape. There is no lack of acres that need treatment for invasive annual grasses in Malheur County. To this point the limit of treatments is only subject to the dollar amount available to purchase the chemical and pay the contractor to do the application.
Another major cost in weed work is the equipment to conduct applications and actually do the work on the ground that is so very often difficult terrain. This work is always challenging and top of the line equipment not only makes individuals jobs easier, but safer and most important more effective. Without funding to cover these cost that have seen such a significant increase in the last year year and a half programs like Malheur Countys will not be able to sustain nor expand the work that has been done.

Amanda Zander
Malheur County Weed Department
(541) 473-5102 office
(541) 709-7037 cell

WEST MULTNOMAH
Soil & Water Conservation District

Lisa Hanson
OWEB Executive Director

Re: Public Comment for OWEB support of ODA weed grants

April 18, 2023

Dear Ms. Hanson and OWEB Board Directors:

We request OWEB to continue dedicating lottery funds to the ODA-Oregon State Weed Board (OSWB) Grant Program. This hugely successful grant program is the sole statewide grant funding source for priority noxious weed projects. The OSWB grant leverages more resources than any other Oregon lottery funded program and has a far greater impact geographically.

Noxious weeds are one of the top threats to our valued natural resources in Oregon. This has been made clear countless times as destructive weed species are well poised for invading, and subsequently, degrading habitat across Oregon. If left unchecked, noxious weeds could cost Oregon's economy over $1.8 billion *annually.* Agricultural and forest productivity, to which our state commodities are so greatly tied, are at immediate risk without continued, dedicated noxious weed grant funding. OSWB funds aid in preventing terrestrial weed species such as hoary alyssum, Dyers woad, knotweed, garlic mustard, rush skeletonweed, and yellow starthistle from overrunning our farms, forests and natural areas. Our environmental investments such as salmon and sage grouse recovery are also at risk. Without funding, aquatic weed species such as *Ludwigia peploides* would be allowed to take over water bodies and degrade salmon-rearing habitat, which OWEB has worked so hard to protect.

The West Multnomah Soil & Water Conservation District is a public service district dedicated to the conservation of soil and water resources for people, wildlife and the environment. Our service territory includes Multnomah County west of the Willamette River, Sauvie Island, and a portion of the Tualatin Mountains known as Bonny Slope. One of our priority conservation goals is the prevention, early detection-rapid response and management and control of invasive species. By definition, invasive species are those introduced plants, pathogens, insects and aquatic organisms that spread rapidly due to a lack of biological controls and such spread leads to ecological, economic and social harm to people and the environment. We work closely with agriculture, range, and forest landowners and have witnessed the benefits of the impactful work set in motion by the OSWB Grant Program.

Locally, in the Four County Cooperative Weed Management Area (which includes the greater Portland Metro region), the OSWB Grant Program has provided funding for on-the-ground surveying and treatment of targeted noxious weeds, mapping, prevention tools, and coordination. With the support of the OSWB Grant Program, we are able to leverage 5:1 ratio in

local funding for projects such as the Portland Garlic Mustard Control program. This public-private partnership effort reaches over a thousand property owners and has assisted in preventing the establishment of garlic mustard, a devastating woodland invader, from impacting forests across the state.

West Multnomah Soil & Water Conservation District urges OWEB to continue supporting the ODA-Oregon State Weed Board Grant Program through dedicated lottery funds.

Thank you for the opportunity for provide comment,



Terri Preeg Riggsby,
Chair and Zone 5 Director
West Multnomah Soil & Water Conservation District

Cc: West Multnomah Soil & Water Conservation District Board of Directors

CRWC
CROOKED RIVER WATERSHED COUNCIL

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Prineville, Oregon 97754

Phone: (541) 447-8567 Fax: (541) 416-2115

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www.crookedriver.deschutesriver.org

4/20/2023

Greetings OWEB Board members & staff,

In the context of your 2023-2025 budget preparation, our organization fully supports the OWEB staff and Budget Committee recommendations specific to council capacity allocations. The staff memo and subsequent discussions within the committee affirm the need to increase capacity grant amounts to both councils and districts in Oregon. You will hear additional input from my colleagues and counterparts at other councils supporting this outcome providing a multitude of reasons and rationale for this decision.

I thought Liz Redons presentation to the committee provided a firm and unassailable foundation for these types of grants. The desire to close the funding gap between councils and districts also strikes me as a valid reason to consider these increases. Equity is important in Oregon, and we talk about it in many different contexts. There is no reason this gap should exist, and I applaud staff for recognizing this disparity and recommending a solution.

In thinking about capacity funding for councils, it occurred to me that we all occasionally benefit from a reminder of our past. Our founding. Our origination story. I think these are important considerations and help inform the decisions before you. I was a bit surprised that the story of OWEB's creation as presented on OWEB's website starts the timeline when OWEB was formally formed in state rule and statute. While this timeline is accurate, it is not complete. OWEB, as we know it today, was formed from a set of precursor organizations and efforts from grassroots, at a local level. I wanted to provide a summary of this timeframe to remind us all of these important origination visions and objectives.

Let's travel back to the early 1980s when natural resource management was first starting to be challenged by environmental interests, particularly for public lands. You may recall the legal challenges to USFS timber sales over spotted owl habitat protection, for example, that emerged during this timeframe. Rangeland resources were beginning to experience similar external interest from organized groups advocating for wildlife, water, and fish. To get in front of what appeared at the time to be a future full of one lawsuit after another, a local, grassroots, loosely organized coalition emerged. This effort brought together diverse interests and perspectives with the overarching goal of working together on important resource issues rather than fighting over the appropriate management and outcomes in court. This approach was deemed favorable as it would steer funding towards resource outcomes desired by all in lieu of endlessly funding lawyers and legal processes that had no guaranteed outcome. The process to

develop this model was led by OSU rangeland science professors and other like-minded leaders that possessed the skills to facilitate open discussions and sharing of ideas

The initial, somewhat formal, outcome of these early efforts was the creation of a diverse collaborative group representing a wide range of interests including landowners, ecologists, environmentalists, preservationists, conservationists, and academia called the Oregon Watershed Improvement Coalition (OWIC) This group evolved over time as it gained traction with legislators and elected officials in Salem. The next iteration, where state funds began to be available for this approach to conservation work, became the Governors Watershed Enhancement Board (known as GWEB). These important steps precluded the formal state agency we know today as the Oregon Watershed Enhancement Board.

I want to present a few examples of the formative years of OWEB to give you an insight to the thinking, perspectives, and potential recognized by our 'founders' Examples here include an excerpt from the Society of Range Management PNW chapter meeting minutes, an email from 2015, and a recent email from Bill Krueger reminiscing on the early years, followed by several references and attached documents that I invite you to review at your convenience and interest level Thank you.

Chris Gannon, Director

2013 Annual Business Meeting

When **Craig Obermiller** presented the PNW financial report, **President Bob** asked, *"Who knows what OWIC is?* Only a few raised hands, so Bob asked, *"**John Buckhouse** would you explain OWIC?"*

"You bet". **What** is **OWIC** and **how** did it get in the budget? Back in the early 1980's, a group of OSU folks returned from an SRM Annual Meeting. **Tom Bedell** exclaimed, *"Gosh, I wish there was a way to make the combatants of the 'eco-wars' see the other guy's point of view . "Yeah"*, **Bill Krueger** dryly responded, *"we ought to lock them in a room together and not let them out until they talk to each other."*

With that, an idea was born. Oregon Watershed Improvement Coalition, **OWIC**, was sponsored by the PNW Section as an outreach to bring community involvement into natural resource issues mostly in riparian and watershed conflicts. PNW voted it into the annual budget Years later, when **Wayne Elmore** was granted a $10,000 award for the work he and OWIC had done, PNW Section was the beneficiary.

How did the OWIC idea work? A 15-person grass-roots coalition of people with vision and passion was formed. It represented 5 environmental groups, 5 commodity groups, and 5 PNW/SRM non-voting technical advisors. Members knew that they would be working with the same people each time, and that each was authorized to speak on behalf of their organization. Apprehensively, they discussed ideas and goals. Gradually, as they understood and respected one another, they agreed on the end product, **healthy environments and viable communities**

After pioneering the collaborative path, OWIC needed money to put on the ground. They asked Governor Goldschmidt to establish a fund to put environmental concepts to work in realistic and practical ways. When he replied, *"I can't put up monies which don't support interests across the board"*, they pointed out that he was talking to a unified coalition of environmentalists and industry representatives. With that, the Governor's Watershed Enhancement Board, GWEB, was formed with about $80K. Ranchers, schools, small landowners and others could apply for funds to conduct pilot projects to improve watersheds. Stream enhancement projects included off-site water developments, willow plantings, in-stream salmon nest boxes, changes in livestock grazing, . . . It was wildly successful!

Working to bring order from chaos, OWIC followed many of the concepts of CRMP - Coordinated Resource Management Planning which evolved throughout BC, WA, and OR under the guidance of **E. William (Bill) Anderson**. OWIC disbanded in early 2000 because they had "worked themselves out of a job". GWEB had become **OWEB** (Oregon Watershed Enhancement Board). It funded Watershed Councils across the state, fulfilling the vision and mission upon which OWIC was begun. Looking around the west, you see a number of groups that have followed the OWIC concept and enjoy success.

From: Bill Krueger
Subject: Re: OWEB Board to Prineville - July 2015

hi everyone

I expect we will have a phone call later this month to talk about OWIC and other stuff. I have attached a brief summary of OWIC that explains the vision and activities at the time it was active. It doesn't include the political activities. Briefly these were to request the legislature to fund an ongoing program to support local projects to restore or improve watersheds. We worked mostly with Bradbury as I remember. Our vision was for a separate department but eventually the Governors Watershed Enhancement Board was placed in Water Resources. I do see the wisdom in retrospect but at the time we thought the need crossed too many departments of state government to be effective in an existing agency. The second political activity was to work with the legislature to form the program that became the Watershed Council program. It was always our idea that the best decisions were made by the local people who understood the land best and had the most invested in successful programs. We were elated when the local watershed council idea was implemented. At that point we thought we had done what we could as the Oregon Watershed Improvement Coalition and ended our group. We considered it a success.

The Society for Range Management sponsored the Coalition as a professional group that represented the varied sciences involved in watershed management. It had OSU Rangeland Resources Department members (2), BLM (1) and USFS (1) members.

Wed 4/19/2023 8:03 AM

A few ideas on why I think OWIC worked.

We didn't debate land use or environmental issues in the abstract. We felt if we did that we just couldn't come to consensus. So, we always met for two days. The first day was spent

somewhere on the land looking at a specific issue. Then we discussed how to solve the specific problem we had investigated. This made us look at specifics rather than whether or not cows are good or fish are good or ranchers are bad or environmentalists are bad. We always found common ground on what would be good ways to address the specific issue. The point is, when we focused on the land we could find agreement on good steps to meet several objectives, for the land and the land users.

We always were sure to have a meal together. For some reason people get along better if they eat together.

Over time the members began to understand and respect each other. It was interesting the first couple of meetings in the field: members grouped according to their culture, a little group of ranchers, a little group of environmentalists, etc. After a few meetings the interest groups dissolved, and everyone mixed with everyone. The point is everyone understood each person had something to offer and they were sincere. Respect was developed within the group. This is why we wanted to see local watershed councils of some kind. First to focus on the land and specific issues and second to have people work together over time to develop respect.

Chris, I'm not sure if these comments are helpful but they get at why OWIC was successful. It is more than just giving money or making rules. I know you get it but it is not always clear to folks that have a passion for something and little experience with those that think differently

So, as I see it:

1. Focus on specific issues not abstract ideas
2. Develop respect for people with interest in those ideas.
3. Try to solve a problem, not save the world

Good luck with your Watershed Council

Bill Krueger

References:
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A USER'S GUIDE TO

THE MIRACLE AT BRIDGE CREEK



What Is The Miracle at Bridge Creek?

Spotted owls and logging. Wetlands and farming. Urban life and waste disposal. Natural resource disputes are confusing and frustrating—even paralyzing—to many of us. For society, they are polarizing and expensive. They often lead to showdowns in courtrooms and legislative halls. The outcomes of those rarely please everyone. Sometimes, they don't please anyone.

That's why in 1986 in Oregon an unlikely combination of people, though suspicious of one another, decided to explore whether they could find ways to reduce—maybe even prevent—polarization on natural resource issues.

Representatives of ranching, timber, environmental and conservation organizations formed a group. They named themselves the Oregon Watershed Improvement Coalition, or OWIC. *The Miracle at Bridge Creek* examines some of the challenges, successes and failures those people experienced while trying to learn to communicate with one another.

The video was designed as an ice breaker.



The 30-minute *Miracle at Bridge Creek* video was designed as an "ice breaker" that could be shown to groups at odds seeking common ground. Attitudes and skills that help people work together are embedded in the story.

Other audiences that may find the video useful: interest groups or individuals considering participating in a coalition; participants in workshops for potential facilitators or educators; participants in classes or workshops on the politics of coalitions.

Cover: Character actor Jack Elam, narrator of The Miracle at Bridge Creek.

A USER'S GUIDE TO THE MIRACLE AT BRIDGE CREEK

Before the Screening
(suggestions for showing the video)

Your role

If you're showing the video as an ice breaker at a meeting between representatives of groups at odds, keep in mind that the individuals may have limited knowledge of each others' lifestyles, beliefs, needs and desires. They may be prejudiced, even hostile, toward one another. Initially, your goal should be to break down barriers and get them to talk. Once they have expressed their thoughts and feelings, they're more likely to work together looking for common goals.

To create an atmosphere conducive to effective communication, it's important to:

- Allow each individual to express feelings and perspectives.
- Encourage people to communicate by talking *to*—not *at* or *about*—each other with the goal of clarifying and understanding rather than scoring points in a "win-lose" debate. The idea is not to squelch conflict. In a constructive dialogue, conflict can stimulate creativity.
- Protect participants from personal attack.



Preparing the Group



- Introduce yourself.
- Explain that meetings of this type are in the experimental stage and that you are accompanying the group in the learning process.
- Ask participants to introduce themselves and tell why they agreed to attend—what they want to get out of the meeting. Encourage candid disclosure of thoughts and feelings about attending and about an opposing group or groups, but *do not allow personal attacks*.
- Ask participants what they hope to gain by communicating with the opposing group.

After the Screening
(a few more suggestions)

Here are questions people at the screening could discuss:

- Near the beginning of the video, an environmentalist refers to ranchers as people who want to "play cowboy" and "play the Marlboro man." A rancher refers to environmental advocates' "lies." What effect do such comments have on communication between individuals and groups?

- In the video, OWIC member Bill Krueger said, "The environmentalists felt the same thing about the cattlemen, that they owned the legislature and that they basically did as they pleased. So the first thing they figured out together was that they feared each other both for the same reason. Kinda meant that either they both were right or they both were wrong, and they couldn't both be right." In what ways do the people at your meeting fear each other? How might they all be wrong? How might all be right?
- OWIC wanted to see if people of opposing viewpoints could reach a consensus on what constitutes a sound watershed. The video says members found that simply developing a scientific description wasn't enough. What did work was identifying each member's land-use needs—what they wanted from the land. What motivates the people at your meeting?
- What was the benefit of having OWIC meetings at sites where watershed issues were obvious? How can this procedure help in working with controversial issues?
- In the video, OWIC members often ate together. How important was the character of OWIC meetings to the progress of the coalition? (Hint for the facilitator: Some OWIC members feel getting to know one another informally was as beneficial as sharing thoughts about natural resource issues.)





- OWIC members agreed early on to look at where they were going, not where they had been. That is, rather than worrying about what happened in the past, they decided to focus on what they wanted to accomplish in the future and how they could do that. Ask the people at your meeting why OWIC might have taken that approach.
- Why did some people leave OWIC? What impact did these people have on the group?
- How did the groups represented by OWIC members benefit from meeting together? How might society at large benefit from such cooperation?



Other Resources

Following are selected references that will help you learn more about the skills, roles and stages in the coalition building process.

1. Ching, Donna R. 1991. *Designing Successful Meetings: Unit I—Meeting Focus: Content, Process.* A participant's guide to accompany the video "Meeting Focus: Understanding the Importance of Content Focus and Process Focus." Honolulu, HI: HITAHR Information Text Series 040, University of Hawaii.
2. Ching, Donna R. 1991. *Designing Successful Meetings: Unit II—Meeting Roles: Facilitator, Recorder, Participant.* A participant's guide to accompany the video "Unit 1—Meeting Roles: Facilitator, Recorder and Participant in Facilitative Meetings." Honolulu, HI: HITAHR Information Text Series 041, University of Hawaii.
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OREGON STATE UNIVERSITY
EXTENSION SERVICE

Members of OWIC

Society for Range Management- PNW Section

Bill Krueger (Co-founder)

Bureau of Land Management

Wayne Elmore (Co-founder)

Oregon Cattlemen's Association (Five Members)

Doc Hatfield (Brothers area)

Bob Skinner Senior (Jordan Valley, Past President OCA)

Cliff Bentz (Juntura area))Not the one who is representative now

Louie Randall (Bonanza area, Past President OCA)

One more?

US Forest Service

Rick Ross

Oregon Extension Service (Oregon State University)

Tom Bedell

Oregon Environmental Council

Mary Hanson

Sierra Club-Oregon Chapter

Two members??

Oregon Trout

Bill Bakke

Cal Cole

Izaak Walton League

Dave Luman

? (former regional director for ODFW)

Oregon Small Woodlands Association

Bill Oberteuffer (Union County)

Oregon forest Industries Council

John Monfore (Weyerhaeuser Klamath Falls)

Pacific Rivers Council

? Don Tryon (I think he was with PRC)

The Nature Conservancy

?

ECOSYSTEM MANAGEMENT:
BEYOND THE RHETORIC

Symposium Proceedings



Edited by Roxanne Martin, Larry R. Rittenhouse, Jeff R. Jones

A working symposium to examine
and understand ecosystem management
for the Rocky Mountain region

Presented at:
Colorado State University
Fort Collins, Colorado

Colorado State University
College of Natural Resources
and
Department of Rangeland
Ecosystems Science

Colorado State University
Cooperative Extension

Colorado State
FOREST SERVICE

COALITIONS TO IMPLEMENT EFFECTIVE ECOSYSTEM MANAGEMENT

WILLIAM C. KRUEGER
Professor and Head, Department of Rangeland Resources
Oregon State University
Corvallis, Oregon

The complexity of ecosystems with all of their individualistic and cumulative interactions has been the subject of intense scientific study for decades. The details of nutrient cycling, energy flow, trophic levels, interspecific competition, structure, function, etc. are the topics of numerous reports. While we struggle with local landscape and global paradigms in an effort to understand ecosystems, we need to move ahead daily with management of these ecosystems. Management of ecosystems is done by people. Each decision made directs ecosystem function in some way. Every land manager is an ecosystem manager and always has been. The new ideas of ecosystem management are different from historic land management principally in the breadth of consideration of the influence of management decisions on ecological processes. The complexity of human interaction is equivalent to ecological processes and must be dealt with effectively if ecosystem management is to be accomplished. My purpose is to explain how we have dealt with human interactions to accomplish ecosystem management.

Defining the Vision

Beyond the scientific understanding of landscape ecological status and potential is the desire of people who manage these lands to achieve specific objectives. If ecosystem management is to attain a single purpose, then defining the vision of future ecological structure and function is straightforward. In this case, the result is primarily a function of application of science and experience to tightly focused goals. Most of the time the output of ecosystem management is more broadly focused on a variety of outputs. This is always the case in public land management and usually the case on private lands where law and preferences define the variety of outputs required of management.

Invariably, the multiple objectives have multiple champions, each focused on a specific objective or group of objectives. In rangeland ecosystems this might include ranchers interested in forage for livestock, sportsmen interested in wildlife harvest, environmentalists focused on native fish, endangered species, aesthetics, wilderness, or native plants, foresters interested in harvest of timber and others. For the most part, people interact primarily with other people who have similar interests. With essentially no communication among the interest groups their evaluation of each other is based on ignorance, fear, and mistrust. This is normal and **will prevent effective ecosystem management with multiple outputs until it is overcome**. Our society has empowered individuals or groups to prevent actions that have an adverse effect on specific interests. Through law or policy that results from law, we can effectively block most actions we find undesirable, especially on public land. As a society, we haven't as clearly defined a protocol to prevent disruption or termination of appropriate actions that others find unacceptable. Because we have given citizens the power to curtail land uses, we need to develop ecosystem management strategies that are widely understood and accepted.

One method that has been effective in Oregon is to spend the time necessary to develop shared knowledge and understanding among the varied interest groups. This is effective because the majority of people, whether industry based or not, want their actions to result in a sustainable, aesthetic ecosystem. When individuals come to a common understanding of ecosystem needs and potentials, they can together develop a vision of a desirable ecosystem management.

An example of this process is the Oregon Watershed Improvement Coalition (OWIC) (Krueger 1992). This group is evidence that widely different interests can find the common ground and move ahead with common goals. OWIC began in 1986 and consists of representatives of the Oregon Environmental Council, Oregon Forest Industries Council, Oregon Cattlemen's Association, Oregon Chapter of the Sierra Club, Oregon Small Woodlands Association, Oregon Trout, Pacific Rivers Council, Oregon Izaak Walton League, The Nature Conservancy, and the PNW Section of the Society for Range Management. These groups represent livestock production, large and small timber producers, sportsmen, local environmentalist interests

and national environmental interests. OWIC meets about five times each year to increase their mutual understanding of ecosystems and to implement a variety of programs. The goal of OWIC follows.

> **Preamble:** We recognize the multitude of benefits which can be derived from proper management of watersheds, which consist of riparian systems and their associated uplands. Benefits from watersheds include wildlife habitat, fish habitat, livestock forage, water storage, aesthetic and recreational values, aquifer recharge and others. We also recognize the absolute need to communicate among the varied interests to create solutions to Oregon's watershed problems.
>
> **Goal:** The goal of this Coalition is to ensure the long term sustainability of Oregon's watersheds and to improve communication among the diverse interests that affect watershed management.
>
> The approach that will be used in attaining OWIC's goal addresses the condition of the entire watershed and values of people. OWIC recognizes the ecological relationships between the riparian zone and its associated uplands. Recognition of social, economic and political interests are also key factors in our approach.
>
> Implicit in the goal is OWIC's desire to develop a healthy, productive environment within the potential of the environment with yield as a secondary output. Yields of all values can be expected to increase if the resource is managed with this in mind. Gain should not be measured solely in a quantitative manner, *e.g.* pounds of forage or logs per acre, number of trout per stream mile
>
> OWIC members view themselves as facilitators, not mediators. Compromises and trade-offs are not goals in and of themselves. The concept that is fostered is that of a healthy watershed, with the resulting effect that everyone benefits. OWIC through its unique membership can provide the impetus and support for seeking pathways to develop working programs for sound watershed management.

OWIC is underpinned by a philosophy that is based on an assumption that our resources are sufficiently abundant to meet our needs, provided that they are managed to meet their potential. This is an important focus because **we can only achieve that which we believe is possible**. The common view of natural resources is one of scarcity. If we accept that resources are scarce, the logical follow-up is to allocate these scarce resources among competing uses. This naturally leads to fear and conflict. In my view, the philosophy of scarcity is the basis of most natural resources law and agency policy. Consequently, agencies have been developed to equitably dispense resources to our citizens. A change in philosophy to abundance, with a focus on ecosystem management as the primary interest and allocation of resources as a secondary activity is the vision of OWIC. When ecosystems are managed so they function to their potential, for the most part, needs of resource users will be met as all interests work together to continuously meet all needs simultaneously.

The lessons from OWIC are that the land can be changed if management is based on ecological knowledge, management feasibility, all of this coupled with a lot of hard work. Along with this, people have to change so that different interest groups develop trust and respect; learn each others values, technological abilities and needs; and focus on resources not bureaucracies and policies (Krueger 1993).

Once a common vision is achieved, then action plans to manage ecosystems can begin. If plans are made before the vision is achieved, you can expect the problems we all see in conflict over resource uses and specific activities such as non-use of areas, livestock grazing or logging. OWIC has lead one project in the Bridge Creek Watershed and assisted the development of other consensus based, ecosystem management groups. I will describe two case histories that illustrate approaches to ecosystem management involving varied interests.

Trout Creek Mountain Working Group

The success of the Trout Creek Mountain Working Group is an example of resolution of intense conflict over livestock grazing that resulted in damage to the watershed's ability to produce Lahontan cutthroat trout. In the middle 1980's, the Vale Bureau of Land Management's Grazing Advisory Board toured the mountain. After the tour the Board agreed watershed conditions were not acceptable. They offered to provide some funds to help repair the damage but no progress was made immediately. In the summer of 1988 the BLM arranged for Doc and Connie Hatfield and Wayne Elmore to meet with ranchers from the Jordan Resource area to discuss the issues on the mountain. Doc and Connie are Oregon ranchers who are leaders in the industry in watershed management and livestock grazing. Wayne Elmore is a riparian specialist in the BLM with experience in livestock grazing and riparian systems. Doc and Wayne are both members of OWIC. The meeting was contentious. The ranchers were angry and frustrated. They feared the worst would happen and they would lose their ability to graze the mountain allotment. After a tour of the mountain, Connie was determined that a solution to the problems would be found. The determination of one person that will be sure something is done is a common feature of successful programs. A single person is frequently the difference between success and failure.

Following the field meeting, Connie arranged for a meeting with the Oregon Director of BLM. At this meeting the Trout Creek Mountain Working Group was formed. The group is made up of local rancher permittees, Oregon Cattlemen's Association representatives, and interested environmental groups. Initially, the ranchers voluntarily agreed to rest the mountain for three years with an agreement that during that period a management program to benefit the resources would be developed. The BLM sent Mr. Earl McKinney to the area to develop a grazing strategy that would work for all interests on the mountain. Earl was an important individual because he not only is an expert in rangeland livestock grazing but he is able to work with the ranching community effectively.

The result was that at the end of three years a grazing strategy was implemented that effectively enhanced the watershed and the stream that was habitat for the endangered trout. The plan was based on the growth of vegetation and the social and eating habits of the cattle. The U.S. Fish & Wildlife Service has evaluated the results and accept the program as effective to protect the trout.

This program was appealed in the normal way by letter. Because of the involvement of affected interests and acceptance by the Fish & Wildlife Service, the Administrative Law Judge would not hear the appeal and the solution was upheld. The program is continuing and so far is successful.

Land Issues Forum

In central Oregon another approach to large scale ecosystem management has been developed. The activities of the Land Issues Forum (LIFe) are focused on developing an integrated use of public and private lands in a contiguous area of about 2,000 mi^2 east of Bend, Oregon (Krueger 1993). This part of the state is rapidly urbanizing and the potential for conflicts between urban environmental interests and ranching interests is increasing. The area is important for ranching, logging, recreation, wildlife habitat, and other environmental interests.

LIFe is made up of about 50 individuals from the area ranches, environmental groups, hunting and fishing organizations, Bureau of Land Management, U.S. Forest Service, Soil Conservation Service, Department of Fish and Wildlife, Off-Road Vehicle Clubs, Fish and Wildlife Commission, and Oregon State University Extension. There are concerns over grazing of public lands, and wildlife habitat on public and private land. There is an interest by environmentalists in developing a large natural resource preserve. Everyone is concerned about subdivision of private ranch land and its potential impacts on wildlife and the watershed.

After many meetings and field tours, which took more than a year, the group developed a common goal and vision statement.

Goal

The purpose of the LIFe is to find opportunities through consensus building among varied interest groups for the enhancement of our natural resources (soil, water and vegetation) regardless of land ownership so the products of those resources, water quality and quantity, wildlife, recreation, livestock and wilderness can be sustained for present and future generations.

Vision

The driving force of any plan should be long-term ecological stability and diversity to meet the Vision.

The focus of planning should work to satisfy needs rather than resolving conflict.

1. Multi-use based with each use appropriate to land potential and citizen needs. Not every use should occur on every square foot of area and no use should be destructive.
2. A diversity of forage and cover for livestock and wildlife.
3. A healthy, functioning watershed.
4. Resource management based on coordination of interests.
5. Areas of pristine or undeveloped (roadless) land.
6. A healthy system with a mosaic of vegetative communities and a diversity of successional stages with emphasis on native species.
7. A common way of monitoring.

The completion of the goal and vision statement set the standards for the land use plan. Operating within the appropriate federal planning processes, the first Coordinated Resource Management plans were developed for two subdivisions of several hundred thousand acres. These plans include special consideration for big game, sage grouse, and watershed enhancement. They coordinate the use of public and private land, maintaining the property rights of both. This total process helped facilitate the required federal land use plans. Other units are undergoing detailed planning now.

The LIFe approach to ecosystem management was new and through the course of development important lessons were learned. Developing a vision is a tedious process and with a diverse group like LIFe it will probably take about a year. This is a necessary investment of time to develop the trust and understanding to move ahead with detailed plans. Once the vision was established, it took about 2 1/2 years to develop the first coordinated action plan and about the same amount of time for the second plan. This is too long and unnecessary. A group of LIFe participants including agency and ranching interests developed a protocol to allow completion of a plan in one year (Table 1). Everyone agreed a year was the maximum time that should be spent in developing and implementing an action plan. The protocol developed meets all state and federal law and policy. Further details and advice on implementing coordinated resource management is found in Anderson and Baum (1988), Anderson (1990) and Anderson (1991).

Conclusion

Ecosystem management must be a careful blend of scientific knowledge and participation of involved citizens. Neither ingredient alone can be used and result in successful ecosystem management. When interested people collectively define a vision of success they will agree to management strategies to achieve that success. The time spent in developing a common vision before developing management strategies is a necessary investment in developing a sustainable ecosystem management program for the long term.

References

Anderson, E. W. and R. C. Baum. 1988. How to do coordinated resource management planning. *J. of Soil and Water Conservation* 43(3):216-220.

Anderson, E. W. 1990. Tips on initiating a coordinated plan. *Rangelands* 12(5):262-263.

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Krueger, W. C. 1992. Building consensus for rangeland uses. *Rangelands* 14(1):38-41.

Krueger, W. C. 1993. Managing areas in mixed ownership. pp. 307-310. In: Tellman, B., Cortner, H. J., Wallace, M. G. and DeBano, L. F. *Riparian Management: Common threads and shared interests.* USDA Forest Service, Rocky Mtn. For. and Range Expt. Sta., Ft. Collins, CO. Gen. Tech. Rep. RM-226. 419 p.

Table 1. The LIFe Coordinated Resource Management Planning Protocol.

WHEN	WHO	WHAT	PRODUCT
1st month	LIFe	SCOPING: Define the area of land, what got us here (basic issues), where do we want to be a year from now, draft landscape description and desired future condition, existing resources and issues to focus on, sideboards, goals/objectives, possible methods to reach goals and objectives. (Possible field trip). SOLICIT PARTICIPATION: Identify people, skills, viewpoints, groups that need to be represented.	1st draft of project scope and plan of attack. Schedule for completion Work group definition by expertise and source. Mailing list Letter requesting comment and participation
2nd month	LIFe	FINALIZE LANDSCAPE DESCRIPTION Bring new people up to speed. Review all comments received. Develop final landscape description. (THIS MEETING SHOULD BE HELD AT FIELD SITE)	Written marching orders for work group.
3rd and 4th month	Work group	DEVELOP DRAFT PLAN: Analyze issues and develop plan and actions to reach goals and objectives. Use FOCUS groups to gain additional understanding. ID issues that are resolved through consensus, compromise, or that are not resolved	Written draft of plan List of issues that were resolved through consensus and compromise List of unresolved issues Identify list of potential projects to begin NEPA clearances
5th month	LIFe group	REVIEW DRAFT Review draft and provide comment on format, content and adequacy to accomplish goals/objectives. Provide guidance on unresolved issues.	Written guidance on revisions needed. Written guidance/direction for dealing with unresolved issues
6th month	Work group	FINALIZE PLAN Using guidance from LIFe group develop final proposal, actions, and alternatives	Written proposed plan to be submitted to agency.
7th and 8th month	Agency	NEPA Documentation	Environmental assessment
9th and 10th month	Agency	Public review and comment. Provide feedback from and to LIFe (possible meeting)	Response to comments. Decision
11th month	Agency landowners per plan	Implementation	Improved resource conditions, realization of landscape description

BETTINARDI Nicole * OWEB

From: oregon-gov-web-services@egov.com
Sent: Tuesday, April 18, 2023 1:04 PM
To: BETTINARDI Nicole * OWEB
Cc: REPPLINGER Linda * OWEB
Subject: Public Comment

I want to leave a public comment on...	Spending Plan,Spending Plan
Topic / Item Letter	N
Date of Meeting	04/26/2023
First and Last Name	Lee Russell
Phone Number	
Organization	Elk Creek Watershed Council
Your Email Address	
Type Comment Here (comments may also be uploaded below):	I want to comment on the spending plan, and the allocation for the Weed Board grant program. Douglas County currently has a Weed Board grant that has funded treatment of Woolly Distaff Thistle and Paterson's Curse, two A- and T-listed noxious weeds that are confined to very limited areas in Douglas County. A-listed weeds are "a weed of known economic importance which occurs in the state in small enough infestations to make eradication or containment possible." There are about 50 known sites containing Woolly Distaff Thistle, and two (2) Paterson's Curse sites. These two (2) weeds have been treated continuously for more than 20 years, and the acreage of the infestation (both total and net acres) has been reduced considerably. Woolly Distaff Thistle has been eradicated (NO new plants) at several sites, and net treated acres are now in the single digits. But there is still work to be done if we are going to avoid losing the ground we have gained for more than 20 years. My comments today are to make the Board aware that the proposed funding levels for the Weed Board grant program need to reflect the increased costs for this important work. I have agonized over the costs in the grant applications, and pleaded with contractors to cut their rates to bare minimums, but the costs for labor, fuel, chemicals, have all gone up. The funding allocation for the Weed Board program needs to reflect this. Please direct staff to provide more information on this topic before you make decisions at your July meeting. Thank you for your time.
I would like to give verbal comment at the meeting in person	No

I would like to give verbal comment at the meeting virtually	No

Submission ID: c3bc7fb6-fc01-47f7-b083-7a9ca6c3c533

Record ID:

From:	CHARPILLOZ-HANSON Lisa * OWEB
To:	BETTINARDI Nicole * OWEB; REPPLINGER Linda * OWEB; HARTSTEIN Eric * OWEB
Cc:	PAGE Stephanie * OWEB
Subject:	FW: OSWB
Date:	Friday, April 21, 2023 2:25:18 PM
Attachments:	1115_001.pdf

From: Margaret Magruder <Margaret.Magruder@columbiacountyor.gov>
Sent: Friday, April 21, 2023 2:19 PM
To: CHARPILLOZ-HANSON Lisa * OWEB <Lisa.Charpilloz-Hanson@oregon.gov>
Subject: OSWB

Dear Director Hanson!

Lisa, I just wanted to add my voice and the voice of Columbia County to this message from the OSWB (letter attached) to ask for consideration of increased grant funding for Weed Grants. It is a never ending battle to control invasives and our "Weed Warriors" need help.

Sincerely,
Margaret

Margaret C. Magruder
Columbia County Commissioner
503-397-4322
503-709-9652 cell

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Commissioners
Craig A. Pope
Jeremy Gordon
Lyla Moorhouse

Gregory P. Hansen
Attorney at Law

April 18, 2023

TO: Oregon Watershed Enhancement Board

FROM: Oregon State Weed Board Chair

RE: Consideration for Increased Weed Grant Funding

The Oregon State Weed Board (OSWB) and grantees throughout Oregon appreciate the support of OWEB in providing funding for statewide noxious weed control projects that support the mission of OWEB. Noxious invasive weeds directly impact fish and wildlife, water resources and overall watershed health.

Since 2012, 577 noxious weed control projects have been approved for funding by the OSWB. This funding provided by OWEB supports projects for our dual missions of natural resource protection.

Over the last several years the cost of implementing these projects has increased and the increased costs directly impact the amount of on the ground project work that can be accomplished by grantees.

For the above reasons, the OSWB requests OWEB to consider a cost of doing business increase of 15% that will allow for keeping viable noxious weed control projects being implemented throughout Oregon. Current funding levels are $3,250,000 biennium, if an increase of 15% were approved by the board it would equate to $487,500 for a total budget of $3,737,500 for the 2023-25 biennium.

Thank you to OWEB for your all your past support and your consideration of the proposed increase.

Please contact me if you have any questions.

Sincerely,

Craig Pope, Chairman
Oregon State Weed Board

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item F

Land Acquisition Grant Awards

Board Meeting April 25-26, 2023

Oregon
Tina Kotek, Governor

OREGON WATERSHED ENHANCEMENT BOARD

775 Summer Street NE, Suite 360
Salem OR 97301-1290
www.oregon.gov/oweb
(503) 986-0178

Agenda Item F-1 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
Miriam Forney, Acquisitions Coordinator

SUBJECT: Agenda Item F-1 September 2022 Land Acquisition Grant Offering
April 25-26 2023, Board Meeting

I. Introduction

This staff report provides an overview of the September 2022 land acquisition grant offering and outlines staff recommendations for a grant award.

II. Land Acquisitions – September 2022 Offering Background and Summary

A. Applications Submitted

The September 2022 grant offering is the second of two land acquisition grant cycles for the 2021-2023 biennium. The solicitation opened in June 2022 instead of autumn 2022 because of efforts to move evenly-spaced offerings earlier in the biennium after delays caused by lottery-revenue reductions in 2020.

The land and water acquisition spending plan includes $8.5 million for the biennium. The board awarded $3,079,073 in the first grant cycle of the biennium. One land acquisition application was received in September 2022 requesting $2,875,000. The application evaluation is included in Attachment A.

Following technical reviews, land acquisition application 223-9900-22451 is recommended for funding with conditions.

B. Review Process

The land acquisition application was reviewed in accordance with administrative rules for the program, most recently revised in 2019. The process utilizes technical experts to evaluate ecological outcomes, project soundness, organizational capacity, and community benefits and impacts. It also includes a public hearing and submission of public comments by interested parties.

At the request of an advisory group of members of the Oregon Coalition of Land

Trusts, the application evaluation process was lengthened to account for the following:

- Pre-application consultations occur no less than one month before the application deadline. This allows applicants time to include consultation discussion items in their application. Exceptions to the consultation deadline may be granted if time-sensitive changes, such as a loss of other funding, occur.
- Reviewers may seek clarification of ecological outcomes and project soundness; however, they may not seek new information. OWEB gathers and provides reviewers' questions to the applicant to maintain reviewer confidentiality. Applicants may, but are not required to, provide answers to the reviewers' questions.
- Applicants may provide OWEB with written responses to questions from public hearings.

Each ecological reviewer completed a project evaluation form, and staff summarized the input of all ecological reviewers.

A team consisting of staff, the land acquisition program's due-diligence technical assistance contractor, and the Oregon Department of Justice conducted a project soundness review. The review included identifying project soundness concerns, and whether reviewers think situations are resolvable in the 18-month timeframe allowed for closing transactions after the board awards funding.

Staff reviewed organizational capacity and community benefits and impacts. Public comment was solicited through notices and a public hearing held by staff.

Staff summarized the review outcomes for the project. After the evaluation was completed, it was provided to the applicant.

III. Staff Funding Recommendation

Staff recommends that the board award funding for the land acquisition grant as specified in Attachment A, with the project-specific conditions detailed in Attachment B. The land acquisition grant funding recommendation totals $2,875,000.

Attachments

A. Land Acquisition Project Evaluation
B. Project-specific Funding Conditions

2022 OWEB Grant Offering
LAND ACQUISITION APPLICATION

Application No.:	223-9900-22451		
Project Name:	Trout Creek Meadows		
Applicant:	Oregon Desert Land Trust	**Region:**	Eastern Oregon
Basin:	Closed Lakes	**County:**	Harney
OWEB Request:	$2,875,000		
Total Cost:	$3,636,899		

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

The Oregon Desert Land Trust and The Nature Conservancy have partnered to acquire the 16,645-acre Trout Creek Ranch near the unincorporated community of Fields in southeast Oregon. Among other things, the property lies in the SONEC project area, one of the most important landscapes in western North America for waterbird migration. The proposed OWEB investment area also includes more than five miles of Trout Creek, an important habitat for the state-sensitive Alvord chub.

The project's need is to permanently protect and establish conservation management on the property's wet meadows. We will accomplish this by developing a conservation easement with OWEB that makes wildlife habitat the driving consideration in management planning. At the same time, we plan to use working lands practices, including livestock grazing and haying, as appropriate to achieve habitat goals.

Our primary project partner is The Nature Conservancy, which has dedicated significant planning and stewardship capacity to the project. We will also rely on our local ranch partners to help us develop, monitor, and implement appropriate agricultural practices.

REVIEW

ECOLOGICAL OUTCOMES

Priority Location and Habitat

Closed Lakes Basin wetland habitat is an ecological priority for OWEB. Additionally, the project is within the SONEC (Southern Oregon Northeast California) focus area, and the project seeks to protect and restore mesic and flood-irrigated wetland habitats in the Pacific flyway through acquisition. While not listed as an OWEB priority fish species, Alvord Chub is an Oregon Conservation Strategy species that will benefit from this acquisition.

Restoration Opportunity

The proposal narrative provides an accurate assessment of the property's current conditions, and the applicant is aware of the need for input, guidance, and cooperation from experts in wet meadow, migratory bird, riparian, and fish management disciplines.

In addition to the applicant's restoration goals, this project will implement needed adjustments to irrigation infrastructure and grazing management to prevent further habitat degradation. Implementing the proposed conservation actions described in the application will provide habitat for migratory birds, and the

amount of benefit will vary annually depending on winter and spring precipitation. Improving grazing management, and re-establishing a more holistic manner of water management, will maximize migrating bird forage resources and improve ecological resources for other wildlife, such as the Alvord chub and sage-grouse. The project will use targeted protection and restoration interventions to protect and enhance mesic habitats. Improved water management will contribute to greater watershed resilience, ultimately ensuring fish and wildlife resources are available even during drought years.

Benefits to Fish, Wildlife, and Watershed Function

While specific actions related to management and restoration are not well presented, the applicant's intent is consistent with Oregon's conservation priorities. The project provides a significant opportunity to demonstrate to the local community that conservation and agriculture can co-exist and provide the needed habitats for the species that depend on them. Trout Creek meadows encompass nearly all of the lower Trout Creek floodplain and are a rare conservation opportunity.

PROJECT SOUNDNESS

ODLT purchased the property proposed for OWEB funding (the "Property"), as part of the larger Trout Creek Ranch (the "Ranch") in July 2021. The chain of title is unclear because of variations and errors in legal descriptions. ODLT should clarify the chain of title to confirm that all intended lands were included in its purchase.

ODLT's purchase and sale agreement for the Ranch required the seller to complete lot line adjustments. ODLT should provide documentation of Harney County's approval of the lot line adjustments to confirm that the Ranch is a lawful unit of land under state law.

The appraisal submitted with the application was prepared for ODLT's lender. ODLT needs to hire the original appraiser, or a new appraiser, to consult with OWEB's review appraiser and then prepare an appraisal of the Ranch that is consistent with OWEB's appraisal guidelines and includes an allocation of value for the deeded land that makes up the portion of the Ranch proposed for OWEB reimbursement. While the federal grazing permit land could be considered an element of value by a potential buyer for the whole Ranch in the open market, it is nonetheless a separate value component, as well as a different type of property right, a non-deeded revokable grazing permit, and cannot be included in the Property's allocated value.

The primary access route to the Ranch headquarters and the Property is a driveway that crosses BLM land. It is unclear whether the driveway is an established right of way. ODLT should seek a formal right of way from BLM if one does not exist. If ODLT is unable to obtain appurtenant access from BLM before OWEB's closing deadline, the conservation easement will need to include a requirement for establishing alternate access if BLM precludes access across its property.

The Property's title includes mineral reservations that would be most soundly addressed by extinguishment. If ODLT is unsuccessful in its attempts to extinguish the mineral reservations, a mineral remoteness assessment may be acceptable.

The deed of trust and assignment of rents for the loan ODLT took to purchase the Ranch must be paid off in full for the Property at the time of, or prior to, the release of OWEB's funds. Other title work is likely to be limited to minor items such as ODLT explaining its risk assessment and removing any exceptions that do not pertain to the Property.

An environmental site assessment determined the presence of hazardous materials at the Ranch. ODLT hired a contractor to clean up the affected areas. ODLT should confirm that the clean-up was adequate for environmental liability purposes.

The status of the Property's water rights, and ODLT's intentions for the rights, are not clear. ODLT needs to contact the Oregon Water Resources Department to determine available options, if any, for protecting water instream or changing the beneficial use to wildlife habitat or wetland formation if the fields are no longer irrigated for agricultural uses as part of the project.

To demonstrate that sound project outcomes can be expected, ODLT should describe the extent and conditions to which the Property will be restored in a management plan outline and description of restored conditions. To ensure that the use of the Property is consistent with the purpose of OWEB's land acquisition funding, ODLT should agree that grazing on the Property will be for the purpose of producing high-quality vegetation and other important habitat conditions for priority fish and wildlife species.

The application states that ODLT has not decided how it will insure its conservation properties. More information is needed to document a sound conservation defense insurance plan for the Property.

COMMUNITY BENEFITS AND IMPACTS

The application describes four types of community benefits resulting from the project:

1. Carrying out the ecological objectives of the project in a manner that benefits the local community.
2. Partnering with local ranchers to make the property and associated grazing allotments more resistant to wildfire and more resilient to a warming climate.
3. Increasing science capacity by providing access to tools and data to local ranchers.
4. Creating demand for services in the local economy, including rebuilding fences, renovating buildings, and restoring streams.

The above benefits can be summarily described as being a good neighbor. Applicant staff has extensive experience building relations with neighbors in ranching communities.

While the application does not include specific plans for public use, it acknowledges long-standing public use by birders in the area. With a full-time, on-site ranch manager, it is likely that the applicant can accommodate such public use without jeopardizing wildlife habitat or neighboring ranches.

PUBLIC INVOLVEMENT

A public hearing was held on November 22, 2022, to provide an opportunity for public comment on the funding application. The hearing location was at the Fields Elementary School in Fields, Oregon. Fifteen members of the public attended and stated community benefits and challenges associated with the project. Community benefits stated are that wildlife habitat will be enhanced and property taxes will continue to be paid to Harney County. A variety of challenges were voiced at the hearing including:

- Increased tourism may result from the project adversely impacting roads, traffic, roadside trash, and public safety.
- The community feels they were not properly notified.
- Habitat improvements on the Trout Creek Ranch will be duplicative of what exists on the Malheur Wildlife Refuge.
- Concern regarding water rights and water availability, distribution, and the potential for increased irrigation water management and measurement.
- Altered ranch management like management at the Malheur Wildlife Refuge.

- The Oregon Desert Land trust does not have a management plan for the Trout Creek Ranch, and it is difficult to understand how ranch management will change under new management.
- If the ranch is conveyed to public ownership property tax revenue may be lost to Harney County.

ORGANIZATIONAL CAPACITY

ODLT is a relatively new land trust, started in 2017. The grant application states that ODLT is a 501(c)(3) public charity that is seeking accreditation by the Land Trust Alliance (LTA). ODLT should provide additional information about itself, including its strategic plan, bylaws, recent financial statements, annual budget, and the status of its application to LTA.

Prior to ODLT's purchase of the Ranch, it had a modest portfolio consisting of approximately 3,500 acres of conservation lands and assets totaling $1.7 million. The $13.5 million acquisition of the Ranch was a significant step for ODLT. ODLT has demonstrated momentum in fundraising to pay off the loan it took to purchase the Ranch, but the organization's track record of fundraising for large-scale restoration, which the Property needs, is unclear. Some of the ODLT staff have been successful with such fundraising at other organizations.

ODLT's staff consists of an executive director, deputy director, Ranch manager, and outreach coordinator. The application states that ODLT is hiring a regional stewardship lead that will be centered in Burns and dedicate 75 percent of their time to the Ranch. Concerns about ODLT staffing being stretched thin are somewhat mitigated by the involvement of The Nature Conservancy (TNC) in the stewardship of the Ranch. To understand the scope and timeframe of TNC's commitment and potentially alleviate concerns about ODLT's capacity to restore the Property, OWEB should review a copy of the ODLT-TNC partnership agreement.

The annual stewardship costs included in the application are unclear. It is also unclear how ODLT will secure stewardship funds for the Property, which the application states are not secured. ODLT should provide a complete accounting of annual stewardship costs and a plan to raise the necessary funds.

SUMMARY

The application offers an opportunity to protect with an OWEB conservation easement the most ecologically significant portion (2,365 acres) of a 16,645-acre parcel recently acquired by the applicant in partnership with The Nature Conservancy. The Trout Creek Meadows link high-elevation sites from the Trout Creek Mountains to the east and the Pueblo Mountains to the west and support a wide variety of the Pacific Flyway's migrating birds. The Property offers significant wet meadow and sagebrush-steppe habitat, some of which require restoration. The project also provides an opportunity to demonstrate conservation in a working land setting.

STAFF RECOMMENDATION

Staff recommends the Board award $2,875,000 for the project in accordance with OWEB's standard grant agreement for land acquisition, including project-specific conditions specified in the grant agreement. Staff will consult with ODLT to finalize project-specific conditions, which will be provided to the Board at its April 2023 meeting.

Trout Creek Meadows 223-9900-22451
Funding conditions

Initial Conditions

1(A)(i) and 1(A)(ii): grant agreement boilerplate for regular project meetings with OWEB.

1(A)(iii) Grantee provides its bylaws and strategic plan.

1(A)(iv) Grantee provides an explanation of its relationship with its parent organization, including any operable agreement with the parent organization for how donations are received and apportioned between the two organizations.

1(A)(v) Grantee provides its 2021 audited financial statement, most recent quarterly financial statement, and current annual budget.

1(A)(vi) Grantee: (i) explains the reason for its varying level of confidence in its ability to restore the Property; and (ii) affirms its commitment to restoring the entire Property to the highest quality fish and wildlife habitat feasible.

1(A)(vii) Grantee provides its partnership agreement with The Nature Conservancy (TNC) and commits to amending the agreement in accordance with Secondary Condition 1(B)(i) if requested by OWEB.

1(A)(viii) Grantee provides a written plan for securing adequate stewardship funds for the Property (the "Stewardship Funds"), including: (a) the acreage of weed treatments, frequency of weed treatments, and cost; (b) an itemized list of all necessary stewardship activities, frequencies, and costs that will be paid from the Stewardship Funds; (c) the amount of Stewardship Funds that will be secured, accounting for the information in items (a) and (b) of this section; (d) the source of the Stewardship Funds; (e) documentation establishing that the Stewardship Funds will generate adequate interest to pay for annual stewardship costs; (f) the rationale for the expected rate of return on the Stewardship Funds; (g) the date by which the Stewardship Funds will be secured; and (h) a written agreement that the Stewardship Funds will be allocated to the Property.

1(A)(ix) Grantee agrees in writing that grazing on the Property will be the result of a management planning process that determines that the grazing is necessary for improving the Property's vegetation and other habitat elements for native fish and wildlife including OWEB's priority species for the basin ("Conservation Values"); (ii) be informed by goals for protecting and enhancing the Property's Conservation Values and not by unrelated considerations; (iii) include measurable ecological performance goals for fish and wildlife habitat developed with the assistance of fish and wildlife professionals with expertise in the habitat requirements of priority species; (iv) include ecological monitoring prescriptions that relate specifically to tracking achievement of the ecological performance goals; and (v) include specific actions and timelines for analyzing and interpreting ecological monitoring data and revising Property management actions as necessary to achieve the ecological performance goals.

1(A)(x) Grantee provides documentation of the Malheur National Wildlife Refuge model of haying and grazing referenced in the Property's grazing lease (the "Lease"), in sufficient detail to describe the model's principles and practices as they relate to the Property.

1(A)(xi) Grantee agrees not to amend the Lease or enter any new leases for the Property without prior written approval from OWEB.

Secondary Conditions

1(B)(i) Grantee amends its partnership agreement with TNC if OWEB determines that additional information is necessary to describe the roles and requirements of the respective parties and demonstrate that the partnership will successfully manage and restore the Property.

1(B)(ii) Grantee submits initial Management Plan content included in OWEB's current management plan guidance, and agrees that the complete Management Plan, due after Closing in accordance with the Project Schedule, will include but not be limited to:

1. A grazing plan that is consistent with Initial Condition 1(A)(x).
2. A plan for any public use of the Property, including but not limited to:
    a. Plans that minimize built infrastructure, ground disturbance, and other impacts to the Property's Conservation Values.
    b. An adequate monitoring plan, including but not necessarily limited to staffing, funding, and actions to detect and respond to impacts to the Property's Conservation Values resulting from recreational use of the Property.
    c. An adaptive plan for responding to recreational impacts to the Property's Conservation Values, including but not limited to restricting recreational access to the Property as necessary to protect the Conservation Values.
    d. A communications plan for ensuring that the public is aware of recreational use restrictions on the Property.
3. Actions for: (i) consulting with the Oregon Water Resources Department ("OWRD") regarding the lease or transfer of the Property's water rights to instream use, or changing the beneficial use of appropriated water to wildlife habitat or wetland formation if agricultural irrigation ceases on all or a portion of the Property; and (ii) completion of these or any other water right preservation measures that OWRD determines are feasible, and are consistent with OWEB-approved restoration and management objectives for the Property.

1(B)(iii) Grantee: (i) obtains Terrafirma conservation defense insurance for the Property at or before Closing; and (ii) provides documentation of commercial liability insurance on the Property in an amount equal to or greater than the industry standard for comparable ranch properties and in no case less than OWEB's established insurance requirements for grant recipients.

1(B)(iv) Grantee: (i) obtains all revisions necessary for OWEB to approve the appraisal prepared by Colliers International, with an effective date of April 28, 2021; or (ii) obtains a new appraisal of the subject property, as of the same effective date, prepared in accordance with OWEB's established appraisal guidance.

1(B)(v) Grantee confirms in writing that any changes in grazing required under Initial Condition 1(A)(x) will not affect any of Grantee's agreements or obligations pertaining to grazing allotments associated with any land owned by Grantee.

1(B)(vi) Grantee confirms that it took title to all property it intended to acquire by: (i) providing a copy of the recorded Sherburn to PMLC deed; and (ii) annotating or color coding the legal description in the PMLC to Grantee deed (#2021-1143) in a manner that

demonstrates that all lands in the Sherburn to PMLC deed and the Stafford Ranches to PMLC deed intended to be conveyed to Grantee, are included in the PMLC to Grantee deed.

1(B)(vii) Grantee seeks a quitclaim deed from Harney County for the mineral reservations included in Exceptions 34, 36, and 53 in Grantee's policy of title insurance dated July 16, 2021 (the "Title Policy").

1(B)(viii) If Grantee is not successful in obtaining the quitclaim deed sought for Secondary Condition 1(B)(vii), Grantee obtains a mineral resource assessment consistent with the objectives and requirements in OWEB's title guidance document and including an analysis of whether Harney County has any form of legal access to the land subject to the mineral reservations.

1(B)(ix) Grantee obtains the Bureau of Land Management's ("BLM") determination of whether there is a formal ROW to Grantee's larger parcel ("Trout Creek Ranch") in the location of the existing driveway in Section 30 of Township 39 South, Range 36 East. Grantee shall seek a formal ROW from BLM if one does not exist.

1(B)(x) If Grantee is unable to obtain a formal ROW from BLM under Secondary Condition 1(B)(ix) by Closing, Grantee agrees that OWEB's conservation easement will include an obligation of Grantee to construct a driveway from Whitehorse Ranch Road to Trout Creek Ranch generally along the eastern boundary of Section 25 of Township 39 South, Range 35 East, if Grantee becomes unable to use the existing driveway.

1(B)(xi) Grantee agrees that OWEB's conservation easement will include all provisions OWEB determines are necessary to ensure that it can proceed to and across Trout Creek Ranch to access the Property.

1(B)(xii) Grantee explains why Exception 16 in the Title Policy was determined to pose a higher risk than other ROW encumbrances affecting the Property.

1(B)(xiii) Grantee removes Exception 20 (dam and canal), Exception 55 (deed of trust), and Exception 56 (assignment of rents) from the Property's title and provides OWEB with an updated title report confirming removal of the items, at or before Closing.

1(B)(xiv) Grantee provides documentation that demonstrates Harney County's approval of all lot line adjustments that resulted from the requirement included in Sale Agreement No. 2021.01.19 PMLC, Addendum No. 1, Section 1(iv), which required the Property seller to complete all lot line adjustments prior to closing.

1(B)(xv) Grantee hires a surveyor to prepare: (i) a legal description for the Property; and (ii) a map that will enable OWEB to verify the accuracy of the legal description.

1(B)(xvi) Grantee provides a complete copy of the Phase 1 Environmental Site Assessment prepared by Wallace Group and dated May 20, 2021 (the "ESA"), including all appendices.

1(B)(xvii) Grantee confirms that the work described in Wallace Group's letter dated July 26, 2021 is adequate for ensuring that Grantee will not incur any liability from the recognized environmental conditions (RECs) identified in the ESA.

1(B)(xviii) Grantee confirms that it has implemented all best management practices and housekeeping described in the ESA.

1(B)(xix) Grantee agrees that if it demolishes or renovates any structure on Trout Creek Ranch, it will complete the actions recommended in the ESA for asbestos, lead-based paint, and septic structures to the extent such actions are applicable.

1(B)(xx) Grantee confirms that it is prepared to enroll the Property in the statewide conservation easement special assessment if necessary for maintaining a comparable assessment.

1(B)(xxi) Grantee provides copies of all water rights applications, permits, certificates, transfers, and claims affecting the Property; the Trout Creek Water Rights Decree; and an updated water rights map that includes the Property boundary and a table of water rights and irrigated acres that are within the boundary.

1(B)(xxii) Grantee describes the status of the water rights transfers under Certificate 51251 and confirms that there are no other pending water rights transfers affecting the Property. If any water rights transfers are still pending, the updated map required in Secondary Condition 1(B)(xxi) should reflect that status.

1(B)(xxiii) Grantee confirms to OWEB's satisfaction that the continued use of groundwater on Trout Creek Ranch, completed water rights transfers, and any pending water rights transfers, will not negatively impact the Property's Conservation Values.

1(B)(xxiv) Grantee prepares baseline inventory documentation that includes, among other items required by OWEB, a description of future conditions on the Property that reflect the restoration of the Property's Conservation Values to the maximum extent feasible ("Description of Restored Conditions").

Oregon
Tina Kotek, Governor

OREGON WATERSHED ENHANCEMENT BOARD

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(503) 986-0178

Agenda Item F-2 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 F-2 Land Acquisition Grant Program - Time Extension
April 25-26, 2023, Board Meeting

I. Introduction

Staff requests the board extend the closing date for the Siuslaw land acquisition project.

II. Background

Every land acquisition grant awarded by the board is conditioned on general and project-specific due diligence requirements, which must be met before funds are released for the land transaction.

If a grantee does not satisfy the conditions of a board funding award, including closing the transaction within 18 months of the award, the board may authorize continued encumbrance of all or part of the awarded funds, or rescind the award in accordance with OAR 695-045-0200.

The Siuslaw project was funded by the board at its October 2021 meeting and has a closing deadline of April 27, 2023. For the reasons explained below, the grantee will not close the transaction by the deadline and has requested a closing extension.

III. Extension Request

Funds for the Siuslaw project (Grant No. 221-9903-19500) were awarded to The Nature Conservancy (TNC). The funds will be used for the fee-simple purchase of an approximately 245-acre property in Lane County.

TNC has completed a portion of the due diligence required by OWEB's funding conditions. TNC's accomplishments include an appraisal and submission of the land use application that is necessary to complete the project. Project activities have been slowed by several factors, including county requirements for submitting the land use application.

IV. Staff Recommendation

Staff recommends the board extend the closing deadline to April 27, 2024, for the Siuslaw land acquisition project (Grant No. 221-9903-19500) with all other conditions of the project remaining unchanged.

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item G

Climate Change Rulemaking

Process Update

Board Meeting April 25-26, 2023

Oregon
Tina Kotek, Governor

OREGON WATERSHED ENHANCEMENT BOARD

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Agenda Item G supports all OWEB's Strategic Plan priorities.

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Eric Hartstein, Board and Legislative Policy Coordinator
Jessi Kershner, Water and Climate Programs Coordinator

SUBJECT: Agenda Item G. Climate Criteria Rulemaking Process Update
April 25-26, 2023, Board Meeting

I. Introduction

Staff will update the board on the climate criteria rulemaking process, including providing an overview of draft climate evaluation criteria, definitions, and guidance.

II. Background

In January 2022, the board passed Resolution 01-2022 ("Climate Resolution"), which commits OWEB to integrate climate mitigation and adaptation into funding and policy decisions through an inclusive and equitable process. Following the adoption of the Climate Resolution, OWEB staff led a public engagement process to gather feedback on how potential challenges and opportunities associated with implementing the resolution. At the July 2022 board meeting, the OWEB Board authorized staff to begin rulemaking to add climate evaluation criteria across OWEB's grant programs.

III. Climate Criteria Rulemaking Process

The climate criteria rules advisory committee consists of 12 members representing applicants, grantees, review team members, and non-traditional partners. Three rulemaking meetings have been held to date: (1) December 5, 2022; (2) January 6, 2023; and (3) February 10, 2023. Four draft climate evaluation criteria were presented to the committee at the first meeting, which has since been revised and condensed to three draft criteria. At the third rulemaking meeting, OWEB staff also shared draft guidance intended to illustrate how the climate criteria could be applied in OWEB grant programs. A fourth rulemaking meeting was scheduled for April 11, 2023, where committee members reviewed the latest draft of climate criteria and associated definitions. All rulemaking meeting materials and agendas can be found here. OWEB staff plans to bring the final climate criteria to the board for their approval at the July 2023 board meeting.

IV. Recommendation

This is an informational item only.

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item H

Open Solicitation Grant Awards

Board Meeting April 25-26, 2023

Tina Kotek, Governor

OREGON WATERSHED ENHANCEMENT BOARD
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Agenda Item H 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: Eric Williams, Grant Program Manager

SUBJECT: Agenda Item H. Fall 2022 Open Solicitation Grant Offering
April 25-26, 2023, Board Meeting

I. Introduction

This staff report describes the Fall 2022 Open Solicitation Grant Offering and funding recommendations. Staff request the board approve the funding recommendations outlined in Attachment D to the staff report, including funding for 44 restoration grants, 21 technical assistance grants, and 7 stakeholder engagement grants.

II. Fall 2022 Grant Offering Background and Summary

A total of 106 applications were received requesting almost $18 million. Attachment A shows applications submitted by region, project type, and funding request.

III. Review Process

Staff facilitated a review process where all eligible grant applications were evaluated by the agency's six Regional Review Teams (RRTs). Staff scheduled site visits for as many proposed projects as possible, with all RRT members invited to the visits.

OWEB then facilitated RRT meetings in each region for all grant types offered. Reviewers considered the likelihood of success of the proposed project based on evaluation criteria in rule, which are provided in Attachment B. After classifying applications as "Recommended," "Recommended with Conditions," or "Not Recommended," the RRTs then prioritized the projects recommended for funding by application type.

The RRT evaluations and recommendations, along with staff recommendations, were distributed to all applicants. Attachment C includes the number of applications recommended by RRTs and staff for each region by project type, as well as staff-recommended award totals by application type and region. Prior to the board meeting, staff will forward to the board any written comments received from applicants regarding the RRT and staff recommendations.

IV. Sage-grouse Projects

At its April 2015 meeting, the board adopted a policy to make available at least $10 million through its granting programs over the next ten years in support of projects located in Oregon's

sage steppe ecosystem that improve greater sage-grouse habitat. The recommended Fall 2022 Open Solicitation Grant awards include four projects that meet the criteria:

- 223-4000, **"**North Warner Rangeland Health Project," requesting $496,571.
- 223-4002, "Lake County All Lands Restoration Initiative Mini FIP Phase II," requesting $397,432.
- 223-4012, "Crooked River Watershed Sage-Grouse Conservation IV," requesting $74,987.
- 223-5000, "So Many Juniper, So Little Time," requesting $61,322.

If awarded, total funding for sage-grouse projects since 2015 will be $14,033,017.

V. Funding Recommendation

Staff considered the RRT recommendations and funding availability in developing the staff funding recommendations provided in Attachment D, which includes the number of applications recommended for funding by RRTs and staff by region and grant type. The funding recommendations for the Fall 2022 Open Solicitation Grant Offering are summarized in Table 1. This will be the final Open Solicitation grant award for the 2021-2023 biennium. Since there are funds remaining in the spending plan for the Technical Assistance, Stakeholder Engagement, and Monitoring grant types, staff is recommending a spending plan adjustment to award additional Restoration grant awards summarized in Table 1.

Table 1: Spending Plan and Funding Recommendations for Fall 2022 Grant Offering

Grant Type	Current Spending Plan	Recommended Spending Plan Adjustment	Revised Spending Plan	Awards to Date	Staff Recommend-ation	Remaining Spending Plan Balance
Restoration	$33,500,000	$620,876	$34,120,876	$22,938,223	$11,182,653	$0
Technical Assistance	$5,500,000	(-$620,876)	$4,879,124	$3,174,776	$1,314,447	$389,901
Monitoring	$4,750,000		$4,750,000	$4,579,200	N/A	$170,800
Stakeholder Engagement	$2,750,000		$2,750,000	$1,235,942	$530,897	$983,161
TOTAL	$46,500,000	$0	$46,500,000	$31,928,141	$13,027,997	$1,543,862

Staff recommend the board adjust the spending plan and award funds for the staff-recommended projects listed in Attachment D.

Attachments

A. Grant Applications Submitted
B. Evaluation Criteria
C. RRT and Staff Funding Recommendations
D. Regions 1-6 Funding Recommendations

Oregon Watershed Enhancement Board
Fall 2022 Open Solicitation Grant Offering

Applications Received by Type

	Stakeholder Engagement	Technical Assistance	Restoration	Totals
Region 1	3	5	7	15
Region 2	0	4	9	13
Region 3	5	5	13	23
Region 4	1	4	10	15
Region 5	2	6	17	25
Region 6	1	5	9	15
Totals	12	29	65	106

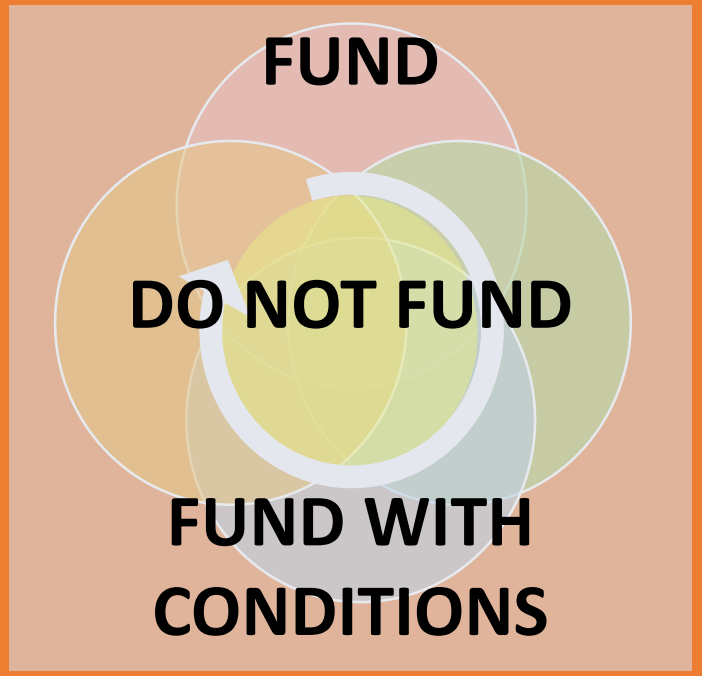
Dollar Amounts by Application Type

	Stakeholder Engagement	Technical Assistance	Restoration	Totals
Region 1	138,305	354,347	1,912,724	$2,405,376
Region 2	0	226,589	2,780,541	$3,007,130
Region 3	299,758	314,342	3,247,195	$3,861,295
Region 4	81,318	265,339	3,174,376	$3,521,033
Region 5	255,951	393,818	2,738,748	$3,388,517
Region 6	101,598	239,928	1,191,771	$1,533,297
Totals	$876,930	$1,794,363	$15,045,355	$17,716,648

Open Solicitation – Restoration Grants

PROVIDE PUBLIC BENEFIT FOR WATER QUALITY, NATIVE FISH AND WILDLIFE HABITAT, OR WATERSHED/ECOSYSTEM FUNCTION

Recommend



Regional team reviews & evaluates each project individually based on how well project meets criteria

Prioritize

CRITERIA
How well project meets criteria for project evaluation & preferences, including:
- Causes over symptoms of disturbance
- Whole watershed approach over site-specific
- Collaboration over single-party

CERTAINTY OF SUCCESS
Certainty of success, based on the organizational capacity of the applicant & the likelihood the project will meet its ecological objectives

BENEFIT TO OREGON PLAN
Benefit to the Oregon Plan for Salmon & Watersheds, as evidenced by its expected benefits to watershed functions, fish habitat or water quality

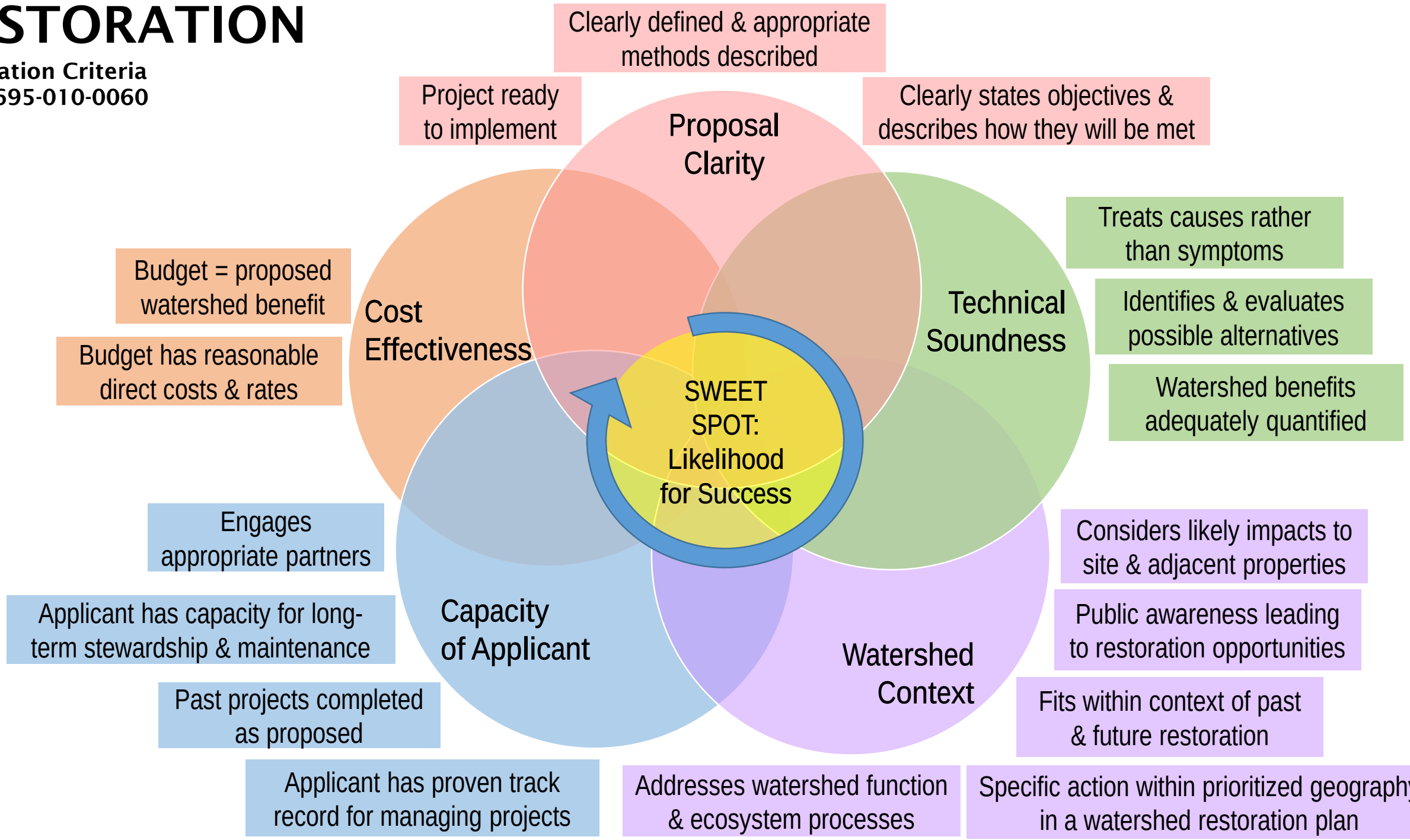
COST BENEFIT
Project costs relative to the anticipated watershed health benefits

Recommendation to Staff

Staff review recommendations from each regional review team & make a statewide funding recommendation to the Board based on available resources for the grant period & type.

RESTORATION

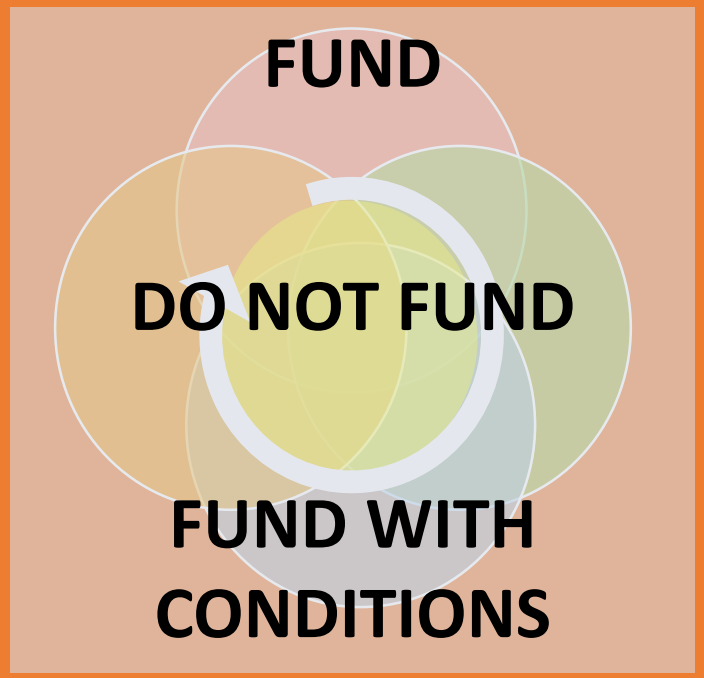
Evaluation Criteria
OAR 695-010-0060



Open Solicitation – Technical Assistance Grants

PROVIDE PUBLIC BENEFIT FOR WATER QUALITY, NATIVE FISH AND WILDLIFE HABITAT, OR WATERSHED/ECOSYSTEM FUNCTION

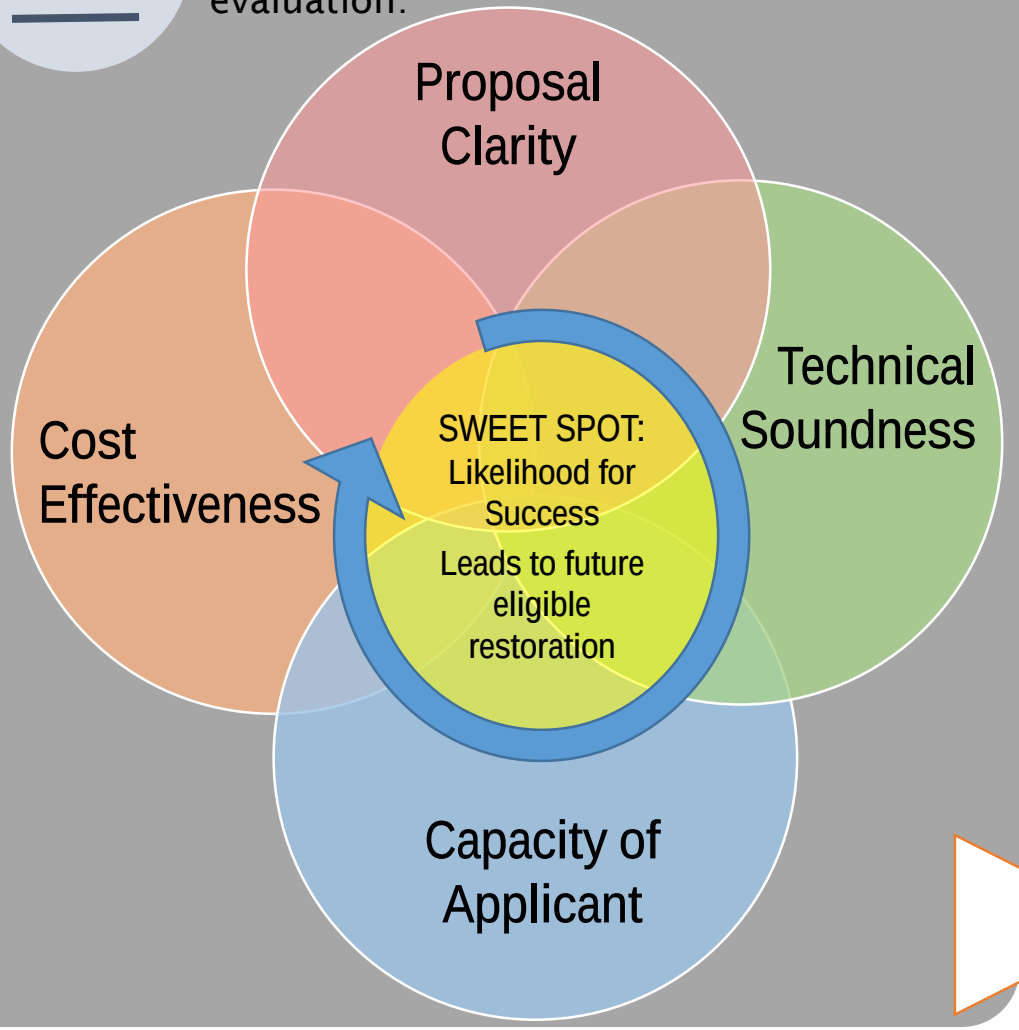
Recommend



Regional team reviews & evaluates each project individually based on how well project meets criteria

Prioritize

CRITERIA
How well project meets criteria for project evaluation:



Recommendation to Staff

Staff review recommendations from each regional review team & make a statewide funding recommendation to the Board based on available resources for the grant period & type.

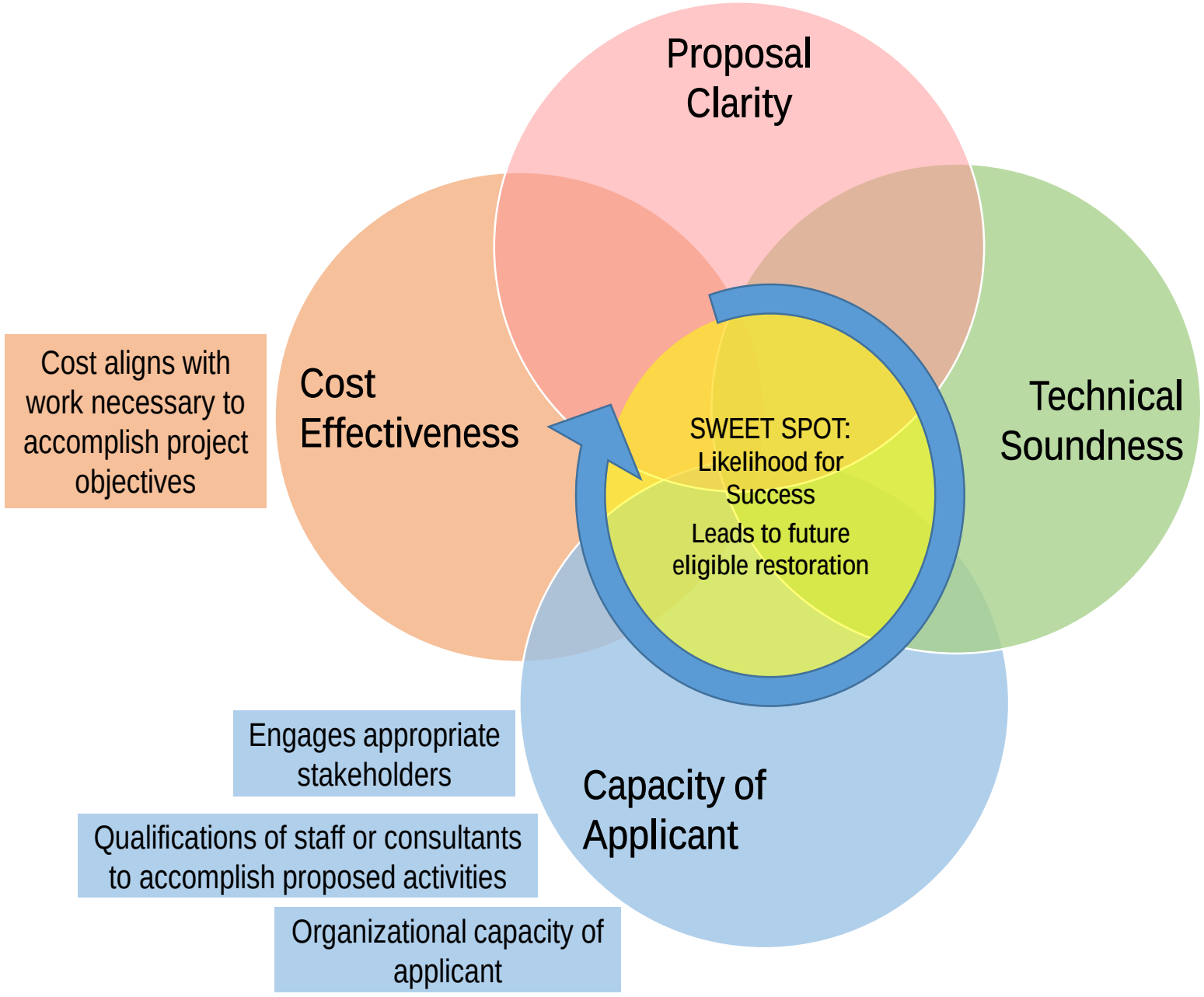
TECHNICAL ASSISTANCE

Evaluation Criteria
OAR 695-030-0045

Technical Design & Engineering = project feasibility reports, designs, or engineering materials that directly lead to site-specific restoration or acquisition projects within a specified timeframe

Resource Assessment & Planning = information about existing water quality or habitat conditions and processes at an identified scale, and relates those conditions and processes to actions that will directly lead to desired future conditions within a specified timeframe

Describes a clear need



Cost aligns with work necessary to accomplish project objectives

Engages appropriate stakeholders

Qualifications of staff or consultants to accomplish proposed activities

Organizational capacity of applicant

Technical Design & Engineering

- Addresses limiting factors in existing conservation or recovery plan
- Describes alternative analysis that demonstrates a range of options were considered
- Appropriate data will be collected to inform designs
- Professionally accepted technical or engineering approaches will be used

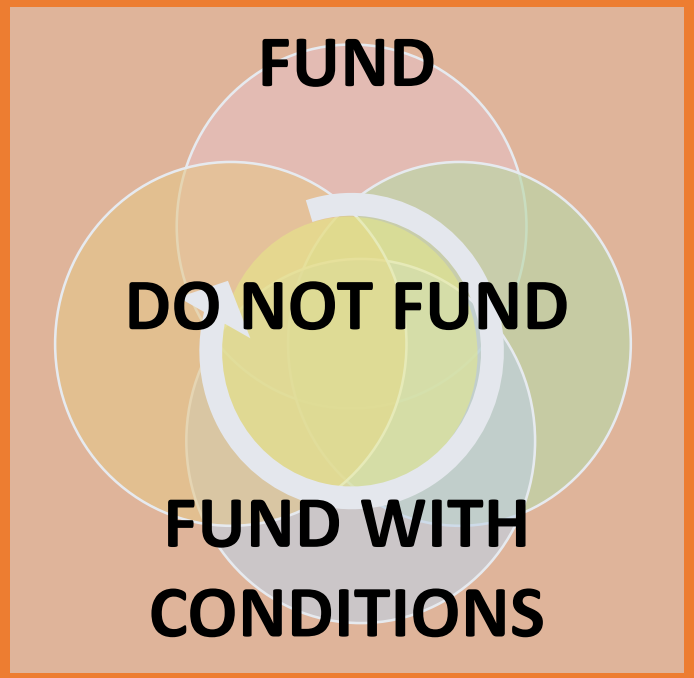
Resource Assessment & Planning

- Scope & scale is feasible, & partners have demonstrated ability in collaborative work at this scale
- Process by which data will be managed & shared with partners
- Professionally accepted methods & parameters will be used

Open Solicitation – Stakeholder Engagement Grants

PROVIDE PUBLIC BENEFIT FOR WATER QUALITY, NATIVE FISH AND WILDLIFE HABITAT, OR WATERSHED/ECOSYSTEM FUNCTION

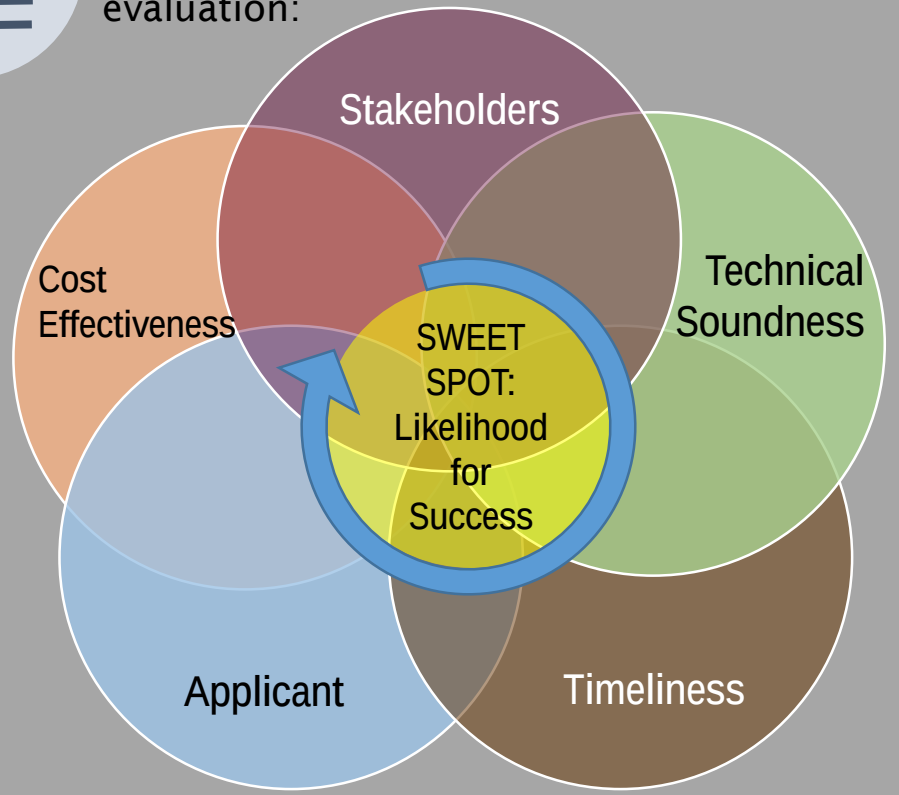
Recommend



Regional team reviews & evaluates each project individually based on how well project meets criteria

Prioritize

CRITERIA
How well project meets criteria for project evaluation:



CERTAINTY OF SUCCESS
Based on the organizational capacity of the applicant & likelihood the project will meet its stakeholder engagement objectives

Recommendation to Staff

Staff review recommendations from each regional review team & make a statewide funding recommendation to the Board based on available resources for the grant period & type.

STAKEHOLDER ENGAGEMENT

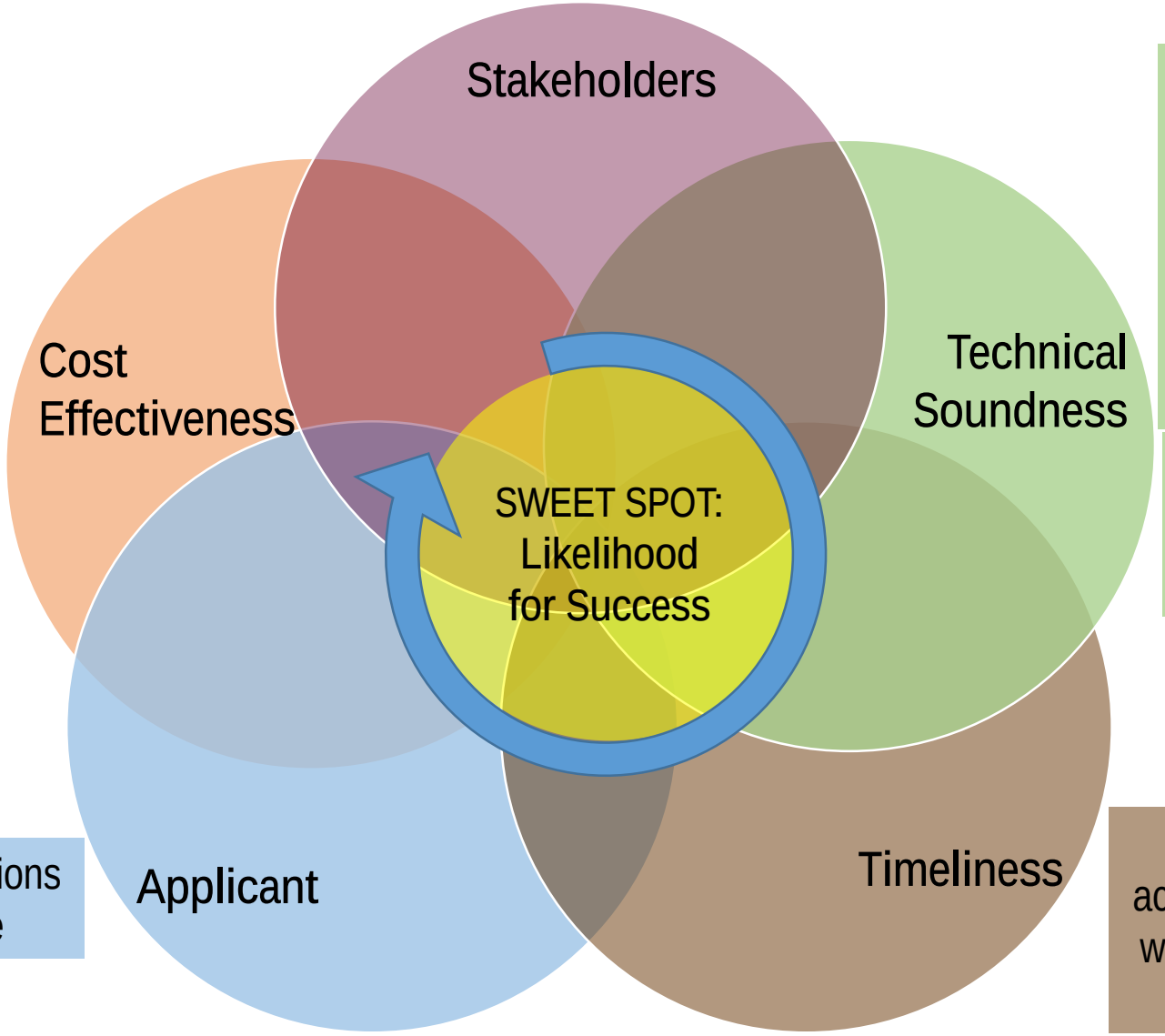
Evaluation Criteria
OAR 695-015-0070

"Stakeholder Engagement Project" means a project whose purpose is to communicate and engage with landowners, organizations and the community about the need for, feasibility, and benefit of a specific eligible restoration or acquisitions project or program that leads to development of eligible projects within an identified geography.

Projects whose primary purpose is education are NOT ELIGIBLE

Applicants engage with appropriate stakeholders in the appropriate geography

Likely effectiveness of multidirectional communication among the applicant & stakeholder



Expected outcomes of resulting restoration or acquisitions include protecting or restoring fish or wildlife habitat, watershed function, and or water quality or quantity

Evidence base linking engagement to eligible project types

Shows qualifications & experience

Resulting restoration or acquisition projects, or program will lead to timely development of eligible projects

RRT and Staff Funding Recommendations for the Fall 2022 Open Solicitation Grant Offering

Restoration

Region	RRT	Staff	%
1	4	4	100%
2	7	7	100%
3	11	10	91%
4	6	4	67%
5	15	13	87%
6	6	6	100%
Total	**49**	**44**	**90%**

Technical Assistance

Region	RRT	Staff	%
1	4	4	100%
2	3	3	100%
3	3	3	100%
4	2	2	100%
5	6	6	100%
6	3	3	100%
Total	**21**	**21**	**100%**

Stakeholder Engagement

Region	RRT	Staff	%
1	1	1	100%
2	N/A	N/A	N/A
3	3	3	100%
4	1	1	100%
5	2	2	100%
6	N/A	N/A	N/A
Total	**7**	**7**	**100%**

Region	Restoration	Technical Assistance	Stakeholder Engagement	Total
1	$1,521,690	$279,932	$27,431	$1,829,053
2	$2,326,180	$188,831	N/A	$2,515,011
3	$2,550,441	$207,809	$166,197	$2,924,447
4	$1,829,086	$149,800	$81,318	$2,060,204
5	$2,336,838	$393,818	$255,951	$2,986,607
6	$618,418	$94,257	N/A	$712,675
Total	**$11,182,653**	**$1,314,447**	**$530,897**	**$13,027,997**

OWEB Open Solicitation Regions

Region 1: North Coast

Region 2: Southwest

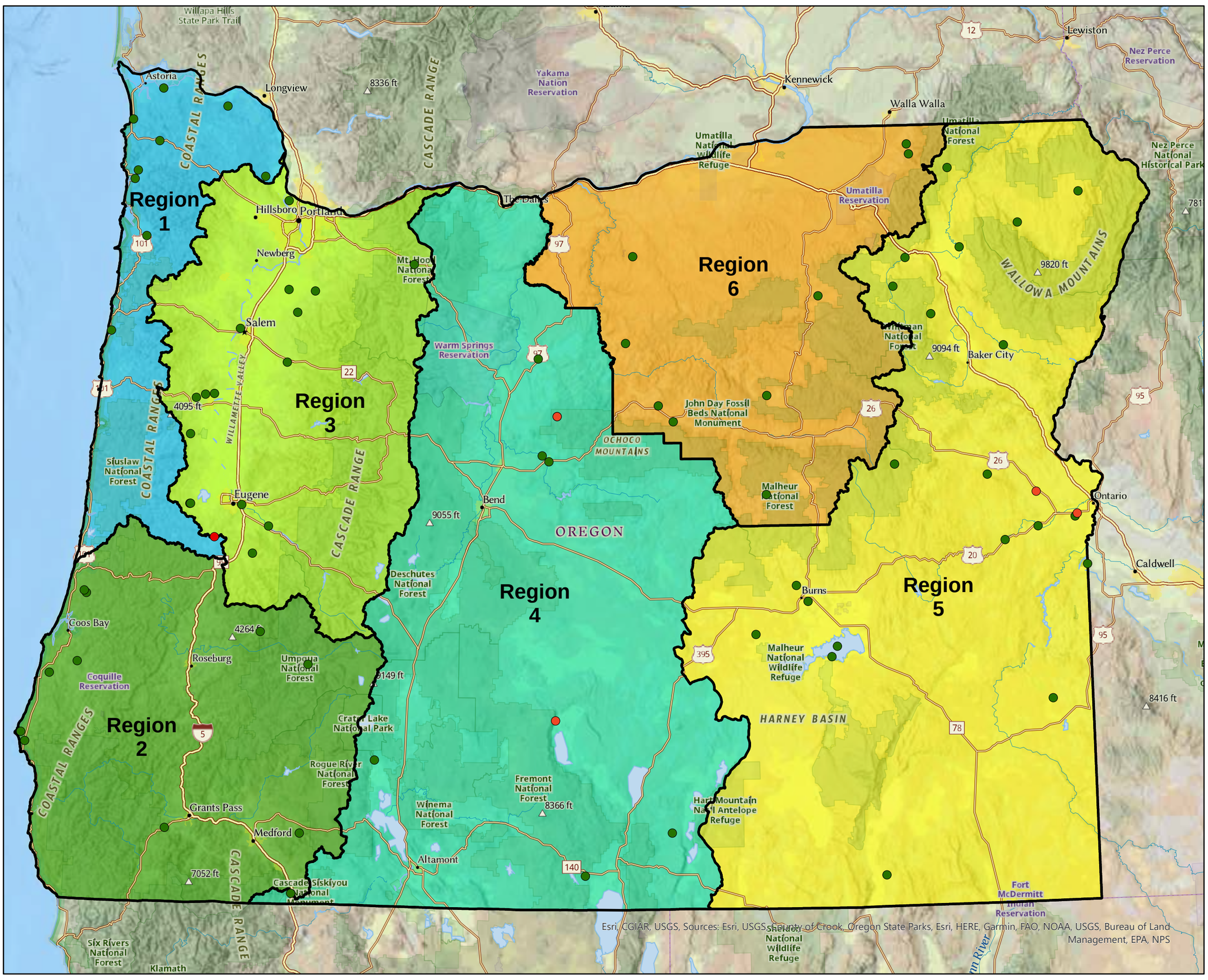
Region 3: Willamette Basin

Region 4: Central Oregon

Region 5: Eastern Oregon

Region 6: Mid-Columbia

All Regions
Fall 2022 Funding Recommendations



Fall 2022 Funding Recommendations

Status

- Staff Recommended Funding
- Below Funding Line

OWEB Regions

- Region 1
- Region 2
- Region 3
- Region 4
- Region 5
- Region 6

OREGON WATERSHED ENHANCEMENT BOARD

775 Summer St, NE Suite 360
Salem, OR 97301-1290
(503) 986-0178
https://www.Oregon.gov/OWEB/

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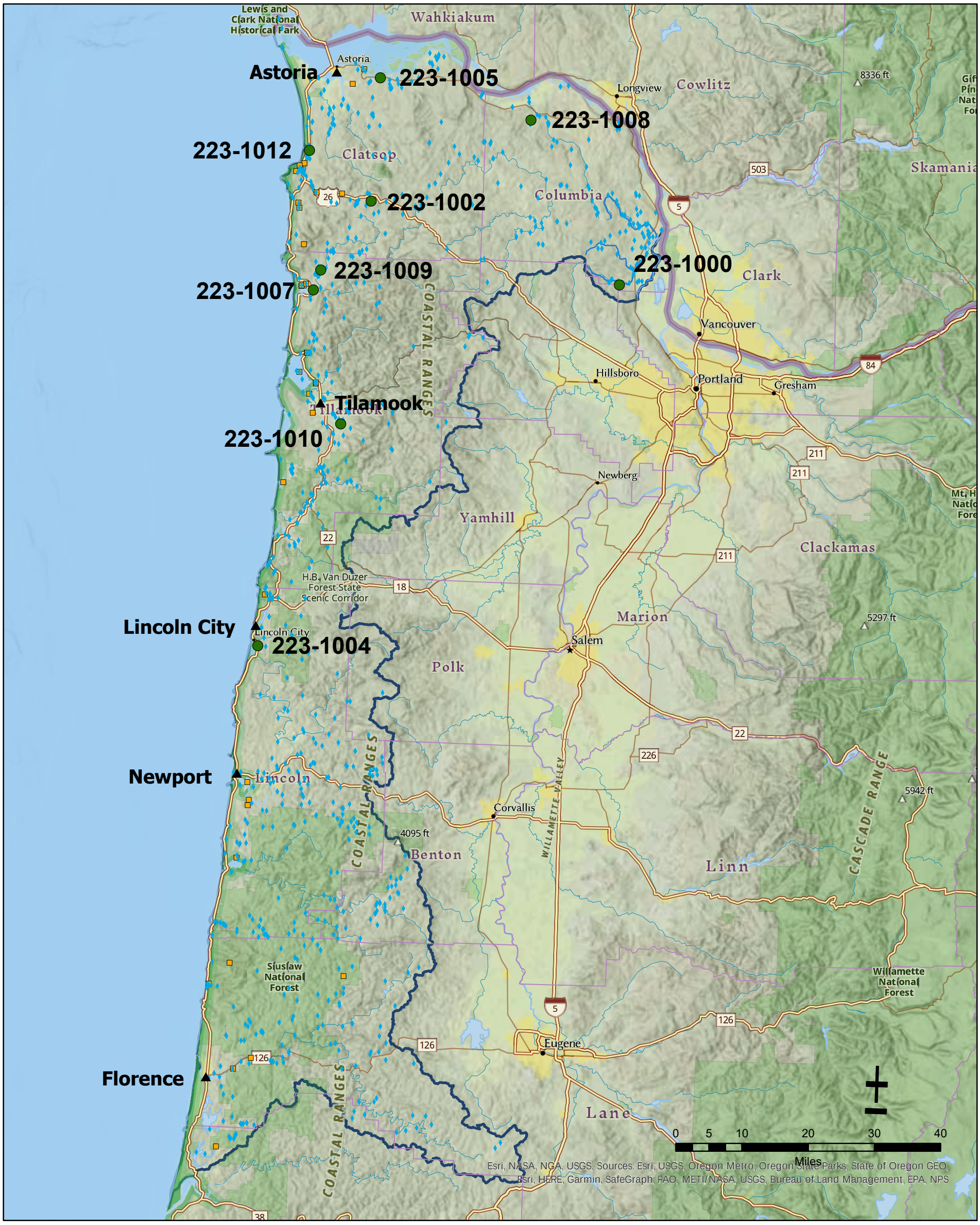
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Region 1: North Coast

North Coast - Region 1 Fall 2022 Funding Recommendations



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Funding Recommendation

- Staff Recommendation For Funding (SRF)
- Below Funding Line (BFL)

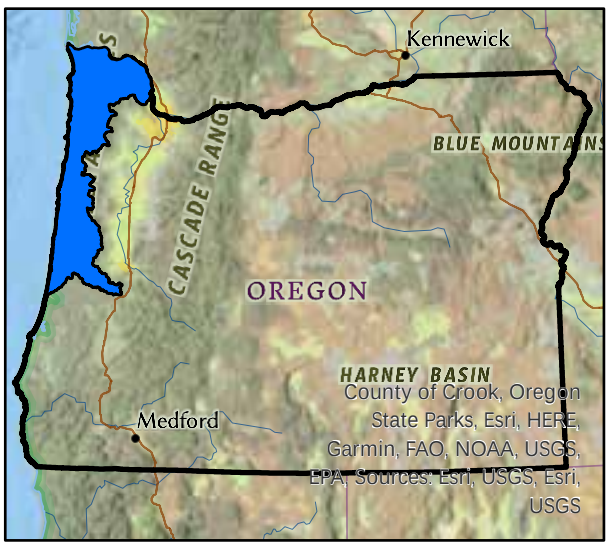
Previous Grants 1998 - Spring 2022

- Land Acquisition
- Restoration
- Region 1 Cities
- Region 1 Streams
- OWEB Region 1 Boundary

OREGON WATERSHED ENHANCEMENT BOARD

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Region 1 - North Coast Restoration

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-1004	MidCoast WC	Lower Drift Creek (Siletz) Tidal Restoration	Tidal wetlands will be restored within the Siletz Bay estuary. Dikes will be removed and tidal channels constructed to restore the site's natural hydrology. Large wood will be placed in the wetlands to improve habitat diversity. Native marsh plant species will be planted and invasive species controlled.	573,724	Columbia
223-1002	Lower Nehalem WC	Little North Fork Large Wood Enhancement	Large wood structures will be placed along a stream reach on the Little North Fork Nehalem River to improve habitat complexity for salmon and steelhead. The project location is a priority for Oregon coast coho salmon.	73,706	Clatsop
223-1005	CREST	Nicolai-Wickiup Watershed Connectivity and Tidal Restoration	Two new fish passage crossings will be constructed under the railroad on the Lower Columbia River. These crossings will restore fish passage and habitat quality. Several existing openings will be expanded and new openings created to provide critical access for salmon and steelhead to the lower river.	629,650	Clatsop
223-1000	Scappoose Bay WC	Upper Raymond Creek Large Wood Enhancement	Large wood structures will be placed and streamside habitat restored along Raymond Creek, a tributary to South Scappoose Creek. This project will improve habitat for Lower Columbia River salmon.	244,610	Columbia
Total Restoration Projects Recommended for Funding by RRT and OWEB Staff				1,521,690	

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
None					

Projects *Not Recommended* for Funding by RRT				
Project #	Grantee	Project Title	**Amount Requested**	County
223-1001	Trout Unlimited Inc	Esther Creek Priority Fish Passage	289,093	Tillamook
223-1003	Worthy Garden Club	Worthy Tenmile Phase III- Upland Restoration	42,901	Lane
223-1006	North Coast WS Assn	Ecola Creek Forest Reserve Beaver Habitat Restoration	59,040	Clatsop

Region 1 - North Coast Technical Assistance

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-1007	Lower Nehalem WC	Coal Creek Riparian and Tidal Wetland Enhancement	Tidal wetland habitat will be restored on Coal Creek, a tributary of the Nehalem River. Technical assistance work will explore alternatives and produce designs to restore streamside vegetation, improve tidal connections, and address a failing tide gate.	73,625	Tillamook
223-1009	Lower Nehalem Community Trust	McCoy Dike Breach Technical Assistance Project	Tidal wetland habitat will be restored on a property within the Nehalem estuary. Restoration in the wetland will provide new rearing habitat for fish in Nehalem Bay. Technical assistance will aid in a site assessment, alternatives, and preliminary designs to reconnect the site to the estuary.	74,888	Tillamook
223-1010	Tillamook Estuaries Partnership	Mill Creek Trib B Culvert Replacements & Habitat Enhancement	Undersized road crossings will be replaced at two locations on an unnamed tributary in the Mill Creek basin, in the Tillamook Bay watershed. Technical assistance will aid to finalize designs for the new crossings. The crossings will restore passage to nearly two miles of habitat for salmon and steelhead.	67,650	Tillamook

223-1008	Columbia SWCD	Conyers Creek Habitat Diversification and Enhancement	Habitat for Columbia River salmon will be restored on Conyers Creek, a major tributary to the Clatskanie River. Technical assistance will help complete site assessments and develop permit ready designs. The restoration project will improve habitat complexity and restore native vegetation along a priority steam.	63,769	Columbia
Total Technical Assistance Projects Recommended for Funding by RRT and OWEB Staff				279,932	

Projects Recommended but Not Funded in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
None					

Projects *Not Recommended* for Funding by RRT				
Project #	Grantee	Project Title	**Amount Requested**	County
223-1011	Tillamook Estuaries Partnership	Mary's Culvert Replacement- Engineering & Design	74,415	Tillamook

Region 1 - North Coast Stakeholder Engagement

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-1012	North Coast Land Conservancy	Conservation Planning Outreach	Stakeholder engagement activities will aid to complete a conservation plan to identify priority conservation areas on the north coast.	27,431	Clatsop
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				27,431	

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
None					

Projects *Not Recommended* for Funding by RRT				
Project #	Grantee	Project Title	**Amount Requested**	County
223-1013	Tillamook Estuaries Partnership	Sitka Sedge Tidal Wetlands Restoration Stakeholder Engagement	52,087	Tillamook
223-1014	Environment for the Americas Inc	Salmon Saving Shorebirds	58,787	Lincoln

Region 1 Total OWEB Staff Recommended Board Award	**1,829,053**

Region 1 - 6 Grand Total OWEB Staff Recommended Board Award	**13,027,997**

Open Solicitation-2022 Fall Offering
North Coast (Region 1)

Application Number: 223-1000-22535
Project Type: Restoration
Project Name: Upper Raymond Creek Large Wood Enhancement
Applicant: Scappoose Bay WC
Region: North Coast
County: Columbia
OWEB Request: $244,610
Total Cost: $305,860

Application Description This project is located in Raymond Creek, a tributary to South Scappoose Creek in the southern quarter of Columbia County. The project includes a reach in northeast Washington County. Raymond Creek flows into South Scappoose Creek, which flows into Scappoose Bay, the Multnomah Channel and the lower Columbia River. The project addresses key salmon-production limiting factors identified in the Lower Columbia River Conservation and Recovery Plan (ODFW, 2011) and the Scappoose Creek Limiting Factor Analysis (SBWC, 2012): 1) lack of physical habitat quality and complexity, including low quantity of instream large wood and loss of pools and refuge habitat, and loss of floodplain connectivity; 2) low numbers of riparian conifers for future wood recruitment and poor riparian vegetation; and 3) temperature limitations in mainstem South Scappoose. The project originated from the Scappoose Bay Watershed Strategic Action Plan (SBWC, 2018), which identified restoration actions that address areas with high potential for ecological benefits. The project will install 150 log pieces along 1.5 mile of creek in summer 2023 and plant approximately 6000 native vegetation, including confers, small trees, and shrubs, during winter 2023-2024.

Project partners include a private landowner, Weyerhaeuser Corporation, Oregon Department of Fish and Wildlife, and the US Bureau of Land Management

Review Team Evaluation

Strengths

- The proposed work addresses limiting factors in the Raymond Creek watershed by increasing instream complexity through placement of instream large wood structures.
- Raymond Creek is a priority stream to restore habitat for ESA-listed fish, including Columbia River coho salmon. The Scappoose population of coho is a priority for restoration under the Lower Columbia River Conservation and Recovery Plan for Oregon Populations of Salmon and Steelhead.
- The applicant has extensive experience and a proven track record implementing similar restoration projects.
- There is a committed project team of both public and private ownership and agency technical experts behind the project. BLM and ODFW is providing technical expertise and a private landowner will assist with monitoring and planting as well as a contribution of materials for the large wood structures.
- The proposed approach for ground-based wood placement is appropriate for the site and equipment will be able to access the creek throughout the project stream reach.

- The project design is technically sound and considers stream morphology and downstream infrastructure in the placement of the structures. The large wood placement will meet both ODFW and NOAA benchmarks.
- The applicant manages their own plant nursery that will provide genetically appropriate plant stock to the project.
- The project is ready to implement with materials sourced, locations of structures sites identified on the ground, and technical partners prepared to complete preparation and permitting for a summer 2023 construction.

Concerns

- There are limited details in the application about the proposed planting such as the size of the riparian buffers, the proposed species composition, and the plan for site preparation. Additionally, the application lacks the vegetation planting map referenced in objective 3 in the application narrative. The planting, however, is a small component of the much larger instream restoration.
- More information describing the ongoing monitoring effort in the basin and how resulting data was used to identify the proposed restoration would be helpful in understanding how the project was prioritized.

Concluding Analysis

The proposed restoration work on Raymond Creek in the Scappoose Bay watershed directly addresses a primary limiting factor for ESA-listed Columbia River fish by increasing the diversity and complexity of aquatic habitat. The approach to large wood placements, the primary project element, is technically sound and likely to succeed in achieving the desired ecological objectives with the riparian revegetation providing additional habitat benefits.

Review Team Recommendation to Staff
Fund

Review Team Priority
4 of 4

Review Team Recommended Amount
$244,610

Review Team Conditions

n/a

Staff Recommendation
Staff Follow-Up to Review Team
n/a

Staff Recommendation
Fund

Staff Recommended Amount
$244,610

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
North Coast (Region 1)

Application Number: 223-1001-22536
Project Type: Restoration
Project Name: Esther Creek Priority Fish Passage
Applicant: Trout Unlimited Inc
Region: North Coast
County: Tillamook
OWEB Request: $289,093
Total Cost: $689,593

Application Description Esther Creek Tide Gate is part of a privately owned dike creating pastureland for the landowner. The project is located near Tillamook on private farmland. Esther Creek is a tributary to the Tillamook River, providing approximately 0.38 linear miles of spawning and rearing habitat for ESA listed coho salmon, chum salmon, steelhead, cutthroat trout, and resident brook and/or Pacific lamprey. Esther Creek drains an area of just over 1.28 square miles from headwaters in privet timber lands. A new tide gate at this site will increase fish passage, maintain water levels for landowner agricultural needs, and prevent a catastophic failure of the current deteriorated culvert.
The current tide gate is a Nehalem Marine NSG5-5mo (aluminum top hinge w/ Mitigator) with a circular corrugated metal pipe, 60 feet long and 5 feet in diameter. In the summer of 2022 Waterways determined the active channel width of Esther Creek to be 12 feet. Under certain tidal conditions the current tide gate creates a passage barrier for adult and juvenile salmon to one of the three most productive subbasins on the western side of the Tillamook Basin for coho salmon.
We are proposing to replace this with a tide gate including a Muted Tidal Regulator (MTR), and a pipe sized appropriatly for fish passage standards. Along with the designs a management plan coordinated with the landowner will improve fish passage. In addition, the inclusion of habitat logs downstream from the structure will improve overall habitat.
Project partners include: Trout Unlimited (TU), US Forest Service (USFS), Oregon Department of Fish and Wildlife (ODFW) and landowners. Bridge designs, hydraulic and tidal analysis, and geotechnical report were provided by a private engineering firm in cooperation and consultation with Trout Unlimited. The USFS is covering Section 106/ SHPO cultural consultation. Trout Unlimited will submit the joint permit application, ODFW fish passage approval, fish salvage permit, and County permits.

Review Team Evaluation

Strengths

- Esther Creek contains populations of cutthroat, lamprey, steelhead, and Oregon coast coho salmon. The creek also has quality habitat for juvenile rearing.
- The project site is highly visible and could be a catalyst for future restoration in the area.
- State and federal natural resources agencies are involved in the project to provide fish salvage and effectiveness monitoring support.

- The project will reduce water velocity through the stream crossing to an appropriate level that will allow for volitional fish passage.
- The applicant and project team has a proven track record of success.

Concerns

- The project is unlikely to benefit Chinook salmon given the evidence to date on fish passage through tide gate structures with a similar design as the proposed approach. Tide gate monitoring at similar sites has demonstrated that Chinook utilize these types of structures less frequently than other fish.
- A water management plan is not included with the application, making it difficult to evaluate ecological benefit. A water management plan would indicate the proposed water elevations that the tide gate would be set for, providing a better understanding of the quality of fish habitat and expected salinity achieved with the level of inundation possible with the new structure.
- The cost of the two wood structures that will be installed downstream of the tide gate seems high compared to similar projects and the ecological goals of the structures are not clearly stated in the application.
- The agricultural influenced area directly upstream of the proposed tide gate structure could benefit from riparian planting or other habitat enhancements, but none are proposed. There is limited shade on the 0.4-mile stream reach upstream.
- While improving passage at the project site will improve fish access to 0.4 miles of habitat, the watershed benefits for the project cost is limited by restricted fish passage through a tide gate structure and the lack of quality habitat immediately upstream.
- The additional funding necessary to implement the project is pending at time of application, and the likelihood of securing sufficient funds for implementation is unknown.
- It is unclear how the tide gate structure will be monitored over time and who will be responsible for monitoring the duration the gate is opened, the water velocities through the structure, and the water elevations upstream of the gate.

Concluding Analysis

A tide gate located on an agricultural road on Esther Creek will be replaced with a newly designed muted-tidal-regulator (MTR) structure that is projected to improve fish passage at the site. The structure itself provides access to less than a mile of habitat, but there are other ongoing projects upstream that will eventually open additional habitat for fish. The ecological benefit of a tide gate replacement project is contingent on a water management plan and how the MTR structure will be stewarded over time. Without this water management plan, it is unclear how much ecological benefit can be achieved from the work. The inclusion of additional riparian habitat work on Esther Creek and a more detailed understanding of how the MTR structure will change water elevations and provide for a longer duration of fish passage would strengthen the application.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

n/a

Review Team Recommended Amount
$0

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
North Coast (Region 1)

Application Number: 223-1002-22550

Project Type: Restoration

Project Name: Little North Fork Large Wood Enhancement

Applicant: Lower Nehalem WC

Region: North Coast

County: Clatsop

OWEB Request: $73,706

Total Cost: $100,306

Application Description The project is located in Clatsop County on the Little North Fork Nehalem River, 4.9 river miles from the confluence with the North Fork Nehalem River. The project reach is on 0.5 miles of privately owned timber land. This project proposes to place large wood structures in the Little North Fork Nehalem River channel to increase stream complexity. The project area includes an anchor habitat prioritized in the Nehalem Strategic Action Plan for Coho. Equipment staged for an adjacent timber harvest will be used to place ten large wood structures composed of seven logs each, including two intact rootwads per structure. Trees from the timber harvest will be donated by Weyerhaeuser for the project.

This project will restore spawning and rearing habitat for salmon and steelhead and stream restoration will benefit ESA threatened coho salmon, winter steelhead, coastal cutthroat and Pacific lamprey. Project partners include Wild Salmon Center, Weyerhaeuser and Oregon Department of Fish and Wildlife (ODFW).

Review Team Evaluation

Strengths

- The project addresses limiting factors for fish in a priority stream identified as anchor habitat by the Nehalem Coho Strategic Action Plan.
- The Little North Fork Nehalem is a very productive stream that is lacking habitat complexity, which this project will address. The spawning habitat that will be made available through the project reach has the potential to be very high quality. Adding large wood structures to the stream will slow water velocity and aggrade gravel for spawning.
- The industrial timber landowner is an engaged partner on the work and will be contributing materials and technical support.
- The project is cost-effective due to the approach of collaborating with the landowner’s timber sale plans. This approach will allow for cost efficiencies with contracting and access as well as provide a handy source of material for the large wood structures.
- The applicant and project partners have a proven track record of success with implementing similar instream large wood projects.
- The application has clearly stated goals and objectives.
- The proposed technical approach for ground-based instream large wood placement is appropriate for the site conditions and practical given there is site access for equipment.

- The amount of wood proposed for the stream reach is appropriate and will result in meeting ODFW and NOAA benchmarks.

Concerns

- No significant concerns are identified.

Concluding Analysis

The proposed instream large wood placement in the Nehalem watershed will improve instream habitat complexity in a priority reach of the Little North Fork. The stream is low gradient through the project area and should immediately respond to the proposed increase of habitat structures. The technical approach is creative by using the material from an old log bridge to provide some of the key pieces for the structures. There is a possibility for restoring additional floodplain function by removing old roadbed fill that bisects the stream's floodplain, and the applicant indicated on site that they may have additional funding for this work. This will further increase ecological benefit of this collaborative effort between the applicant, the landowner, and natural resource agencies that has a high likelihood of success.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 4

Review Team Recommended Amount
$73,706

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Fund

Staff Recommended Amount
$73,706

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
North Coast (Region 1)

Application Number: 223-1003-22554

Project Type: Restoration

Project Name: Worthy Tenmile Phase III- Upland Restoration

Applicant: Worthy Garden Club

Region: North Coast

County: Lane

OWEB Request: $42,901

Total Cost: $57,460

Application Description

IN August 2022, Siuslaw Soil and Water Conservation District (SWCD) and Worthy Garden Club (WGC) agreed to spend $286,851.20 on the first phases of a riparian restoration project in Tenmile valley, near Yachats, OR. In this phase, roughly 10-15 acres of legacy meadows will be converted to an early seral phase of a developing riparian forest. The meadow sites have been cleared of invasive species and mowed. Large woody debris (LWD) and whole downed red alder trees will be placed throughout the planting area to discourage elk browsing and bedding. Additionally, during the fall/winter of 2023, CWD will be placed via helicopter throughout 3 miles of the active channel.

In late fall/early winter of this year, both organizations will help plant the 10-15 acre portions of prepared riparian land. We intend to replicate two plant communities commonly associated with coastal Oregon riparian forests. 1) western hemlock/oxalis. 2) western hemlock/salmonberry/vine maple. Both organizations have pledged/agreed to fund site maintenance for this portion of the project.

Moving forward, WGC is seeking funding for additional restorative activities at Tenmile Creek. Specifically, WGC wants to treat/manage an additional 10-15 acres of adjacent upland forest. This project phase would include an understory release, a limited overstory release/thin, and conifer tree planting with associated maintenance. This would foster additional habitat/ecological connectivity between a coastal marine reserve, a restored fresh water salmon run, the Audubon sanctuary, and WGC's riparian/upland restoration project.

Review Team Evaluation

Strengths

- The project area in Tenmile Creek contains high quality habitat for juvenile fish and is a productive stream for salmon and steelhead.
- The landowner has a strong stewardship ethic and is committed to improving habitat on the property.
- The site is connected to other conservation areas, being surrounded by National Forest land that is managed as a Late Successional Reserve.

Concerns

- The project will transition habitat from hardwood to conifer forest with a goal of late successional habitat. Early seral pockets like the one on this property are uncommon in this watershed and hardwood forests have a high value to wildlife including amphibians, migratory birds, and deer and elk.
- The project design would benefit from consultation with a forester and a terrestrial ecologist, rather than the arborist services proposed in the application. A diversity of technical expertise will ensure that the designs are informed by a watershed-level perspective that considers a range of species needs. The benefit of girdling alders by an arborist is unclear.
- The need for the work is not well described in the application. Some of the sites proposed for treatment already appear to be on a healthy ecological trajectory.
- The ecological benefits of the proposed actions are unclear. The project is unlikely to benefit water quality, temperature, or aquatic habitat.
- The capacity of the applicant to conduct the work is unknown. It is unclear if the applicant and project manager has experience with similar types of restoration work.
- Long term management strategies for the property are unclear. The landowner does not have a forest management plan guiding the work.

Concluding Analysis

Forest health actions are proposed for an upland forest on a private property along Tenmile Creek to accelerate the conversion of forest habitat to late successional characteristics. The application proposes to hire an arborist to tackle some of the forestry work. Given the goals and condition of the property, it may be more beneficial to engage with other types of natural resource professionals to develop a forest management plan before engaging in forest restoration on the site. The proposed restorations treatments to restore late successional conifer habitat may not align with the watershed context and is likely to provide uncertain watershed benefit by impacting functional hardwood and early seral habitats important to wildlife and biodiversity.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

n/a

Review Team Recommended Amount

$0

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team

n/a

Staff Recommendation

Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
North Coast (Region 1)

Application Number: 223-1004-22572

Project Type: Restoration

Project Name: Lower Drift Creek (Siletz) Tidal Restoration

Applicant: MidCoast WC

Region: North Coast

County: Lincoln

OWEB Request: $573,724

Total Cost: $1,097,424

Application Description This project occurs primarily within the Siletz Bay National Wildlife Refuge on the south end of Lincoln City, Oregon. It was designed, in consultation with local landowners, to restore 80 acres of tidal wetlands (marshes and swamps). This work, in combination with the 86 acres subject to prior restoration, will result in eventual recovery of 75% of the 222 acres of this habitat that had been lost historically. Due to the importance of estuaries and their tidal wetlands to threatened coho salmon and other salmonids, Federal and State recovery plans call for estuary restoration. This proposal involves dike removal, initiation of primary and secondary channels, placement of wood habitat structures, removing channel obstructions, creating topographic diversity, control of invasive grasses, and planting and seeding to help restore native marsh, shrub swamp and spruce swamp vegetation. The restored hydrological connections are designed to promote native plant growth and sediment retention that build the marsh surface, making it more resilient to climate change, storing carbon in the soils, and absorbing flood waters. Project partners are US Fish and Wildlife Service, Oregon Coast National Wildlife Refuge Complex, The US Forest Service, Bureau of Land Management, private landowners, the Lincoln Soil and Water Conservation District, the Wild Salmon Center, and the Confederated Tribes of the Siletz Indians.

Review Team Evaluation

Strengths

- The project will restore 80 acres of tidal wetland to the Drift Creek watershed and is a component of a larger restoration effort in the Siletz Bay estuary that will help restore a significant portion of the historic estuarine habitat.
- The proposed work will support diverse life history characteristics of the Oregon coast coho salmon population in the watershed and the project is consistent with recommendations in the Oregon Coast Coho Recovery Plan.
- The technical approach is sound and built on data from the landward migration study, lessons learned from past similar projects in nearby estuaries, and historic work in the Siletz estuary.
- The project has a partnership of technical experts and the applicant has experience implementing other successful estuarine habitat projects. The team has invested in a considerable amount of stakeholder engagement to arrive at the selected restoration design.
- The proposal has clearly stated objectives and detailed actions describing how the objectives will be met.

- Tidal wetland habitats are sensitive to pollution. The proposed restoration will have a significant benefit to water quality by reducing sedimentation and runoff from the road.
- The methodology used in the restoration design is innovative and utilizes new practices for estuarine restoration that have been shown to be successful. Techniques planned include burying wood into the floodplain to create topographic diversity for plant establishment and filling ditches with excavated reed canary grass to achieve the desired elevation while disposing safely of the invasive plants.

Concerns

- No significant concerns noted during review.

Concluding Analysis

The project targets a priority habitat type for restoration and will result in 80 additional acres of tidally influenced wetlands within the Siletz Bay estuary. The restoration will have a significant ecological benefit to a myriad of fish and wildlife species as well as improve water quality and mitigate the effects of sea level rise. The project designs consider climate change projections, are technically sound, and employ professionally accepted restoration approaches that are likely to be successful.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 4

Review Team Recommended Amount
$573,724

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Fund

Staff Recommended Amount
$573,724

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
North Coast (Region 1)

Application Number: 223-1005-22573

Project Type: Restoration

Project Name: Nicolai-Wickiup Watershed Connectivity and Tidal Restoration

Applicant: CREST

Region: North Coast

County: Clatsop

OWEB Request: $629,650

Total Cost: $2,252,065

Application Description Located between River Mile (RM) 20 and 30 of the Columbia River in Clatsop County Oregon, four geographically distinct but functionally similar sites comprise the Nicolai-Wickiup Watershed Connectivity and Tidal Restoration Project: Wolf Bay at Columbia RM 20 (46.169558, -123.695282), Agency Creek at RM 25 (46.186919, -123.607724), Warren Slough at RM 26 (46.192721, -123.575337), and E. Aldrich Point at RM 30 (46.232615, -123.496397).

This proposal only seeks funds to complete Wolf Bay and E. Aldrich projects in summer of 2023. Agency Cr. and Warren will seek grant funding in 2023, for 2024 construction.

The project area is located directly adjacent to the Lewis & Clark National Wildlife Refuge on the OR shoreline of the Columbia River (CR) within the Big Creek- Frontal CR (HUC 10). This project is a partnership between CREST, North Coast Land Conservancy (NCLC), Columbia Land Trust (CLT), Oregon Department of Forestry (ODF), and three private landowners (Connie and Bob Hunt, Hampton Lumber, and ODOT/PNWR Rail). All landowners strongly support project implementation and have been key advocates throughout the design process.

In the project area, foraging and rearing habitat for all local and upriver stocks of juvenile salmonids are limited by past land use (rail/hwy, and agriculture) developments. Restoration efforts will focus on the enhancement of CR mainstem-adjacent habitat at the base of the Nicolai-Wickiup watershed bisected by the railroad, reestablishing juvenile salmonid access to rearing habitats. The projects will expand several existing openings and create new openings in the railroad prism providing access to over 110 acres (67 of which from Wolf and Aldrich) of rearing habitat for salmonids. New railroad breaches, reducing velocities at existing openings, and channel excavation will significantly reduce the distances between existing available habitat patches, increase wetland capacity, and restore natural hydrologic connectivity.

Review Team Evaluation

Strengths

- The project will result in the restoration of 67 acres of tidal habitat, which will address a critical need for fish within the Columbia River estuary.

- Fish passage barriers from the railroad lines running along the Columbia River are impeding access to historically important habitats and have changed watershed hydrology. High water velocities at railroad crossings can prevent juvenile fish from accessing tidal rearing habitat and fish can be entrained in the bisected embayments created by the railroad line cutting through the river corridor.
- The applicant brought together appropriate partners to the project. The entities involved have a proven track record of success and experience implementing other similar restoration projects.
- The work will positively benefit several conservation properties by increasing tidal exchange and restoring hydrology. The landownership includes several land trusts and a state agency. The proposed restoration will increase tidal exchange across these properties, which will provide over 110 acres of rearing habitat for salmonids.
- Expected benefits to fish are very high. In particular, young Chinook will benefit from having more access to habitat refuges along the lower Columbia River.
- The application has clearly stated objectives and the design approach is well defined.
- A thorough alternatives analysis was conducted to identify the best locations for the new railroad crossings.
- The applicant has done extensive due diligence to successfully develop this phased project that will restore additional sites when entirely complete. Working on railroad crossings is complex and the myriad of landowners involved creates additional requirements for project planning and implementation.
- The project is ready to implement with permitting underway and designs nearly finished. The project was reviewed and ranked highly by BPA during their grant evaluation process.

Concerns

- The project has a relatively high cost for the habitat benefit due to the higher costs associated with designing the crossings to the standards of the railroad.

Concluding Analysis

The presence of the railroad line along the lower Columbia River has long served as a barrier for fish needing to access slower-moving estuarine habitat. This project, in partnership with the railroad, will improve access for fish to several priority areas along an extensive reach of the river. This application is the first phase of that effort, with other projects expected to follow in subsequent phases. Collectively these projects will have a significant benefit to fish by widening the openings of the crossings under the railroad, creating new openings, and subsequently slowing the velocities of the water moving under the railroad so that fish will be able to access optimum rearing habitat during critical times of their life histories. This provides an excellent opportunity to work with the railroad to address a long-standing problem for fish in the lower Columbia estuary.

Review Team Recommendation to Staff

Fund

Review Team Priority

3 of 4

Review Team Recommended Amount
$629,650

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Fund

Staff Recommended Amount
$629,650

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
North Coast (Region 1)

Application Number: 223-1006-22623
Project Type: Restoration
Project Name: Ecola Creek Forest Reserve Beaver Habitat Restoration
Applicant: North Coast WS Assn
Region: North Coast
County: Clatsop
OWEB Request: $59,040
Total Cost: $87,971

Application Description The Ecola Creek Forest Reserve (ECFR) is comprised of 1,040 acres within the Ecola Creek watershed. Ecola Creek flows from steep mountainous headwaters through commercial timberland and into the Pacific Ocean at Cannon Beach. Restoring beaver habitat will create low-velocity pools and high-quality off-channel habitat for ESA listed coho salmon, chinook salmon, chum salmon, steelhead, coastal cutthroat trout and Pacific lamprey.

The goal of the project is to support, expand, and retain beaver populations in the watershed as a natural promotor of habitat complexity. Beavers are a keystone species and recovering beaver habitats in the ECFR will improve habitat conditions for several species of amphibians, birds and mammals listed in the ODFW Oregon Conservation Strategy.

In 2021, the North Coast Watershed Association (NCWA) partnered with the City of Canon Beach to implement an OWEB funded TA grant to assess existing and potential beaver habitat using the Beaver Restoration Assessment Tool (BRAT). Findings were reviewed by a technical team comprised of ODFW, USFWS, Greenwood Resources and the City of Cannon Beach. Assessments were conducted throughout the Ecola Creek Watershed to implement a whole watershed approach and six sites were identified and prioritized for this project.

The primary project objective will be to plant sitka willow (Salix sitchensis), twinberry (Lonicera involucrata), and vine maple (Acer circinatum) at GPS located planting sites on 1.1 acres of the Ecola Creek Forest Reserve. Secondary objectives will be invasive plant removal and alder release to coincide with planting and effectiveness monitoring. Restoration efforts will expand on the OWEB funded Ecola Creek Forest Reserve Large Wood Mobilization project (213-1040).

Project partners will provide technical review of project designs. Partners include US Fish and Wildlife Service, Oregon Department of Fish and Wildlife, Greenwood Resources and the City of Cannon Beach.

Review Team Evaluation
Strengths

- The project builds off a technical assistance effort that used a scientifically sound approach to identify

and characterize beaver habitat in the Ecola Creek watershed.

- The proposed restoration work considers the needs of the City of Cannon Beach and surrounding infrastructure.
- Appropriate partners are engaged in the project, including City staff, volunteers, and natural resource professionals.
- There is an opportunity for public outreach and engagement with the work to raise awareness about watershed restoration.
- The effectiveness monitoring tools developed as part of the technical assistance work will be helpful in tracking the project's successes over time.

Concerns

- There does not seem to be sufficient funds allocated to accomplish the labor-intensive invasive species removal and planting work proposed. The project relies primarily on a volunteer work force that has not been identified.
- Some of the proposed approaches for site preparation and controlling invasive species, such as the plan to mechanically remove Canada thistle, are not technically sound.
- The project proposes a large-scale plant community conversion in relatively stable habitat that is in good ecological condition. There are species proposed for planting which are not geographically or ecologically appropriate.
- The project goal is to increase native floodplain plant communities to provide beaver forage and dam building material. The rationale for the restoration method is to address the lack of forage for beaver in Ecola Creek, which is why beaver are not currently present in the watershed. Beavers do, however, have food in the Ecola Creek watershed. Additionally, other coastal watersheds with similar plant species composition as Ecola Creek have healthy populations of beaver. It is unclear why beaver are not currently present in Ecola Creek and whether the proposed actions will result in habitat benefit for beaver.
- A substantial cost of the project is for "branding" of beaver for stakeholder engagement purposes. The justification and need for a marketing campaign around beaver is unclear in the application and may be better suited in a stakeholder engagement project.
- Information on restoration alternatives that may have been considered is lacking in the application.
- Girdling alders to encourage them to fall into the stream channel will reduce canopy cover in riparian areas and may have unintended effects on stream temperature. This action combined with an intensive outreach effort may send the wrong message to the public.

Concluding Analysis

The proposed restoration aims to improve beaver habitat within the Ecola Creek watershed in the City of Cannon Beach through a combination of planting forage for beavers, controlling invasive species, and girdling hardwood trees. The scope of work, the extent of the six planting sites, and the rugged terrain is a big task for the volunteer labor proposed for implementing the project, and likelihood of project success is uncertain. This project could have excellent benefits to stakeholder engagement with the goal of using volunteer labor and promoting beaver habitat through a marketing campaign, but the details of how that will be accomplished and the justification for the methods proposed is not clear in the application.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority
n/a

Review Team Recommended Amount
$0

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
North Coast (Region 1)

Application Number: 223-1007-22512

Project Type: Technical Assistance

Project Name: Coal Creek Riparian and Tidal Wetland Enhancement

Applicant: Lower Nehalem WC

Region: North Coast

County: Tillamook

OWEB Request: $73,625

Total Cost: $111,046

Application Description The project is located in the city of Nehalem at the approximate head of tide for Coal Creek near where Northfork Road crosses Coal Creek. It extends downstream on both sides of the creek for 0.3 miles, includes a 0.1 mile ditched and tidegated tributary, and several fields (10 acres approximately). This location is a high priority for restoration improving tidal wetland habitat availability and creek shading to support juvenile salmonid rearing. The availability of tidal wetland habitats like this are a key limiting factor for salmonids in the Nehalem watershed. The fields in the project area are also leased for grazing by local dairies, a use which is threatened by erosion and a significant undercut.

To protect the agricultural use and improve salmonid habitat, this project will produce permit ready designs to restore riparian vegetation, improve the tidal wetlands, and possibly remove or improve the tide gate located on the 0.1 mile ditched tributary. Some of the potential activities include:
1: Bank laybacks and large wood enhancement to manage erosion by presenting a vegetated surface and lower angle of incidence to high winter flows.
2: Tide gate removal, replacement, or repair to improve fish passage and maintain the productivity of the upstream field.
3: Creation of new tidal channels to increase tidal wetland area.
4: Placement of nurse logs to promote spruce swamp characteristics.
5: Riparian planting to provide shade, nutrient exchange, manage invasive plants, provide future large wood recruitment, and bank stabilization.

This project is a partnership between the LNWC and Tillamook Estuaries Partnership, Wild Salmon Center, and the Oregon Department of Fish and Wildlife.

Review Team Evaluation

Strengths

- The proposal is clear and the methodology described for accomplishing the technical assistance work is appropriate and strategic for restoring salmon spawning and rearing habitat in Coal Creek.
- The site has a high value for restoration potential with the opportunity to restore and enhance spawning and rearing habitat for fish, including Oregon coast coho salmon.

- The landowner engagement in the project and interest in improving habitat on their property is documented by a letter of support.
- The current tide gate on the channel running across the site controls the water level of the ditch but does not appear to be functionally necessary. The proposed technical assistance work will look at alternatives for the structure, and there may be an opportunity to remove the tide gate. This option could natural hydrology to the site without impacting current land use.
- The banks of Coal Creek through the project area will benefit from riparian planting, which will improve water quality and address erosional concerns of the landowner.
- Partners around the region are engaged in data collection to inform the restoration design and will assist with the water quality monitoring effort.
- The project location has excellent visibility and could be a catalyst for future work on similar sites.
- The applicant is experienced and has a proven track record implementing similar projects.
- The budget is appropriately detailed and the line items are reasonable.

Concerns

- The site is currently grazed intermittently throughout the year, which could impact the potential benefits of the project if cattle are able to access the creek and future plantings. The plan for protecting the restoration investment is unclear.
- The presence of powerlines in a portion of the project area will limit the possibility of establishing conifers on the site.
- Details are lacking on the possibility of the restoration of tidal channels on the site and where that might occur. Additional details about alternatives that might include this project element along with proposed locations would be helpful for better understanding the potential ecological benefits from the future restoration.

Concluding Analysis

The technical assistance work proposed for this site on Coal Creek in the lower Nehalem watershed is a necessary and prudent step to achieving future restoration. The site has high potential to provide additional habitat for fish and wildlife and the complex site conditions need to be evaluated by a technical professional to generate alternatives for action. The property connects to a pristine tidal swamp in conservation ownership, which will further expand the potential ecological benefits that can be achieved from a resulting restoration project.

Review Team Recommendation to Staff

Fund

Review Team Priority

1 of 4

Review Team Recommended Amount

$73,625

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team

n/a

Staff Recommendation

Fund

Staff Recommended Amount

$73,625

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
North Coast (Region 1)

Application Number: 223-1008-22514

Project Type: Technical Assistance

Project Name: Conyers Creek Habitat Diversification and Enhancement

Applicant: Columbia SWCD

Region: North Coast

County: Columbia

OWEB Request: $63,769

Total Cost: $79,997

Application Description 1) The project location is on Conyers Creek, a major tributary to the Clatskanie River, and is situated in the mid to upper Conyers watershed. This is located within the larger hydrologic unit of the Lower Columbia – Clatskanie River watershed. GPS location: (46.088408, -123.218575)

2) Conyers Creek is habitat for ESA listed Coho, Chinook, and Steelhead salmon as well as Coastal cutthroat trout, Pacific lamprey and other sensitive species. eDNA testing in the summer of 2021 confirmed the presence of Pacific lamprey and even a weak presence of Chinook at a sampling location off of Himple Road (about center of the project reach). Over time Conyers, like so many other streams and rivers, has been greatly simplified and degraded by human settlement and activity. Road building, residential development, farming and forestry practices have all contributed to its present day degraded condition. However, there is still a lot of good habitat potential in Conyers Creek if restoration activities can be applied. The native wildlife that uses this watershed will benefit from actions that encourage greater planform diversity, floodplain connection, in-stream channel complexity, and fully functional wetlands.

3) The SWCD will hire Waterways Consulting Inc to conduct a topographic survey, hydraulic and hydrologic analysis, develop design alternatives, draft a design technical memorandum, and produce permit ready designs for the chosen plan. A private contractor will produce aerial imagery of the project area so that changes to the planform and habitat features, as a result of future restoration activities, can be monitored over time. The SWCD will consult with the engineer, ODFW, the local watershed council, and participating landowners in deciding on a design for restoration.

4) Project partners include Waterways Consulting Inc., ODFW, Lower Columbia River Watershed Council, Air Insight Consulting LLC, and private landowners.

Review Team Evaluation

Strengths

- Restoration on Conyers Creek will improve habitat for three ESA-listed Columbia River species of fish, including coho, steelhead, and Chinook.
- The application demonstrates the need for additional rearing habitat for salmon in the Clatskanie watershed and increasing the diversity of stream habitat in Conyers Creek will also have benefits for other wildlife such as birds and amphibians.
- The project partners are experienced in working in Clatskanie watershed with similar projects and have a proven track record of success. There is a range of technical advisors participating who will help guide the design work.
- The landowners involved are engaged and supportive of restoration on their properties.
- Material needed for the future restoration project may be partially sourced from another upstream landowner partnering on the project, which will result in cost savings.
- The project is cost-effective for the amount of work proposed and the potential ecological benefit from the expected future restoration.

Concerns

- Details on the potential restoration actions that may be achievable through the designs are not provided in the application.
- The extent of the proposed topographic surveys is not described in the application narrative. Extensive topographic surveys may not be necessary to achieve the project goals and these surveys may have inaccurate results due to the presence of abundant reed canary grass at the site locations.
- Beavers were not considered in the design approach, encouraging their presence on the site may be a cost-effective method to achieve the restoration goal of increased in stream complexity.

Concluding Analysis

The project involves multiple contiguous landowners along a stream reach on Conyers Creek, a tributary of the Clatskanie River. The watershed is a priority place in which to work to improve aquatic habitat for fish. This project will address limiting factors by developing alternatives that will increase instream complexity. There is a clear need described for the technical assistance work, which will provide the landowners with a range of alternatives to consider.

Review Team Recommendation to Staff

Fund

Review Team Priority

4 of 4

Review Team Recommended Amount

$63,769

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team

n/a

Staff Recommendation

Fund

Staff Recommended Amount

$63,769

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
North Coast (Region 1)

Application Number: 223-1009-22525

Project Type: Technical Assistance

Project Name: McCoy Dike Breach Technical Assistance Project

Applicant: Lower Nehalem Community Trust

Region: North Coast

County: Tillamook

OWEB Request: $74,888

Total Cost: $95,094

Application Description 1) LOCATION: The McCoy wetland property is in Tillamook County, between the Coast Highway and the Nehalem River, approximately 1 mile north of Wheeler. It is immediately north, and adjacent to, Bott's Marsh, but is separated from the River and from Bott's Marsh by dikes.

2) NEED: This property was once part of a much larger tidal wetland, but is now isolated from tidal influence except at highest high tides. This project will explore options to restore natural tidal cycles to the property through one or more breach(es) of the surrounding dike, to restore access to over four acres of tidal wetland and surrounding scrub-shrub habitat for native fish.

Restored tidal connectivity will significantly improve the wetland's currently altered hydrology, and improve water and habitat quality in the wetland for rearing salmonids as well as salmon prey species that are critical for juvenile salmonid growth and survival.

This project will contribute to the goals of the Nehalem Strategic Action Plan for Coho, to increase “the quality and extent of tidal rearing habitats and associated freshwater habitats” in the focal area of Nehalem Bay.

3) PROPOSED WORK: This stage of the project will include a Site Assessment, Alternatives Analysis, and development of preliminary designs to procure project permits. The Site Assessment will examine topography and conduct hydrology and hydraulic analysis, existing and proposed conditions modeling, and more. The Alternatives Analysis will examine options to breach the dikes surrounding the property, with the goal to reconnect the central wetland to Bott’s Marsh, and/or directly to the Nehalem River. The preliminary design will be sufficient for the fill/removal permits, fish passage approval, a no-rise certification, and any other permit necessary for implementation.

4) Partners include: the Wild Salmon Center, Lower Nehalem Watershed Council, Tillamook Estuaries Partnership, and the Oregon Department of Fish & Wildlife.

Review Team Evaluation

Strengths

- The technical assistance work will focus on a design that restores tidal hydrology and ecologically valuable estuarine habitat to the McCoy wetlands.
- The goals and objectives for the project are described clearly in the application.
- The project location is directly adjacent to another conservation property funded with an OWEB Acquisition grant, Botts Marsh. The two properties could both benefit from hydrologic reconnection.
- The application demonstrates a clear need for the technical assistance to understand the challenging site hydrology caused by the relict levees and ditches on the property.
- Restoration of natural hydrology will have significant benefits to water quality as well as wildlife. In its current condition, the site could be a stranding site for fish.
- The site is located on the west side of highway 101 and is highly visible to the public, which will provide an opportunity for outreach and public engagement.
- The partnership includes the appropriate level of technical expertise.
- The land trust applicant is the landowner, has been proactive in pursuing restoration on the site, and has demonstrated a commitment to site stewardship.
- The applicant has a stated commitment to engaging with local tribes in the restoration design and implementation.

Concerns

- The applicant does not have extensive experience managing estuarine restoration projects.
- The technical assistance work may end up being substantially more complex than originally conceived, given the unanswered questions about site hydrology and alternatives to address the levee system. It is currently unclear how water is moving around the site and this technical assistance work may uncover new site constraints and challenges.
- The budgeted amount for cultural resource work may be low for the work proposed.

Concluding Analysis

Technical assistance work is a needed step to achieve high value estuarine restoration on the McCoy conservation property in the lower Nehalem watershed. The subject property is relatively small in size, but the project will have a larger watershed benefit by improving hydrologic connections with an adjacent tidally influenced site. The application indicates a commitment to restoration and an understanding of the scope and scale of information needed to achieve a successful design. The review team recommends that the applicant confirm that there are no levees/easements in place that will inhibit restoration prior to embarking on technical assistance work. Outreach should be conducted early on to the Army Corps of Engineers now and planning for the additional capacity to address permitting for this project will ensure a high likelihood of success.

Review Team Recommendation to Staff

Fund

Review Team Priority
2 of 4

Review Team Recommended Amount
$74,888

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Fund

Staff Recommended Amount
$74,888

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
North Coast (Region 1)

Application Number: 223-1010-22607

Project Type: Technical Assistance

Project Name: Mill Creek Trib B Culvert Replacements & Habitat Enhancement

Applicant: Tillamook Estuaries Partnership

Region: North Coast

County: Tillamook

OWEB Request: $67,650

Total Cost: $117,006

Application Description This project proposes to replace two undersized road crossings and enhance riparian habitat on an unnamed tributary, Tributary B, of Mill Creek in the Trask River basin, Tillamook Bay watershed. The project site is 5 miles from the town of Tillamook in Tillamook County. The road crossings are in close proximity (200 yards) and both have been identified as high priorities for replacement in order to: 1) restore passage to 1.9 miles of spawning and rearing habitat for Chinook, coho, Pacific lamprey, steelhead and cutthroat trout; 2) restore watershed function and natural channel processes, and 3) improve County road infrastructure by reducing local flooding. The lower crossing is on County owned Brickyard Road and sits on two undersized and perched concrete culverts with trash- racks that clog with debris and can temporarily block the stream. The upstream crossing is a private driveway with two undersized culverts. Bridge installations are proposed for both sites. These projects address the only road/stream barriers in Tributary B. Riparian enhancement is proposed for both banks on a quarter-mile stream reach and along the shoreline of Christie Pond. Christie Pond is a historic impoundment pond on Joan Christie's property that was created with an earthen dam and low weir. This earthen dam has self-breached recently, allowing for Tributary B to freely flow until the first set of culverts at the private driveway.
Project partners include US Fish and Wildlife Service, US Forest Service, Oregon Department of Fish and Wildlife, Tillamook County Public Works Department, the Christie family, Salmon Super Highway and Pelican Brewing.

Review Team Evaluation

Strengths

- Restoring fish passage at the Mill Creek tributary site in the Trask River basin will result in access to 1.9 miles of aquatic habitat suitable for spawning and rearing for fish species, including Oregon coast coho salmon.
- Mill Creek is a priority basin for restoration work in the Trask River watershed. This creek has notable riparian vegetation complexity, a high incidence of beaver activity, and a range of flow conditions that provide a diversity of aquatic habitat types.
- The habitat present on the property immediately upstream of the road crossings is of low gradient and has potential for effectively restoring stream function.
- The long-term family landowners are invested in the ecological health of their property and are supportive of riparian restoration.

- The project is supported by a broad partnership of nonprofits and local, state, and federal agencies. Restoring fish passage at this location is a designated priority of the Salmon SuperHwy.
- The project approach will build on previously collected data, resulting in an efficient effort to achieve final designs.
- There could be potential to conduct additional restoration upstream if this project is successful.

Concerns

- More details explaining how previously collected data will be utilized in the design rework would be helpful for understanding whether appropriate data will be used to inform restoration design.
- There is a remnant pond that was originally created by an earthen dam. Fish passage at this dam was not previously assessed. This dam has recently self-breached, which has allowed upstream fish passage. Fish are now rearing in the remnant pond that is similar to the habitat conditions in the downstream beaver ponds. The long-term plans for this remnant pond are unclear in the application. Additional information is needed to understand whether the earthen dam will be replaced to maintain the manmade pond, which would likely affect future fish passage.
- The restoration project that will result from this technical assistance work could be prohibitively expensive given the geomorphology of the site. Previous technical assistance work revealed that the depth to bedrock at the site of the proposed crossing replacement is extensive, requiring an upgraded approach.

Concluding Analysis

This project in the Trask River watershed was last reviewed as a restoration project that was not recommended for funding due to the presence of a dam at the outlet of the manmade pond. Since the time of that application the earthen dam has blown out and the site conditions have changed, eliminating that fish passage concern and elevating the expected ecological benefit of the project. Due to the lapse in time from the previous designs, an engineering update is needed prior to pursuing restoration funding.

Review Team Recommendation to Staff

Fund

Review Team Priority

3 of 4

Review Team Recommended Amount

$67,650

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team

n/a

Staff Recommendation
Fund

Staff Recommended Amount
$67,650

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
North Coast (Region 1)

Application Number: 223-1011-22619
Project Type: Technical Assistance
Project Name: Mary's Creek Culvert Replacement - Engineering & Design
Applicant: Tillamook Estuaries Partnership
Region: North Coast
County: Tillamook
OWEB Request: $74,415
Total Cost: $105,766

Application Description This technical assistance application is to fund engineering and design work for two culvert replacements on Mary's Creek, a tributary of Fawcett Creek in the Tillamook Bay Watershed of Tillamook County. Anadromous salmonid fish species occurring on the Tillamook watershed include spring and fall chinook salmon, coho salmon, summer and winter steelhead, and sea-run cutthroat trout. These two culverts are the two lowest fish passage barriers in Mary's creek before it joins Fawcett creek. Each culvert exists on a separate private property, owned by Robert Phillips and Bradley Pierce respectively.
Mary's creek was surveyed by Oregon Department of Fish and Wildlife (ODFW) biologists in the summer of 2022. Cutthroat trout and coho salmon fry were found present at the time of survey. The survey identified 1.19 miles of coho habitat upstream from the lowest fish passage barrier, and 1.78 miles of fish habitat upstream of the lowest barrier total.
The goal of this project is to secure complete engineering designs for replacement of both culverts with adequately sized structures and streambed simulation design.
Engineering designs will be contracted out to a private engineering firm. TEP will prepare and release an RFP for engineering designs, manage the engineering contract, and convene the technical team for design review.
Project partners include Oregon Department of Fish and Wildlife (ODFW), Trout Unlimited (TU), USDA Natural Resource Conservation Service (NRCS), and Tillamook County Public Works (TCPW).

Review Team Evaluation

Strengths

- Mary's Creek is a priority location in the Tillamook Bay Watershed to restore habitat for Chinook, coho, steelhead, lamprey, and potentially chum.
- The application describes a clear need for the proposed design engineering plans for replacing two undersized culverts, with the downstream crossing in an imminent stage of failure and the upstream crossing providing access to a community water source.
- There is a broad project partnership behind the work, including local, state, and federal agencies. The applicant has a proven track record of success with similar projects.

Concerns

- Replacing the downstream structure will likely be costly with the gradient of the stream and the substantial fill that will be required to maintain the road. Additionally, road use at the downstream crossing is limited to occasional ATV use. A highly engineered culvert replacement may not be necessary or warrant the cost when removing the crossing would provide greater habitat benefit.
- Construction access to the sites may be challenging due to the current road conditions, particularly the downstream crossing. The plan for equipment access is unclear.
- Limited detail is provided in the application about potential alternatives to replacing the culverts that were considered for restoring fish passage.

Concluding Analysis

Marys Creek is a tributary of Fawcett Creek in the Tillamook Bay watershed. The creek is prime habitat for a full suite of fish species, including Oregon coast coho salmon. Replacing the two road crossings will improve fish access to 1.8 miles of quality habitat for spawning and rearing. The need for the technical assistance for the upstream crossing is clear given the site conditions that need to be considered, including community use of the road to access a water source and the water lines that run under the creek. There are missing details in the application about why other alternatives were not considered for the downstream crossing. More information about the need for replacing the downstream crossing, the landowner’s tolerance for different options for the site, and the expected cost-benefit of a resulting restoration project would strengthen the application.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
n/a

Review Team Recommended Amount
$0

Review Team Conditions

n/a

Staff Recommendation
Staff Follow-Up to Review Team
n/a

Staff Recommendation
Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
North Coast (Region 1)

Application Number: 223-1012-22510
Project Type: Stakeholder Engagement
Project Name: Conservation Planning Outreach
Applicant: North Coast Land Conservancy
Region: North Coast
County: Clatsop
OWEB Request: $27,431
Total Cost: $34,791

Application Description This stakeholder engagement project will take place throughout North Coast Land Conservancy's service area, which runs from the Columbia River down to Siletz Bay and from the nearshore ocean east to the crest of the Coast Range. It will benefit the streams, rivers and watersheds of this territory.
Important natural habitat throughout our service area is threatened by land conversion, fragmentation and climate change, which together impact a wide range of species whose life cycles are dependent upon the availability and condition of the forests, streams, wetlands, rivers and estuaries that comprise their habitats.
While there are a number of agencies and organizations implementing conservation and restoration efforts at different scales in our region, there is not a comprehensive plan to guide acquisition of lands for conservation and restoration purposes across our service area.
We have begun the process of updating our conservation plan to reflect strategic priorities of habitat connectivity, climate resilience, and community conservation, and we're evaluating our entire service area to identify priority areas to better address these issues. We wish to meet with stakeholders whose work overlaps with ours to hear perspectives on our conservation plan and obtain input regarding our conservation priorities and criteria that have been used to prioritize land within our service area, as well as ways our land conservation efforts can complement their work. The input we gather will then be reflected in a conservation plan that will guide our land acquisition efforts for the next 20 years.
The stakeholders NCLC will engage include federal and state natural resource agencies, such as USFWS and ODF; local and regional nonprofit organizations, such as watershed councils and land trusts; tribal entities whose traditional homelands lie within NCLC's service area; and local public agencies, such as municipalities, county parks departments, and planning departments.

Review Team Evaluation

Strengths

- The proposal is thorough by describing a clear path from the proposed objectives to potential future acquisition projects. It is evident that a lot of thought has been put into the stakeholder engagement strategy.
- There is a broad partnership engaged in the work with the applicant and the project is an opportunity to strategically bring new stakeholders into conservation work on the north coast.

- The comprehensive conservation plan developed as part of this project will result in a prioritized list of acquisition projects that will help the applicant plan and strategize into the future.
- The timing for strategic conservation planning is appropriate, with the applicant having just finished a decades-long landscape level acquisition project.
- The project team is experienced with engaging community members in land acquisition conversations and has a proven track record of success.
- The work is cost-effective for the amount requested and expected quality of the work proposed.

Concerns

- No significant concerns identified during review.

Concluding Analysis

The applicant is uniquely positioned in the region to accomplish conservation work into the future, and this project is well-timed to help designate the next direction of the land trust. With a large, flagship conservation project recently completed, there are a host of engaged stakeholders that can be convened to help prioritize the future of the organization and identify strategic projects to pursue. The application clearly explains the need to bring additional stakeholders into the conversation, including tribal entities. The applicant's staff have done a thorough job laying a strong foundation for the project, and this stakeholder engagement effort will provide the necessary capacity to bring new voices to the table and result in a successful strategic plan that will benefit fish, wildlife, and coastal communities for years to come.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 1

Review Team Recommended Amount
$27,431

Review Team Conditions

n/a

Staff Recommendation
Staff Follow-Up to Review Team
n/a

Staff Recommendation
Fund

Staff Recommended Amount
$27,431

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
North Coast (Region 1)

Application Number: 223-1013-22527

Project Type: Stakeholder Engagement

Project Name: Sitka Sedge Tidal Wetlands Restoration Stakeholder Engagement

Applicant: Tillamook Estuaries Partnership

Region: North Coast

County: Tillamook

OWEB Request: $52,087

Total Cost: $65,906

Application Description Sitka Sedge Tidal Wetland Restoration (SSTW) is a significant opportunity to improve tidal wetland function, habitat complexity, species diversity, and water quality in the Sand Lake Estuary (SLE). TEP, in partnership with Oregon Parks & Recreation Department (OPRD) and the Nestucca Neskowin Sand Lake Watersheds Council (NNSLWC), has initiated a project to evaluate dike breach and setback flood protection alternatives key to restoration of Beltz Marsh and improve community resilience for Tierra Del Mar (TDM), Oregon. OWEB has already contributed $75,000 in a Technical Assistance grant to fund 30% engineering designs for this project. This request is to bolster Stakeholder Engagement associated with the larger restoration project.

SSTW, is a unincorporated portion of Tillamook County on Oregon's north coast. SSTW comprises the southern extent of SLE nested within the 357-acre Sitka Sedge State Natural Area (SSSNA). The project is located immediately North of the community of TDM, the residents of which understandably have concerns about the hydrologic impact of this project on their community. Transparent and frequent communication with the public stakeholders will be critical in moving the larger restoration project forward smoothly.

Establishing a dike alternative that provides uninhibited tidal connectivity to Beltz Marsh, including comprehensive tidal wetland design, is the first step in a larger project that includes upstream fish passage improvements on 3 salmon streams, floodplain wetland restoration, and large wood placement on Beltz and Reneke Creeks. Additionally, SSTW evaluates setback flood protection alternatives for the Tierra Del Mar community to mitigate impacts of localized flooding, king tides, and sea level rise while making much-needed improvements to local infrastructure. Other project partners include Tillamook County Public Works, USFS, OFD, USFW, ODFW, and the Confederated Tribes of Siletz Indians.

Review Team Evaluation

Strengths

- The project builds on a previously funded OWEB Technical Assistance project to develop designs for restoring tidal hydrology to the site.
- The applicant has experience with stakeholder engagement in the Sand Lake watershed and has a proven track record of success.

- The project team, including the technical consultant, has established respect within the community and will be an asset to the development of a successful project.
- Restoration of tidal hydrology at the project site will have a significant ecological benefit to the estuary.

Concerns

- A substantial amount of time, resources, and effort has already been invested in the Sitka Sedge Tidal Wetland restoration project. It is unclear whether additional stakeholder engagement is what is necessary to prevent further delays in the restoration project.
- Details on what has been accomplished with the previously funded Technical Assistance grant are not included in the application and it is unclear what progress has been made.
- More information in the application about prior investments in technical engineering and hydrologic modeling, and how the data is being utilized by the project team would clarify the need for the work.
- The plan for stakeholder engagement meetings is not well-described. More details on the specific goals of each meeting and how the project objectives will be accomplished would strengthen the application.
- Utilizing an outside facilitator may be a more effective strategy in building community support.

Concluding Analysis

Restoration at Sitka Sedge State Natural Area remains a high priority in the watershed with the return of tidal hydrology slated to have a myriad of benefits to fish and wildlife species. OWEB has recently funded a Technical Assistance grant for the design work and there has been nearly a decade of public involvement, technical work, and planning efforts funded by several different entities. It is unclear if the proposed stakeholder engagement work described in the application is what is needed to bring the restoration project to fruition. More details on the strategy for engagement and the expected deliverables would have strengthened the application.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
n/a

Review Team Recommended Amount
$0

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team

n/a

Staff Recommendation

Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
North Coast (Region 1)

Application Number: 223-1014-22601
Project Type: Stakeholder Engagement
Project Name: Salmon Saving Shorebirds
Applicant: Environment for the Americas Inc
Region: North Coast
County: Lincoln
OWEB Request: $58,787
Total Cost: $81,727

Application Description Coastal wetlands, estuaries, and beaches across the Oregon coastline provide important stopover habitats for long-distance migratory and breeding shorebirds. Shorebirds use wetlands and estuaries to refuel and rest during their pole-to-pole migration. According to the 2022 State of the Birds Report, shorebird populations have decreased by 33% in the last 40 years. A third of the species are at risk of losing half of their remaining population over the next 50 years. The main threats to shorebirds in Oregon are disturbance and loss of stopover habitat along coastal beaches and estuaries and the draining of shallow wetlands. Plans to restore coastal watersheds for salmon habitat management are already in action but do not currently incorporate the needs of shorebirds. By working with existing broad community partnerships, we can support not only the protection of salmon but also of shorebirds. The Salmon Saving Shorebirds (SSS) project is a collaboration between Environment for the Americas, USDA Forest Service, U.S. Fish and Wildlife Service, American Bird Conservancy, and Pacific Birds Habitat Joint Venture. SSS will 1) develop shorebird Best Management Practices for restoration in coastal habitats, 2) inform and make recommendations to natural resource specialists, conservationists, regulatory land management agencies, and restoration planners, 3) seek to integrate these recommendations into the actions of salmon conservation efforts, and 4) lead coordination efforts to ensure that important areas for shorebirds are being protected and shorebird monitoring is established at key restoration sites. Through active engagement with watershed restoration stakeholders, the SSS project aims to incorporate practices into current and future salmon restoration plans that will improve shorebird welfare.

Review Team Evaluation

Strengths

- The partners on the project bring strong technical expertise to inform the work. Natural resource experts from USFS, USFWS, American Bird Conservancy, and Pacific Birds Habitat Joint Venture are all involved.
- Shorebird conservation is an important component of estuary restoration projects and a priority in the coastal region.

Concerns

- It is unclear what data was utilized to determine shorebirds are not accounted for in current restoration projects in Oregon. Most estuary restoration projects within the region are not specific to salmon and strive to incorporate habitat benefits for all fish and wildlife. The application does not contain evidence that shorebirds are not considered in project planning on the Oregon coast.
- The need for shorebird conservation within estuarine projects is described in the application needed to improve practices in Oregon, but the description of the practices within the application is not consistent with common practices employed in the project area. It is unclear if this stakeholder engagement work is necessary.
- Capacity of the applicant to implement the project is unknown and details about the stakeholder engagement strategy are unclear.
- The project is not cost-effective for the expected ecological benefit, since there is no evidence that supports the idea that shorebirds are not currently accounted for in restoration practices in the project geography.

Concluding Analysis

Estuary restoration on the Oregon coast is a complex endeavor fueled by the best available science, practitioner experience, and ongoing adaptive management. Projects have certainly benefited salmon by restoring tidal hydrology and habitats critical for fish survival. Past and current estuarine projects funded by OWEB are not species specific and include pertinent information from sea-level rise and landward migration research to achieve restoration on a holistic landscape level, and do not tend to be solely focused on aquatic species. The assumption that the project designers did not consider the needs of shorebirds may not be an accurate assessment, making the need for the stakeholder engagement work unclear. The application would benefit from details describing the justification for the work and the data that was considered to arrive at the conclusion that present day estuarine projects are not inclusive of shorebirds.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
n/a

Review Team Recommended Amount
$0

Review Team Conditions

n/a

Staff Recommendation
Staff Follow-Up to Review Team

n/a

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

n/a

Region 2: Southwest

South Coast - Region 2 Fall 2022 Funding Recommendations



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Funding Recommendation

- Staff Recommendation For Funding (SRF)
- Below Funding Line (BFL)

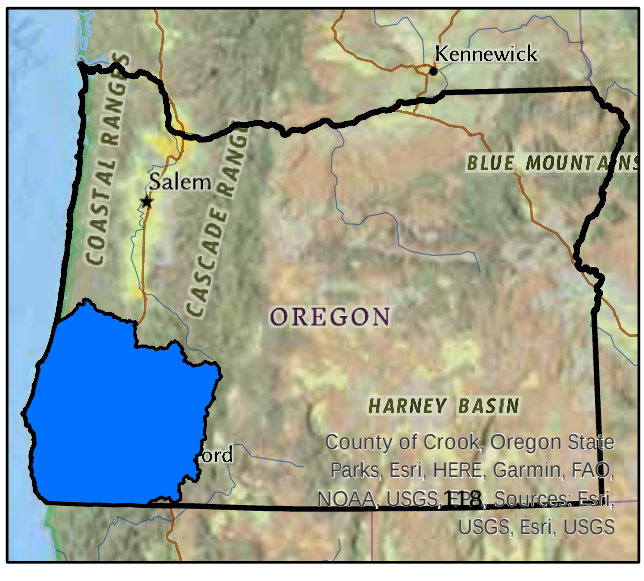
Previous Grants 1998 - Spring 2022

- Land Acquisition
- Restoration
- Region 2 Cities
- Region 2 Streams
- OWEB Region 2 Boundary

OREGON WATERSHED ENHANCEMENT BOARD

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Region 2 - Southwest Oregon Restoration

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-2001	Rogue River WC	South Fork Little Butte Creek River Mile (RM) 4.5, RM 5.5, and RM 6.2 Riparian Rehabilitation	Streamside habitat will be improved in a stream near Lake Creek. Restoration includes reconnecting a historic side-channel, removing invasive weeds, and encouraging native plant establishment.	221,225	Jackson
223-2009	Curry SWCD	Elk River Coho SAP Riparian Restoration	Trees will be planted and invasive weeds removed in the lower watershed, from the head of the tide, upstream on the Elk River.	483,184	Curry
223-2002	WaterWatch of Oregon	Lovelace Dam Removal and Restoration Project	Lovelace Dam on Slate Creek near Grants Pass will be removed. The restoration project will improve access for salmon to over twenty-five miles of spawning and rearing habitat.	159,180	Josephine
223-2007	Coos SWCD	North Bank Working Landscape & Tidal Channel Restoration: Phase II	The installation of a new culvert and Muted Tidal Regulator tide gate will improve salmon access to tidal habitat. Muted Tidal Regulated tide gates stay open on default instead of closed, which allows more time for fish passage.	497,129	Coos
223-2008	Partnership for the Umpqua Rivers	Rock Creek Tributaries Instream Enhancement	Rock Creek, located in the North Fork Umpqua River watershed, will have whole trees and logs placed across one and a half miles of streams. The instream trees and logs will improve fish habitat and trap sediment runoff from the recent Archie Fire.	275,878	Douglas
223-2000	Cascade Pacific RC&D	Benson Creek Wetland Restoration	Land near Lakeside will be restored to a functioning wetland. The project will improve habitat for native salmon, trout, and wildlife species along with stream and lake water quality.	521,943	Coos

223-2005	National Forest Foundation	Copeland Creek Priority Watershed Protection	A section of road along the North Umpqua River in the Copeland Creek Watershed will be hydrologically closed off to remove sediment inputs into the stream.	167,641	Douglas
Total Restoration Projects Recommended for Funding by RRT and OWEB Staff				2,326,180	

Projects Recommended but Not Funded in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
None					

Projects *Not Recommended* for Funding by RRT				
Project #	Grantee	Project Title	**Amount Requested**	County
223-2003	WaterWatch of Oregon	Parrott Creek Barrier Removal Project	308,448	Douglas
223-2006	Illinois Valley SWCD	IV Collective Fuels Reduction	145,913	Josephine

Region 2 - Southwest Oregon Technical Assistance

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-2010	Curry Watersheds Nonprofit	Greene Creek Habitat Restoration Design	Conceptual design alternatives will be developed for channel restoration, floodplain restoration, and livestock management around Greene Creek, a tributary to the lower Sixes River.	74,525	Curry

223-2011	Coos SWCD	Cunningham Creek Fish Passage and Riparian Improvement Technical Assistance	Designs to address fish passage concerns and improve streamside health will be developed for sites along one mile of Cunningham Creek, a tributary of the Coquille River.	74,924	Coos
223-2012	Willamette Partnership	Needs & Gaps Assessment to Update Tenmile Lakes Restoration Plan	Project Partners will create an assessment of Tenmile Lakes to guide future restoration plans.	39,382	Coos
Total Technical Assistance Projects Recommended for Funding by RRT and OWEB Staff				188,831	

Projects Recommended but Not Funded in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
None					

Projects *Not Recommended* for Funding by RRT				
Project #	Grantee	Project Title	**Amount Requested**	County
223-2013	Applegate Partnership Inc.	Williams Creek Floodplain Review	37,758	Josephine

Region 2 - Southwest Oregon Stakeholder Engagement

Projects Recommended for Funding in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
None					
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff					

Projects Recommended but Not Funded in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
None					

Projects *Not Recommended* for Funding by RRT				
Project #	Grantee	Project Title	**Amount Requested**	County
None				

Region 2 Total OWEB Staff Recommended Board Award	**2,515,011**

Region 1 - 6 Grand Total OWEB Staff Recommended Board Award	**13,027,997**

Open Solicitation-2022 Fall Offering

Southwest Oregon (Region 2)

Application Number: 223-2000-22482
Project Type: Restoration
Project Name: Benson Creek Wetland Restoration
Applicant: Cascade Pacific RC&D
Region: Southwest Oregon
County: Coos
OWEB Request: $521,943
Total Cost: $821,434

Application Description The Tenmile Lakes, a chain of freshwater lakes on the southern Oregon coast identified as one of the premiere habitats for that supports one of the few fisheries for wild Coho salmon and coastal cutthroat trout. These populations decimated over the past several decades due to loss of habitat and poor water quality from 90% loss of the wetlands that buffer the lake and provide important habitat for juvenile fish. Benson Creek which flows into Coleman Arm, South Tenmile Lake, is the third largest tributary (10.3miles) in the Tenmile Lakes Watershed. The Tenmile Lakes TMDL and Tenmile Lakes Native Fisheries and Water Quality Restoration Plan, identified the Benson Subbasin as a high priority for wetland restoration. Benson Creek is an example of a managed stream which has been channelized and the wetlands removed for agricultural use. Benson Creek is confined to its channel for a longer period of time and transports more sediment to the lakes than do streams with improved connectivity to adjoining wetlands. Restoring a permanent wetland in this Subbasin will dramatically improve the water quality as well as fish and wildlife habitat in the Benson Creek Subbasin. With our Project Partners that include Coos County, Confederated Tribes of the Coos, Lower Umpqua and Siuslaw (CTCLUSI), ODFW, ODEQ, Porior Engineering, and Lone Rock Timber, The Tenmile Lakes Basin Partnership (TLBP) is going to restore 16 acres of agricultural land to a functioning wetland, engineered and permitted to improve habitat for native fish and wildlife species while also improving stream and lake water quality. Construction of the wetland will be completed by September 2023. Wetland Plantings will take place November through March of 2023/2024 and 2024/2025. This project is shovel ready with needed OWEB funding to be matched with secured ODEQ and ODFW grant funding and in-kind donations for project management, construction, supplies, and administration.

Review Team Evaluation

Strengths

- The project addresses sediment and nutrient loads issues identified in the Tenmile Lakes Total Maximum Daily Load (TMDL) Study and associated Tenmile Lakes Water Quality Management Plans.
- The Tenmile Lakes system has been identified as one of the premier habitats that support cutthroat and ESA- listed coho. Habitat degradation and poor water quality due to the loss of wetlands has been a major factor in population decline of these fish.
- The TMDL identifies the project location as a high priority for restoration.

- A detailed planting plan for the site is provided in the application that includes opportunities for tribes to re-establish first food plant species.
- The signed agreement with the landowner is for 25 years, demonstrating a long-term commitment to the project.
- The project is ready for implementation with $2.9 million in additional funding secured for the this and another related wetland restoration project. The OWEB funding will allow the project to be fully implemented.
- A diversity of partners supports the project, including Coos County, Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians (CTCLUSI), Oregon Department of Fish and Wildlife, the Department of Environmental Quality, Porior Engineering, and Lone Rock Timber. A long-term goal is to give CTCLUSI a leadership role in future management of restoration and monitoring efforts.

Concerns

- The design in the application has a straight channel construction that would lack the configuration of a more natural meandering channel network. The design engineer clarified during the site visit that due to the low stream gradient, sinuosity will be added based on-site conditions and elevation measures during construction.
- There may be a missed opportunity for the planting approach to achieve the greatest ecological uplift; the applicant is encouraged to have the local CREP technician review plans for the planting density, species composition, and plant protection strategies.

Concluding Analysis

Sixteen acres of agricultural land will be restored to a functioning wetland, improving water quality and habitat for native fish and wildlife species. Wetland ecosystems are now exceedingly rare in the Tenmile watershed with less than 1% remaining. Restoring wetland habitat in places like Benson Creek is a high priority for achieving TMDL and Watershed Restoration plan goals in Tenmile basin.

Review Team Recommendation to Staff

Fund

Review Team Priority

6 of 7

Review Team Recommended Amount

$521,943

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Southwest Oregon (Region 2)

Application Number: 223-2001-22508

Project Type: Restoration

Project Name: South Fork Little Butte Creek River Mile (RM) 4.5, RM 5.5, and RM 6.2 Riparian Rehabilitation

Applicant: Rogue River WC

Region: Southwest Oregon

County: Jackson

OWEB Request: $221,225

Total Cost: $414,424

Application Description The project at South Fork Little Butte Creek River Mile (RM) 4.5, RM 5.5, and RM 6.2 is Phase 4 of multi-year actions throughout the sub- basin. With a drainage area of 140 square miles, South Fork joins North Fork near the town of Lake Creek to form Little Butte Creek, which flows into the Rogue River at Eagle Point. South Fork has degraded water quality, stream processes, and aquatic and terrestrial habitats that negatively affect ecosystems. Riparian forests are reduced, grazed, and infiltrated with noxious weeds, unimpeded livestock access to the creek increases sedimentation and nutrient loading, simplified channels and large wood removal eliminate channel complexity, aquatic habitat, and floodplain interactions, and irrigation practices decrease water quantity. These cumulative impacts also elevate summer water temperatures, threatening cold water fish populations. We propose a riparian rehabilitation ecological restoration action on 46.9 acres to recover the native plant community through noxious weed control, natural recruitment of native species, and native nursery stock planting, covering 2.7 miles of creek, including a reactivated 0.76 miles of winter secondary channel. Part of the 46.9 acres is to continue rehabilitating 35.1 acres of floodplain at RM 6.2, which involves converting 12.7 acres of historic pasture into riparian forest. These actions will restore critical stream processes and improve water quality and habitat conditions by increasing floodplain function. Public awareness is also an essential component to promote restoration efforts and generate interest through media outlets and project tours. The project area is identified in the Upper Rogue Coho Salmon Strategic Action Plan, developed with partners to address limiting factors and stressors. This project is in partnership with private landowners, Wild Salmon Center/ NOAA Restoration Center, and Bureau of Land Management.

Review Team Evaluation

Strengths

- The application has clearly stated objectives and detailed actions describing how the objectives will be met to address the watershed problem.
- The videos links included in the application provides a visual explanation of the restoration planned for South Fork Little Butte Creek, why the proposed actions are needed, and the locations for the proposed work.
- The project will be highly visible to the public during implementation because it is in close proximity to a main road. The applicant uses an aggressive outreach campaign, which includes social media platforms.

- The native vegetation that will be released by removing blackberry will not require watering, which will be cost effective in a very dry area.
- The applicant has a proven track record implementing similar projects and has clearly put in a lot of groundwork to establish a partnership with the landowners.
- The project approach builds off lessons learned from previous riparian vegetation project phases by encouraging native species to regenerate from seed banks that have been suppressed by invasive blackberries. This has resulted in costs savings over traditional approaches and has proved to be very effective.
- South Fork Little Butte Creek River has been simplified and impacted by land management resulting in degraded habitat and impaired water quality. The system supports steelhead, chinook, cutthroat, Pacific lamprey, and ESA-listed coho. Rehabilitating the riparian forest will address critical limiting factors impacting these species and their habitats.

Concerns

- The budget includes detail from the ongoing project phases that are outside the currently proposed phase of restoration. While this helps capture the complete restoration picture, costs specific to the proposed restoration actions are unclear.

Concluding Analysis

A riparian rehabilitation restoration strategy will be completed on almost 47 acres over nearly 3 miles on South Fork Little Butte Creek River to recover the native plant community through noxious weed control, natural recruitment of native species, and native nursery stock planting. The project will build on previous restoration phases, which will expand the positive cumulative impacts to the stream's health. The project is technically sound and has a high likelihood of achieving its objectives.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 7

Review Team Recommended Amount
$221,225

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team
N/A

Staff Recommendation

Fund

Staff Recommended Amount

$221,225

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Southwest Oregon (Region 2)

Application Number: 223-2002-22516

Project Type: Restoration

Project Name: Lovelace Dam Removal and Restoration Project

Applicant: WaterWatch of Oregon

Region: Southwest Oregon

County: Josephine

OWEB Request: $159,180

Total Cost: $355,691

Application Description 1) This project is located on private property near Wilderville, in Josephine County, on Slate Creek, within the Applegate River subbasin of the Rogue River Basin.

2) One stream-spanning concrete dam blocks or impedes adult and juvenile fish passage to over 25 miles of spawning habitat. Impacted species include Chinook Salmon, Coho Salmon, summer and winter Steelhead, Pacific Lamprey, Cutthroat Trout, and Suckers. Lovelace Dam on Slate Creek is ranked in Group 2 of ODFW's 2019 Statewide Fish Passage Priority List. Lovelace Dam serves no water supply, flood control, or hydropower purpose and does not comply with NOAA and ODFW fish passage criteria. This project complements salmon restoration efforts ongoing throughout the Rogue Basin.

3) This project would remove the dam noted above and significantly improve access to over 25 miles of spawning and rearing habitat.

4) WaterWatch's project partners include the landowner, ODFW, USFWS, NOAA Fisheries, BLM, Rogue River Watershed Council, River Design Group, and Rogue Basin Partnership.

Review Team Evaluation

Strengths

- The application has clearly stated objectives and detailed actions describing how the objectives will be met.
- The design is complete, and the permitting process is on schedule for implementation during the 2023 in water work window.
- The dam proposed for removal is ranked number 2 in the Rogue basin by the ODFW statewide priority list.
- The project budget is reflective of similar dam removal projects and costs are reasonable for the work proposed.
- The applicant has experience with removing dams in the Rogue River region and has assembled an experienced team to design and implement the removal of Lovelace Dam.
- Appropriate partners necessary for successful dam removal are engaged in the project, including the landowner, ODFW, USFWS, NOAA Fisheries, BLM, Rogue River Watershed Council, River Design Group, and Rogue Basin Partnership.

- The stream has high intrinsic potential habitat for ESA-listed fish. Removing Lovelace Dam implements recommendations from the coho recovery plan by addressing fish passage, a key limiting factor for coho populations.

Concerns

- Information on the planting plan to revegetate areas disturbed by construction would be helpful for understanding how the project approach will address impacts to the site.

Concluding Analysis

Removing Lovelace Dam will improve access to over 25 miles of spawning and rearing habitat for multiple species, including chinook, ESA-listed coho, winter steelhead, cutthroat, and lamprey. The project is likely to succeed in improving habitat and water quality conditions on Slate Creek at a reasonable cost.

Review Team Recommendation to Staff
Fund

Review Team Priority
3 of 7

Review Team Recommended Amount
$159,180

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

Staff Recommendation
Fund

Staff Recommended Amount
$159,180

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Southwest Oregon (Region 2)

Application Number: 223-2003-22520
Project Type: Restoration
Project Name: Parrott Creek Barrier Removal Project
Applicant: WaterWatch of Oregon
Region: Southwest Oregon
County: Douglas
OWEB Request: $308,448
Total Cost: $404,448

Application Description 1) This project is located on private property in Roseburg, in Douglas County, on Parrott Creek, within the South Umpqua River subbasin of the Umpqua River Basin.

2) One stream-spanning concrete dam and two culverts block adult and juvenile fish passage to 2 miles of spawning habitat. Impacted species include winter steelhead and Cutthroat Trout. Parrott Creek Dam serves no water supply, flood control, or hydropower purpose and does not comply with NOAA and ODFW fish passage criteria. This project complements salmon restoration efforts ongoing throughout the Rogue Basin.

3) This project would remove the dam noted above, modify the 2 existing culverts to improve fish passage, and significantly improve access to 2 miles of spawning and rearing habitat.

4) WaterWatch's project partners include the landowner, ODFW, USFWS, and River Design Group.

Review Team Evaluation

Strengths

- Removing the dam at Parrot Creek's confluence with the South Umpqua River and modifying culverts directly upstream will restore passage for winter steelhead, cutthroat trout, ESA-listed coho, and lamprey to two miles of spawning habitat.
- The landowner is engaged in project design and committed to the success of the project as evidenced through his participation at the project site visit.
- The applicant has a great deal of dam removal experience and the capacity to see the project successfully through completion.
- The applicant has engaged an experienced and qualified contractor to develop the design and oversee the dam removal.
- The approach for removing the dam and modifying the two existing culverts is reasonable for the location at the confluence of Parrott Creek with the South Umpqua River.

Concerns

- The watershed above the culvert covers approximately two square miles and is urbanized with many road crossings. The application lacks information describing the water quality and habitat conditions

upstream of the project site. Additionally, there is no formal assessment of barriers located above the project site that could provide information about how much habitat will be made available from the proposed restoration.

- The application provides a design overview that lack details needed to understand the project and evaluate whether the methods are technically sound and likely to succeed. The more in-depth design detail provided during the review team site visit should be incorporated into any future applications.
- The budget has costs grouped into lump sums. Budget details broken into the individual tasks and associated costs would be helpful to better understand whether costs are reasonable and necessary for the proposed project.
- The project cost is high for the unknown quantified habitat benefit compared to similar projects.
- The application lacks information describing a planting plan.
- It is unclear from the application whether all appropriate partners necessary to make this urban project successful, such as the railroad and City of Roseburg, are involved in the project.

Concluding Analysis

Restoring fish passage on Parrott Creek by removing man-made barriers is important for improving native fish access to spawning habitat. Without information describing watershed conditions above the project site, the ecological benefit of the project is unknown.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

N/A

Review Team Recommended Amount

$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Southwest Oregon (Region 2)

Application Number: 223-2005-22534
Project Type: Restoration
Project Name: Copeland Creek Priority Watershed Protection
Applicant: National Forest Foundation
Region: Southwest Oregon
County: Douglas
OWEB Request: $167,641
Total Cost: $453,727

Application Description The National Forest Foundation (NFF) and the U.S. Forest Service (USFS) Umpqua National Forest are working together to protect water quality and aquatic habitat in the Copeland Creek Priority Watershed and North Umpqua River. Copeland Creek provides critical habitat to Oregon Coast coho salmon (federally threatened), spring Chinook (state sensitive species), summer steelhead (federal species of concern), winter steelhead, cutthroat trout, Pacific lamprey (federal species of concern), and other native fish and aquatic species. The North Umpqua provides drinking water to Glide, Roseburg, and many other smaller drinking water providers and rural residents. Copeland Creek Watershed contains 87 miles of forest road which amounts to a road density of 2.41 miles per square mile. Approximately 12% of the watershed is occupied by roads, and 22 miles of roads are within Riparian Reserves. Many of these aging roads and culverts are at significant risk of failure. If road and culvert failure occur, large amounts of sediment could enter Copeland Creek and the North Umpqua resulting in clogged spawning gravels and increased turbidity. This would negatively impact threatened and sensitive fish species as well as human communities. To protect critical fish habitat and source water, the NFF and the USFS will hydrologically store and close 12.28 miles of road in Copeland Creek Watershed by removing 27 culverts and associated fill, installing water bars and armored stream crossings, partially recontouring problematic road sections, restoring proper drainage, barricading roads with berms, and seeding disturbed areas with native grasses and forbs. This work will be implemented in two phases and builds upon a first phase of the project in which project partners decommissioned 1.70 miles of Copeland Creek Road. NFF will lead contracting and community engagement; the USFS will lead design and project inspection. The two partners will work collaboratively to oversee project implementation.

Review Team Evaluation

Strengths

- The proposed restoration builds on a previous project phase where 1.7 miles of roads in the upper Copeland Creek watershed were decommissioned.
- The Copeland Creek watershed is a United States Forest Service priority for restoring forest health to build wildfire resiliency and habitat restoration for cutthroat and lamprey.
- ESA-listed coho use the lower 1.5 miles of the system and will benefit from any water quality benefits that occur upstream.

- The project objectives are consistent with Department of Environmental Quality's water quality plan for the basin.
- The applicant takes a hands-on approach to implement road decommissioning projects by assigning a project manager that is on site during implementation to help guide project activities and ensure there are no miscommunications about the design.
- The approach to treating and placing the removed fill material from the decommissioned roads offsite will reduce the potential for it re-entering the stream system and causing impacts to the project site or downstream locations.
- The application includes a description of four alternative design approaches that were evaluated and an explanation for how the selected alternative was chosen.
- The costs are reasonable for the project approach and the expected ecological benefit.
- The budget is detailed and clearly divides out the current project phase.
- The before and after photos provided in the application clearly illustrated how wildlife habitat will be improved.

Concerns

- No significant concerns identified.

Concluding Analysis

Decommissioning roads and removing stream crossings and the associated road fill will protect aquatic habitat and drinking water sources by decreasing sediment loading in Copeland Creek and the North Umpqua River. The project location is above areas of fish usage which are restricted by natural barriers and natural water chemistry higher in the system. The project will provide secondary benefits for ESA-listed fish located downstream of the project site by improving water quality and preventing the risk of sediment loading events that can impact spawning gravels. The project is likely to succeed in improving hydrologic function in the upper reaches of Copeland Creek at a reasonable cost.

Review Team Recommendation to Staff
Fund

Review Team Priority
7 of 7

Review Team Recommended Amount
$167,641

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Southwest Oregon (Region 2)

Application Number: 223-2006-22565
Project Type: Restoration
Project Name: IV Collective Fuels Reduction
Applicant: Illinois Valley SWCD
Region: Southwest Oregon
County: Josephine
OWEB Request: $145,913
Total Cost: $484,636

Application Description 1) Location: This project, located within the Illinois Valley (IV) in Josephine County, proposes 332 acres of fuels reduction activities on high-priority private lands currently at high-risk for catastrophic fire. Project work will occur on strategic properties within Wildland Urban Interface (WUI) regions immediately east of Selma, south and east of Cave Junction, south of O'Brien, and within the triangle of Cave Junction, O'Brien and Takilma. All work is within the project area of the applicants current/open stakeholder engagement program agreement with OWEB: The Illinois Valley Collective Mobilization for Fire and Fish Project (IVCMFFP, OWEB proj#221-2058).

2) Need: The threat of severe fire due to an overly dense and dry-forest with associated risks to human and natural resources, in the context of rapidly changing climate conditions in an extremely unique salmon stronghold, drives this project. The applicant's IVCMFFP and IVFROG's Takilma Phase 1 NRCS/ODF CIS assistance (TA & FA) projects are generating considerable landowner activity in the Takilma and O'Brien areas directly related this proposal.

3) Work: Ecological surface and ladder (S&L) restoration treatments will be implemented on 332 acres of private property in 10 project areas at different treatment levels (L1-L3). OWEB funds are proposed to fund treatments on 100 acres of the 332 total project acres as follows:
L2 10 acres (Takilma, OR)
L2 5 acres (Cave Junction, OR)
L1 30 acres (Takilma, OR)
L2 5 acres (Takilma, OR)
L1 20 acres (Takilma, OR)
L2 10 acres (Selma, OR)
L2 5 acres (Cave Junction, OR)
L2 5 acres (Cave Junction, OR)
L2 5 acres (Holland, OR)
L3 5 acres (Holland, OR)

4) Project Partners: Key members of the IVCMFFP's fire cohort, the Illinois Valley Fire Resiliency Oversight Group (IVFROG), and numerous committed landowners are also core partners of this proposal. Please refer to the "Partners" attachment in the upload section for a

full list of project partners.

Review Team Evaluation

Strengths

- Fuel reduction treatments will be completed on 100 acres of privately owned forested properties following site specific prescriptions.
- The project is the result of a concentrated community engagement and awareness effort that was funded through an OWEB Stakeholder Engagement grant. The landowners are engaged and highly motivated to thin overly dense forests after the Slater Fire. Landowner and project partner commitments are evident through secured match contributions and letters of support in the application.
- The Natural Resources Conservation Service and Oregon Department of Forestry are engaged in the project by providing critical technical assistance and project guidance support.

Concerns

- The connection between the proposed actions for preventing catastrophic wildfire and restoring watershed functions is unclear in the proposal. Additional information explaining the quantified watershed benefits to wildlife and aquatic habitats as well as water quality and quantity expected from the proposed treatments would be helpful for understanding the project cost-benefit.
- There is no long-term plan described in the proposal for maintaining the properties after the treatments, it is unclear what strategies will be used to maintain the restoration investment.
- The treatments proposed are not likely to stop catastrophic fire for individual properties and it was not clear what the long-term benefits to watershed health would be.
- Including additional habitat expertise on the technical planning team, such as a wildlife and fisheries biologists, could provide an opportunity to include aquatic and terrestrial habitat considerations into the forest treatment approach. The Rogue Forest Collaborative would be a useful resource for developing a comprehensive approach to improving forest health that integrates watershed health outcomes.

Concluding Analysis

Strategically thinning overly dense forests will reduce fuels within the Wildland Urban Interface in the Illinois Valley. The proposed treatments focus more on the human factor and protecting properties and it is unclear from the application how watershed processes or the health of terrestrial and aquatic habitats will benefit from the project.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Southwest Oregon (Region 2)

Application Number: 223-2007-22589

Project Type: Restoration

Project Name: North Bank Working Landscape & Tidal Channel Restoration: Phase II

Applicant: Coos SWCD

Region: Southwest Oregon

County: Coos

OWEB Request: $497,129

Total Cost: $1,524,941

Application Description

The North Bank Working Landscapes (NBWL) project encompasses 32.87 acres of pasture located at River Mile (RM) 7.5 on the Coquille River, near Bandon, Coos County. The site was historically tidal saltmarsh prairie (Benner, 1992). Diking and draining to convert the site for agricultural use occurred in the early 1900s through construction of a 0.5mi berm along the river, and installation of linear drainage channel network with 1ft diameter culvert and tide gate. Tidal influence in channels is near zero as the single tide gate servicing the property is a top-hinged “flapper” gate. The dike has suffered from erosion in multiple locations. Site conditions currently result in poor water quality, little or no fish access to channels, and both ecological and agricultural productivity has been reduced. OWEB awarded TA funds facilitated development of a fully refined restoration proposal for this site. Restoration project actions include installation of a new culvert and Muted Tidal Regulator (MTR) tide gate to restore and maximize fish passage; reconstruction of 4,466 ft of sinuous, on-grade, tidal channel network to provide greatly improved tidal floodplain habitat and hay production; riparian fencing along both sides of the primary reconstructed channel; re-establishment of native riparian vegetation along the banks of the primary channel for direct improvements to water quality over current conditions; installation of large woody debris to increase hiding cover and complexity; and repair to damaged segments of the dike. This project is led by Coos SWCD in partnership with the Stalley/Young families and the ODFW and invaluable technical contributions from the Coquille Indian Tribe. In 2022 due to inflationary issues the project was partitioned into two Phases. Phase I actions were confined to installation of the culvert, tidegate, and MTR, all completed in summer 2022. Phase II includes the majority proportion of project components, which are slated for 2023.

Review Team Evaluation

Strengths

- The application has clearly stated objectives and detailed actions describing how the objectives will be met, demonstrating a well thought out project.
- Contingencies tied to different funding levels are outlined in the application that explain how the applicant plans to prioritize project actions if there is reduced funding secured and how different funding levels will impact ecological outcomes.
- The project builds on phase one work, which focused on tide gate installation and addressing a failing levee.

- The applicant is experienced working in tidally influenced agricultural areas and has adapted lessons learned from earlier efforts into the project development.
- Appropriate partners are engaged in the project.
- Tidally influenced habitat will be restored on 33 acres, which will address a critical habitat limiting factor for ESA-listed coho by creating winter rearing opportunities. The proposed actions are consistent with recommendations in the coho recovery plans.
- The riparian area adjacent to the Coquille River will be enrolled in the Conservation Reserve Enhancement Program (CREP) as a wildlife buffer.
- The project will build on similar restoration efforts on properties with tidally influenced habitat areas both below and upstream of the project site.
- Riparian buffers will be planted on both sides of the main constructed channels and the buffer width is likely to be sufficient to achieve the riparian habitat objectives.
- The landowners are engaged and committed to the project, which is demonstrated by their active engagement in the project development and implementation.

Concerns

- The application lacks information about fencing treatments for the pond areas that function as hydrologic bulbs to help manage water levels; however, the applicant clarified during the site that the ponds will be fenced off to exclude livestock.
- Three strand barbed wire will be used for fencing along the tidal channels to exclude livestock. Selecting a more wildlife-friendly fencing design would facilitate passage of wildlife moving through the wildlife buffer that will be established through CREP.

Concluding Analysis

Restoring historic tidal salt marsh prairie is important to the recovery of critical habitats supporting ESA-listed coho. Implementing this second phase of a two-phased project planned for 33 acres on the Coquille River will provide the complete ecological uplift to coho refugia and overwinter rearing habitat expected from the long-term, phased investment at the project site.

Review Team Recommendation to Staff

Fund

Review Team Priority

4 of 7

Review Team Recommended Amount

$497,129

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team

Staff Recommendation
Fund

Staff Recommended Amount
$497,129

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Southwest Oregon (Region 2)

Application Number: 223-2008-22598
Project Type: Restoration
Project Name: Rock Creek Tributaries Instream Enhancement
Applicant: Partnership for the Umpqua Rivers
Region: Southwest Oregon
County: Douglas
OWEB Request: $275,878
Total Cost: $410,878

Application Description The catastrophic Archie Creek Fire began in September 2020 and severely burned 60% of the Rock Creek Watershed. Partnership for the Umpqua Rivers (PUR) and Roseburg Bureau of Land Management (BLM) are working together to implement a four-phase project to recover fish habitat in Rock Creek. The third phase of work further expands our restoration efforts to three Rock Creek tributaries: North Fork East Fork, Wapiti, and Upper North Fork East Fork Rock Creek. These stream reaches are all within the Archie Creek fire area and have experienced 80-100% riparian tree mortality. BLM Aquatic Staff have identified fire-killed roadside hazard and riparian trees to utilize for stream restoration in the above reaches. The urgency of this project is great because if the riparian hazard trees are not utilized for restoration in the next two years, then they will be felled and sold through Reciprocal Right-of-Way agreements, or the trees will rot and be unusable for instream habitat recovery. The first two phases of work occurred in 2021 and 2022 and resulted in the placement of 1,400 trees into 6.1 miles of mainstem Rock Creek, 1.9 miles of new side channel habitat restored and reconnected, 51 acres of floodplain habitat restored, 18 large, legacy logs jams created and 87 complex pools excavated. The Phase III project will result in the placement of 150 trees and logs into 30 sites across 1.5 miles of tributary streams and is planned for implementation in 2023. BLM is donating staff time, trees and logs to the project, ODFW is donating staff time and Western Oregon RAC funds have been sought as cash match.

Review Team Evaluation

Strengths

- The project approach designed for the stream size and expected higher sediment transport is technically sound and has a strong likelihood of success.
- The project is designed and permitted, making it ready for implementation during the 2023 instream work window.
- The project is in direct response to severe impacts to the watershed from the Archie Fire. Instream wood placement will be designed to capture sediment coming from the post-fire areas and locations with salvage logging activities.
- The proposed actions will restore instream habitat conditions necessary to support ESA-listed coho, steelhead, cutthroat trout, and lamprey.

- The project is timely with the large amount of fire killed trees immediately available for placement. Fire killed logs will be utilized that need to be placed instream within the next couple of years or they will lose their usefulness due to deterioration. Placing these logs in a wetted environment will arrest this degradation while providing long-term instream habitat.
- The design approach will incorporate the entire tree, including the rootwad, into the instream habitat structures.
- The project builds directly on previous instream and channel habitat restoration work, expanding ecological uplift to other stream reaches.
- A qualified design and implementation team will provide project oversight.

Concerns

- No significant concerns identified.

Concluding Analysis

The Rock Creek system suffered a watershed level catastrophic fire that destroyed 85%-95% of the riparian trees and burned most of the upland areas as well. A huge influx of large wood and sediment will likely move into the project reach because the upstream area impacted by the fire has potential for contributing significant material load into the Rock Creek system during a storm event. Without the proposed placement of instream wood structures in advance of these events, this material load could further destabilize the stream system and allow material to move out of the stream instead of holding it in place to enhance fish habitat. This timely project will restore instream habitat and improve stream function over a one-and-a-half-mile section of stream, expanding on work accomplished last year.

Review Team Recommendation to Staff
Fund

Review Team Priority
5 of 7

Review Team Recommended Amount
$275,878

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$275,878

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Southwest Oregon (Region 2)

Application Number: 223-2009-22620
Project Type: Restoration
Project Name: Elk River Coho SAP Riparian Restoration
Applicant: Curry SWCD
Region: Southwest Oregon
County: Curry
OWEB Request: $483,184
Total Cost: $1,131,344

Application Description This project is located in the Elk River Watershed, which is located on the southern Oregon coast to the north of the town of Port Orford. Project activities will take place in the lower watershed, from the head of tide upstream 4.22 miles on the Elk River mainstem, and on tributary channels that cross the Elk River floodplain within the project reach. The project will restore 181.74 acres of self-sustaining, native riparian forest, which are needed to address key limiting factors that threaten the existence of Coho salmon and the viability of wild fall Chinook in the watershed. To restore riparian habitat, we will replace stands of contiguous mature gorse and other invasive species with a diverse assemblage of native riparian conifers, hardwood trees, and shrubs; and we will maintain those seedlings until they are Free-to-Grow. This project is part of Phase II Implementation of the Elk River Coho Recovery Strategic Action Plan (SAP). Other SAP partners include the Oregon Department of Fish and Wildlife, the Wild Salmon Center, the National Oceanic and Atmospheric Administration Fisheries, the Wild Rivers Coast Alliance, and the Wild Rivers Land Trust.

Review Team Evaluation

Strengths

- The project team has experience successfully implementing similar projects and has established a working relationship with the landowners.
- Native riparian forest will be restored across 182 acres on Elk Creek, which will address priority habitat limiting factors to ESA-listed coho and chinook recovery, including loss of instream complexity and elevated summer stream temperatures.
- The project will implement site specific actions identified in the Elk River Coho Strategic Action Plan.
- The application presented a well thought out and detailed planting approach. There are experienced crews in place for installing the plantings and the applicant is coordinating with local nurseries to secure disease resistant Port Orford cedar.
- The approach to treating invasive plant species, such as gorse, is based on lessons learned from previous projects that had positive results in difficult treatment areas.
- The fence setbacks will provide a generous buffer that is likely to allow the necessary room for functioning riparian areas to become established. There are long-term plant establishment plans in place for the planting.

Concerns

- Plans for long-term fencing maintenance are unclear in the application; however, the applicant clarified during the site visit that they will hold primary responsibility.
- Utilizing tree protectors within the average high-water mark may result in loss during higher flows.
- More detail on how the sites will be incorporated into long-term effectiveness monitoring would be helpful for understanding how the applicant will determine completed restoration is contributing to the overall success of the Coho Strategic Action Plan.

Concluding Analysis

Native riparian forest will be reestablished on approximately 182 acres in the Elk Creek watershed. High functioning riparian habitat provides multiple ecosystem functions for the aquatic environment, including stream shading, reduced bank erosion, future large wood recruitment for instream habitat complexity, and flood attenuation. The project is likely to succeed in achieving restoration objectives as a result of a technically sound approach and commitments to long-term maintenance.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 7

Review Team Recommended Amount
$483,184

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$483,184

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Southwest Oregon (Region 2)

Application Number: 223-2010-22551
Project Type: Technical Assistance
Project Name: Greene Creek Habitat Restoration Design
Applicant: Curry Watersheds Nonprofit
Region: Southwest Oregon
County: Curry
OWEB Request: $74,525
Total Cost: $94,125

Application Description The proposed project site is located on a floodplain on the north side of the lower Sixes River in Curry County, on a privately-owned cattle ranch. Fish rearing habitat is naturally limited in the Sixes River watershed, and nearly all of the bottomland habitat that naturally existed in the lower Sixes watershed was converted to farmland and pasture because it was the most fertile and accessible land. Currently, approximately 45 acres of Greene Creek and adjacent low gradient bottomland are fenced out from cattle and represent under-functioning, potential rearing and wetland habitat. Meanwhile, nearly 15 acres within cattle rotation are seasonally inundated and contribute to degraded water quality and management challenges. The goal of this project is to collaboratively develop conceptual restoration design alternatives for channel and floodplain restoration and livestock management in and around Greene Creek. Alternative scenarios will allow CWP, subject-matter experts, and the landowners to evaluate short-term effects on site hydraulics (water depths, velocities, and erosional forces) to create more rearing habitat, improve water quality through surface water retention and surface/groundwater interaction, and improve pasture management. Selection of a preferred alternative will be taken to the approximate 60% level of design. Project partners include the Curry Watersheds Partnership (CWP; including the South Coast Watershed Council, Lower Rogue Watershed Council, and the Curry SWCD), the landowners and the ranch manager, USGS, ODFW, BLM, USFS, the Coquille Indian Tribe, and the Confederated Tribes of the Siletz Indians.

Review Team Evaluation

Strengths

- The proposal is comprehensive and site selection is based on pre-project monitoring data including water level and fish use sampling. The objectives are appropriate for developing conceptual design alternatives for stream channel and floodplain restoration in and around Greene Creek.
- The resulting restoration work will benefit habitats important for Chinook, ESA-listed coho, steelhead, and lamprey.
- The applicant is working with a qualified engineering firm to collect data.
- An array of project partners is engaged in the project, including the Coquille Indian Tribe and the Confederated Tribes of the Siletz Indians. The applicant has experience in collecting baseline water quality and quantity data necessary for a thorough and impactful project.

- The array of partners assembled for the project demonstrates the applicant's ability to collaboratively collect baseline water quality and quantity data necessary for a thorough and impactful project.
- The design approach considers future sea level rise.

Concerns

- The application lacks letters of support describing partner commitments, which would provide helpful information about the level of priority agencies have placed on the project.

Concluding Analysis

The future restoration project will compliment similar restoration activities completed in the lower Sixes River area. The proposed technical assistance is likely to succeed in addressing critical habitat limiting factors for ESA-listed coho by opening rearing habitat and improving water quality on Greene Creek.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 3

Review Team Recommended Amount
$74,525

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$74,525

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Southwest Oregon (Region 2)

Application Number: 223-2011-22585

Project Type: Technical Assistance

Project Name: Cunningham Creek Fish Passage and Riparian Improvement Technical Assistance

Applicant: Coos SWCD

Region: Southwest Oregon

County: Coos

OWEB Request: $74,924

Total Cost: $167,023

Application Description The Cunningham Creek Fish Passage and Riparian Improvement Project will improve fish access to 2.2 miles of coho salmon habitat and 2.7 miles of winter steelhead habitat and improve riparian habitat along 1 mile of Cunningham Creek, a tributary of the Coquille River in Coos County, OR. Currently, fish passage is partially impeded by two undersized culverts. One culvert that poses a partial fish barrier is a concrete box culvert underneath a county road. This culvert has a 2ft perch and spills onto a concrete slab. Another culvert is an old boiler that has been repurposed as a culvert on a farm road. The culvert is undersized and has an 18in perch at the outflow during summer low flows. The stream has been eroding underneath and around the culvert. Both culverts are narrower than the active channel of Cunningham Creek, concentrating the flow of water. Coho salmon are present above both culverts, although the culverts do not meet fish passage guidelines and are likely complete barriers to juvenile salmonids, partial barriers to adult salmonids, and complete barriers to Pacific lamprey. The highest quality spawning habitat on Cunningham Creek is upstream of the culverts. Currently, riparian condition in the floodplain valley of Cunningham Creek is poor, with significant shade only present in the uplands. The Coos Soil and Water Conservation District (Coos SWCD) proposes to contract the design of new stream crossings to address the fish passage issue in Cunningham Creek. Coos SWCD will also design a riparian restoration plan to remove invasive vegetation and plant native trees along 1 mile of Cunningham Creek. Partners of Coos SWCD include Leatherman Land and Timber Company, the Coos County Public Works Department, and the Oregon Department of Fish and Wildlife.

Review Team Evaluation

Strengths

- The photos provided in the application are helpful for supporting the application narrative and demonstrating the need for the proposed technical assistance.
- The applicant successfully incorporates restoration opportunities on public and private lands by designing a road crossing with the county to address fish passage and working with a landowner to plan voluntary conservation actions that will improve water quality by excluding livestock from the stream and replant the riparian area.
- The applicant will leverage partner experience and capacity by engaging the county to design the road crossing while the applicant will work with the landowner on a restoration plan for the riparian area.

- Fencing and riparian plantings will be incorporated into the project design and will be vital for addressing factors, such as E. coli and reduced dissolved oxygen, impairing water quality in Cunningham Creek.
- The project will address fish passage, stream complexity, and water quality, which are primary and secondary limiting factors for ESA-listed coho.
- The landowner is engaged in the project development.
- Archaeological surveys will be conducted in cooperation with the local tribes.
- Project partners have local experience in the Coquille watershed area and a proven track record with bringing projects through the design phase and into implementation.

Concerns

- It is not clear how the project deliverables will be impacted if some of the match funding is not secured.
- The application lacks information indicating a range of design alternatives will be considered. For example, it is not clear why large wood is not incorporated into the design approach to improve stream complexity.

Concluding Analysis

Cunningham Creek is a priority location for restoration because it provides critical habitat for ESA-listed coho as well as steelhead and lamprey. The proposed project is likely to succeed in leading to restoration that will improve fish access to almost three miles of salmon and steelhead habitat and improve riparian habitat along one mile of this tributary to the Coquille River.

Review Team Recommendation to Staff

Fund

Review Team Priority

2 of 3

Review Team Recommended Amount

$74,924

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$74,924

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Southwest Oregon (Region 2)

Application Number: 223-2012-22606
Project Type: Technical Assistance
Project Name: Needs & Gaps Assessment to Update Tenmile Lakes Restoration Plan
Applicant: Willamette Partnership
Region: Southwest Oregon
County: Coos
OWEB Request: $39,382
Total Cost: $49,384

Application Description Location: The Tenmile Lakes basin (HUC 1710030111) is located on the Oregon South Coast between the Umpqua River and Coos Bay and encompasses approximately 98 square miles. There are ten named lakes within the watershed with a combined surface area of 4.7 square miles. The City of Lakeside is adjacent to North Tenmile Lake. The watershed spans Coos and Douglas Counties.

Project Need: The Tenmile Lakes Basin Partnership (TLBP) has been convening the Tenmile Lakes watershed group for several years with the goal of restoring water quality in this premiere Coho fisheries habit. The Partnership completed the Tenmile Lakes Native Fisheries and Water Quality Restoration Plan (Plan). However, the Plan lacks key components to facilitate coordinated implementation including governance and operationalization documentation. These gaps have been identified by funders as key barriers to the watershed group securing the funding needed to implement the Plan. The Plan therefore needs to be updated to facilitate coordinated implementation among partners and to secure multi-year funding from state and federal grant programs.

Proposed Work: Willamette Partnership will perform a Needs & Gaps Assessment (Assessment) of the current Plan to identify issues and areas for improvement of the current Plan and produce recommendations to follow when updating the Plan. A Partnership TA grant application will be submitted to fund the Plan Update.

Project Partners: Applicant is Willamette Partnership. The following watershed group partners will lead the Plan's implementation and will participate in interviews and meetings as needed to perform the Assessment: Coos County, City of Lakeside, CTCLUSI, and Tenmile Lakes Basin Partnership. Additional watershed group partners to participate in meetings to inform the Assessment include OR DSL, OR DFW, OR DEQ, Wild Rivers Land Trust, Tenmile Lake Association, and Cascade Pacific Resource Conservation & Development.

Review Team Evaluation

Strengths

- The application clearly presents the rationale for and importance of conducting a needs and gaps assessment for the Tenmile Lakes Restoration Plan to update the plan. This will lead to securing funding to address high priority issues such as water quality and restoring instream habitat for native coho salmon, steelhead, pacific lamprey, and cutthroat trout.
- The application captures the need for this project. The approach to developing capacity in the watershed is thoughtful and well described. The needs and gaps assessment will lead to capacity for restoration by providing partners direction for prioritizing and implementing their watershed restoration and monitoring efforts.
- There is a clear plan for managing and sharing data.
- An appropriate array of partners is involved in the effort that are needed to achieve the project objectives. The work will build on decades of successful collaboration on restoration and monitoring activities.
- The applicant has worked effectively with other watershed restoration partnerships to build capacity through planning prioritized restoration strategies such as the Tenmile Lakes Native Fisheries and Water Quality Restoration Plan.

Concerns

- The budget has costs grouped into lump sums. Budget details broken into individual tasks and associated costs would be helpful to better understand whether the costs are reasonable and necessary for the proposed technical assistance.

Concluding Analysis

The existing Tenmile Lakes Native Fisheries and Water Quality Restoration Plan has become outdated and lacks key components and information needed to support the current strategic, governance, and operational needs of the partners. A needs and gaps assessment will be completed to guide an update to this plan. The assessment will identify local capacity constraints and issues in the current plan that are barriers to its implementation and the restoration of the Tenmile Lakes watershed.

Review Team Recommendation to Staff
Fund

Review Team Priority
3 of 3

Review Team Recommended Amount
$39,382

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team

N/A

Staff Recommendation
Fund

Staff Recommended Amount
$39,382

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Southwest Oregon (Region 2)

Application Number: 223-2013-22608
Project Type: Technical Assistance
Project Name: Williams Creek Floodplain Review
Applicant: Applegate Partnership, Inc.
Region: Southwest Oregon
County: Josephine
OWEB Request: $37,758
Total Cost: $53,820

Application Description

Williams Creek, a major tributary to the Applegate River is within the FEMA Flood Hazard Zone. We have recently prepared and received grants through the OWEB Small Grant Program to complete instream habitat restoration work but were surprised when Josephine County started a new policy to require a floodplain "no-rise" for all projects that involve riparian and instream work for salmon habitat. As a result, we are required to obtain an engineering report that reviews and resolves the "no-rise" FEMA requirements. We are applying for Technical Assistance to hire an engineering group that can survey and calculate the work needed to provide this requirement. We seek this funding to complete a study of the mapped FEMA Flood Hazard Zone area on Williams Creek to continue our work in developing instream salmon habitat projects and riparian restoration projects. This will provide us with an engineering report that will help us continue developing broad restoration project across Williams Creek. We will work with Oregon Department of Agriculture, Oregon Department of Fish & Wildlife, the Bureau of Land Management, and local landowners to develop these projects.

Review Team Evaluation

Strengths

- Floodplain restoration is important for ESA-listed coho recovery efforts in the Williams Creek watershed. The project focuses on a reach of Williams Creek where ESA-listed coho, steelhead, lamprey, and chinook will all benefit from habitat restoration.
- Engineering analysis for the mapped FEMA Floodplain Hazard Zone permitting requirements will be completed, which can be very time consuming and costly. Getting ahead of the curve to secure permits for stream and riparian restoration implementation is important, especially when working with private landowners who like to see on-the-ground project results as soon as possible.

Concerns

- The application provides a list of participating landowners involved in stream restoration projects; however, there are no details regarding the watershed issues and opportunities on their properties that would demonstrate the need for the proposed technical assistance.

- Engineering tasks will be completed for a “no-rise” analysis for a suite of restoration projects that are not described in the application. The work proposed is not tied to a specific project engineering design. It is unclear whether this approach to floodplain permitting is likely to succeed and lead to restoration implementation. It is possible the County will ask for the proposed engineering tasks to be redone when each site-specific design is submitted for review, or some projects may not require the additional engineering. Information from the County indicating the proposed approach and products is necessary and sufficient for securing permits will provide evidence that the project is likely to lead to restoration implementation.
- The budget lacks details needed to evaluate costs related to specific project activities.
- It was unclear if the no-rise certification work for the future projects that have not been defined yet would be accepted by the County.
- It is unclear if engineering design and permitting costs is included in the original budgets of the funded projects. If so, additional information is needed to understand how the additional technical assistance funding will leverage that work.
- The application presents one objective. Breaking the objective into two or more objectives would provide an opportunity to incorporate more detail on the details and activities needed for both projects already funded and potential future projects.

Concluding Analysis

The application lacks clarity describing the future restoration outcomes that will result from the proposed technical assistance. Developing specific projects and identifying ways to permit and license them on a project-by-project bases may be more effective in meeting regulatory requirements and restoration implementation.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount

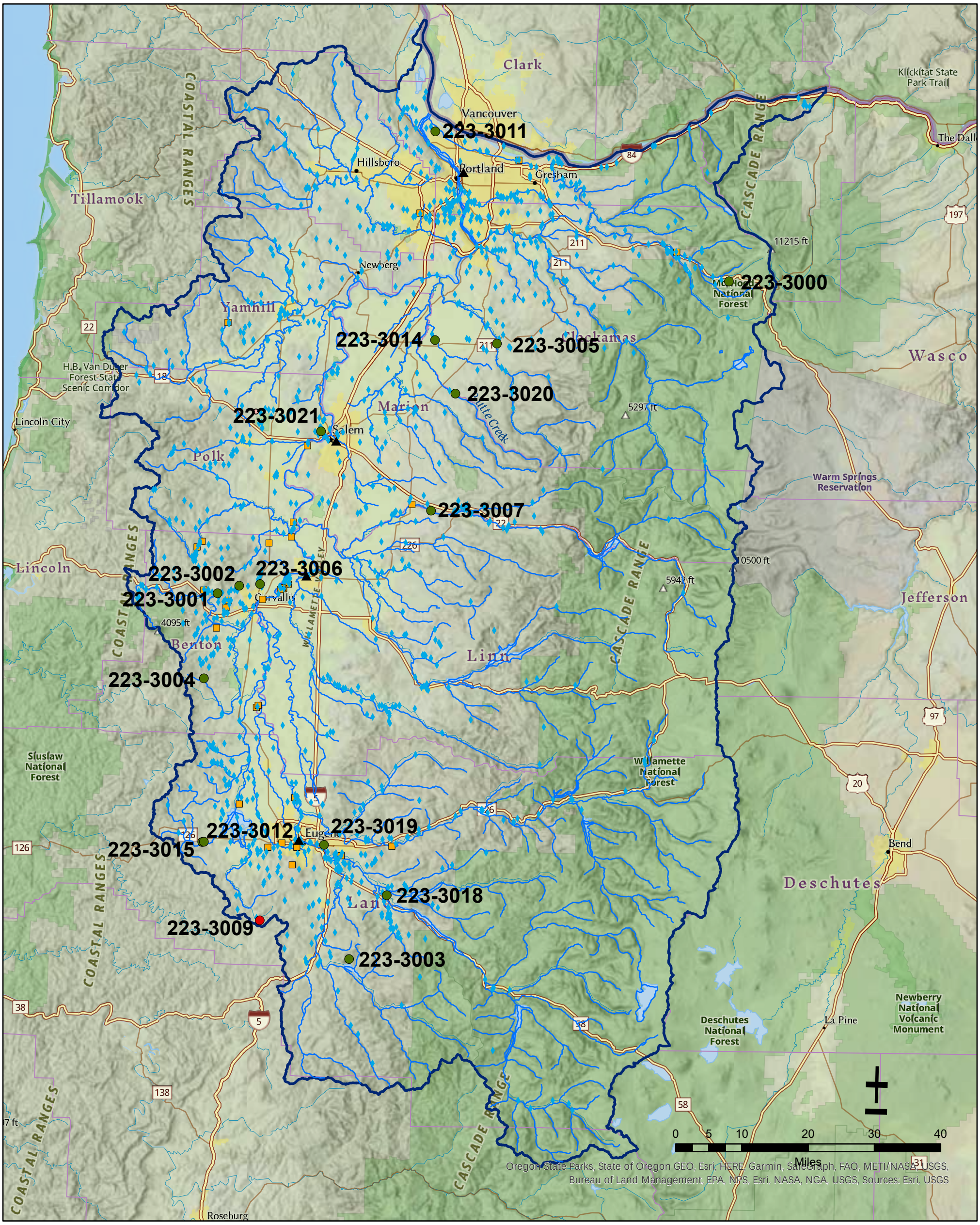
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Staff Conditions

N/A

Region 3: Willamette Basin

Willamette Basin - Region 3 Fall 2022 Funding Recommendations



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Funding Recommendation

- Staff Recommendation For Funding (SRF)
- Below Funding Line (BFL)

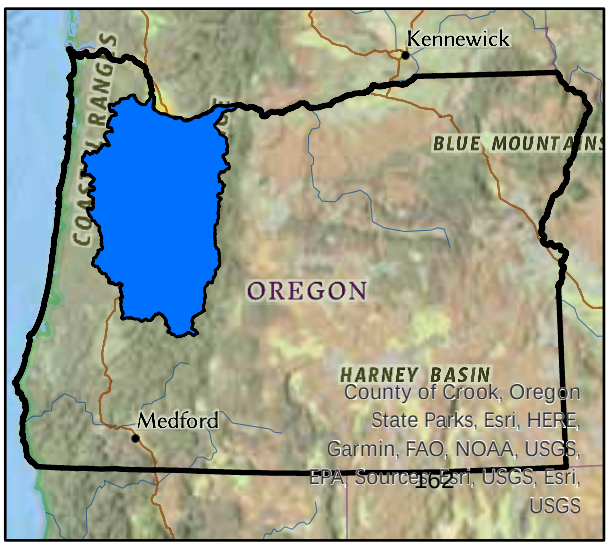
Previous Grants 1998 - Spring 2022

- Land Acquisition
- Restoration
- Region 3 Cities
- Region 3 Streams
- OWEB Region 3 Boundary

OREGON WATERSHED ENHANCEMENT BOARD

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Region 3 - Willamette Basin Restoration

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-3007	Greenbelt Land Trust	Kingston Prairie & Santiam Kingston Hills Restoration Phase 1	Oak woodland, upland prairie, and wet prairie habitats will be restored. The habitats will support native bird and wildlife populations in the North Santiam Watershed.	314,133	Linn
223-3001	Institute for Applied Ecology	Restoring Taylor's checkerspot butterfly in Oregon	Upland prairie habitat will be restored for the endangered Taylor's checkerspot butterfly. There are only two remaining populations of Taylor's checkerspots in Benton County, Oregon.	510,622	Benton
223-3000	The Freshwater Trust	Upper Sandy-Zigzag River Tributaries Restoration Project	A fish passage barrier will be replaced in a tributary to the Zig-Zag River to allow salmon and steelhead access to an additional three miles of stream habitat and floodplain habtat. The restoration project will increase the abundance and productivity of Sandy basin fish populations.	393,967	Clackamas
223-3004	Marys River WC	Recovering System Process in Reese Creek	The health and function of Reese Creek will be improved by restoring instream conditions and habitat for native aquatic species. Streamside native vegetation will be established to create diversity of wildlife habitat.	196,710	Benton
223-3005	Molalla River Watch Inc	Molalla Side Channel Restoration	Side-channel habitat important to winter steelhead and spring Chinook, coho, and cutthroat trout will be enhanced and protected by installing large wood instream structures in the Molalla River watershed.	156,382	Clackamas
223-3006	Greenbelt Land Trust	Building Resilience of Mid-Willamette Valley Habitats	Oak woodland, wetlands, grasslands, and mixed deciduous forest will be restored across two sites in the Willamette Valley that will provide habitat for native species such as acorn woodpecker, white-breasted nuthatch, Nelson's checkermallow and Willamette daisy, along with other rare plants, birds, and wildlife.	229,872	Benton

223-3011	Metro	Prairie in Portland - St. Johns Prairie Phase 4	Upland prairie habitat will be restored on a former landfill in North Portland. The site will provide habitat to grassland birds, insects and pollinators, nesting turtles, and other wildlife.	141,150	Multnomah
223-3002	Institute for Applied Ecology	Oak prairie restoration at Live Oak Drive	Oak woodland, streamside forest, and upland prairie habitat will be restored north of Corvallis. The project will reduce nonnative and invasive plants, and reintroduce native plants and First Foods plants that are important to Tribes. Restoration will also help prevent old-growth Oregon white oaks from being overtopped by Douglas fir trees, and increase fire resiliency of the woodland.	109,036	Benton
223-3012	Long Tom WC	Lower Upper Long Tom Oak-Prairie Ecocultural Restoration	A fish passage barrier will be replaced to allow fish access to two miles of headwater stream habitat on a private property along the Long Tom River just upstream of Fern Ridge Reservoir. Oak, prairie, and streamside plant communities will also be restored on the property.	238,257	Lane
223-3003	Cerro Gordo Land Conservancy	Cerro Gordo Prairie and Oak Restoration Phase 1	A diverse native habitat will be restored and maintained on a threatened remnant of Willamette Valley prairie, oak savanna, and oak woodlands in the Row River watershed. The project will reverse conifer tree encroachment and inhibit the spread of non-native plant species.	260,312	Lane
Total Restoration Projects Recommended for Funding by RRT and OWEB Staff				2,550,441	

Projects Recommended but Not Funded in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-3009	Long Tom WC	Cassidy Ranch Oak Restoration and Stream Enhancement	Oak woodland habitat will be restored on 40 acres, grazing will be used to manage invasive plant species, and a stream, channel will be restored to control streambank erosion in the Long Tom Watershed.	185,025	Lane

Projects *Not Recommended* for Funding by RRT

Project #	Grantee	Project Title	Amount Requested	County
223-3008	Coast Fork Willamette WC	Creswell Butte: Oak Woodland Restoration	334,568	Lane
223-3010	Calapooia WC	Oak Creek - Oak Woodland Restoration	177,161	Linn

Region 3 - Willamette Basin Technical Assistance

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-3018	Middle Fork Willamette WC	Finalizing Floodplain Restoration Designs & Permitting for Elijah Bristow State Park - Phase 1	Final designs will be completed for a floodplain restoration project on the Middle Fork Willamette River that will result in habitat for native species such as Oregon chub, western pond turtle, spring Chinook salmon, and beaver. The designs will be process-based–they will focus on restoring the natural, physical processes that occur to create healthy river habitat over time.	75,000	Lane
223-3015	Long Tom WC	Long Tom River and Wilson Creek Floodplain Restoration Design	Designs will be completed to restore, create, and maintain habitat for important native fish and wildlife species in Wilson Creek, a tributary to the Long Tom River.	73,330	Lane
223-3014	Pudding River WC	Aamodt Dam Alternatives Analysis and Preliminary Design	Designs will be developed to remove a splash dam that spans a stream channel. Dam removal will restore natural streamflow, improve water quality, and provide summer migratory fish access to cold-water habitat in the Pudding River Watershed.	59,479	Clackamas
Total Technical Assistance Projects Recommended for Funding by RRT and OWEB Staff				207,809	

Projects Recommended but Not Funded in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
None					

Projects *Not Recommended* for Funding by RRT				
Project #	Grantee	Project Title	**Amount Requested**	County
223-3013	Friends of West Salem Watersheds	Salem Area Natural Floodplain Functions Plan	32,750	Polk
223-3017	Human Access Project	Ross Island Lagoon HAB Treatment	73,383	Multnomah

Region 3 - Willamette Basin Stakeholder Engagement

Projects Recommended for Funding in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-3021	Oregon Agricultural Trust	Protecting Habitat and Water Resources on Willamette Valley Farmland	The Oregon Agricultural Trust will build landowner interest to implement conservation easements that will preserve the Willamette Valley's unique mix of agriculture, native oak, forest, and streamside habitats.	63,552	Polk
223-3020	Pudding River WC	Scotts Mills Dam Removal Stakeholder Engagement	The Pudding River Watershed Council will engage local residents in the City of Scotts Mills to build support for the removal of Scotts Mills Daml Dam removal will open thirteen miles of spawning and rearing habitat to Endangered Species Act-listed steelhead and Chinook salmon.	41,457	Marion

223-3019	Middle Fork Willamette WC	Island Park Slough Stakeholder Engagement	Springfield community members around Island Park Slough will be engaged to raise awareness about water quality concerns and generate support for stormwater infrastructure improvements and streamside restoration. These enhancements will improve the communities' social, economic, and environmental health.	61,188	Lane
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				166,197	

Projects Recommended but Not Funded in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
None					

Projects *Not Recommended* for Funding by RRT				
Project #	Grantee	Project Title	**Amount Requested**	County
223-3022	Oswego Lake Watershed Council	Uniting Stakeholders to Protect and Enhance Oregon White Oak Habitat in Lake Oswego	75,961	Clackamas
223-3023	Social Good Fund	PHCC Stakeholder Engagement	57,600	Multnomah

Region 3 Total OWEB Staff Recommended Board Award	**2,924,447**

Region 1 - 6 Grand Total OWEB Staff Recommended Board Award	**13,027,997**

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3000-22511

Project Type: Restoration

Project Name: Upper Sandy-Zigzag River Tributaries Restoration Project

Applicant: The Freshwater Trust

Region: Willamette Basin

County: Clackamas

OWEB Request: $393,967

Total Cost: $1,556,058

Application Description The Freshwater Trust (TFT) and US Forest Service (USFS) are taking the lead on the Upper Sandy-Zigzag River Tributaries Restoration Project on behalf of the Sandy River Basin Partners (the Partners). The Sandy River originates on Mt. Hood and flows 56 miles northwest before entering the Columbia River near Portland, Oregon. Sandy River salmon and steelhead populations have declined over the last century due to degradation of habitat and other factors. The Partners have identified the upper Sandy sub-watershed among the top areas providing high quality habitat for the basin's native fish. The Partners are aligned on a near term goal of restoring this priority watershed to advance Sandy basin-scale restoration.

The proposed project will address primary limiting factors by increasing off channel habitat/floodplain connectivity and large wood abundance on Still Creek and by restoring fish passage at a road crossing on Henry Creek. Both project sites are on prioritized tributaries of the Zigzag River in the upper Sandy River basin. Proposed work on Still Creek is on public land managed by the USFS and proposed work on Henry Creek is on land managed by Clackamas County. Both project sites are near Zigzag, Oregon in Clackamas County.

Restoration actions to be undertaken as part of the proposed project include large wood placement and tree tipping on Still Creek and replacement of a culvert road-stream crossing with a bridge on Henry Creek. This project is part of a larger, multi-year, watershed-scale restoration effort and builds on similar successful projects completed in the basin by TFT and the Partners since 2008. OWEB funding will support TFT staff time for project design/permitting, project management, construction, travel, administration, and reporting.

Review Team Evaluation

Strengths

- The applicant will use clearly defined restoration methods that have been applied in the Upper Sandy Basin for over a decade.
- The proposed restoration actions will address watershed limiting factors to Endangered Species Act (ESA)-listed fish recovery by reconnecting 57 acres of floodplain habitat for coho, chinook, and steelhead.

- Replacing the culvert on Henry Creek with a bridge will improve fluvial processes that will resonate through the entire stream system while also opening fish passage to 2.5 miles of stream habitat.
- The proposed work is part of a large-scale restoration strategy that builds on momentum from and leverages investments in previously successful restoration. The proposed instream large wood placement will add five miles to an existing eight stream miles already treated, collectively providing thirteen contiguous miles of restored stream habitat.
- The project is ready for implementation with a supply of large wood located nearby and it is time-sensitive due to match dollars that must be spent in 2023.
- The project team has a consistent track record for implementing similar high-quality projects.
- The applicant engaged design engineers and equipment operators to evaluate the feasibility of the bridge design and estimate the costs.
- The project will provide high watershed benefit for the cost.

Concerns

- The large wood placement proposed for Still Creek may not be as high of a restoration priority since it was not prioritized in the Sandy Basin strategic action plan.

Concluding Analysis

The proposed project builds on a phased stream restoration strategy that has been implemented since 2012 and has a record of producing a quantified fish response to habitat improvements. The Sandy River watershed provides habitat to numerous ESA-listed fish species, making it a priority area for instream habitat restoration. The project has a high ecological benefit-cost ratio and certainty of success, which is guided by a multi-year strategic action plan and documented by monitoring data from previous phases of restoration.

Review Team Recommendation to Staff

Fund

Review Team Priority

3 of 11

Review Team Recommended Amount

$393,967

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation
Fund

Staff Recommended Amount
$393,967

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3001-22513
Project Type: Restoration
Project Name: Restoring Taylor's checkerspot butterfly in Oregon
Applicant: Institute for Applied Ecology
Region: Willamette Basin
County: Benton
OWEB Request: $510,622
Total Cost: $802,806

Application Description Taylor’s checkerspot butterfly (TCB), a federally listed endangered species was once abundant in the Pacific Northwest. Currently there are only two extant populations in Oregon, both located in Benton County. Taylor’s checkerspot butterfly are threatened by loss of habitat from agricultural development, fire suppression, urbanization, forest succession, the spread of invasive species, and genetic drift.

The goals of this project are to bolster ongoing restoration activities at sites currently occupied by TCB, expand restoration efforts to high-priority lands near occupied sites, increase the availability of host plant materials and captive-bred larvae, and release larvae at new sites prepared to support TCB. 276 acres across nine sites in Benton County, OR have been selected for restoration. The sites include Cardwell Hill, Rung Meadows, Fitton Green Natural Area, Bald Hill Farm, Echo Hills Farm, Pearcy-Schoener, Crisp-Lidell, Harris, and Beazell Memorial Forest.

Management actions include herbicide applications, hand weeding, mowing, felling and limbing trees, flame weeding, and planting TCB nectar and host plant species. Monitoring will occur at all project sites and include photo points and regular site assessments. Seed increase fields of TCB host plants, English plantain, and the endangered golden paintbrush, will be established and produced seed will be sown at all sites. To increase the number and distribution of TCB populations, a captive rearing program will be formed at Oregon State’s Mid-Columbia Agriculture Research Station.

This proposal builds on previous restoration projects funded by the U.S. Fish and Wildlife Service (USFWS) and OWEB. It draws upon a highly functioning network of partners who are working together to restore prairie habitat and recover TCB. Partners include the USFWS, Benton County Natural Areas and Parks, Greenbelt Land Trust, OSU, TCB experts in the fields of husbandry and entomology, and private landowners.

Review Team Evaluation
Strengths

- The application has a clearly defined project goal to support Taylor's checkerspot butterfly (TCB) species recovery and appropriate objectives to achieve this goal.
- The proposed restoration will benefit TCB, which is listed as endangered under the Endangered Species Act. Only two TCB populations remain in Oregon. The project sites identified for restoring plant populations that support TCB are near the locations of these two populations. The proposed planting actions will build habitat corridors for this species.
- The project builds on previous OWEB and US Fish and Wildlife Service (USFWS) investments in prairie habitat restoration at the project sites and other locations in the surrounding area.
- The applicant will use a similar approach used for restoring habitat to support Fender's blue butterfly populations, which was recently downlisted from endangered to threatened. The applicant also has previous experience working with golden paintbrush, a host plant for the TCB.
- The applicant is taking a reasonable approach by incorporating English plantain into the restoration plan. While this plant species is not native, it has proven to be an effective surrogate as a host plant for TCB. While the native golden paintbrush is also included in the restoration approach, it is a difficult plant to establish. Plantain provides an alternative to ensure TCB will have options for building their populations.
- Some of the project sites are protected by conservation easements, which will protect restoration investments and increase the likelihood for ensuring long-term stewardship of those habitat investments.
- The applicant has experience working with partners and landowners to restore habitats for threatened and endangered species.
- A highly functioning network of partners are involved in the project, including Oregon State University, USFWS, Benton County, Greenbelt Land Trust, and landowners.
- While the overall project cost is significant, the expenses are clearly described in the application budget and are comprehensive to effectively implement the strategies necessary for restoring TCB populations and the habitat this species relies on.

Concerns

- Some of the project sites overlap with sites associated with previously funded OWEB restoration grants that focus on different species, including Kincaid's lupine, Willamette daisy, and Fender's blue butterfly. A map and additional information that describes how the proposed work relates to these previous investments would be helpful for understanding how the efforts are leveraged to achieve overlapping prairie restoration goals.

Concluding Analysis

While the proposed project is a significant investment, the actions are comprehensive and necessary for preventing species extinction. The applicant has the technical experience working with species that are on the brink and moving them towards recovery. This investment could be the last opportunity for TCB survival in Oregon.

Review Team Recommendation to Staff

Fund

Review Team Priority

2 of 11

Review Team Recommended Amount
$510,622

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$510,622

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3002-22515
Project Type: Restoration
Project Name: Oak prairie restoration at Live Oak Drive
Applicant: Institute for Applied Ecology
Region: Willamette Basin
County: Benton
OWEB Request: $109,036
Total Cost: $138,054

Application Description The goal of this project is to enhance 40 acres of remnant oak woodland and prairie in northwest Corvallis to improve diversity and increase fire resiliency. The acreage is at the end of Live Oak drive, on a steep southern slope of Dimple Hill. The land was purchased in 2021 by a private citizen with the intent to restore native habitat. Live Oak's location between the Chip Ross Natural Area to the east, Beazell Memorial Forest to the west, and OSU's McDonald Dunn forest to the north, magnifies its value for ongoing efforts to preserve and protect the Willamette Valley's threatened ecology.

In consultation with the owner, ecologists at the Institute for Applied Ecology (hereafter IAE) have drafted a multi-year restoration plan that encompasses Live Oak's upland forest, meadow, and riparian forest habitats. The first stage of the project, begun in 2022, is the removal of invasive species through mowing and targeted herbicide application. In 2023 and 2024, the focus will be on thinning the conifers to afford the oaks, madrones, and ash more light, and to boost fire resiliency. Once the invasive species are minimized, the plan is to forgo further herbicide applications in favor of hand management so that First Foods can be introduced for eventual harvest.

The Live Oak restoration project will complement IAE's Plants for People restoration project, where culturally important plant species and traditional ecological knowledge of the Confederated Tribes of Grand Ronde (CTGR) resulted in restoration of Willamette Valley sites. The owner has contacted CTGR about the introduction of First Foods, and is interested in making the site available for harvesting and for teaching others. Taken together, the Live Oak restoration endeavor unifies the owner's longstanding interests in history, education, and foodways, with a newfound passion for the unique and precious oak woodlands and prairies of the Willamette Valley.

Review Team Evaluation

Strengths

- The application has clearly defined project goals and objectives for restoring 40 acres of oak woodland, riparian forest, and upland prairie habitats. The applicant and landowner have created a multi-year restoration plan for reducing nonnative and invasive species, increasing fire resiliency,

thinning conifers, and restoring native plant understory.

- The proposed work builds on restoration that has already occurred on the project site.
- The planting plan includes reintroducing Tribal First Foods plant species and utilizing resources developed with the Confederated Tribes of Grande Ronde in part from OWEB Plants for People grant investments.
- The project is located near a few conservation sites in the area, including Chip Ross Natural Area to the east, Beazell Memorial Forest to the west, and OSU's McDonald Dunn Forest to the north. The project has potential for restoring a stepping stone habitat that will connect these sites.
- Landowner project support is demonstrated by match and a letter of support. The landowner indicated a commitment to maintaining habitat gains resulting from the proposed restoration and is potentially interested in a long-term conservation easement.
- The applicant has the capacity and relevant experience for implementing the project.
- Project costs are reasonable for the proposed work.

Concerns

- A letter of support from the Confederated Tribes of Grande Ronde related to the First Foods project elements would strengthen the application by incorporating traditional ecological knowledge.
- The McDonald Dunn Forest is a source of False brome, an aggressive invasive species. It will be challenging to maintain the site to prevent continuous infestation.
- Benefits from a restoration investment may be somewhat limited by the surrounding urban development isolating the site.

Concluding Analysis

The project is likely to succeed in achieving the expected habitat outcomes with the proposed methods, budget, and timeline. While the site is surrounded by urban areas, it could provide a habitat stepping stone among other large acreage conservation sites. This will provide more benefit for the increasingly scarce oak habitat compared to the development that would likely occur on the site without the restoration partnership between the landowner and applicant.

Review Team Recommendation to Staff

Fund

Review Team Priority

8 of 11

Review Team Recommended Amount

$109,036

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$109,036

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3003-22519

Project Type: Restoration

Project Name: Cerro Gordo Prairie and Oak Restoration Phase 1

Applicant: Cerro Gordo Land Conservancy

Region: Willamette Basin

County: Lane

OWEB Request: $260,312

Total Cost: $497,832

Application Description The project encompasses 157 acres in the Row River watershed, 5 miles east of Cottage Grove in Lane County. This oak and prairie project is situated on 532 acres protected by a WWMP easement held by McKenzie River Trust (MRT) and owned by Cerro Gordo Land Conservancy (CGLC). An additional 447 acres of forest land abuts the property and is permanently protected by an NRCS HFRP easement.

The project will restore a matrix of high-quality upland and wet prairie, herbaceous bald, riparian forest, oak savanna, and oak woodland habitat types that have been negatively impacted by habitat fragmentation and the absence of indigenous fire. These impacts have resulted in conifer and invasive species encroachment into the native prairies and woodlands. Unchecked competition has threatened the 111 documented native prairie and oak-associated species found at Cerro Gordo, including several species of rare plants and two Federal Species of Concern.

Encroaching conifers and invasive species will be manually and mechanically removed from ±110 acres of prairie and ±43.3 acres of oak woodlands. Historic prairie connectivity will be restored on ±3.4 acres, while invasive species will be removed from 1,728’ of stream banks and ±3.9 acres of associated riparian forest, including a small fish-bearing tributary of Dorena Lake. Native herbaceous species will be reintroduced throughout the treatment areas, and the prairies will be further prepared for the reintroduction of fire. Secured WWMP easement stewardship operation and maintenance funds will annually fund post-project maintenance. Trout Mountain Forestry (TMF) will design and implement this project on behalf of CGLC with the support of MRT, NRCS, ODFW, USFWS, BLM, USACE, and the Coast Fork Willamette Watershed Council (CFWWC).

Review Team Evaluation

Strengths

- The application has clearly defined project goals and objectives for restoring and maintaining structure, function, connectivity, and native species diversity on 157 acres of threatened remnant Willamette Valley prairie, oak savanna, and oak woodlands in the Row River watershed.

- The proposed project builds on previously completed meadow restoration.
- There is a long-term management plan for the property that describes a phased approach to restoration and includes prescribed fire in partnership with US Fish and Wildlife Service.
- The project site is protected by a conservation easement that has operations and maintenance funds associated with it that will ensure investments in habitat restoration will be protected and maintained long term.
- A diversity of native plants has been documented on the site, including some rare plants.
- The project is located in close proximity to other prairie and oak restoration sites, creating broader habitat connectivity.
- The application budget is detailed and includes an explanation describing how costs were estimated.
- The project is ready to implement with a qualified contractor that has relevant experience with upland oak habitats selected to design and implement the proposed restoration.
- Partnership support is demonstrated by match and support letters.

Concerns

- The primary strategy for controlling invasive plants will be mechanical treatments. It will be challenging to get ahead of the invasive plant population and maintain the site to prevent future infestations. While the application indicates that herbicides can be used as a last resort, it is unclear how that decision will be made and what will trigger a shift to using herbicides if mechanical treatments are not effective.
- Project management and personnel costs are high for a four-year project, almost double to similar projects submitted in the same review cycle. Higher costs may be related to using a higher portion of hand labor.

Concluding Analysis

The proposed actions will restore and expand historic prairie habitat at a location that already has a highly diverse plant community to build from. The project is also timely to protect the oak habitat from deteriorating due to conifer encroachment and long-term fire suppression.

Review Team Recommendation to Staff

Fund

Review Team Priority

10 of 11

Review Team Recommended Amount

$260,312

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$260,312

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3004-22526

Project Type: Restoration

Project Name: Recovering System Process in Reese Creek

Applicant: Marys River WC

Region: Willamette Basin

County: Benton

OWEB Request: $196,710

Total Cost: $443,127

Application Description Marys River Watershed Council (MRWC) proposes to undertake a riparian restoration project on Reese Creek (tributary to Muddy Creek, tributary to the Marys River) in cooperation with private landowners, the BLM, USFS and Xerces Society. Over the last three years, MRWC has worked with BLM, USFWS, ODFW and Xerces Society to conduct sampling and physical surveys to determine presence and distribution of Pacific Lamprey (Entosphenus tridentatus) and freshwater mussels (Western ridged mussels [Gonidea angulata], which were recently petitioned for listing, are present in the Muddy Creek sub-watershed and Western pearlshell mussels [Margaritifera falcata] are found in Reese Creek). This project will benefit these species as well as Cutthroat Trout (Oncorhynchus clarkii), Willamette Winter Steelhead (Oncorhynchus mykiss) and Spring Chinook Salmon (Oncorhynchus tshawytscha) which are present in the Muddy Creek watershed, by improving the health and function of Reese Creek in a number of important ways.

MRWC is requesting OWEB funding to cover the planting and plant establishment of native riparian species over 13.75 acres. This request is part of a larger restoration project at the site with secured funding from BLM RAC and Siuslaw National Forest Stewardship Fund to implement a number of actions slated for implementation in 2023, which will increase floodplain connection and habitat complexity, improve water quality, provide fish passage and improved hydrological function. This OWEB funding request complements these other project elements by supporting the cost of extensive riparian planting to further achieve project goals over the long term, including improved riparian plant diversity and forest structure, providing and expanding riparian buffers for stream shading and a future source of large woody debris.

Review Team Evaluation

Strengths

- The proposed actions will improve the health and function of Reese Creek by increasing floodplain connection and habitat complexity, improving water quality, and improving riparian vegetation diversity and width for wildlife habitat, stream shading, and long-term source of large wood contribution to the stream.

- The project is located on a low-gradient meandering stream that is well-suited for the proposed restoration approach. The site is a former agricultural field that has not been highly impacted and still has foundational structure for restoring watershed function.
- The proposed restoration will improve habitat for native aquatic species, including cutthroat trout, lamprey, and freshwater mussels.
- A modified Rapid Riparian Restoration method will be used for restoring the native plant community and is appropriate for the site.
- The applicant will be working in a new part of the Marys River watershed for the first time; the proposed project could raise public awareness and lead to future restoration.
- The landowner is actively involved in the project and will help to maintain restoration investments through weed control. The landowner has experience with a variety of weed control methods and has effectively maintain invasives plants on the property.
- Project costs are reasonable.
- The project is part of a larger project in partnership with Bureau of Land Management (BLM) and US Forest Service (USFS) that is funded through the Resource Advisory Council and Forest Stewardship Program.
- The project is ready for implementation and timely; it will be important to follow the instream work funded by BLM and USFS with riparian revegetation work to prevent erosion in disturbed areas.
- The applicant has capacity and relevant experience to implement the project.

Concerns

- The application lacks design information for instream restoration components that will be funded through match dollars. This information would be helpful for better understanding the project goals and objectives. The instream component will, however, require National Oceanic and Atmospheric Administration programmatic review to ensure the design is technically sound.
- Including letters of support from the landowner and partners would strengthen the application.

Concluding Analysis

Timing revegetation of riparian areas after the instream work is important for achieving stream health and function restoration goals and objectives. The project is likely to succeed in providing the expected watershed benefits at a reasonable cost.

Review Team Recommendation to Staff

Fund

Review Team Priority

4 of 11

Review Team Recommended Amount

$196,710

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$196,710

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3005-22579
Project Type: Restoration
Project Name: Molalla Side Channel Restoration
Applicant: Molalla River Watch Inc
Region: Willamette Basin
County: Clackamas
OWEB Request: $156,382
Total Cost: $311,632

Application Description Side channel habitats between RM 14 and 26 along the Molalla River, in Clackamas County Oregon, are highly productive thermal refugia for rearing salmonids. The Molalla River, located directly upstream of Willamette Falls, is the Willamette River's longest undammed tributary and provides habitat for ESA threatened winter steelhead and spring Chinook, coho, and cutthroat. Side channels contained 61% of all juvenile coho and 21% of all juvenile Chinook rearing in the watershed and were therefore identified in the 2012 Rapid Bio-Assessment as key rearing habitat. Side channel habitats are critical to protect and enhance because they provide summer thermal refugia by connecting with hyporheic flows when the Molalla River mainstem dries down and is 303d listed for temperature. A lack of large wood recruitment and channel confinement has left side channels vulnerable to amplified winter flood flows and making them ephemeral habitats. Side channel habitat key characteristics that differentiate it from mainstem habitats include: cooler summer water, more canopy cover, and lower winter flows. The proposed solution is to protect and enhance four unique side channels by installing stable point bar log jams at inlets to keep the side channel protected from avulsion by the mainstem during high winter flows. Also, logs will be placed in side channels to scour deep pools down to bedrock to access cold hyporheic flow disconnected from summer warm flows of the mainstem Molalla River and thereby enhancing summer thermal refugia for rearing salmonids. Partners include Molalla River Watch, ODFW, Native Fish Society, landowners, and contractors. Site selection, landowner outreach, and preliminary project design have been completed by an OWEB funded TA grant. Recent work includes two side channel restoration projects completed, and temperature and snorkel data collected for two restored and four proposed side channels. OWEB funds will be used for final design and implementation.

Review Team Evaluation

Strengths

- The application has a clearly defined project goal and objective to protect and enhance 0.9 mile of side-channel in the Molalla Watershed.
- Side-channel habitat is a high priority restoration target for the Molalla River that is important for steelhead, Chinook, coho, and cutthroat trout.
- The project is ready for implementation with a supply of large wood that is available for use.

- A novel design approach will be used to address the lack of large wood in the Molalla River system, which is a limiting factor that has prevented natural side-channel formation. Previously completed side-channel projects using the same design approach are functioning as expected and monitoring data indicates they are providing habitat for fish. The method has potential for also creating cool water habitat in a reach of the Molalla River that is temperature limited and offers few opportunities for fish rearing.
- A qualified contractor that has relevant experience will implement the stream work.
- The applicant plans to continue monitoring side-channels to document the effectiveness of the design approach over time.
- Partner support for the project is demonstrated by match and letters of support from the Native Fish Society, Bureau of Land Management, Oregon Department of Fish and Wildlife, and the landowners.
- The project costs are reasonable and appropriate for the proposed work and the scale of the project.

Concerns

- The temperature and fish data used to demonstrate effectiveness of the completed side-channel may have been collected over too short of a timeframe to definitively prove the design approach is causing reduced stream temperatures. The data was also not collected at enough locations to capture the variability that can occur across a side-channel. Since the fish data indicates there was a modest increase in fish presence at the restored side-channel, this early data demonstrates the concept has potential. Further data collection could provide more insights on the efficacy of the approach for providing side-channel habitat for fish in a river system that has lost side-channel functionality.
- It is unclear from the application why a somewhat counter-intuitive design approach was selected and will address the site conditions limiting side-channel formation. For example, human caused stream confinement was identified as a constraint; however, the project reach shows considerable natural bed rock confinement instead. The design rationale was clarified during the site visit and the previously completed side-channel project indicates the approach has potential to achieve ecological objectives that will provide needed habitat for fish.
- There could be a missed opportunity to explore a broader range of design alternatives by not engaging a broader team of technical experts to weigh in on approaches to restore Molalla River side-channel function.

Concluding Analysis

Side-channels were historically formed by large wood transported from upstream forested areas that would form wood jams on gravel point bars in the stream. These wood jams over their lifespan would protect the side-channel from closing through avulsion so that the side-channel could provide off-channel habitat for fish. Long-term harvesting of conifer forests in the upper Mollala watershed has mostly eliminated a sustainable source of large wood recruitment needed to build and sustain side-channel habitat. The project provides an opportunity to test a novel approach for protecting and enhancing high priority side-channel stream function that provides important cold water refugia habitat for ESA-listed fish.

Review Team Recommendation to Staff

Fund

Review Team Priority

5 of 11

Review Team Recommended Amount
$156,382

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$156,382

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3006-22588

Project Type: Restoration

Project Name: Building Resilience of Mid-Willamette Valley Habitats

Applicant: Greenbelt Land Trust

Region: Willamette Basin

County: Benton

OWEB Request: $229,872

Total Cost: $293,464

Application Description Owens Farm (95 ac, Benton County) and Willamette Bluffs (120 ac, Polk County) were some of the earliest OWEB and BPA conservation easements that focused primarily on oak and prairie habitat in the mid-Willamette Valley (2002 and 2009). Both sites support significant oak woodlands, upland prairie, wetlands and mixed deciduous forest teaming with wildlife. The geographic location of these sites is phenomenal for wildlife connectivity as they collectively intersect three Oregon Conservation Strategy (OCS) Conservation Opportunity Areas: Luckiamute River & Tributaries, Middle Willamette River Floodplain, and Corvallis Area Forests and Balds.

A primary feature of these properties is the Conservation Easements that ensure permanent protection and sustained habitat management. While phase one of restoration (conversion of agriculture to natural habitats) is mostly complete, both sites are not meeting their full ecological potential, as they are threatened by the destabilizing threats of ecological succession and invasive species. By pairing freshly updated management plans with 20 years of adaptive management experience, additional investments will elevate the significance of these sites and ensure greater ecological resilience for the future.

We will restore 154 acres following newly updated management plans. We will enhance and control invasive species on 34 acres of wetlands, 63 acres of grasslands, 32 acres of oak woodland, and 25 acres of mixed forest, focusing on establishing species resilient to disturbance and invasion by non-natives, benefitting rare plants and stabilizing resources for pollinators. Work will promote Acorn Woodpecker, White Breasted Nuthatch, Nelson’s checkermallow and Willamette daisy, along with other rare plants, birds and wildlife.

A key to Greenbelt's success is our cooperative approach with partners including OWEB, ODFW, BPA-WWMP, USFWS Partners for Fish and Wildlife and Recovery Programs, and Institute for Applied Ecology.

Review Team Evaluation

Strengths

- The application has clearly defined project goals and objectives for collectively restoring 32 acres of oak woodlands, 34 acres of wetlands, 63 acres of grasslands, and 25 acres of mixed deciduous forest at two locations in the Mid-Willamette Valley.
- The restoration approach is technically sound and will focus on establishing native plant species, including Willamette daisy. Additionally, pairing two restoration sites will provide an economy of scales in restoration costs associated with mobilizing equipment.
- Restoring diverse habitats at the two project sites will provide benefits for wildlife movement because they collectively intersect three Oregon Conservation Strategy Conservation Opportunity Areas, including the Luckiamute River and Tributaries, Middle Willamette River Floodplain, and Corvallis Area Forests and Balds.
- The project sites are both protected by conservation easements that will ensure investments in habitat restoration will be protected and maintained long term. Restoration treatments and maintenance are guided by management plans for the properties that are associated with the conservation easements.
- Appropriate partners are engaged in the project that will provide additional resources and relevant expertise, including US Fish and Wildlife Service and Institute for Applied Ecology.
- The applicant has the capacity and relevant experience for implementing the project.
- The project costs are reasonable for the proposed treatments.

Concerns

- The Willamette Bluff site is surrounded by agricultural land that has potential for being an ongoing source of invasive plant species encroachment; however, treatment strategies are included in the project methods to address this challenge to the greatest extent possible.

Concluding Analysis

While previous phases of restoration have been completed on the project sites, both sites cannot reach their full habitat potential without additional funding. The net benefit of the project will be more resilient ecological conditions in these upland habitats.

Review Team Recommendation to Staff

Fund

Review Team Priority

6 of 11

Review Team Recommended Amount

$229,872

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$229,872

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3007-22590
Project Type: Restoration
Project Name: Kingston Prairie & Santiam Kingston Hills Restoration Phase 1
Applicant: Greenbelt Land Trust
Region: Willamette Basin
County: Linn
OWEB Request: $314,133
Total Cost: $427,805

Application Description This project occurs across two adjacent properties owned and managed by Greenbelt: Santiam Kingston Hills (SKH) and Kingston Prairie Preserve (KPP), both located in Linn County, west of Stayton, within two Oregon Conservation Strategy (OCS) Conservation Opportunity Areas: Santiam Confluences and Kingston Prairie-Scio Oak Pine Savanna. They are also within the USFWS mapped critical habitat for Willamette daisy and Salem-East Recovery Zone for endangered plants, and The Nature Conservancy's Resilient Lands Map area of recognized biodiversity value. Encompassing over 550 acres, SKH and KPP are key among the few conservation lands on the east rim of the Willamette Valley and within these high priority areas. A regionally recognized biodiversity hotspot, KPP includes high quality upland and wet prairie remnants, and supports significant populations of multiple rare and OCS strategy species including Bradshaw's lomatium, Willamette daisy and western meadowlark. In addition to oak woodlands, SKH has 225 acres of agriculture to be converted to native habitats.

Native prairie and oak habitats are extremely rare, with remaining examples often in degraded and fragmented condition and threatened by invasive species and woody species encroachment. This loss of habitat quality, quantity and connectivity has left many species in peril.

This project includes the first phase of restoration at SKH: it will enhance 40 acres of oak woodlands, convert 78 acres of agricultural fields to wet and upland prairie, remove unneeded agricultural infrastructure, and control invasive species. At KPP this project will restore and enhance 56 acres of prairie for rare species, and control invasive plants and woody encroachment.

In addition to OWEB funding, Greenbelt will complete the project with the support of the WWMP stewardship funds and the NRCS EQIP program, and in collaboration with the USFWS Partners for Fish and Wildlife and Recovery Programs and Institute for Applied Ecology.

Review Team Evaluation
Strengths

- The application has clearly defined project goals and objectives to restore and enhance

approximately 182 acres of oak woodland, upland prairie, and wet prairie habitats.

- The project is part of a larger restoration plan to strategically convert 550 acres of agricultural lands to habitat. The applicant is using a phased approach to break restoration into smaller, manageable portions while continuing to farm the remaining areas to control weeds until they are able to move to the next restoration phase.
- The project approach focuses restoration on rare plant and bird species using a variety of methods, including prescribed fire, to restore a habitat mosaic.
- The project site is protected by a conservation easement with dedicated stewardship funds that will ensure long-term protection and maintenance of investments in habitat restoration will be protected and maintained long term.
- The project site is located in close proximity to a number of conservation and restoration sites in the North Santiam Watershed that are a result of significant investments by a diversity of funders. These include two OWEB funded restoration projects, US Fish and Wildlife Service (USFWS) easements, and two acquisition sites owned by the Confederated Tribes of Grande Ronde.
- The applicant has the capacity and relevant experience and knowledge for implementing the project. The applicant has a history of long-term maintenance of habitat restoration investments.
- The applicant has engaged neighbors and secured their support for the project. There is potential for the restoration investment to lead to future restoration on adjacent properties.
- The budget detail indicates the applicant has carefully considered what is needed to effectively accomplish the expected ecological outcomes. For example, a third of the costs will be for native seed, which is necessary for achieving the restoration goals for the site.
- The project will leverage a Natural Resource Conservation Service Environmental Quality Incentives Program investment.

Concerns

- No concerns identified.

Concluding Analysis

The proposed project will rebuild the ecological web of three interconnected Oregon Conservation Strategy habitats that supports priority upland species, including Western Meadowlark, Oregon Vesper Sparrow, Willamette daisy, and Bradshaw's lomatium. Kingston Prairie Preserve and Santiam Kingston Hills, in combination with two adjacent private properties enrolled in the USFWS Partners for Fish and Wildlife Program along with the Confederated Tribes of Grand Ronde's 425-acre Chankawan site immediately upstream and the downstream 338-acre Chahalpam property will form a habitat anchor of over 1700 acres. This scale of diverse oak, prairie, and riparian habitats managed for conservation can sustain a broad array of wildlife and act as resilient refugia to preserve biodiversity into the future, particularly in the face of climate change. The resulting habitat connectivity will provide significant benefit for the investment.

Review Team Recommendation to Staff

Fund

Review Team Priority

1 of 11

Review Team Recommended Amount
$314,133

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$314,133

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3008-22593

Project Type: Restoration

Project Name: Creswell Butte: Oak Woodland Restoration

Applicant: Coast Fork Willamette WC

Region: Willamette Basin

County: Lane

OWEB Request: $334,568

Total Cost: $459,503

Application Description The 74.21-acre project is in Lane County along the southern border of the City of Creswell's urban growth boundary at Creswell Butte. Creswell Butte itself can be seen from the I-5 corridor and is within the City of Creswell's viewscape. The property is currently owned by private landowners who enrolled their property into a Conservation Easement (CE) held by McKenzie River Trust (MRT). The easement did not come with operations and maintenance (O&M) funds. Years of limited management have left the legacy oaks and open meadow habitats overgrown with shrubs, cherry, and conifers. The risk of losing the legacy oaks that remain is imminent and with no action key habitat values will be lost forever. The project seeks to leverage Oregon Department of Forestry (ODF) fuels reduction and Oregon Department of Fish & Wildlife (ODFW) Oregon Recreation & Conservation Funding with OWEB restoration funding in order to restore the degraded upland prairie and oak habitats. Project partners include Coast Fork Willamette Watershed Council, MRT, ODF, ODFW, Natural Resources Conservation Service, Larry H Weaver & Sheila J Hale Living Trust and the Creswell Butte Technical Advisory Team which includes the previously mention organizations in addition to US Army Corps of Engineers, US Fish & Wildlife Service, and the City of Creswell.

Review Team Evaluation

Strengths

- The application has clearly defined project goals to restore and improve upland prairie, oak savanna, and oak woodland habitats and native species diversity on Creswell Butte located within the lower Coast Fork Willamette watershed.
- The project builds on an OWEB Technical Assistance Grant investment and previously completed restoration.
- The project has potential for raising awareness about habitat restoration because it is located on the edge of the City of Creswell and is highly visible.
- The target quantified habitat benefits expected from the project are reasonable. Restoring habitat on a hardwood butte will be valuable for migratory birds.
- Prescribed burns will be implemented in partnership with the Willamette Valley Fire Collaboration, which will provide the capacity and experience needed for using fire as a restoration treatment.
- The project site is protected by a conservation easement that will ensure long-term protection and maintenance of investments in habitat restoration.
- The applicant has the capacity and relevant experience for implementing the project.

- A diversity of partners and technical experts are engaged in the project and the Creswell Butte Technical Advisory Team.
- Project support from partners and the landowners is demonstrated by letters of support included in the application.
- The project is time-sensitive due to match dollars that must be spent in 2023.

Concerns

- There are significant populations of invasive plant species on the site. It could be challenging to control these populations and maintain habitat gains from restoration.
- It is unclear from the application and site visit whether there is a clear plan or strategy for identifying the trees that need to be thinned and removed from the property.
- The project site is steep and has only one road providing access for implementing restoration; however, this road cannot provide access to all the areas that may be treated. It is unclear how equipment will be able to access treatment sites on a steep slope and are located further away from the road. There are also significantly large trees that will be removed to restore the oak habitat and it is unclear how this material will be handled with limited road infrastructure needed to feasibly remove the trees from the site. Without a clear solution for removing this material, slash could be left on the site and pose a fire risk. Without these logistics described in the application, it is difficult to determine whether the budget is adequate for achieving the proposed 68 acres of oak woodland and savannah habitat restoration. The project may not be ready for implementation without these logistics planned.
- More detail is needed to understand the honoraria costs included in the budget. While honoraria are an effective method to remove financial barriers to participation and ensure diverse voices are participating in the conversation, it is unclear if there is a focused purpose for engaging native people and a plan for how feedback will be incorporated into the project design. Also, it is unclear how these honoraria will be managed, including how the applicant plans to offer them, engage potential recipients, and select who shall receive them.
- Project costs are provided as lumped sums, it is difficult to evaluate whether costs are reasonable, necessary, and adequate for achieving the proposed restoration actions.

Concluding Analysis

The proposed restoration could contribute to addressing the degradation, loss, and fragmentation of upland prairie and oak habitats that has resulted in an overall significant decline of these habitats in the Willamette Valley. It is, however, unclear if the proposed treatments are feasible for the site conditions and limited road infrastructure needed for equipment access and wood material removal. While the applicant is likely able to determine a solution, the plans are not currently developed. Without additional implementation logistic details, such as a logging plan, it is unclear if the cost estimates are accurate and adequate for achieving the proposed restoration objectives. If the application is resubmitted, the applicant is encouraged to address the concerns described above.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3009-22594

Project Type: Restoration

Project Name: Cassidy Ranch Oak Restoration and Stream Enhancement

Applicant: Long Tom WC

Region: Willamette Basin

County: Lane

OWEB Request: $185,025

Total Cost: $402,815

Application Description The proposed "Cassidy Ranch Oak Restoration and Stream Enhancement" project proposes innovative and low-tech strategies to restore ecosystem functions from a headwater tributary channel to uplands habitat in the farthest southern portion of the Long Tom Watershed in the Coyote Creek subbasin south of Eugene. The Giudici property, totaling 256 acres, is located within the Willamette Valley Oak and Prairie Cooperative's (WVOPC) proposed Opportunity-Based Conservation Area (OCA) which emphasizes habitat connectivity and integration of oak-prairie ecosystem functions with farm and forest activities on private land. The proposal includes restoration of habitat structure and composition to 40 acres of mixed oak-hardwood-conifer woodland. Targeted grazing by a mixed herd of livestock (goats, sheep, and camelids) will be employed to maintain blackberry and other woody species regrowth in the oak woodland understory following an initial mastication of the understory, in consultation with numerous technical consultants including OSU Extension, Natural Resource Conservation Service, Resilience Permaculture Design, US Fish & Wildlife Service, and Coast Fork Willamette Watershed Council Working Lands Program. Beaver Dam Analogues and Post-Assisted Log Structures will be installed in the degraded, incised channel of Jackson Creek, a headwaters tributary of Coyote Creek to restore hydrologic function and stream channel complexity. The project pairs funding from NRCS Environmental Quality Incentives Program for livestock exclusion fencing, associated infrastructure, and oak woodland restoration, as well as landowner match, in-kind technical assistance, and a USDA Conservation Innovation Grant focused on targeted grazing for vegetation management in Willamette Valley oak-prairie habitats. Restoration actions will provide critical habitat connectivity for oak-prairie dependent species, restore currently missing habitat niches for a diversity of aquatic life.

Review Team Evaluation

Strengths

- A holistic restoration approach will be used to restore upland mixed oak woodland and stream channel complexity on a property located on Jackson Creek in the Long Tom Watershed.

- Alternative approaches for habitat restoration will be tested as part of the project. For example, grazing will be used as a tool to manage blackberry. If this is not effective, there is a “Plan B” to mow blackberry so regrowth can more easily be grazed. This strategy could deplete energy in the blackberry root ball, which will prevent or reduce future regrowth. The landowner will also mulch instead of using burn piles to reduce carbon dioxide release from restoration activities.
- Beaver Dam Analogs (BDA) will be installed in Jackson Creek to restore stream complexity, slow water velocity, and capture sediment to aggrade the stream channel where there is channel incision. The applicant is encouraged to limit BDA installation to areas with less incision. BDAs located where there are six-foot banks are unlikely to remain in place during a high flow event. BDAs installed at locations with less incision are likely to succeed in restoring stream function.
- The project will leverage a Natural Resource Conservation Service Conservation Innovation Grant investment.
- Partner and landowner project support is demonstrated by letters of support provided in the application.
- The landowner is committed to the project, has capacity to implement some of the work, and has already completed a considerable amount of work contributing to ecological preservation on the property.

Concerns

- It is unclear what the ecological endpoint will be for the proposed blackberry management using grazing and mowing. These alternatives treatments are not considered Best Management Practices that will lead to quantifiable habitat restoration.
- It is unclear how some of the research citations provided in the application support the rationale for not using herbicides to treat invasive plant species. For example, one cited research article did not look at the impacts of glyphosate on the aquatic species identified in the application as described in the problem statement.
- No design alternatives were considered for the upland and invasive species control project elements.

Concluding Analysis

The proposed project provides an opportunity to test alternative restoration approaches that could be helpful in determining whether these alternatives can be effective in controlling invasive plant species without using herbicides. Some landowners are concerned about the potential negative impact of herbicides. There may need to be space provided to test ideas for restoration so that voluntary conservation work in priority habitats can continue with all interested landowners.

Review Team Recommendation to Staff

Fund

Review Team Priority

11 of 11

Review Team Recommended Amount

$185,025

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3010-22596
Project Type: Restoration
Project Name: Oak Creek - Oak Woodland Restoration
Applicant: Calapooia WC
Region: Willamette Basin
County: Linn
OWEB Request: $177,161
Total Cost: $230,248

Application Description The Oak Creek - Oak Woodland Restoration project seeks to establish an Oregon White Oak woodland plant community on 23.8 acres within the City of Albany's Oak Creek Open Space. The project is positioned near the confluence of the Calapooia River and Oak Creek within the Calapooia River Conservation Opportunity Area as identified by the Oregon Department of Fish and Wildlife and The Nature Conservancy. Oak woodlands once covered close to 400,000 acres within the low-lying portions of the Willamette Valley. However, today, after over a century of clearing for agricultural and residential needs and encroachment due to the removal of fire from the landscape, only 5% of these valuable woodlands remain. The restoration of these Oregon White Oak dominated habitats offer an abundance of ecological benefits for over 200 known species of birds, mammals, reptiles, amphibians and insects not found in surrounding habitats. The project will create a climate-resilient oak woodland on 23.8 acres by eliminating the non-native species currently present at the site and later planting Oregon White Oaks, scattered understory shrubs, and native grasses. The site will then be maintained through selective removal of non-native plants and extensive mowing to create an open landscape for the plants to thrive with minimal plant competition. The project involves collaboration between city and federal partners including Bonneville Power Administration and the City of Albany's Parks and Recreation Department who will be committing a significant amount of staff time and equipment during the site prep and plant establishment phases, as well as long-term maintenance of the site.

Review Team Evaluation

Strengths

- The project site is permanently protected by City of Albany ownership and has some connectivity to nearby City-owned open space park properties that connect to the confluence of the Calapooia River with the Willamette River. There is potential for investments in habitat restoration to be protected and maintained long-term throughout this corridor if there was a management plan guiding a broader approach for these important green space areas.
- There are not many restoration projects in the area and the proposed project provides an opportunity to raise awareness about watershed restoration.

Concerns

- The restoration approach may not match the site conditions. The restoration goal focuses on establishing an oak woodland dominated by Oregon White Oak with a mosaic of native shrubs and grasses. There is a considerable standing water on the project site, which does not match conditions ideal for oak habitat. The site appears better suited for floodplain riparian forest restoration. Historic aerials could potentially provide evidence of what the historic vegetation community looked like on the project site and assist with planning a restoration strategy the best suits site conditions.
- Some of the treatments proposed may not be effective. For example, planting oak from acorn has shown to be more effective than planting bare root oak as proposed.
- Restoring an oak plant community at the project site will provide minimal habitat benefit compared to other oak habitat restoration opportunities in the Willamette. The site is surrounded by urban development, which will isolate any restored habitat and limit the ecological uplift for the cost.
- The plan for long-term maintenance that will be required to control invasive plant species is unclear from the application.
- The applicant may not have relevant experience for restoring oak type habitats.
- The site is highly visible and actively used by the community; however, the application indicates raising public awareness is not included in the project. Due to the visibility of the project site, the potential for building public buy-in for restoration is one of the greatest opportunities for the project. While the oversight regarding the public awareness opportunity was clarified during the site visit and the applicant indicated outreach is part of the project, the application lacks details describing how the applicant plans to utilize the site to raise awareness.

Concluding Analysis

Creating green space and raising awareness about habitat restoration investments is important in Oregon's communities. The habitat benefit, however, for the restoration approach may be limited if the proposed oak dominant plant community is not appropriate for the site conditions. Further, there are plenty of oak restoration opportunities ready for implementation that will likely have greater habitat gains.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

N/A

Review Team Recommended Amount

$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3011-22603
Project Type: Restoration
Project Name: Prairie in Portland - St. Johns Prairie Phase 4
Applicant: Metro
Region: Willamette Basin
County: Multnomah
OWEB Request: $141,150
Total Cost: $330,750

Application Description Smith and Bybee Wetlands Natural Area is popularly known for extensive wetlands that stretch across almost 2,000 acres in industrial north Portland. In the south portion of the natural area is a former landfill that is in the process of being converted to upland prairie habitat through successive phases of restoration. Three phases of restoration on 133 acres have begun and have succeeded in boosting native plant cover and diversity, supporting a wide variety of native pollinators (providing cascading food chain benefits), and attracting breeding Western meadowlark and stopover habitat for streaked horned lark. Vegetation, pollinator and bird monitoring is documenting these gains. This work has succeeded in converting an otherwise industrial site (a former landfill) dominated by invasive weeds into a diverse and lush blooming prairie habitat.

The proposed project seeks funding to support contracted site preparation and purchase of native plant materials for the fourth and final phase of upland prairie restoration at St Johns Prairie. Phase 4 will restore the final 80 acres of the site to upland prairie habitat. Other work planned for the site includes a new public trail and overlook that will provide a rare opportunity for residents of north Portland to learn about and spend time in native prairie habitat (no OWEB funding is requested for the trail project). North Portland community organizations have expressed their support for the prairie work (see letter).

Although situated in urban north Portland, the St Johns Prairie is surprisingly close to, and provides habitat connectivity with, grasslands and oak habitats on Government Island, the Sandy River Delta, Ridgefield National Wildlife Refuge, Sauvie Island, and smaller nearby sites managed by the Port of Portland. St Johns Prairie is a growing central anchor habitat. Once restored, St Johns Prairie will be the largest prairie site in Metro’s portfolio and one of the largest in the Willamette Valley.

Review Team Evaluation

Strengths

- The application has clearly defined project goals and objectives that will result in the following watershed benefits: (1) established anchor habitat for common and rare species of grassland birds, insects and pollinators, and nesting turtles; (2) a large, regionally significant block of prairie that is a climate-resilient ecosystem; and (3) healthy habitats people can immerse themselves in and learn

about rather than the site becoming another abandoned brownfield.

- St. Johns Prairie is located in the southern portion of the Smith and Bybee Wetlands Natural Area, a 2,000-acre site in the industrial area of north Portland. Restoration benefits will be leveraged by habitat connectivity with grasslands and oak habitats on Government Island, the Sandy River Delta, Ridgefield National Wildlife Refuge, Sauvie Island, and smaller nearby sites managed by the Port of Portland.
- The proposed actions will build on previously completed restoration.
- The project site has existing habitat structure in place that is used by at-risk prairie-dependent bird species, including streaked horned lark and Western meadowlark. This provides a starting point for building and leveraging restoration investments that will lead to greater ecological uplift in priority habitat types.
- The project will provide opportunity for raising public awareness about prairie habitat restoration because there will be recreational access in the future. There is also an environmental justice benefit because the project is located in an area of Portland where healthy habitat has historically not been available to and accessible by the predominantly underserved community surrounding the site.
- Restoring prairie habitat in an urban area is likely to provide climate benefits because prairies are important carbon sequestering habitats and can provide a cool space in an urban setting that has a warming affect.
- The applicant has the capacity and relevant experience and knowledge for implementing the project. The applicant has a history of maintaining habitat restoration investments long term.
- Project costs are reasonable for the proposed restoration.

Concerns

- No concerns identified.

Concluding Analysis

St. Johns Prairie is a large anchor habitat that provides a key habitat corridor link connecting prairie, oak, and other open habitats in the north-south Willamette Valley to the Puget Trough transition zone and an east-west corridor of natural and human-made Columbia River islands. It is also the largest prairie site in Metro's natural area portfolio. The site is a capped landfill and services as an example of how a brownfield can be effectively transformed into valuable habitat. The proposed project has an innovative approach to create habitat from a highly impacted site.

Review Team Recommendation to Staff
Fund

Review Team Priority
7 of 11

Review Team Recommended Amount
$141,150

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$141,150

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3012-22625
Project Type: Restoration
Project Name: Lower Upper Long Tom Oak-Prairie Ecocultural Restoration
Applicant: Long Tom WC
Region: Willamette Basin
County: Lane
OWEB Request: $238,257
Total Cost: $328,532

Application Description The project is located on private property along the Long Tom River just upstream of Fern Ridge Reservoir, west of Veneta in Lane County. Fish passage is blocked to 1.9 miles of headwater spawning habitat in Tyler Creek, a tributary to Wilson Creek, which enters the Long Tom River on the property, by a passage barrier culvert. 4.5 acres of historic floodplain forest has been converted to pasture and lacks native tree and shrub cover. 52 acres of historic bottomland oak-prairie habitat has been encroached on by woody vegetation and non-native pasture grasses. Hybrid poplars were planted on 8.5 acres within the oak savanna area 20 years ago.
The barrier culvert on Tyler Creek will be replaced with a stream-simulation pipe-arch culvert. 4.5 acres of riparian area along the Long Tom River will be reforested and livestock exclusion fencing installed. The hybrid poplars will be removed. Woody vegetation and ladder fuels will be reduced. Two rounds of prescribed fire will be brought back to the oak savanna area. Native grasses and forbs will be planted. An organic pasture-to-prairie trial will be conducted on a one-acre plot in the oak savanna. Partners include the landowner, the Bureau of Land Management, the US Army Corps of Engineers, Ecostudies Institute, and neighboring ranchers and farmers offering technical assistance. A companion technical assistance proposal being submitted concurrently will develop designs to address another fish passage barrier on the property and for floodplain reconnection and revegetation on 25 acres along the Long Tom River and Wilson Creek on the property.

Review Team Evaluation

Strengths

- Previous application evaluation concerns are addressed.
- The application has clearly defined project goals and objectives to restore natural ecosystem functions on a private property along the Long Tom River just upstream of Fern Ridge Reservoir.
- The proposed project will restore a mosaic of habitats and habitat connectivity that will benefit multiple native species, including fish, wildlife, and pollinator species.
- The proposed restoration investment will leverage and expand habitat corridors that will connect with previous restoration projects near the project site.
- Specific actions identified in local and regional plans will be implemented.

- Blackberry control is planned for the entire project area with integrated methods that include spot spraying, mowing, and prescribed burns. The project team will be flexible while considering treatment methods and plan to adapt if non-herbicide treatments are not effective in removing the invasives plants. The applicant and landowner would like the site to be available for indigenous people to gather plants and this will not be feasible if herbicides are used.
- Replacing the culvert will open access to almost two miles of stream habitat for native fish and other aquatic species.
- A cultural resource survey is incorporated into the project objectives and budget.
- The project provides opportunities for raising public awareness about watershed restoration. One neighbor is already involved in the project and there is opportunity for continued outreach that could lead to additional restoration projects.
- The landowner is actively engaged in restoration planning and implementation. The applicant has a history of building long-term relationships with landowners that result in effective restoration projects.
- Partners are invested in the project for the long term.
- The applicant has the capacity and relevant experience and knowledge for implementing the project.

Concerns

- It will be challenging to successfully control invasive plant species and restore native plant communities at the scale of the project site without herbicides. A potential alternative to consider is to use herbicides to get the invasive weeds under control and manageable to maintain, then rest the site for a number of years to allow the space to be used for tribal gathering. Habitat impacts from invasive plants resulted from an industrial land management approach and may require an industrial solution in the short term before returning to indigenous land management approaches.
- A portion of the project will be used to test organic pasture-to-prairie alternative restoration methods. These methods do not include Best Management Practice (BMPs) known to be effective in restoring habitats at large scales. While it is uncertain whether the organic approaches can be as effective as BMPs, the investment is a minimal part of the overall project and could potentially serve as a demonstration site if successful.
- The potential efficacy of fire alone to manage invasive plants and establish native seed may be overstated in the application. For example, fire alone is unlikely to effectively remove pasture grasses and could even make pasture grasses more prolific.

Concluding Analysis

Upland and instream habitat restoration will be paired to address limiting factors affecting these habitats, including altered fire regimes and suppression, invasive species, land use conversion, and habitat loss. As a result, a mosaic of habitats will be restored that will support native fish and wildlife in an Oregon Conservation Strategy Conservation Opportunity Area.

Review Team Recommendation to Staff

Fund

Review Team Priority

9 of 11

Review Team Recommended Amount
$238,257

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$238,257

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3013-22518

Project Type: Technical Assistance

Project Name: Salem Area Natural Floodplain Functions Plan

Applicant: Friends of West Salem Watersheds

Region: Willamette Basin

County: Polk

OWEB Request: $32,750

Total Cost: $45,750

Application Description As the capitol city and the second largest city in the state, Salem can provide an a model approach to providing advance protection to floodplain species. This pilot can show other communities a way to address the apparent conflicts between the Endangered Species Act and the National Flood Insurance Program. Current management of floodplain development in Salem does not consider ecological impacts of that proposed development. This project will provide the City of Salem a tool to identify and take measures to protect floodplain functions that are critical to riparian and aquatic species. The project includes the floodplains of the Willamette River, Mill Creek, Pringle Creek, Glenn Creek and all and flood prone areas within the urban growth boundary of the City of Salem. Currently the City of Salem reviews floodplain development projects only for compliance with engineering standards.

The project will develop a Floodplain Species Assessment and Natural Floodplain Functions Plan (see https://floodsciencecenter.org/products/crs-community-resilience/element-profiles/512-c-natural-floodplain-functions-plan/) for the City of Salem. The Assessment and Plan will be to the standards of FEMA (Section 510 of the CRS Coordinator's Manual) (see https://www.fema.gov/sites/default/files/documents/fema_community-rating-system_coordinator-manual_addendum-2021.pdf) . A Natural Floodplain Functions Plan will provide tools for the City to improve the protection of floodplain resources. The City of Salem is the primary partner, however the project will coordinate with NMFS, USF&WS, ODFW, and the Oregon Natural Heritage Program to ensure the assessment is complete.

Review Team Evaluation

Strengths

- A collaborative approach will be used to create a Floodplain Species Assessment and a Natural Floodplain Functions Plan to protect floodplain areas used by threatened and endangered species. The applicant is using FEMA guidance for the National Flood Insurance Program to proactively create a potentially replicable approach for meeting the program requirements while demonstrating that better information about ecological considerations can be incorporated into floodplain development programs at the local level.
- The applicant will coordinate with a diversity of agencies and non-profits, including Oregon Department of Fish and Wildlife (ODFW), Oregon Department of Agriculture (ODA), US Fish and Wildlife Service (USFWS), National Marine Fisheries Service (NMFS), Oregon Natural Heritage Program, and City of Salem to collect habitat data and form a plan that could lead to long-term protection of floodplain functions that will benefit endangered species.

- The expected product will compile information about each listed species, their habitat needs, and the management considerations necessary to protect them into the form of an assessment. This assessment could be used by the City of Salem as a planning resource to ensure ecological conditions of floodplains are considered when making floodplain development decisions.
- The example plan for the City of Monroe included in the application provides helpful context for understanding the expected product that will result from the proposed technical assistance.
- Information collected through the project will be made publicly available.
- Partner support for the project is demonstrated by letters of support from the City of Salem, Salem Audubon Society, and West Salem Neighborhood Association.

Concerns

- It is unclear whether the entire costs associated with GIS are necessary and whether 180 hours is needed to compile the data. Many of the data layers are readily available and it would not require a lot of time to bring them together. Additional information describing how GIS costs were determined and whether there are unique circumstances related to the proposed planning process that requires the number of GIS hours.
- It is unclear what data will be included from ODFW, ODA, NMFS, USFWS, and Oregon Natural Heritage Program. There are additional data resources that may provide more current and detailed information, including the Oregon Conservation Strategy, iNaturalist, and Ebird.
- It is uncertain that the Floodplain Species Assessment and Natural Floodplain Functions Plan will be adopted and used by the City of Salem. While creating the plan could create the momentum needed for the City to incorporate habitat protection in land use planning decisions, it is unclear how long the plan will remain relevant or whether it could become outdated for use if it takes a long time for the City to adopt it.
- It is unclear what the process will be for the City of Salem to review the assessment and incorporate it into planning decisions that protect floodplain species.

Concluding Analysis

Protecting floodplain habitat for threatened and endangered species is important for species recovery, and floodplain development is a major threat to their survival. The proposed Floodplain Species Assessment and Natural Floodplain Functions Plan has potential for serving as a model for providing information needed for future floodplain development decisions to incorporate and protect ecological functions. Since it is uncertain if or when the City of Salem could approve the plan and use it, it is unclear if the product can lead to habitat protection or restoration outcomes.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

N/A

Review Team Recommended Amount

$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3014-22566
Project Type: Technical Assistance
Project Name: Aamodt Dam Alternatives Analysis and Preliminary Design
Applicant: Pudding River WC
Region: Willamette Basin
County: Clackamas
OWEB Request: $59,479
Total Cost: $74,428

Application Description Aamodt Dam is a seasonal, channel-spanning flash board dam in Rock Cr used for agricultural irrigation storage within the Molalla-Pudding subbasin of the Willamette Basin. The dam is approximately six miles above the confluence with the Pudding River in the Willamette Valley Ecoregion, and is a barrier to more than twenty miles of Western Cascade tributary habitat . The project site is in rural Clackamas County between the communities of Molalla and Hubbard on property zoned Exclusive Farm Use.
Funding is needed to develop a plan/design for restoration implementation. According to the Oregon Department of Fish and Wildlife (ODFW) 2019 Fish Passage Barrier Priority List, Aamodt Dam (#18582) impacts federally-listed Upper Willamette Winter Steelhead and Spring Chinook Salmon (UWRStCh) . Removing the dam will restore natural streamflow improving water quality and migratory access for sensitive juveniles to upstream cold-water refugia. In addition to benefits for UWRStCh, stream restoration at this site benefits ODFW Conservation Strategy aquatic species, such as Western Brook Lamprey.
Funding will be used to develop the technical details needed to assess the preferred alternative for year-round fish passage. Waterways Consulting and GSI Water Solutions will investigate the feasibility of switching to groundwater or developing an off-channel storage system. The product that will result from this project will provide the documentation needed to proceed to the next steps for restoration implementation. Partners participating in the project are working collaboratively: Ernst Irrigation will develop a plan for modernized irrigation equipment, the landowner/operator is volunteering his time and equipment, ODFW and Clackamas SWCD are providing technical assistance to consult with the engineers, review the design and help PRWC develop a strategy for restoration implementation.

Review Team Evaluation

Strengths

- The proposed project provides an opportunity to address a priority fish passage barrier on Rock Creek, a primary habitat limiting factor for fish in the Pudding River watershed.
- The application describes a clear need for the technical assistance and the scope of work identifies appropriate data that will be collected to inform the project design.
- The project objectives indicate the applicant is carefully considering the water right components related to the project.

- A number of partners are engaged in the project, including Ernst Irrigation, the landowner, Oregon Department of Fish and Wildlife, and Clackamas Soil and Water Conservation District.
- The project team includes qualified professionals with relevant experience on similar projects.
- The applicant has the capacity to engage appropriate stakeholders and qualified contractors to implement the proposed technical assistance.
- Alternatives will be identified and analyzed as part of the technical assistance project.
- Project cost aligns with the proposed scope of work.

Concerns

- Summer benefit for fish may be limited because Rock Creek dries up. Removing the dam will, however, provide fish habitat benefits during the shoulder seasons around summer.
- Potential viable options for irrigation without the dam may be cost prohibitive because it may not be feasible to draw enough water from a well needed to replace the current water withdraw from the stream. It has proven difficult to achieve the kind of groundwater connection in the Willamette Valley needed to get an amount of water out of the ground equivalent to surface water rights. A pond or some similar storage will likely need to be constructed to meet irrigation needs, which will increase the costs for the future implementation project.
- Additional background information to understand whether design options under consideration are feasible and within a reasonable cost benefit would provide helpful context. For example, documentation of feedback from Oregon Water Resources Department or a well driller, or information about any related groundwater analysis or mapping for the area, could provide helpful context.

Concluding Analysis

Removing Aamodt Dam will restore natural streamflow, improve water quality, and provide migratory fish seasonal access to upstream cold-water refugia on Rock Creek in the Pudding River watershed. The future removal of the dam could lead to additional fish passage projects in collaboration with other landowners in the same area.

Review Team Recommendation to Staff
Fund

Review Team Priority
3 of 3

Review Team Recommended Amount
$59,479

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$59,479

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3015-22592

Project Type: Technical Assistance

Project Name: Long Tom River and Wilson Creek Floodplain Restoration Design

Applicant: Long Tom WC

Region: Willamette Basin

County: Lane

OWEB Request: $73,330

Total Cost: $103,057

Application Description The project is located on private property along the Long Tom River just upstream of Fern Ridge Reservoir, west of Veneta in Lane County. Fish passage is blocked to 4.1 miles of headwater spawning habitat in Wilson Creek, a tributary that enters the Long Tom River on the property, and its tributary Tyler Creek, by a barrier culvert. Wilson Creek is also disconnected from 20 acres of floodplain and its lower 0.5-mile of historic, meandering channel, as a previous landowner re-routed it into a 900-foot long straight channel, which subsequently caused it to downcut and further disconnect it from the floodplain. A 5-acre historic mill pond complex only connects to the Long Tom River during high flows, and then when flows recede fish get stranded by its constructed berm.

The project will develop hydraulic and hydrologic models for the site, two restoration concepts for reconnecting the Wilson Creek floodplain, and 30% designs for the chosen concept. This will include a 30% design for a replacement stream crossing on Wilson Creek to remove the passage barrier culvert. We will also do a feasibility and benefit-cost assessment of improving connectivity of the mill ponds to the Long Tom River. We will explore and outline an approach to acquiring all required regulatory permits for the chosen concepts.

Partners include the landowner, technical advisors, and the Bureau of Land Management.

Review Team Evaluation

Strengths

- The proposed technical assistance project addresses previous evaluation concerns.
- Twenty acres of floodplain habitat will be restored and will benefit native cutthroat and lamprey.
- Technically sound solutions will be incorporated in the project design. For example, moving the stream crossing upstream, higher up in the valley, will provide more opportunity to restore stream and floodplain function in the stream valley floor. The applicant is encouraged to carefully consider the design approach for reconnecting Wilson Creek with the Long Tom River to ensure it addresses the current ten-foot elevation difference between these stream systems.
- Alternatives will be identified and analyzed as part of the technical assistance project.
- The landowner is actively engaged in project planning and future restoration implementation.
- Qualified contractors have been identified to design the project.

- The applicant has capacity to implement the project and relevant experience with similar projects.
- Costs are reasonable for the work proposed.

Concerns

- Potentially connecting the historic mill pond as described in objective 4 of the application could impact water quality if contaminants remain on the site. The applicant is encouraged to consider testing for contaminants to determine the potential risks of reconnecting the pond.
- There is a ditch that drains the valley and then appears to stop at a berm. As part of the design work, the applicant is encouraged to investigate where the ditch ends. For example, there may be a culvert at the bottom of the berm that has been covered. If not thoroughly investigated, this site constraint could impact the effectiveness of a restoration project.

Concluding Analysis

The project property offers a significant opportunity to restore ecological and fluvial processes that create and maintain habitat for important native fish and wildlife species. The proposed technical assistance has a high likelihood for success in leading to habitat restoration outcomes.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 3

Review Team Recommended Amount
$73,330

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$73,330

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3017-22621
Project Type: Technical Assistance
Project Name: Ross Island Lagoon HAB treatment
Applicant: Human Access Project
Region: Willamette Basin
County: Multnomah
OWEB Request: $73,783
Total Cost: $194,361

Application Description A Harmful Algal Bloom (HAB) in Ross Island Lagoon (RIL) on the Willamette River near Portland, OR threatens environmental and human health. Manipulation of the lagoon over the last century has contributed to the HAB, which has been occurring with increasing frequency and intensity, and has led to the recent ODEQ listing of the lagoon as impaired for cyanobacteria.?Since 2018, Human Access Project has partnered with Oregon State University to 1) lead analysis and design and 2) support a very diverse and engaged group of stakeholders, towards identifying a feasible and effect solution for suppressing the HAB. Through this process, two key solutions have emerged as most promising: a) mixing the lagoon to cool and destratify it; & b) installing a gated channel on the upstream end of the lagoon to reintroduce flow to the lagoon and flush the surface. Preliminary design for the mixing system is underway. This technical assistance request would fund developing the gated channel. The gated channel is viewed as the most promising, long-term, low energy, and low risk option, but involves more complex modeling & design. Tasks to be funded under this technical assistance award involve experimenting with channel dimensions and locations within and existing hydrodynamic/water quality model, estimating the effect of channel configurations on algae biomass, design of additional cap material for the embankment, rough cost estimate, and development of a monitoring and evaluation plan. In addition, the final report will summarize and compare the two alternatives (mixing vs. gated channel) and make a recommendation on which design to pursue. Finally, this project would support public outreach, including meetings with stakeholders, development of infographics with a graphic designer to illustrate RIL ecology and the impacts of the two alternatives, and development of a project StoryMap that will include a library of links to the many historical and current documents about the lagoon.

Review Team Evaluation

Strengths

- The application describes a clear need for the technical assistance and the project objectives and associated actions necessary to achieve those objectives.
- Data was collected that demonstrates the Harmful Algal Blooms (HABs) are affecting water quality, and a solution that reduces or prevents future HABs will address a priority identified in the 303(d) list of water quality impaired waterbodies.
- Costs in the budget align with the proposed work.
- Potential alternatives were considered for addressing the HABs.

- The applicant and technical partner are qualified to complete the proposed technical assistance. The partnership blends the appropriate technical expertise with community engagement experience that will result in the capacity necessary to implement the project.

Concerns

- It is unclear from the application whether the landowner supports the project. A letter of support from the landowner would be helpful for demonstrating that the project design will result in restoration implementation.
- The selected design alternative is likely to release warm water into the Willamette River during the summer, which will further impact water quality that is already temperature limited.
- There may be a missed opportunity to consider a broader range of alternatives that could provide greater watershed and habitat benefits. For example, notching either side of the Ross Island Lagoon to allow the river to run through the lagoon could potentially provide more habitat benefits.
- The project could benefit from engaging additional technical expertise, such as Oregon Department of Fish and Wildlife, US Geological Survey, and Oregon Department of State Lands, to vet the project design and consider other potential alternatives.
- It is unclear how likely the preferred design alternative will not require maintenance long-term as described by the applicant.

Concluding Analysis

Harmful Algal Blooms in Ross Island Lagoon are impacting water quality and human health. The proposed project will integrate a high level of community engagement with a focus on collaboration to address an issue greatly affecting watershed health and community access to the river. The design approach, however, may be missing an opportunity to consider alternatives that could lead to additional habitat uplift and instead focuses more on human recreational access.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3018-22624

Project Type: Technical Assistance

Project Name: Finalizing Floodplain Restoration Designs & Permitting for Elijah Bristow State Park - Phase 1

Applicant: Middle Fork Willamette WC

Region: Willamette Basin

County: Lane

OWEB Request: $75,000

Total Cost: $107,580

Application Description The 437-acre project area within Elijah Bristow State Park (EBSP) is at the confluence of the Middle Fork Willamette River with Lost Creek, below Dexter Dam, and between the Lane County towns of Jasper and Lowell. Historically, a dynamic floodplain existed with multiple, braided channels and sloughs, ephemeral gravel bars and islands, and extensive cottonwood gallery forests. Due to its location below three large dams that have modified flows and altered the natural sediment regime, the dynamism of this floodplain has been lost. Activities such as gravel mining and building berms have also led to a more static environment. After the completion of a feasibility analysis, modeling and alternative analysis, and the creation of initial conceptual designs, the MFWWC conducted a Stakeholder Engagement process to foster tribal and community input and involvement in Elijah Bristow Floodplain Restoration. The Stakeholder Engagement process included public events, tours, extensive landowner outreach, communication with federally recognized Tribes, and culminated in the creation of the Community Advisory Committee to represent community interests and provide input on the final design processes. The MFWWC and the Technical Team of collaborating partners from Oregon Parks and Recreation Department, Oregon Department of Fish and Wildlife, Confederated Tribes of Grand Ronde, US Forest Service, and US Army Corps of Engineers seek funding to contract Wolf Water Resources finalize engineered designs, complete project permitting.

Review Team Evaluation

Strengths

- The proposed project builds on previous technical assistance and stakeholder engagement OWEB investments on a large-scale, complex river restoration project that will require a long-term approach to both design and implementation.
- The scope of work in the proposed solution section of the application has clear objectives and activities for achieving the objectives.
- The application provides a clear explanation describing the need to finalize stage eight process-based floodplain restoration designs and initiate permitting processes.
- The stage eight restoration approach is reasonable for addressing limiting factors affecting stream habitat that resulted from loss of floodplain function in the Middle Fork Willamette River. While the stage eight concept is relatively new, it is becoming more widely accepted for restoring watershed process and function.
- Appropriate data and analysis will be used to inform the design.

- The applicant has a technical team of qualified experts to help guide the project.
- A qualified contractor is implementing the design work.
- The proposal has a description of the alternatives that will be considered.
- Partner support for the project is documented in letters of support included in the application from the Army Corps of Engineers, Oregon Department of Parks and Recreation, Oregon Department of Fish and Wildlife, and US Forest Service.
- Project costs are reasonable for the proposed contracted services.
- The project will leverage the Army Corps section 408 program to implement a long-term, phased restoration strategy.

Concerns

- Implementing a stage eight restoration approach below a flood control dam may have uncertain results due to the influence of the dam on stream flows and supply of large wood.
- There is a conceptual design diagram included in the application that has a boat passage component that is likely to affect the outcomes of a stage eight restoration approach. The applicant is encouraged to reconsider this design element.

Concluding Analysis

Utilizing a process-based restoration approach at Elijah Bristow State Park will restore a portion of the Middle Fork Willamette River back to a dynamic, braided multi-channel meandering river through a cottonwood gallery floodplain forest. This will provide habitat benefits for key indicator species such as Oregon chub, western pond turtle, spring Chinook salmon, and beaver. The site provides opportunity to be highly visible to the public and serve as an example of process-based floodplain restoration strategies for areas between headwaters and downstream zones.

Review Team Recommendation to Staff

Fund

Review Team Priority

1 of 3

Review Team Recommended Amount

$75,000

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$75,000

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3019-22549

Project Type: Stakeholder Engagement

Project Name: Island Park Slough Stakeholder Engagement

Applicant: Middle Fork Willamette WC

Region: Willamette Basin

County: Lane

OWEB Request: $61,188

Total Cost: $135,981

Application Description Island Park Slough (IPS) is a .48 mile, highly urban impacted waterway that, in its current configuration starts as a diversion of the Springfield Millrace just before it enters the Upper Willamette River (UWR), within a mile downstream of the Coast and Middle Fork Willamette confluence. The IPS runs north then northwest, forming a 15-acre developed island before IPS's confluence with the UWR. IPS is additionally fed by four City stormwater drain pipes from 330 acres of Springfield including the downtown core. Multiple private stormwater drains also connect directly to the ISP. The vast majority of this stormwater is untreated, contributing to the urban complex of pollutants including sediment that silts in the ISP where it harbors pollutants, reduces flood storage capacity and habitat while posing a potential safety hazard for park visitors.

By forming a partnership of interests and experts, a holistic approach to restoring and maintaining the slough can be developed and supported by the community if proper stakeholder engagement is performed. Traditional river restoration techniques will be paired with upstream green stormwater infrastructure and hard stormwater management structures, providing flood attenuation and filtration before stormwater enters the IPS.

Engagement will begin with identified project partners and outreach to nearby residential and commercial landowners. Project partners will coordinate through regular planning meetings to identify future collaborative project phases. Adjacent residential and business landowners will be engaged to extend restoration onto private lands, increasing ownership and impact. A broader public engagement effort to raise awareness of stormwater issues and solutions and the future of restoration at IPS will also be implemented under this proposal. The MFWWC will work closely with the LTWC, Willamalane (WPRD), the City of Springfield, UWWP, WAAC, throughout the stakeholder engagement process and future project phases.

Review Team Evaluation

Strengths

- Island Park Slough enters the Upper Willamette River downstream of the Coast Fork and Middle Fork Willamette confluence. Multiple untreated public and private stormwater sources drain into Island Park Slough, impacting water quality and fish habitat. Restoration that could result from the proposed stakeholder engagement is likely to improve stream conditions for salmon, Oregon chub, Pacific lamprey, and Western pond turtles.

- Appropriate community members representative of the geography will be engaged to develop a holistic approach for restoring and maintaining Island Park Slough. Future projects will likely include using river restoration techniques that will be paired with upstream green stormwater infrastructure and hard stormwater management structures.
- Appropriate communication techniques will be used to raise awareness about water quality concerns and generate support for stormwater infrastructure improvements and riparian restoration that can positively impact the communities' social, economic, and environmental health.
- The stakeholder engagement is designed to form collaborative partnerships across public and private community members to plan, fundraise, and implement future restoration efforts.
- The applicant will leverage skills of staff from nearby watershed councils and partners that have experience implementing stormwater related projects.

Concerns

- Future restoration to reduce pollutant load and attenuate floods will require multiple sizeable investments in large projects to achieve the watershed benefits envisioned for Island Park Slough.
- Since the community and businesses will be integral to initiating momentum and interest, a letter of support from a private business or community member would strengthen the application by demonstrating early supporters already exist.

Concluding Analysis

The holistic approach that will be taken to plan restoration at Island Park Slough is likely to succeed in leading to habitat benefits, addressing water quality concerns, and improving a community green space resource. The proposed community engagement and planning is necessary for any restoration solution to move forward.

Review Team Recommendation to Staff

Fund

Review Team Priority

3 of 3

Review Team Recommended Amount

$61,188

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation
Fund

Staff Recommended Amount
$61,188

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3020-22575
Project Type: Stakeholder Engagement
Project Name: Scotts Mills Dam Removal Stakeholder Engagement
Applicant: Pudding River WC
Region: Willamette Basin
County: Marion
OWEB Request: $41,457
Total Cost: $61,532

Application Description

Project Location: Stakeholder engagement will be led by the Pudding River Watershed Council (PRWC) and take place primarily within the city of Scotts Mills. PRWC will engage residents of the City of Scotts Mills as well as residents in the surrounding rural area that have a Scotts Mills address.

Project Need: Scotts Mills Dam removal progress stalled in early 2020 because only one of three Marion County Commissioners expressed support for the project. Approval from one more Commissioner is needed in order to proceed with removal. Commissioners have often heard from the minority of residents who oppose removal because supporters have assumed that PRWC and Oregon Department of Fish & Wildlife (ODFW) would handle all necessary steps to secure removal. PRWC needs this stakeholder engagement grant to have the staff, travel, and materials resources necessary to engage supporters of removal like the City of Scotts Mills and many local residents. These local leaders, once organized and energized, can convince Marion County to allow PRWC and ODFW to move forward with dam removal.

Proposed Work: PRWC’s stakeholder engagement plan is to galvanize and mobilize dam removal supporters, educate and engage neutral and undecided residents, and listen and respond to the concerns raised by opponents. The result of this stakeholder engagement will be a powerful and united group of supporters who will effectively advocate for dam removal. Additionally, neutral residents will be well informed about plans for removal, and opponents of removal will have their concerns addressed and have a hand in crafting a historical monument to commemorate the dam.

Project Partners: PRWC’s primary partner in this engagement work is the City of Scotts Mills. Mayor Paul Brakeman, City Manager Robin Fornier, and the Scotts Mills City Council are all supportive of dam removal. PRWC will also work with Dave Stewart & the Oregon Department of Fish & Wildlife (ODFW), as well as the Clackamas SWCD.

Review Team Evaluation

Strengths

- The application provides a clear description of the parties that need to be engaged and strategies that will be used to build support for removing Scotts Mills Dam.
- The proposed community engagement is needed to move a funded restoration project to implementation.
- Removing Scotts Mills Dam located on Butte Creek in the Pudding River Watershed will address a priority fish passage barrier and open 13 miles of spawning and rearing habitat to Endangered Species Act (ESA)-listed steelhead and Chinook salmon.
- Future dam removal is already supported by members of the community, including the Scotts Mills' City manager, council, and mayor. This will provide a foundation for building broader support across the community needed for the project to move forward.
- Letters of support included in the application indicate project support from Oregon Department of Fish and Wildlife, The Native Fish Society, and community members.
- The applicant has capacity to implement the proposed project with staff that has experience in grassroots community engagement.

Concerns

- A success indicator for objectives two and three in the application is receiving feedback from the community to determine whether outreach materials are effectively communicating facts about the project. It is unclear how the applicant will collect this feedback.
- While working with community members actively opposing dam removal is an identified outcome described in the application, it is unclear whether it is a priority compared to working with other target audiences. The applicant is encouraged to work with opponents to understand social barriers to removing the dam.

Concluding Analysis

Dam removal will improve needed fish passage upstream to habitat with cooler water temperatures. The extent of stream habitat that will be made more accessible to ESA-listed fish will provide significant ecological uplift. The proposed community engagement is necessary for the future removal of Scotts Mills Dam even though implementation funds are already secured for project.

Review Team Recommendation to Staff

Fund

Review Team Priority

2 of 3

Review Team Recommended Amount

$41,457

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$41,457

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3021-22604

Project Type: Stakeholder Engagement

Project Name: Protecting Habitat and Water Resources on Willamette Valley Farmland

Applicant: Oregon Agricultural Trust

Region: Willamette Basin

County: Polk

OWEB Request: $63,552

Total Cost: $85,512

Application Description 1) Oregon Agricultural Trust's (OAT's) stakeholder engagement project will partner with farmers and ranchers for conservation on privately owned agricultural (ag) lands in our Mid/South Willamette focus region encompassing parts of Washington, Clackamas, Yamhill, Polk, Marion, Benton, Linn, and Lane counties (see map) and all or part of 17 watershed councils.
2) This project will focus on three habitat types commonly found on Willamette Valley ag land: a) oak woodland and savannah, b) wildfire-prone forests, and c) anadromous fish habitat. Funding will enable OAT to build existing and new relationships with ag landowners to permanently protect their land with working land easements and participate in conservation activities funded by OWEB and/or NRCS.
Willamette Valley farmland is more at risk of fragmentation and development than any other region of Oregon. When farmland and its associated habitat is developed, any public investments in wildlife and watersheds are irrevocably lost. Moreover, landscape-scale conservation is much more efficient on land that is not fragmented. Therefore, using working land conservation easements to prevent development and fragmentation in the Willamette Valley will enable effective implementation of regional conservation efforts.
3) Project activities are: a) 8 outreach events (one per county) to a total of at least 80 ag landowners on how to use conservation tools to meet their business/succession planning goals, using outreach materials we developed in our 2021 OWEB Stakeholder grant; b) one-on-one meetings with 20 existing and new landowner partners; c) apply with partner organizations for a Regional Conservation Partnership Project (RCPP) grant focusing on oak conservation on agricultural lands.
4) This project will lay the groundwork for an RCPP with: Willamette Partnership, Long Tom Watershed Council, Greenbelt Land Trust, Benton SWCD, Institute for Applied Ecology, US FWS and/or Pacific Birds Habitat Joint Venture.

Review Team Evaluation

Strengths

- The application describes strategies for engaging landowners to build interest in conservation easements that will contribute to preserving the Willamette Valley's native oak, forest, and riparian habitats located on agricultural lands.

- The proposed engagement with the Willamette agricultural community is modeled on a project that effectively used the same outreach approach in Southeast Oregon.
- Ninety percent of the Willamette is privately owned lands; recovering native species that rely on oak and riparian habitats will require working on private lands. Species recovery plans typically prioritize protecting habitat over restoration and conservation easements are a tool for accomplishing this protection.
- The landowner engagement will likely lead to opportunities for landowners to utilize programs such as the Natural Resource Conservation Service Agricultural Conservation Easement Program and Regional Conservation Partnership Program, OWEB's Oregon Agricultural Heritage Program, and the US Fish and Wildlife Service North American Wetland Conservation Act Grant.
- The applicant is incorporating succession planning as part of the conversation with agricultural landowners. Succession plans are a tool for preventing farms from being converted to other uses and there currently is a lack of succession plans in place.
- There is a clear path from the proposed landowner engagement to potential on-the-ground protection and restoration projects.
- The applicant has relevant experience for implementing the proposed landowner engagement and a track record implementing similar work in other Oregon geographies.
- The project cost is reasonable in relation to the habitat protection benefits that will result from the expected conservation easements.

Concerns

- It is unclear from the application how the applicant plans to reach out to landowners to advertise the events and recruit attendance and whether the applicant has relationships in place to effectively engage target landowners in the Willamette.
- It is uncertain whether there is capacity in place and readily available funding if more landowners than expected express interest in pursuing easement projects.
- The prioritized geographies may be missing areas in the Willamette Valley with stronger land use pressure that could lead to agricultural lands being converted to development. The applicant clarified that interested landowners outside the priorities would not be excluded from pursuing a conservation easement project.

Concluding Analysis

Most priority habitats in the Willamette basin, including riparian, oak woodland, forest, wetland, and prairie, are located on private lands. Meaningful recovery of threatened and endangered species will rely on protection and restoration on private lands in addition to public lands. Conservation Easements provide a path to protect habitat first and establish locations for future restoration to build further ecological uplift.

The proposed engagement provides an opportunity to establish new options for agricultural landowners to participate in conservation and could serve as a model for working with landowners more broadly across the state.

Review Team Recommendation to Staff

Fund

Review Team Priority
1 of 3

Review Team Recommended Amount
$63,552

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$63,552

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering

Willamette Basin (Region 3)

Application Number: 223-3022-22617

Project Type: Stakeholder Engagement

Project Name: Uniting Stakeholders to Protect and Enhance Oregon White Oak Habitat in Lake Oswego

Applicant: Oswego Lake Watershed Council

Region: Willamette Basin

County: Clackamas

OWEB Request: $75,961

Total Cost: $125,761

Application Description

This project will take place in Lake Oswego, Oregon which contains remnant patches of historic Oregon white oak habitat. Need for this project stems from the imperiled status of Oregon white oak ecosystems, in which only a small fraction of historic oak habitat remains in our region. Among the biologically richest ecosystems in the Pacific Northwest, Oregon white oak prairie and woodlands support diverse plant and animal communities, and play a significant role in the culture and living heritage of Northwest Tribes. In spite of their ecological and cultural importance, oak habitat patches found in our watershed are generally poorly managed and often overgrown with competing plant species. In addition, many of these habitat patches are in close proximity to the urban-wildland interface where risk of catastrophic wildfire is of growing concern.

We have identified need for a cohesive management strategy of urban oak habitat in Lake Oswego. To engage regional stakeholders in this effort, we are proposing a rigorous community outreach project that includes a number of engagement strategies, such as landowner/HOA member surveys, presentations, community events and tours of successful restoration and hazardous fuel reduction sites.

Ultimately, our goal is to create a Lake Oswego Urban Oaks Action Plan to guide the preservation, restoration and management of our regional oak habitat on both public and private lands. Measures to protect against catestrophic wildfires will also be addressed. This Action Plan will be designed based on input from stakeholders and serve as a template for other urban communities in need of best practices to manage fragile urban/suburban oak habitat.

Numerous stakeholders are identified for this project, including private landowners, business owners, HOA members, the City of Lake Oswego Parks and Rec, LO School District, LO Fire Department, Clackamas SWCD and Metro.

Review Team Evaluation

Strengths

- A large number of community members, including homeowners' associations, businesses, city planners, fire department, and schools, will be engaged to promote stewardship of oak habitat and fire resilient landscapes.
- A variety of communication strategies will be used.
- The Intertwine map of Oregon white oak data points was used to prioritize work.
- The applicant has worked with a homeowners' association on a hazardous fuels reduction project.

Concerns

- The communication strategies appear to focus on raising general awareness about oak issues; the expected path from this social effort to the urban oaks action plan and future restoration is unclear.
- There is a limited amount of oak habitat in urban areas and it is not quantified, so it is challenging to determine if an investment can lead to meaningful restoration with measurable ecological uplift.
- It is unclear from the application how the Indigenous Community will be engaged to incorporate Traditional Ecological Knowledge (TEK) into the oak action plan. TEK is a placed-based knowledge; it is important to ensure people connected to the place are providing this information. Additional information explaining what the purpose is for engaging Native People or Tribes to incorporate TEK and how this will be done would be helpful for understanding the project success indicators related to TEK.
- Oak habitat restoration and fuels reduction to minimize wildfire risks seem conflated in the application. While the two actions can be compatible and utilizing the common concern for wildfire can effectively engage community involvement, it is important to ensure restoration goals remain a primary driver for the project. Additional clarity describing plans for maintaining oak habitat as the project focus while using messaging related to wildfire prevention to recruit community involvement would be helpful for understanding how the proposed engagement will lead to oak focused restoration.
- Information in the application proposed solution section does not align with the budget. For example, the narrative indicates surveys will be sent to 500 households and only 100 surveys are included in the budget. Also, significant costs are included in the budget for major outreach events; however, there is limited information in the narrative that describes these events and how they are designed to lead to an oak action plan and identifying future restoration. Finally, it is unclear how the urban oak action plan is part of the project because there does not appear to be corresponding costs in the budget.
- The project will engage private landowners with backyards that have only a few oaks. Working an "oak-by-oak" approach with urban landowners will likely contribute limited ecological uplift for oak habitat compared with working on larger acreage with oak.

Concluding Analysis

Oregon white oak ecosystems are highly imperiled in the Willamette Valley and promoting a community appreciation and stewardship for oak habitat and fire resilient landscapes through the proposed engagement is likely to provide a social benefit. Oak is sparse in urban areas and the path to ecologically significant restoration outcomes that could potentially result from the project is uncertain.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority
N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Willamette Basin (Region 3)

Application Number: 223-3023-22626
Project Type: Stakeholder Engagement
Project Name: PHCC Stakeholder Engagement
Applicant: Social Good Fund
Region: Willamette Basin
County: Multnomah
OWEB Request: $57,600
Total Cost: $79,579

Application Description The Portland Harbor Community Coalition is requesting funding to support a community engagement process to engage stakeholders in the cleanup and restoration of Willamette Cove located between river miles 6 and 7 on the Willamette River. The upland portions of the site cover approximately 24 acres and include approximately 3,000 acres of waterfront. Willamette Cove is part of the Portland Harbor Superfund Site which extends from river mile 1 to river mile 11 on the Willamette River and encompasses more than 2,000 acres. This stretch of river is the most polluted and degraded stretch of river in Oregon. In addition to industrial contamination, this stretch of river has been steepened, deepened, hardened, shallow water, riparian and floodplain habitat has been largely eliminated. The community has largely been cut off from the river for cultural and recreational activities. The degradation of Portland Harbor undermines recovery of all salmon utilizing the 187-mile-long Willamette River system as well as other fish, bird, mammal and invertebrate species.

Willamette Cove represents one of only a few publicly owned sites in the Portland Harbor Superfund Area and one of the best opportunities to restore fish and wild habitat, reconnect the community to the ecology of the river and honor tribal connections to the river that date back to time immemorial. Responsible parties including the State of Oregon, Port of Portland, City of Portland and Metro are current working with EPA and DEQ on remedial design plans for the river and upland area. Metro, which owns the uplands, is currently initiating a community-based planning process for the natural area. All public agencies involved in this project have agreed to a community-based public involvement process led by the Portland Harbor Community Coalition (PHCC). The PHCC was founded in 2012 to elevate the voices of historically marginalize communities in the Superfund cleanup and restoration process.

Review Team Evaluation

Strengths

- There is a clear need for restoration in the Portland Harbor and Willamette Cove provides an opportunity for improving habitat connectivity.
- The applicant has established trust with the community and has experience implementing outreach with diverse communities and helping marginalized community voices be heard.

- The timeline for the proposed community engagement is reasonable and this project will ensure the community is able to participate in setting priorities for the future Willamette Cove nature park.

Concerns

- The application lacks details needed to understand the project scope of work, how each objective will be executed, and how the proposed community engagement will lead to future restoration.
- A broad spectrum of community members will be engaged; however, the target messages for these audiences and how this messaging is expected to tie into potential restoration are unclear.
- It is unclear how target audiences will be contacted, there are no costs associated with outreach materials in the budget.
- Superfund cleanup projects are complex and unpredictable; unexpected roadblocks can slow progress. There is potential that any possible future restoration will not occur in the near term.
- The application lacks support letters indicating the parties responsible for the site, including City of Portland, Metro, Environmental Protection Agency, and Oregon Department of Environmental Quality, support the proposed stakeholder engagement. For example, a support letter from Metro describing how the proposed stakeholder engagement will help with their future work on the site would provide evidence for how this work can lead to future restoration.
- More detail is needed to understand the “Honorariums to Community Participants” included in the budget. While honorariums are an effective method to remove financial barriers to participation and ensure diverse voices are participating in the conversation, it is unclear how these honorariums will be managed. Additional detail describing the expectations from these honorariums and how the applicant plans to decide to offer them and select who shall receive them would be helpful for understanding the outcomes for this cost.

Concluding Analysis

Willamette Cove has potential for providing migration corridor habitat benefits for native fish migrating from streams such as the McKenzie and Clackamas Rivers on their way out to the ocean. It is unclear from the application what types of restoration might be considered and could result from the proposed community engagement conversations. Additional information is needed to understand the potential for the project to lead to a watershed benefit.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

N/A

Review Team Recommended Amount

$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Do Not Fund

Staff Recommended Amount

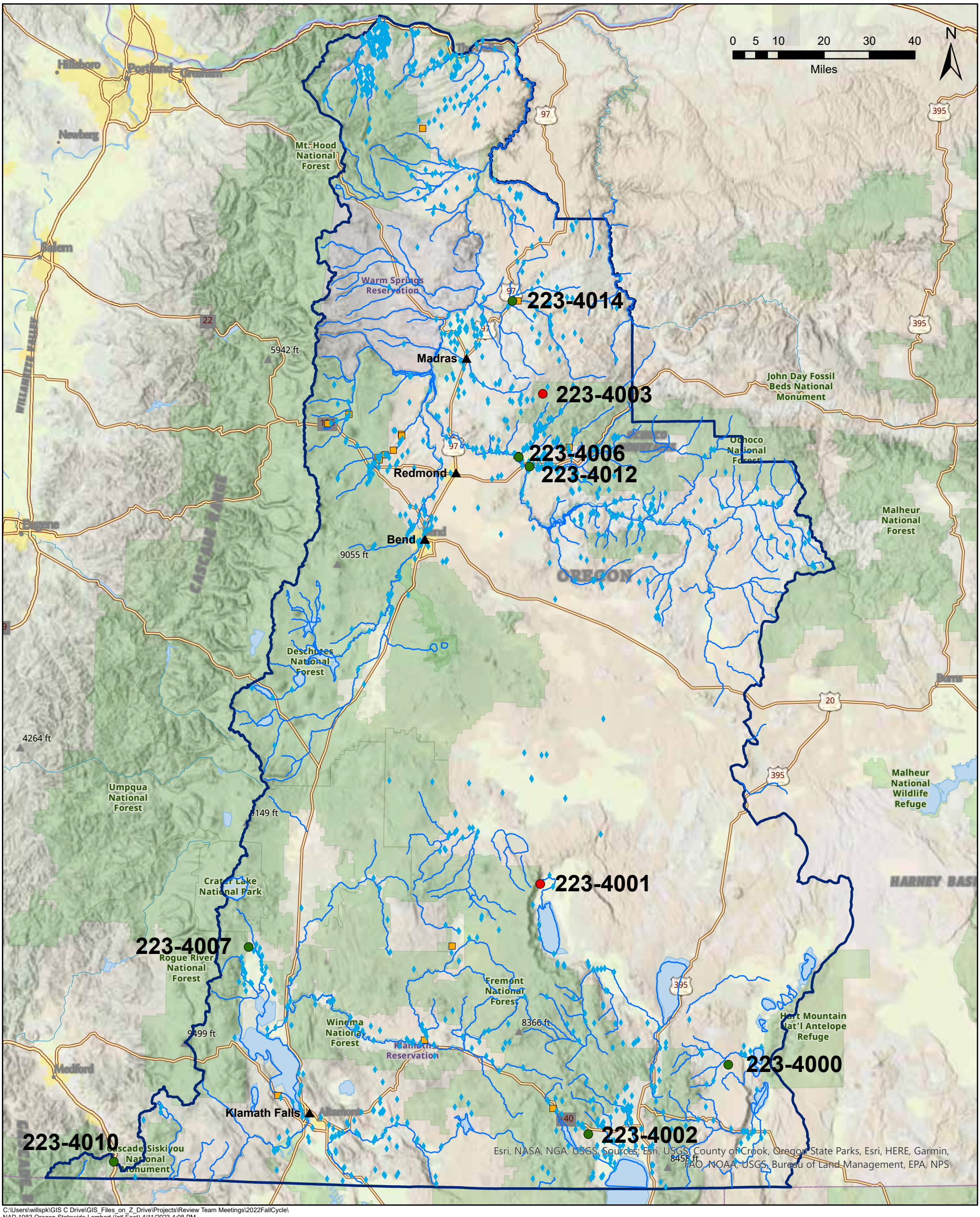
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Staff Conditions

N/A

Region 4: Central Oregon

Central Oregon - Region 4 Fall 2022 Funding Recommendations



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Funding Recommendation

- Staff Recommendation For Funding (SRF)
- Below Funding Line (BFL)

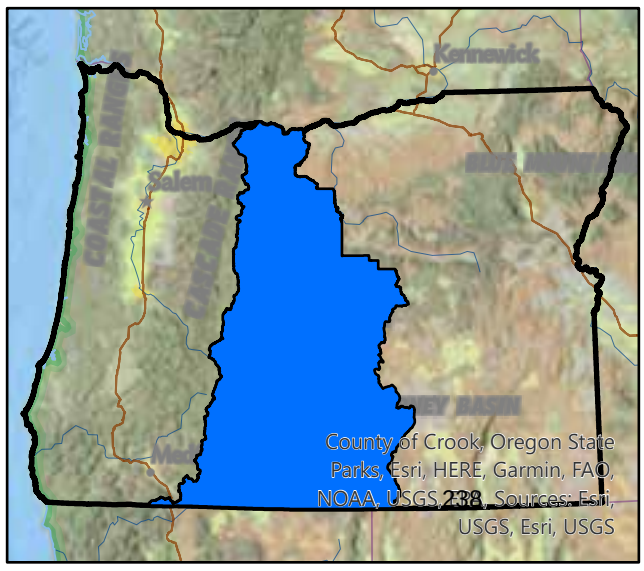
Previous Grants 1998 - Spring 2022

- Land Acquisition
- Restoration
- Region 4 Cities
- Region 4 Streams
- OWEB Region 4 Boundary

OREGON WATERSHED ENHANCEMENT BOARD

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Region 4 - Central Oregon Restoration

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-4006	Deschutes Land Trust	Ochoco Preserve Restoration - Phase 2	Stream and floodplain restoration will continue along private property on the Crooked River downstream of Prineville. Restoration will enhance fish and wildlife habitat.	689,365	Crook
223-4007	Trout Unlimited Inc	Annie Creek Non-Native Fish Barrier and Screening	A dam on Annie Creek will be installed keep invasive brook trout from moving upstream and support future bull trout reintroduction.	245,718	Klamath
223-4000	Lakeview SWCD	North Warner Rangeland Health Project	Rangeland conservation will be implemented across a large landscape to restore core sage steppe habitat for sage-grouse.	496,571	Lake
223-4002	Lake County Umbrella Watershed Council	Lake County All Lands Restoration Initiative Mini FIP Phase II	Private forests adjacent to public lands will be thinned, and thinning debris piles burned to restore wildlife habitat and connectivity in the North Warner and Thomas Creek project areas.	397,432	Lake

Total Restoration Projects Recommended for Funding by RRT and OWEB Staff	1,829,086

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-4003	Crooked River WC	Foley Butte Holistic Restoration	Stream and upland conservation actions will be implemented to improve habitat for fish and wildlife in the Upper McKay Creek drainage in Crook County. The project will remove encroaching western juniper, protect aspen stands, install livestock exclusion fencing, develop springs for better grazing management, and treat weeds.	185,420	Crook

223-4001	Lake County Umbrella Watershed Council	Summer Lake All Lands Restoration	Private landowners adjacent to Winter Rim and Summer Lake will be engaged to implement forest thinning and juniper removal along forest that is flanked by three recent mega wildfires. The project will improve wildlife habitat and build future wildfire resilience.	259,368	Lake

Projects *Not Recommended* for Funding by RRT				
Project #	Grantee	Project Title	**Amount Requested**	County
223-4004	Lake County Umbrella Watershed Council	Upper Drews Creek Fish Passage	259,578	Lake
223-4005	Trout Unlimited Inc	South Fork Sprague Low-Tech Process-Based Restoration	191,689	Lake
223-4008	Crooked River WC	Silva Ranch In-Stream Restoration Phase I	203,609	Crook
223-4009	Hood River WC	Tony Creek Fish Passage Restoration Project	245,356	Hood River

Region 4 - Central Oregon Technical Assistance

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-4010	Oregon Wildlife Heritage Foundation	Restoring Ecological Connectivity via Wildlife Overcrossings in Southwest Oregon	Project designs will be developed for two Interstate 5 overpasses south of Ashland that will provide safe wildlife passage.	74,813	Jackson

223-4012	Crook SWCD	Crooked River Watershed Sage-Grouse Conservation IV	Private landowners will be engaged to develop Site Specific Plans (SSP) for blueprints to restore high-priority sage-grouse habitat.	74,987	Crook
Total Technical Assistance Projects Recommended for Funding by RRT and OWEB Staff				149,800	

Projects Recommended but Not Funded in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
None					

Projects *Not Recommended* for Funding by RRT				
Project #	Grantee	Project Title	**Amount Requested**	County
223-4011	OSU Office of Sponsored Research & Award Admin	Armstrong OWEB 2022	73,282	Klamath
223-4013	Hood River WS Group	Hood Reiver Basin Partnership Restoration Effectiveness Monitoring Plan	42,257	Hood River

Region 4 - Central Oregon Stakeholder Engagement

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-4014	Deschutes River Conservancy	Trout Creek Stakeholder Engagement Project	Landowners in the Trout Creek watershed will be engaged to facilitate future land and water acquisitions and on-the-ground restoration.	81,318	Jefferson
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				81,318	

Projects Recommended but Not Funded in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
None					

Projects *Not Recommended* for Funding by RRT				
Project #	Grantee	Project Title	**Amount Requested**	County
None				

Region 4 Total OWEB Staff Recommended Board Award	**2,060,204**

Region 1 - 6 Grand Total OWEB Staff Recommended Board Award	**13,027,997**

Open Solicitation-2022 Fall Offering
Central Oregon (Region 4)

Application Number: 223-4000-22499

Project Type: Restoration

Project Name: North Warner Rangeland Health Project

Applicant: Lakeview SWCD

Region: Central Oregon

County: Lake

OWEB Request: $496,571

Total Cost: $1,021,834

Application Description The North Warner high desert is home to a variety of critical habitats and a multitude of wildlife species, such as sage grouse, mule deer and the Warner Sucker. Located within the Twelvemile Creek, Fish Creek and McDowell Creek Watersheds are the Fitzgerald Partner's Inc. and the Taylor Ranch Inc. landowners, both highly valued properties by both wildlife and rangeland species.

The proposed project area is on private lands that are covered under a Sage Grouse CCAA in which the Lakeview SWCD engages private landowners in 30-year voluntary conservation actions in exchange for certain assurances should sage grouse be listed under the Endangered Species Act (ESA). Lakeview SWCD, Lakeview BLM, Fitzgerald Partner's Inc. and Taylor Ranch Inc. proposes to initiate a project that continues their efforts to implement identified conservation actions under their CCAA Site Specific Plans that will improve sage grouse habitat as well as rangeland health and increasing resistant and resilient landscapes.

OWEB's financial assistance will help remove 1768.2 acres of juniper, 552.4 acres invasive annual grass treatments, 10 spring developments, one additional trough, 11 wildlife escape ramps, 5280 feet of fence construction and 30,543 feet of fence marking as part of a larger landscape scale project with the Lakeview BLM to improve sage grouse habitat and sage-steppe ecosystem health. OWEB funds will be used for juniper treatment, invasive annual grass treatments, wildlife escape ramps, fence construction and fence marking, spring developments, post monitoring, project management and travel expenses.

Review Team Evaluation

Strengths

- The application provides sufficient detail regarding proposed conservation activities that will address high priority ecological threats impacting sage grouse habitat. It is clear how each restoration treatment will be implemented, which will include juniper removal, invasive annual grass control, wildlife-friendly spring developments, and fence installation.
- The actions identified are included in Site Specific Plans (SSP) developed for the two project properties as part of the Candidate Conservation Agreement with Assurances (CCAA) program approved by USFWS.

- The fencing and spring developments will improve livestock distribution thus allowing native vegetation vigor to recover, which will increase forage for a plethora of wildlife species utilizing the sagebrush steppe habitat.
- The proposed conservation actions will provide habitat benefits for mule deer in an area that is identified as a high priority by ODFW's mule deer initiative.
- The project area is adjacent to other conservation work implemented by BLM and other private landowners that improved habitat for fish and wildlife species. The proposed restoration will provide improved connectivity of enhanced habitat with these previously restored sites.
- The applicant, landowner, and partners have relevant experience with implementing the conservation actions proposed.
- The landowners' commitment to conservation is demonstrated by the previous restoration accomplished on their properties.
- The project costs are appropriate, especially the per acre rate for juniper removal.

Concerns

- It is unclear why there are different rates for fencing costs associated with spring exclusion and cross fencing.
- The proposed herbicide application rate of 8 ounces per acre seems a little high and potential overspray could cause detriment and harm to native forbs. Additional information is needed to understand why this herbicide application rate is preferred and precautions that will be made to protect existing native forbs.

Concluding Analysis

A landscape scale approach is proposed to address key limiting factors affecting sage grouse conservation in Lake County's Warner Valley. The entire project area is considered core or low-density sage grouse habitat, and at least five known 'leks' or strutting grounds are located within a mile of the proposed treatment sites. There is a high likelihood of success for the proposed restoration actions to provide habitat benefits for sage grouse and other native wildlife. The applicant is encouraged to revisit the herbicide application rate for annual invasive grasses to consider potential negative impacts to native forbs.

Review Team Recommendation to Staff

Fund

Review Team Priority

3 of 6

Review Team Recommended Amount

$496,571

Review Team Conditions

NA

Staff Recommendation

Staff Follow-Up to Review Team

NA

Staff Recommendation

Fund

Staff Recommended Amount

$496,571

Staff Conditions

NA

Open Solicitation-2022 Fall Offering
Central Oregon (Region 4)

Application Number: 223-4001-22531
Project Type: Restoration
Project Name: Summer Lake All Lands Restoration
Applicant: Lake County Umbrella Watershed Council
Region: Central Oregon
County: Lake
OWEB Request: $259,638
Total Cost: $520,879

Application Description 1) The Summer Lake All Lands project area will focus on an approximately 300 acres within an overall 8,000 acre area with multiple ownerships. The project area is flanked by three megafire scars and the US Forest Service has been focused on conducting thinning treatments to the boundaries.
2) These areas are the last forested stands at risk of wildfire. Juniper encroachment as a result of previous fires would contribute to fuel loading that could lead wildfires to multiple permanent and temporary residences. The area has been surveyed for pre-wildfire roads and contingency lines within a grant agreement between the USFS and the High Desert Rangeland Fire Protection Association (HDRFPA).
3) The implementation of a thinning project could successfully complete a wildfire contingency line between the USFS/BLM and the private lands, Additionally, the treatment would improve watershed function in five sub-watersheds of the region.
4) Partners would include Lake County Umbrella Watershed Council, BLM, USFS, ODF, ODFW, HDRFPA and private landowners

Review Team Evaluation

Strengths

- Some of the last remaining green forests around Summer Lake not impacted by previous wildfires will be thinned to create and protect a healthy, resilient, and functional forest landscape.
- The map included in the application displays previous scars in the area caused by high severity wildfire, which indicates there is a timely need for addressing dense fuel stands in these last remaining forest habitats.
- The applicant and partners have a long history of working together implementing similar forest health projects.
- The private landowners in Summer Lake are receptive to the type of tree thinning work proposed and support forest health practices on their land.
- Numerous species of wildlife will benefit from the restored forest habitat that is less likely to be impacted by severe wildfires in the future.

Concerns

- The application lacks a description of the quantified watershed benefit expected from the proposed forest health thinning treatments. For example, the application lacks details describing how the

project will benefit various wildlife species, which was clarified during the site visit.

- The ecological benefits from using brush mastication as proposed in objective 2 in the application is unclear. Specific information describing the habitat that will be improved and species that will benefit would provide helpful context for understanding the technical soundness of this approach for removing fuel.
- There are no maps included in the application that show exactly where the forest health treatments will occur, the maps provided are at a coarse scale and do not identify specific treatment areas. It is difficult to evaluate the ecological value of the restoration investment without knowing where the 300 acres of proposed treatments will occur in the 8,000-acre project area.

Concluding Analysis

Forest health treatments will be completed on some of the last remaining green forests near Summer Lake, an area that has been plagued by previous wildfires. The project approach of engaging private landowners to complete small tree thinning has proven to be effective. The current project builds off previous restoration accomplished by the applicant and partners. For future applications, the applicant is encouraged to demonstrate in greater detail the ecological value of these types of forest health projects using maps and text describing wildlife ranges and providing fine scale maps of proposed treatment areas targeted for OWEB investment.

Review Team Recommendation to Staff
Fund

Review Team Priority
6 of 6

Review Team Recommended Amount
$259,638

Review Team Conditions

NA

Staff Recommendation

Staff Follow-Up to Review Team
NA

Staff Recommendation
Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount
$0

Staff Conditions

NA

Open Solicitation-2022 Fall Offering
Central Oregon (Region 4)

Application Number: 223-4002-22532

Project Type: Restoration

Project Name: Lake County All Lands Restoration Initiative Mini FIP Phase II

Applicant: Lake County Umbrella Watershed Council

Region: Central Oregon

County: Lake

OWEB Request: $397,432

Total Cost: $3,010,437

Application Description 1) The Lake County All Lands Restoration Initiative Mini Focused Investment Partnership (FIP) Phase II project will continue to focus on the North Warner and Thomas Creek areas located adjacent to each other. These projects combined are referred to as the Lake County All Lands Restoration Initiative. In lieu of not being awarded our full FIP application in 2022 due to falling below the funding recommendation line, we are decreasing our original geographic range while still hoping to maintain the forward momentum of forest health improvements through a second phase of a mini FIP which will echo all the same goals and objectives as the FIP but at a much smaller scale. The original FIP total area covers 402,400 acres, this mini FIP will cover about 278,633 acres (see Map 6, Zone 1 and 2) near the communities of Lakeview and Valley Falls. This project area includes high concentrations of old legacy ponderosa pine forests; and habitat for priority species.
2) Within the last year alone we have lost over 100,000 acres within this project area to wildfires (Patton Meadow and Cougar Peak). Past and current management practices, including fire exclusion, have left forests in dry regions stressed from drought, overcrowding, and uncharacteristic insect and disease outbreaks. The increase in size and severity of wildland fires is causing ecological, social, and economic damage. The departure from historic fire patterns is also having an impact on water, wildlife habitat, stream function, large and old tree structure, and soil integrity.
3) We plan to continue the thinning treatments of dry ponderosa pine and mixed conifer forests in the North Warner project area and expand thinning efforts in Thomas Creek project area (333 acres on private land, 2666 acres on USFS). Additionally we will perform conifer encroachment in aspen and meadows (258 acres of private land and 633 acres of USFS land).
4) LCUWC, KLFHP, USFS, ODF, NRCS, OSU, ODFW, LCCWMA

Review Team Evaluation

Strengths

- The project builds off previous OWEB investments in the Lake County geography that targeted forest health treatments on private lands adjacent to public lands in a cross boundary landscape scale restoration effort. This included a previously awarded OWEB technical assistance grant to develop treatment prescriptions on private lands.

- The focus on enhancing aspen and meadow habitats in conjunction with forested habitats will benefit a wide variety of wildlife species.
- The application provides a clear description of the potential ecological value expected from the project and includes citations demonstrating how the proposed restoration efforts are identified in the Oregon Conservation Strategy to restore habitat for multiple wildlife species.
- The applicant and partners have a long history of working together implementing similar type forest health projects.
- The private landowners in North Warner and Thomas Creek are receptive to the type of tree thinning work proposed and support forest health practices on their land.
- The applicant and partners have a strategic action plan that identifies and prioritizes the proposed thinning work to create a healthy, resilient, and functional forest landscape.
- The forest health treatments sites are adjacent to areas targeted for projects that will address fish passage concerns, which together will build connectivity across ridgetop to ridgetop conservation efforts.

Concerns

- It is unclear where forest health treatments will occur across the large North Warners and Thomas Creek geography. The maps provided in the application are at too coarse of a scale and do not identify specific treatment areas within the 278,633-acre project area.

Concluding Analysis

The project will continue forest health restoration in Lake County's Thomas Creek and Warner Mountain focus areas. Large severe wildfires have plagued Lake County in recent years, which has elevated the need for thinning green forests to protect functional forest landscapes for native fish and wildlife species. For future applications, the applicant is encouraged to demonstrate in greater detail the ecological value of these types of forest health projects using maps and text describing wildlife ranges and providing fine scale maps of proposed treatment areas targeted for OWEB investment.

Review Team Recommendation to Staff

Fund

Review Team Priority

4 of 6

Review Team Recommended Amount

$397,432

Review Team Conditions

NA

Staff Recommendation

Staff Follow-Up to Review Team
NA

Staff Recommendation
Fund

Staff Recommended Amount
$397,432

Staff Conditions

NA

Open Solicitation-2022 Fall Offering
Central Oregon (Region 4)

Application Number: 223-4003-22540
Project Type: Restoration
Project Name: Foley Butte Holistic Restoration
Applicant: Crooked River WC
Region: Central Oregon
County: Crook
OWEB Request: $185,420
Total Cost: $360,357

Application Description Foley Butte Ranch, located in the northwest corner of Crook County, Oregon, encompasses 30,655 acres of timberland, creeks, meadows, and mountains. This property is known for its abundant wildlife species, including Mule deer, Rocky Mountain elk, Cougars, Black bears, Bobcats, coyotes, grouse, chukar, and native fish species in the creeks. Within the Foley Butte property, there are several different HUC-6 watersheds, for this grant the focus will be on the Allen Creek Watershed. Working on a large property of this size offers a unique chance for large scale watershed restoration work throughout the uplands, and several different headwaters of tributaries to McKay creek, with McKay creek being a main tributary to the Crooked River. This application will address several limiting factors identified in this area by working with the partners to address habitat needs on a holistic landscape scale.
2. This specific project area has suffered from past grazing management regimes that have allowed cattle to overgraze the riparian corridors along streams throughout this property, causing native vegetation to be nearly void along the riparian areas. Grazing management has also led to the encroachment of western juniper, and the decline of forbs, shrubs, and quaking aspen.
3. Project elements include cutting 88.2 acres of encroached Western Junipers, protecting and enhancing 5 acres of sensitive aspen stands by removing encroaching conifers and 4-strand wildlife-friendly fencing. Six springs will be developed with one spring including an above ground cistern for emergency wildfire water storage. 17.84 acres of CREP will be enrolled along Allen Creek, with VerticalPost Structures and large wood, enhancing the riparian corridor, an additional 4 acres of non-CREP riparian fence will be installed in the uplands, lastly 7 acres of weed treatment.
4. Project partners include the following: CRWC, Nuveen Natural Capital, Crooked River Weed Management Area, and Crook County SWCD.

Review Team Evaluation

Strengths

- The application has a clear description of the proposed restoration actions and how the areas proposed for implementation were chosen.
- The landowner is new to the area, has a strong interest in conservation, and is actively engaging local partners to develop restoration plans to improve fish and wildlife habitat.

- The wildlife friendly exclusion fence along the riparian areas and aspen stands will serve as an effective tool for managing livestock while promoting native plant protection and vigor.
- The upland spring developments will facilitate improved livestock distribution and remove their dependence on riparian areas to access water.
- The instream habitat structures proposed for Allen Creek are likely to improve aquatic habitat conditions for juvenile and adult fish. This stream is designated as critical habitat for Mid-Columbia Steelhead.
- The applicant is engaging appropriate partners to assist with implementation of the conservation actions. The application includes support letters documenting how partners plan to engage in this project.

Concerns

- There is no grazing management plan attached to the application and the application narrative does not indicate the landowner has established such plans. Without information describing how grazing will be managed throughout the property, it is unclear how restoration investments will be protected.
- The CREP component described in objective 3 of the application could add a lot of value for enhancing habitat; however, there are currently no contracts in place. According to the application, CREP enrollment is planned for fall of 2024. It is unclear why it will not be pursued earlier. CREP is critical to the project's success and is a large part of the overall match contribution, integrating it early into project planning and implementation will increase the likelihood for the project to succeed.
- The application budget includes funds for plant establishment. If a property is enrolled in CREP, OWEB funds cannot be used for plant establishment activities for CREP funded plantings.
- It is unclear how the lump sum match from the Crook County CWMA aligns with the project objectives and actions. Noxious weed treatments are planned for only seven acres, which will not require the $78,000 listed in the budget from the CWMA.
- Installing vertical post structures and large wood debris to increase stream sinuosity and lateral migration may not be effective in the high gradient transport stream reaches targeted for restoration in Allen Creek. Additional information describing the site's hydrologic context and how the restoration approach was selected for the site conditions is needed to evaluate technical soundness and better understand whether the objective can be met as proposed.

Concluding Analysis

A new landowner with a strong interest in fish and wildlife conservation that recently purchased a 30,000-acre ranch on Allen Creek in the Crooked River watershed will be engaged to restore 115 acres of upland, aspen, and riparian habitats. The actions outlined in the application present a holistic suite of restoration activities that are likely to improve habitat for upland species and aquatic species, including Rocky Mountain elk, Mule deer, steelhead, and Redband trout. The applicant is encouraged to work with the landowner to develop a grazing management plan and pursue CREP enrollment as soon as possible to ensure all conservation actions proposed are aligned with one another.

Review Team Recommendation to Staff

Fund

Review Team Priority

5 of 6

Review Team Recommended Amount
$185,420

Review Team Conditions

NA

Staff Recommendation

Staff Follow-Up to Review Team
NA

Staff Recommendation
Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount
$0

Staff Conditions

NA

Open Solicitation-2022 Fall Offering
Central Oregon (Region 4)

Application Number: 223-4004-22553
Project Type: Restoration
Project Name: Upper Drews Creek Fish Passage
Applicant: Lake County Umbrella Watershed Council
Region: Central Oregon
County: Lake
OWEB Request: $259,578
Total Cost: $326,078

Application Description Drews Valley Ranch is located 21 miles west of Lakeview in Lake County, Oregon. The 11,400-acre ranch is surrounded by the Fremont-Winema National Forest and includes nine miles of streams, eight tributary creeks, a reservoir, and grassy wet meadows. The ranch is home to more than 185 species of birds, fish, and mammals, including the bald eagle and red-band trout.

The Upper Drews Creek Fish Passage Project was initiated in the summer of 2020 as the Lake County Umbrella Watershed Council secured an Oregon Watershed Enhancement Board Technical Assistance grant to survey the project sites and develop a 60% design plan to address fish passage, stream function, and aspen die off. The lower diversion is a fish passage barrier when boards are in place, which is a critical time fish migrate upstream to spawn.

A design plan has been developed and cost estimates have been retained from a local engineering firm. The Council is seeking construction funds to implement work to restore fish passage at an irrigation diversion on Drews Creek to provide access upstream, while maintaining flood irrigation to the wet meadows. The project will compliment and build upon several conservation actions that have been executed on the ranch over the last three decades, including a conservation easement, four fish screens, improved fish passage, crossing fencing, and off-site water developments.

Project Partners involve Drews Valley Ranch, Oregon Department of Fish and Wildlife, US Fish and Wildlife Service, and Anderson Engineering and Surveying.

Review Team Evaluation

Strengths

- Previous project evaluations concerns were addressed in this resubmitted project application by removing the instream treatments associated with the aspen stand.
- The fish passage solution will support volitional movement of fish and lamprey, which are of high importance in Drews Creek. This project will make available an additional 1.5 stream miles of stream habitat.

- The applicant is working with a private landowner that has implemented previous fish passage solutions on other parts of the ranch as well as enrolled a portion of the property in a conservation easement.
- The ditch associated with the water diversion proposed for modification is already screened to ensure no fish are entrained in irrigation ditches.
- The applicant has successfully implemented similar type fish passage projects.

Concerns

- There is a known fish passage barrier 1.5 miles upstream of the project location, and downstream there is no fish passage on Drews Reservoir. These barriers are limiting movement of aquatic species, which limits their ability to access habitat and for populations to exchange genetic diversity that may be important to population viability. This limits the potential benefit that could be gained from the investment.
- It is unclear how the hardened stream crossing described in objective 4 of the application will effectively protect the stream when there are no plans to install associated fencing. Without fencing to exclude livestock from the stream, the riparian plantings will likely be browsed on and other parts of the stream channel will be utilized by livestock. It is unclear how the overall grazing management approach will ensure restoration investments will be protected.
- The design plan for the bank reshaping and large wood placement incorporates bank armoring that seem aggressive and unnecessary. Treating only 110 feet of streambank on one side of the stream will likely address localized symptoms and not root causes leading to streambank failure. The application lacks information describing how the proposed treatment approaches for restoring a segment of streambank along one side of Drews Creek will enhance habitat.

Concluding Analysis

The project seeks to address fish passage and streambank failure along Drews Creek in Lake County. Due to passage barriers located both upstream and downstream of the project site and restoration methods that are not clearly defined, it is likely limited fish and wildlife habitat will result from this project for the cost.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

NA

Review Team Recommended Amount

$0

Review Team Conditions

NA

Staff Recommendation

Staff Follow-Up to Review Team
NA

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

NA

Open Solicitation-2022 Fall Offering
Central Oregon (Region 4)

Application Number: 223-4005-22555

Project Type: Restoration

Project Name: South Fork Sprague Low-Tech Process-Based Restoration

Applicant: Trout Unlimited Inc

Region: Central Oregon

County: Lake

OWEB Request: $191,689

Total Cost: $241,873

Application Description The Sprague River watershed in the Upper Klamath Basin once supported thriving riparian ecosystems and abundant native fish populations in the arid high desert of the eastern Cascades. However, land use change post-European settlement has reduced instream flows, incised stream channels, removed riparian vegetation, and decreased instream and riparian habitat resulting in precipitous population declines of native fish including ESA-listed endangered C'waam (Lost River Sucker, Deltistes luxatus) and Koptu (Shortnose Sucker, Chasmistes brevirostris) and threatened Bull Trout (Salvelinus confluentus). Further, climate change and high-severity wildfires are adding additional pressure to this already fragile system. Recognizing the importance of the South Fork Sprague River to the long-term recovery of native fish species, a diverse group of partners (e.g., Trout Unlimited, USFWS, ODFW, Green Diamond Resource Company) is undergoing an ambitious effort to restore fluvial processes and vast riparian corridors using Low-Tech Process-Based Restoration (LTPBR) techniques. LTPBR, which utilizes hand-built non-permanent structures to increase surface water residence time, groundwater storage, floodplain connectivity, in-channel habitat complexity, and ecosystem resilience, implemented at a watershed-scale will greatly improve habitat conditions for aquatic species and improve resiliency to drought and wildfire. Further, LTPBR efforts will help reduce suspended sediment and nutrient concentrations that contribute to algae blooms and associated poor water quality in Upper Klamath Lake and the Klamath River. Project activities will occur in two reaches of the South Fork Sprague Basin (i.e., South Fork Sprague mainstem and Whitworth Creek) which has been identified as a high priority restoration area by the Upper Klamath Basin Watershed Action Plan (UKBWAP) and the Klamath Basin Integrated Fisheries Restoration and Monitoring Plan (IFRMP).

Review Team Evaluation

Strengths

- Installing beaver dam analogues (BDA) and post assisted log structures (PALS) is an appropriate restoration approach for the project area located along the South Fork Sprague River. Historically the low gradient stretch of river would be full of beaver complexes.
- There is evidence of existing beaver populations adjacent to the project area, suggesting they could move into this area and build upon installed restoration structures.

- The project area is downstream of the Bootleg fire complex. The instream structures will aid in trapping and storing sediment, which is important to improving water quality by limiting the mobility of phosphorus laden sediments downstream.
- The applicant and consultant have experience implementing similar types of instream projects in nearby streams.
- The landowner support for the project is demonstrated by a letter of support. The landowner will also identify and provide tree material for use in the instream habitat structures.

Concerns

- Livestock utilize the project area; however, the application lacks a grazing management plan describing how restoration investments will be protected from future livestock use. Livestock could negatively impact the restoration potential, more information is needed to understand how the land will be utilized by livestock to evaluate whether this project can successfully achieve expected ecological outcomes.
- The application lacks project designs needed to evaluate technical soundness of the restoration approach. Design information is needed to determine whether the instream structures will be built for the site-specific conditions to achieve the intended ecological output.
- The project budget is comprised of lump sums with no explanation as to how costs were developed. Without site specific designs indicating what the structures will look like and where they will be installed on the landscape, it difficult to understand whether the costs are reasonable and appropriate for the proposed work and evaluate cost effectiveness.

Concluding Analysis

The proposed project concept of improving instream habitat complexity and floodplain connectivity along the South Fork Sprague River utilizing BDAs and PALS is likely appropriate for this location. The application, however, lacks details and specifics relating to designs, grazing management, and budget development needed to evaluate the project likelihood for success. If the application is resubmitted, the applicant is encouraged to address these concerns.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

NA

Review Team Recommended Amount

$0

Review Team Conditions

NA

Staff Recommendation

Staff Follow-Up to Review Team
NA

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

NA

Open Solicitation-2022 Fall Offering
Central Oregon (Region 4)

Application Number: 223-4006-22564
Project Type: Restoration
Project Name: Ochoco Preserve Restoration - Phase 2
Applicant: Deschutes Land Trust
Region: Central Oregon
County: Crook
OWEB Request: $689,365
Total Cost: $3,364,365

Application Description Ochoco Preserve (Preserve) Restoration – Phase 2 near Prineville, Oregon is the second step in a multi-year, multi-phased restoration effort that supports the reintroduction of spring Chinook salmon and summer steelhead and helps to achieve the restoration of self-sustaining upland, wetland, floodplain, and stream ecological processes. Over the past 150 years, landscape changes have occurred on the Preserve in order to facilitate agricultural practices. Common land manipulations such as stream relocation, straightening, armoring, and diking have transpired. Further, most oxbows and wetlands were filled and leveled. The ecological value of the Preserve has been drastically reduced. This project is designed in order to allow Ochoco Creek and the Crooked River to access floodplains to the maximum extent possible with consideration for risk and constructibility. This will allow for a more sustainable project over time, where dynamic stream processes occur, the floodplain is frequently accessed, and variable habitats form that are able to support all life stages of anadromous and resident fish.

Significant land manipulation must occur in order to reset the current channelized conditions on both systems . Therefore, heavy equipment will be used to construct stream channels, off-channel habitats, wetlands, floodplains, and uplands across about 86 acres of the Preserve. The length of Ochoco Creek and the Crooked River will nearly double. Much of the increased length will include complex habitats suitable for Chinook and steelhead rearing. For example, the newly created Ochoco Creek will contain 3,390 feet of side channels, 34 pools, and 35 riffles.

Our primary partners include the Confederated Tribes of Warm Springs, Oregon Department of Fish and Wildlife, Portland General Electric, City of Prineville, Crook County, U.S. Forest Service, Crooked River Watershed Council, and the U.S. Fish and Wildlife Service.

Review Team Evaluation

Strengths

- The application provides detailed objectives tied directly to ecological outcomes.

- The project is a second phase of a multi-year, multi-phased effort that will support the reintroduction of spring Chinook salmon and summer steelhead in Ochoco Creek by restoring self-sustaining upland, wetland, floodplain, and stream ecological processes. Previously completed restoration will provide insight and lessons learned moving forward that can be used to inform phase two restoration actions.
- The project is addressing key limiting factors affecting native fish, including the lack of juvenile rearing and adult spawning habitat. Restoration actions planned are specifically geared towards supporting the reintroduction of salmon and steelhead, which will have access to the newly created habitat resulting from the proposed investment.
- The applicant owns the land and will protect it in perpetuity for the purpose of conservation of fish and wildlife habitat.
- The project is ready for implementation with construction level designs, secured permits, and a contractor selected to do the work that is familiar with the site and its constraints after constructing the phase one project.
- The landowner has staff dedicated towards project implementation in addition to a dedicated pool of volunteers that can help with planting and stewardship.
- The planting plan was developed by a local botanist that has worked on similar type projects with the applicant on other conservation properties in Central Oregon.

Concerns

- With phase one of the project just completed, the applicant and partners have not yet assessed whether this phase is effectively achieving the desired ecological outputs. There may be a missed opportunity to learn more from how the restored habitat is performing as a result of the previously completed phase.
- Alternative restoration strategies that were considered are not described in the application. Additional information is needed to better understand how and why the selected high cost, highly engineered approach was selected over potential lower cost, low tech approaches to achieve the expected ecological outcomes.

Concluding Analysis

The project will continue the applicant’s strategy to restore floodplain connectivity and aquatic habitat along McKay and Ochoco Creeks as well as along the mainstem Crooked River. The approach, technique, and anticipated outcomes associated with this project is deemed necessary and essential by project partners for the reintroduction of salmon and steelhead past the Pelton dam complex to be successful.

Review Team Recommendation to Staff

Fund

Review Team Priority

1 of 6

Review Team Recommended Amount

$689,365

Review Team Conditions

NA

Staff Recommendation

Staff Follow-Up to Review Team

NA

Staff Recommendation

Fund

Staff Recommended Amount

$689,365

Staff Conditions

NA

Open Solicitation-2022 Fall Offering
Central Oregon (Region 4)

Application Number: 223-4007-22581
Project Type: Restoration
Project Name: Annie Creek Non-Native Fish Barrier and Screening
Applicant: Trout Unlimited Inc
Region: Central Oregon
County: Klamath
OWEB Request: $245,718
Total Cost: $552,396

Application Description 1) The proposed project will occur on Annie Creek, a tributary of the Wood River in Klamath County, Oregon. 2) The project will assist in preparing the Annie Creek watershed for reintroduction of Bull Trout (Salvelinus confluentus). 3) Bull Trout historically occupied the Annie Creek watershed, but have been extirpated since the 1980s, at the latest. The Klamath Recovery Unit Implementation Plan for Bull Trout calls for the establishment of additional local populations in historically occupied streams or those that have suitable cold-water habitats. Therefore, Annie Creek has been identified by management agencies in the Upper Klamath Basin as a priority location for reintroduction of Bull Trout. One of the first steps in preparing a watershed for Bull Trout reintroduction is the construction of a non-native fish barrier. The purpose of such a barrier is to prevent non-native fish from accessing a specific river reach upstream of the barrier. This creates a refuge for Bull Trout, in which hybridization and competition risks from non-native fish are eliminated. A similar strategy has been implemented in nearby Sun Creek, which has resulted in an increase in Bull Trout abundance. Project partners have identified an appropriate site on Annie Creek to construct this barrier. This application requests funding to construct and install a barrier. Importantly, the barrier will include a fish trap which will allow management agencies to selectively pass native fish upstream of the barrier. Additionally, funding will be used to install a fish screen at the project site to eliminate entrainment risks to native fish in the irrigation infrastructure. 4) Project partners include Crater Lake National Park, U.S. Fish and Wildlife Service, Oregon Department of Forestry, Oregon Department of Fish and Wildlife, and private water users.

Review Team Evaluation

Strengths

- The project focuses on setting the stage for Bull trout reintroduction to Annie Creek, where historically the species was present but is no longer. Annie Creek is the highest priority for Bull trout reintroduction given its habitat abundance and cool water.
- The project is targeting the biggest threat to Bull trout recovery by working methodically to reduce and ultimately remove Brook trout that compete and hybridize with Bull trout. The technique that will be employed to remove and keep Brook trout out of the stream has been successfully used along the adjacent Sun Creek.
- The applicant and its long list of dedicated partners have an effective working relationship and have the appropriate experience to design and monitor the effectiveness of the project.

- The Klamath Recovery Unit for the threatened Bull trout was severely impacted by recent wildfires, including the 2021 Bootleg fire. Recent surveys suggest six of the eight Bull trout streams no longer have Bull trout present. There is urgency for investing in this project to support recovery of Bull trout populations.
- Annie Creek has potential for seeing anadromous steelhead fish return once the mainstem Klamath River dams are removed. Designs for the dam that will be installed to prevent Brook trout from affecting Bull trout populations will include a fish ladder should steelhead begin to arrive at the project location and require passage.
- Project costs seem reasonable and were estimated based on the nearby Sun Creek project as a proxy for developing project costs and monitoring needed to evaluate project effectiveness.

Concerns

- There are no concerns with this project.

Concluding Analysis

The project resulted from previous efforts on Annie Creek to restore volitional fish passage. The opportunity for Bull trout reintroduction is the highest priority due to the limited opportunities for recovery of this native fish population. For the reintroduction to be successful, the proposed dam must be built to remove and keep out Brook trout who are predatory and detrimental to Bull trout. The project presents a methodical approach and timeline to reintroduce Bull trout to one of its historical stream habitats in the Upper Klamath Basin.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 6

Review Team Recommended Amount
$245,718

Review Team Conditions

NA

Staff Recommendation

Staff Follow-Up to Review Team
NA

Staff Recommendation
Fund

Staff Recommended Amount
$245,718

Staff Conditions

NA

Open Solicitation-2022 Fall Offering
Central Oregon (Region 4)

Application Number: 223-4008-22610
Project Type: Restoration
Project Name: Silva Ranch In-Stream Restoration Phase 1
Applicant: Crooked River WC
Region: Central Oregon
County: Crook
OWEB Request: $203,609
Total Cost: $328,589

Application Description 1)The proposed work takes place on the Silva Ranch, located within the LCRSR area, approximately 4.5 miles northwest of Prineville. The Project reach extends from approximately River Mile (RM) 43 to RM 44.3.

2) The Crooked River Watershed Council and Natural Resources Conservation Service, through a Regional Conservation Partnership Program (RCPP), are working with private landowners between the City of Prineville and Smith Rocks State Park to implement the Lower Crooked River Strategic Restoration (LCRSR). The LCRSR is a comprehensive project intended to address key watershed deficiencies as recognized by the Mid-C Steelhead Recovery Plan (ODFW 2010), NRCS Hydrology Study (NRCS 2010), Lower Crooked River Watershed Assessment (CRWC 2008), and Deschutes Sub basin Plan (DBWG 2008) which all include an element of degraded fish and wildlife habitat, water quality, and riparian plant communities within the 17-mile reach of the Mainstem Crooked River in Central Oregon.

3) A multi-phased approach is being used to implement smaller sections of the sprawling property, which will be fully designed and permitted through NRCS RCPP Funds. The Silva Ranch Improvements Phase 1 will include 1,200' linear feet of restoration treatments, Large Wood Structures, Bank Sloping/Planting, Existing Side Channel Connection at Base Flow, Habitat Promoting Features inside Channel. The proposed project will aid in Steelhead and Chinook Salmon reintroduction efforts in the Greater Deschutes Basin, specifically for water quality, Juvenile out-migrating habitat, and potential for adult holdover structure and water quality.

4) Specific project partners include Portland General Electric, Crooked River Ditch Company, Crooked River Weed Management Area, Confederated Tribes of the Warm Springs, City of Prineville, Oregon Watershed Enhancement Board, Oregon Department of Fish and Wildlife.

Review Team Evaluation

Strengths

- Sloping back streambanks, using large wood structure, and restoring riparian vegetation to stabilize

the bank can be a sound approach for arresting erosion.

- The project engineer has relevant experience designing bank stabilization solutions.
- The proposed restoration actions will tie directly into work just completed by the neighboring Deschutes Land Trust, building connectivity among restoration investments.
- The activation of the side channel at ordinary high water will provide much needed rearing habitat for juvenile fish.
- The large wood and rootwads will likely provide some cover and refugia habitat for fish.
- Bank sloping will provide a better soil medium for establishing riparian vegetation, as opposed to direct planting into an incised streambank.
- The project is part of a larger focus by the applicant and partners through the NRCS Regional Conservation Partnership Program. The match funding provided by NRCS is secured and will support final design development and permitting.

Concerns

- Only one side of the Crooked River will be treated. There may be a potential missed opportunity by not engaging the neighboring landowner to also participate in the project. This could maximize the potential watershed benefit and mitigate any potential lateral stream migration onto the neighboring property that could result from the proposed restoration.
- The application indicates the proposed project is phase one of a larger conservation effort on the property. It is unclear what future phases will entail and exactly how this project will complement future efforts.
- The application lacks a grazing management plan. Without such a plan that includes utilizing riparian fencing to prevent livestock from having access to the stream, it is unclear how restoration investments will be protected.
- The stream temperature benefits from the project may be overstated in the application, given the small footprint of proposed riparian revegetation.
- The application indicates the landowner plans to enroll into CREP; however, no timeline is provided for when this will occur.
- The application lacks details needed to evaluate whether revegetation plans are likely to succeed. It is unclear how the proposed seeding will be implemented, more detail on the seeding mechanism and rate per specie would be helpful. The list of woody species seems appropriate; however, the application lacks visuals or other information describing how and where plants will be installed along the reshaped streambank. It is also unclear who will install plants and seed.
- Plant stewardship is not included in the planting plan. There is a significant amount of invasive vegetation currently present on the project site that will likely outcompete new seed and plantings, especially after the soil disturbance that will occur associated with the proposed bank stabilization installation. Plant stewardship actions, including watering and invasive species treatment, will likely be needed for plants to reach a free to grow status.
- It is unclear whether the budget has enough funding to procure and install plant material because the plant budget is provided as a lump sum.

Concluding Analysis

The project is phase one of a larger conservation effort on agricultural land along the Lower Crooked River downstream of Prineville. The project benefits from having an associated RCCP that will bring much needed technical expertise and design resources. The application lacks details describing critical

elements needed to evaluate whether the project is likely to succeed in achieving expected ecological outcomes. If the application is resubmitted, the applicant is encouraged to finish the design process and provide completed design plans for the bank stabilization, revegetation, and plant stewardship.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
NA

Review Team Recommended Amount
$0

Review Team Conditions

NA

Staff Recommendation

Staff Follow-Up to Review Team
NA

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

NA

Open Solicitation-2022 Fall Offering
Central Oregon (Region 4)

Application Number: 223-4009-22615

Project Type: Restoration

Project Name: Tony Creek Fish Passage Restoration Project

Applicant: Hood River WS Group

Region: Central Oregon

County: Hood River

OWEB Request: $245,356

Total Cost: $478,756

Application Description This project will create fish passage at a hydro diversion on Tony Creek, a tributary to the Middle Fork Hood River. Tony Creek is an important clearwater tributary to the glacial Middle Fork Hood River, with documented populations of spring Chinook, winter steelhead, coho, bull trout, and resident cutthroat trout. All of these species except cutthroat trout are listed as threatened under the Endangered Species Act. The bull trout population in the Middle Fork Hood River Subbasin is the only known population in the Mt. Hood National Forest and the Hood River Watershed. Fish passage is a primary limiting factor to the recovery of these listed species in the watershed.

Without passage barriers, Tony Creek would provide more than five miles of fish habitat, but fish access is currently limited by a zero to 2.5 cfs low head diversion dam located at RM 0.5. Fish may be delayed or blocked from migrating to upstream habitat because of a variable 0 - 18-inch-high step barrier.

This project will provide up and downstream fish passage for fish at all life stages at all flows to approximately 5 miles of upstream habitat on Tony Creek by constructing a combination of engineered riffles and cascade pools downstream of the existing diversion. The constructed riffle would provide passage over the dam without impacting the diversion or associated infrastructure. OWEB funds will be used for contracted services, project management, project monitoring, travel, plant establishment, and fiscal administration.

Project partners include the Hood River Watershed Group, the Confederated Tribes of the Warm Springs, Bonneville Power Administration, Green Diamond Management Company, and the hydro water right holder.

Review Team Evaluation

Strengths

- The project is identified as the second highest priority for restoring fish passage in the Hood River Basin, which is a key limiting factor affecting known anadromous fish use in the area.

- Landowner support and engagement in the project is demonstrated by a letter of support. The applicant currently has an agreement with the landowner to facilitate the fish passage designs.
- Tony Creek supports one of the last populations of Bull trout in the Hood River Basin, this project would make available additional high-quality habitat for the species.
- The applicant and partners have relevant experience implementing similar type fish passage projects.
- The chosen engineering firm tasked with developing project designs has relevant experience implementing similar projects.

Concerns

- The application includes a design concept suggesting cascade pools will be installed as the preferred fish passage solution. No additional designs, technical detail, or description of alternatives that were considered are provided in that application that could be used to evaluate if cascade pools are the best option to achieve the desired ecological outcomes.
- The landowner has made clear the diversion weir cannot be manipulated as part of the fish passage solution. This requirement adds complication and constraints to the design process. As a result, project ready design plans need to be included with the application to effectively evaluate whether the project is likely to succeed in achieving a cost-effective habitat benefit.
- With limited information describing the chosen design, it is challenging to discern whether the budget is accurate and aligns with implementing the proposed actions.

Concluding Analysis

The fish passage barrier has been known for a long time, and up until recently the landowner expressed no interest in collaborating on allowing fish passage at the irrigation diversion weir. That has changed and ODFW awarded the applicant funds to develop project designs, which are currently in process. Unfortunately, at time of application, the designs were only at a concept level. If the application is resubmitted, the applicant is encouraged to provide completed designs that address the concerns above.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

NA

Review Team Recommended Amount

$0

Review Team Conditions

NA

Staff Recommendation

Staff Follow-Up to Review Team

NA

Staff Recommendation

Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

NA

Open Solicitation-2022 Fall Offering
Central Oregon (Region 4)

Application Number: 223-4010-22506

Project Type: Technical Assistance

Project Name: Restoring Ecological Connectivity via Wildlife Overcrossings in Southwest Oregon

Applicant: Oregon Wildlife Heritage Foundation

Region: Central Oregon

County: Jackson

OWEB Request: $74,813

Total Cost: $1,132,711

Application Description The Cascade-Siskiyou National Monument in Southwest Oregon is the only monument set aside specifically for its biodiversity. The Monument contains over 300 species of birds, mammals, reptiles, and amphibians. Interstate-5 is a major impediment to wildlife movement and fragments the east-west ecological connectivity needed to support the region's high biodiversity. As a result, rare species such as Pacific fisher and ringtail, and more abundant species like black bear, elk, and black-tailed deer are hindered in accessing important habitats as ecological conditions change by season or due to drought or wildfire disturbance. To restore ecological connectivity and reduce wildlife-vehicle collisions, the Oregon Wildlife Foundation (OWF) is requesting funds to assist the Oregon Department of Transportation (ODOT) in the design and engineering of two wildlife overcrossings; one north of the Siskiyou Summit near milepoint 8.7 identified as Barron Creek, and another south of the Summit near milepoint 1.6 and designated as Mariposa Preserve. A recently completed analysis of wildlife crossing needs between the City of Ashland and the California border found the Barron Creek and Mariposa Preserve sites to be the highest priority locations for wildlife crossing structures within the 14-mile project area. As resources allow, eight crossing projects are proposed within the project area. ODOT has secured $1.0MM in state funding and has applied for $0.5MM in federal funding to complete design and engineering for the first two overcrossings. Requested OWEB funding will augment State funds and make this project more competitive for Federal funding awards. BLM and Southern Oregon University (SOU) continue to monitor wildlife use at all sites. OWF is serving as the fiscal agent for the Southern Oregon Wildlife Crossing Coalition, which includes ODOT, Oregon Department of Fish and Wildlife, BLM, US Fish and Wildlife Service, SOU, and more than a dozen nonprofit organizations.

Review Team Evaluation

Strengths

- The project builds off work by the applicant and its partners to evaluate multiple locations for safe wildlife passage along the I-5 corridor. This resulted in identifying the two highest priority locations needing wildlife passage restoration that are the focus of the proposed technical assistance.
- The application demonstrates a clear need for providing passage by articulating the habitat availability and quality on either side of the highway and identifying the variety of species that will benefit.

- The future habitat connectivity will protect and preserve biodiversity and allow for greater genetic diversity amongst wildlife species.
- The applicant is involving appropriate partners, including local college students, and is utilizing social media platforms to engage the local community.
- The project could serve as a demonstration site for showing how safe wildlife passage can be successfully restored throughout Oregon.
- The proposed solution using over-crossings will not require extensive permitting or highway traffic control. This increases the viability for future restoration implementation.
- The project will potentially leverage federal funds that will be pursued for implementation.
- The maps provided in the application are helpful in discerning wildlife movement and behavior and further demonstrate the need for safe passage at the prioritized locations.

Concerns

- There have been uncertain results from recently completed highway fencing intended to protect wildlife species. Moving forward, the partnership is encouraged to continue engaging with ODFW to learn and adapt fencing strategies as necessary based on animal use and behavior.

Concluding Analysis

Designs will be developed for two overcrossings to allow for safe wildlife passage over Interstate 5 south of Ashland. There are no highway overcrossings in Oregon for safe wildlife passage, these two will be the first in the state. The approach provides an opportunity to test a more feasible, cost-effective design that could be utilized at other locations across the state.

Review Team Recommendation to Staff

Fund

Review Team Priority

1 of 2

Review Team Recommended Amount

$74,813

Review Team Conditions

NA

Staff Recommendation

Staff Follow-Up to Review Team

NA

Staff Recommendation

Fund

Staff Recommended Amount

$74,813

Staff Conditions

NA

Open Solicitation-2022 Fall Offering
Central Oregon (Region 4)

Application Number: 223-4011-22524
Project Type: Technical Assistance
Project Name: Armstrong OWEB 2022
Applicant: OSU Office of Sponsored Research & Award Admin
Region: Central Oregon
County: Klamath
OWEB Request: $73,282
Total Cost: $91,607

Application Description The Upper Klamath Basin is slated for one of the largest restoration acts in US history, the removal of four mainstem dams that have blocked anadromous salmonids for over a century. Huge investments in habitat restoration will accompany this dam removal, targeting the > 400 miles of newly accessible stream that could rear juvenile salmon and steelhead. In stark contrast to the magnitude of this conservation effort, there is virtually no empirical fish data available to guide conservation planning. Such data are especially valuable because the Upper Klamath Basin is hydrologically unique and defies common assumptions about fish-habitat relationships (Hahlbeck et al. 2022), so existing information from other basins may not be informative. Since 2018, our research team (including OSU, ODFW, The Klamath Tribes, and others) has conducted intensive field studies to close this knowledge gap, using juvenile and adult Klamath redband trout as proxies for salmon and steelhead. We have collected data that elucidates (1) spawning sites across the entire Upper Klamath Basin, (2) juvenile rearing habitat in the mainstem Sprague River, (3) thermal refuges used by juveniles across the Sprague River Floodplain, and (4) riverscape patterns of hypoxia risk across the Sprague River Basin. These data are fundamentally important for recovering future runs of steelhead and salmon. We will process, analyze, georeference, and upload these datasets to the Klamath Watershed Action Plan's web application, the Interactive Reach Prioritization Tool. This will allow any practitioner in the basin to use this information for planning, including our partners at Trout Unlimited and the Klamath Tribes, who work on restoration throughout the basin.

Hahlbeck, N., Tinniswood, W. R., Sloat, M. R., Ortega, J. D., Wyatt, M. A., Hereford, M. E., ... & Armstrong, J. B. (2022). Contribution of warm habitat to cold-water fisheries. Conservation Biology, 36(3), e13857.

Review Team Evaluation

Strengths

- The applicant has extensive knowledge of Redband trout habitat use in the Upper Klamath Basin.

- There is a high likelihood that fish use data collected for Redband trout will serve as an effective proxy for understanding potential anadromous salmonid use in the Upper Klamath Basin once the Klamath River dams are removed and volitional fish passage to the Upper basin is restored.
- The fish use data that will be shared through an online mapping tool is important for local conservation partners to consider as they plan future restoration projects.
- The online mapping tool developed for the Upper Klamath Basin Watershed Action Plan is an appropriate location to house the data.

Concerns

- It is unclear whether the project incorporates considerations for how large wildfires that burned in the Upper Klamath Basin since 2021 have changed the watershed.
- The applicant has one year of juvenile data and four years of spawning data. It is unclear whether this amount of data will require a year's worth of work as reflected in the budget to process and upload these datasets to the online mapping.
- It is unclear if spawning data collected by ODFW will be uploaded along with the data collected by the applicant and how those data sets will complement one another.
- It is unclear from the application whether the dataset for dissolved oxygen is spatially complete to characterize dissolved oxygen levels throughout the Sprague River Basin.
- It is unclear how the data will assist in identifying priority areas for restoration. The data could be useful in providing additional watershed context, but the path from the data leading to future on-the-ground restoration is not clear.
- There is only one letter of support included in the application. Additional letters documenting that conservation partners plan to use the data would demonstrate the benefit from this data being made available in the online mapping tool.
- The data quality assurance and quality control plans are unclear from the application, and it is unclear whether the budget includes these costs.

Concluding Analysis

The applicant has collected important fish use data for Redband trout in the Upper Klamath Basin. This data, along with data from other partners in the basin, will help tell the story of fish use and could potentially indicate areas anadromous fish may seek once the Klamath River dams are removed. The pathway connecting the proposed technical assistance to restoration is unclear without more evidence demonstrating intent from conservation partners to use the information.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

NA

Review Team Recommended Amount

$0

Review Team Conditions

NA

Staff Recommendation

Staff Follow-Up to Review Team

NA

Staff Recommendation

Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

NA

Open Solicitation-2022 Fall Offering
Central Oregon (Region 4)

Application Number: 223-4012-22587

Project Type: Technical Assistance

Project Name: Crooked River Watershed Sage-Grouse Conservation IV

Applicant: Crook SWCD

Region: Central Oregon

County: Crook

OWEB Request: $74,987

Total Cost: $250,151

Application Description The project is located on private rangelands within the Crook and Deschutes Counties CCAA, where ranching operations are occurring on greater sage-grouse (hereafter sage-grouse) habitat.

This work is important because we are engaging private landowners in a coordinated conservation program that prioritizes the most critical sage-grouse habitat for restoration. In Crook and Deschutes Counties we are at the edge of the range of sage-grouse and therefore our work is insulating the larger statewide population so that it can grow and protect core areas.

These OWEB funds will pay our CCAA specialists to continue developing Site Specific Plans, which are designed to improve and protect sage steppe habitat throughout the range of sage-grouse in Crook and Deschutes counties. Our ecological inventory is used as the foundation of the tailored management plans and provides a guiding document for ranch managers over the next 30 years. This funding will also be used to manage existing plans, which require continuous grant writing and landowner interaction to implement. This phase of planning will inventory upland and riparian habitat covering approximately 86,293 acres. In the next 3 years we will also maintain completed plans by repeating the ecological monitoring on two ranches (21,560 acres), provide annual reports to USFWS, write 3 grants to implement the restoration actions that are called for in the plans and maintain our database. As a part of this CCAA project, we will also spend time implementing restoration actions that were planned in the approved SSPs using funds we have secured elsewhere.

The core partners are the landowners, Crook County SWCD and USFWS. SageCon Partnership, NRCS, Crooked River Weed Management and ODFW are involved as technical partners.

Review Team Evaluation

Strengths

- The project is a continuation of the applicant's work with private landowners signed up with the USFWS Candidate Conservation Agreements with Assurances (CCAA) program to develop Site Specific Plans (SSP) and improve sage-steppe habitat for sage-grouse and other desert-adapted

species.

- The applicant has a track record and relevant expertise with developing the SSPs that will identify and prioritize restoration projects to address threats to sage grouse habitat.
- The average ranch size in Crook County is large with ranches covering 20,000 or more acres. This provides an opportunity to develop landscape scale treatment plans that could result in a wide range of habitat enhancements for a variety of species dependent on intact sage steppe habitat.
- The applicant serves as the database manager for all five counties involved in sage grouse conservation, this facilitates a consistent data collection and analysis.

Concerns

- The application includes objectives associated with on-the-ground restoration that are not appropriate for technical assistance applications.
- Little detail is provided in the application describing the type of data that will be collected and analyzed and scale of acres where data collection will occur. Including a previously completed SSP as a sample and a detailed description of the data sets used would provide helpful context for evaluating the technical soundness of the planning product.
- Information describing how previously completed SSPs are used towards implementation of on-the-ground actions would be helpful to understand what conservation measures are being achieved.

Concluding Analysis

The project will continue SSP development on two new ranches and include ecological monitoring on sites where previous SSP's were developed. For future applications working on SSPs and properties with CCAAs, the applicant is encouraged to include additional information to articulate site conditions, such as maps and ground photos, along with a list of data that will be collected to develop SSPs and description of potential habitat enhancement opportunities, to the extent possible. Landowners enrolled in the CCAA program, a 30-year agreement between landowners and SWCD, demonstrate commitment to sage steppe conservation.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 2

Review Team Recommended Amount
$74,987

Review Team Conditions

Remove objectives #3 and #6 from the application that are associated with on-the-ground restoration activities.

Staff Recommendation

Staff Follow-Up to Review Team

OWEB staff will have the applicant remove objectives #3 and #6 from the application.

Staff Recommendation

Fund

Staff Recommended Amount

$74,987

Staff Conditions

These objectives are related to on-the-ground restoration activities that are not appropriate for Technical Assistance grants.

Open Solicitation-2022 Fall Offering
Central Oregon (Region 4)

Application Number: 223-4013-22618

Project Type: Technical Assistance

Project Name: Hood River Basin Partnership Restoration Effectiveness Monitoring Plan

Applicant: Hood River WS Group

Region: Central Oregon

County: Hood River

OWEB Request: $42,257

Total Cost: $53,261

Application Description This project will develop a restoration and conservation effectiveness monitoring plan for the Hood River Watershed. The plan will guide watershed partners in evaluating the effectiveness of Hood River Basin Partnership Strategic Action Plan projects in meeting short and intermediate-term ecological objectives. The monitoring plan will include objectives for effectiveness monitoring for each project type, a description of survey protocols that are robust, repeatable, and focus upon ecologically relevant outcomes, and programming electronic survey applications that can be used to collect data in the field. Project partners are the Hood River Watershed Group, Confederated Tribes of the Warm Springs, US Forest Service Hood River Ranger District, the Hood River Soil and Water Conservation District, East Fork Irrigation District, Middle Fork Irrigation District, and Farmers Irrigation District.

Review Team Evaluation

Strengths

- The application clearly articulates a need for developing a comprehensive effectiveness monitoring plan that is basin wide and encapsulates the variety of conservation work being implemented.
- The applicant and partners have a long history of implementing restoration and collecting monitoring data.
- The contractor assisting with the development of the plan appears to have relevant experience with similar type plans.
- The data management and quality assurance and quality control methods are well described in the application, indicating data will be appropriately managed.

Concerns

- It is unclear what types of data will likely be collected and how the applicant expects the data to provide information about the effectiveness of restoration and conservation efforts across various habitats. This additional detail would clarify whether the approach described is likely to succeed in evaluating whether restoration and conservation actions are leading to the intended ecological outcomes.
- Additional details regarding possible metrics that will be considered to evaluate success and how these will be used across different habitat types to inform future on-the-ground restoration would be helpful for understanding the project.
- The application lacks letters of support from partners indicating a need for this project.

- Without details describing different types and amounts of datasets that will be incorporated, it is unclear whether the contractor costs are reflective of the effort needed.
- Including in the application a previous example of a monitoring plan developed by the consultant would serve as a helpful reference to understand what a plan would entail.

Concluding Analysis

An effectiveness monitoring plan will be developed for collecting data to evaluate whether restoration and conservation actions are meeting expected ecological benchmarks in the Hood River Basin. Such a plan could be very useful in calibrating partners' understanding of how well restoration projects are performing while providing tools that could inform the partners on how to adjust restoration strategies. The application lacks details needed to understand if the types of data under consideration is likely to provide the information that will indicate whether restoration strategies across diverse habitats are effectively meeting expected outcomes. If resubmitted, the applicant is encouraged to address concerns above.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
NA

Review Team Recommended Amount
$0

Review Team Conditions

NA

Staff Recommendation

Staff Follow-Up to Review Team
NA

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

NA

Open Solicitation-2022 Fall Offering
Central Oregon (Region 4)

Application Number: 223-4014-22560

Project Type: Stakeholder Engagement

Project Name: Trout Creek Stakeholder Engagement Project

Applicant: Deschutes River Conservancy

Region: Central Oregon

County: Jefferson

OWEB Request: $81,318

Total Cost: $108,318

Application Description The Trout Creek Stakeholder Engagement Project is located in the Trout Creek drainage - part of the Lower Deschutes River Watershed. The Trout Creek Watershed encompasses 692 square miles. Elevations range from 1,280 feet at the confluence with the Deschutes River to almost 6,000 feet in the Ochoco Mountains. Most of the watershed (88%) is privately owned. This drainage is critical for restoring and preserving, as the Trout Creek Watershed plays a critical role in maintaining fish populations in the Deschutes River Basin. Biologists estimate Trout Creek provides up to 25% of the entire Deschutes River's steelhead production. Historically, large numbers of wild summer steelhead trout used the Trout Creek Watershed. The system still supports a significant population of steelhead trout (particularly east-side warm water adapted trout) with most of the production and rearing in the upper areas of the watershed.

The need for this project is evident in the number of groups involved in/with landowners within the Trout Creek drainage, and the ambitious goals of all for restoration, preservation, and habitat improvements. By encouraging cooperation and stakeholder engagement, efforts can be coordinated and amplified to reach as many of the ambitious goals as possible. These groups include: Deschutes River Conservancy, Deschutes Land Trust, Jefferson County Soil and Water Conservation District, BPA, Portland General Electric, US Forest Service, ODF&W, and OWRD, as well as the property owners and irrigators. A Stakeholder Engagement grant will allow for specific actions to be taken by the groups, working together to accomplish the shared goals.

Review Team Evaluation

Strengths

- The applicant is engaging appropriate partners to assist in the proposed landowner engagement effort. Each partner identified works within a unique niche and collectively represent a wide range of expertise to engage landowners in on-the-ground conservation and acquisition of land and water.

- The applicant is currently working on a water conservation project with one landowner in the target geography. This will provide lessons learned and hopefully build a foundation for future landowner engagement in the Trout Creek basin.
- The Trout Creek basin is 88% privately owned with a large percentage of landownership in large land holdings. These large land holdings present opportunities for landscape-scale restoration and acquisition projects.
- The Trout Creek basin is a stronghold for mid-Columbia steelhead, this project could lead to beneficial restoration and land and water acquisition in and along critical habitats for Steelhead.

Concerns

- It is unclear from the application what social barriers to future restoration and land and water acquisition will be addressed by the proposed stakeholder engagement.
- Information describing potential opportunities for future streamflow restoration would be helpful for understanding the expected watershed benefits from the project. For example, opportunities identified to conserve water with senior water rights and the viability of resulting conserved water to protect instream flow as opposed to those rights being used by a downstream user.
- The project budget lacks details needed to evaluate costs. Information describing the roles and actions each partner will be responsible for would provide details needed to determine whether costs are reasonable to achieve the proposed work.

Concluding Analysis

Private landowners will be engaged to recruit potential land and water acquisition and on-the-ground restoration in the Trout Creek watershed. The applicant is encouraged to develop a specific strategy with each partner to outline their approach, technique, and anticipated deliverables that will result from the landowner engagement. The project provides an opportunity to build water and land acquisition projects that will benefit steelhead habitat in an area that has not had significant landowner interest.

Review Team Recommendation to Staff

Fund

Review Team Priority

1 of 1

Review Team Recommended Amount

$81,318

Review Team Conditions

NA

Staff Recommendation

Staff Follow-Up to Review Team

NA

Staff Recommendation
Fund

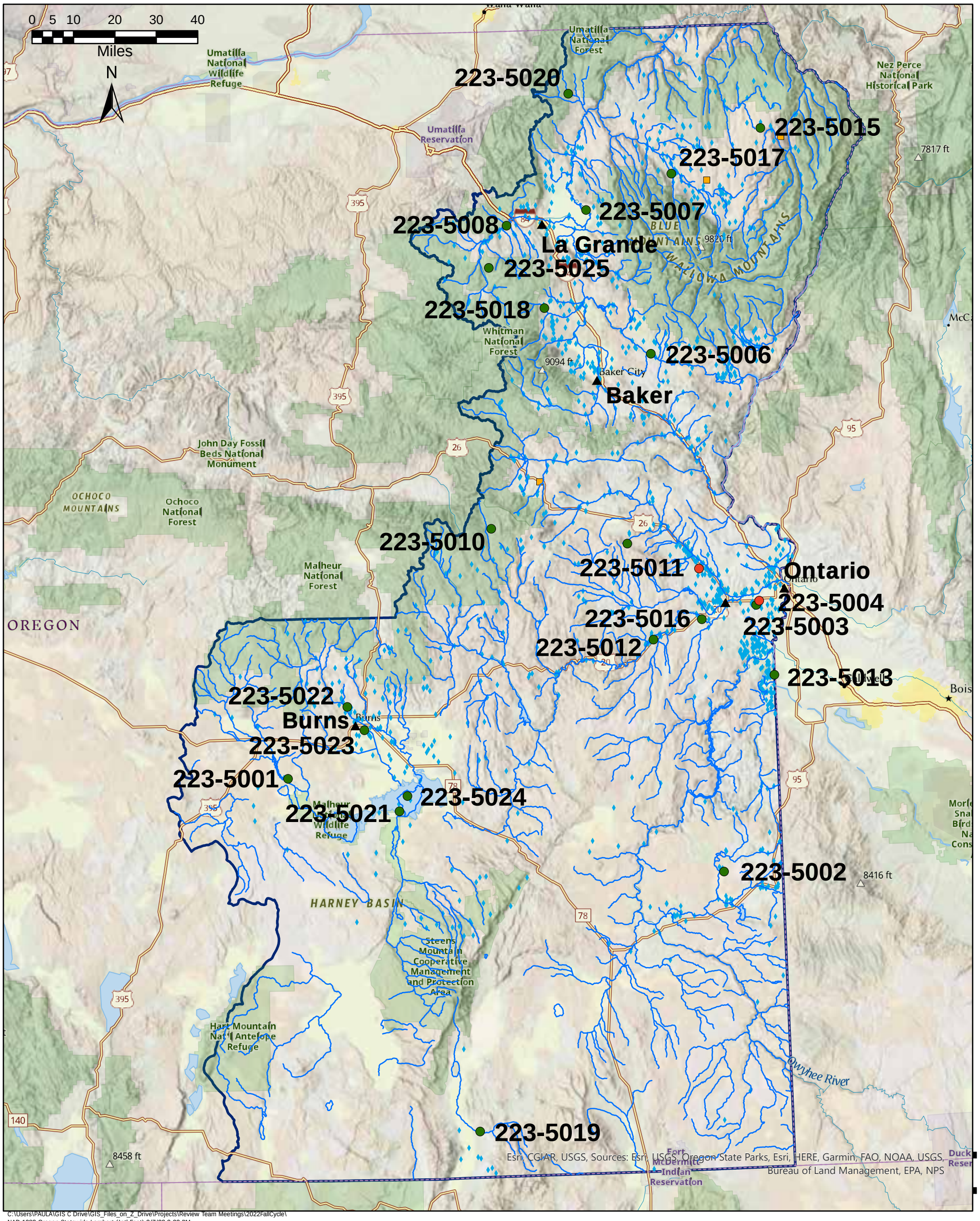
Staff Recommended Amount
$81,318

Staff Conditions

NA

Region 5: Eastern Oregon

Eastern Oregon - Region 5 Fall 2022 Funding Recommendations



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Funding Recommendation

- Staff Recommendation For Funding (SRF)
- Below Funding Line (BFL)

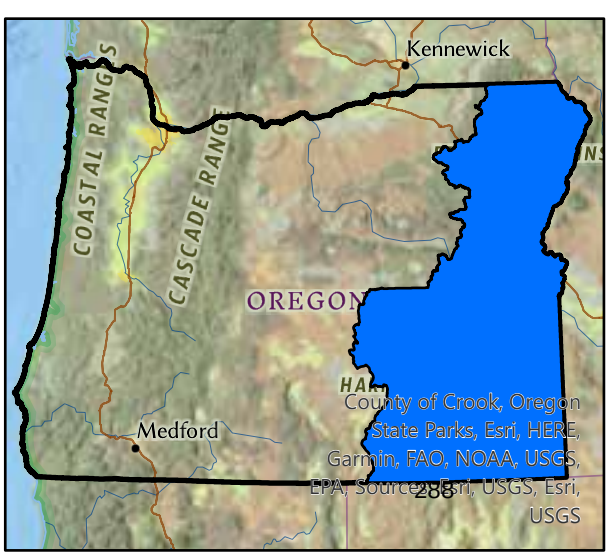
Previous Grants 1998 - Spring 2022

- Land Acquisition
- Restoration
- Region 5 Cities
- Region 5 Streams
- OWEB Region 5 Boundary

OREGON WATERSHED ENHANCEMENT BOARD

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Region 5 - Eastern Oregon Restoration

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-5017	Nez Perce Tribe	Lostine River Mile 5.7 Floodplain and Side Channel Enhancement Project	Instream, floodplain, and streamside vegetation on the Lostine River, near Lostine, will be restored to improve water quality and habitat conditions for native fish.	396,381	Wallowa
223-5007	Union SWCD	Elmer Dam Fish Passage and Flow Improvement Construction	An irrigation diversion, fish ladder, and irrigation infrastructure on Catherine Creek, near La Grande, will be replaced to improve water quality, fish passage, and habitat conditions for native fish.	521,001	Union
223-5006	Keating SWCD	Restoring The Powder Phase II	Native tree planting, streambank stabilization, and streamside fencing will be installed along the Powder River, near Keating, to improve water quality and stream habitat.	100,400	Baker
223-5000	Malheur WC	So Many Juniper, So Little Time	Juniper will be removed on a privately owned property, near Brogan. The project will build on prior sage-grouse conservation, improve water quality, and enhance wet meadow function.	61,322	Malheur
223-5008	Tri-County CWMA	Upper Grande Ronde Invasive Weed Control Phase VII	A variety of non-native weeds will be contained and controlled in the Upper Grande Ronde River Watershed, west of La Grande. Several local, state, and federal partners, as well as private landowners, will collaborate to build upon achievements realized since 2016.	37,102	Union
223-5010	Malheur WC	Fiercely Fighting for Fopian Crk and the NF Malheur with Off-stream Water II	Forest and rangeland health, wildlife habitat, and water quality will be improved in the Fopian Creek watershed, a tributary to the north fork of the Malheur River. Habitat for redband and bull trout will be improved by fencing livestock away from Fopian Creek and developing off-stream livestock watering systems.	96,038	Baker

223-5015	Wallowa Resources	Defend & Grow Core Grassland Vegetation in Wallowa County	Improvement for rangeland and native perennial vegetation on Wallowa County's Zumwalt Prairie will include stakeholder engagement and the development of ranch management plans with private landowners. Plans will include treating invasive annual grasses.	167,537	Wallowa
223-5016	Malheur WC	Improving Wildlife & Riparian Habitat Along the Malheur River	Instream, floodplain, and streamside vegetation on the Malheur River near Vale will be restored to improve water quality and habitat conditions for native fish and wildlife.	199,989	Malheur
223-5012	Malheur WC	Mockingbird 3	Located near Harper, flood-irrigated land will be converted to sprinkler irrigation. The conversion will reduce irrigation wastewater, sediment, nutrients, and bacteria contribution to the nearby Malheur River.	115,280	Malheur
223-5003	Malheur SWCD	KWV LITE FM	Located near Ontario in the Morgan Bench area, flood-irrigated land will be converted to sprinkler irrigation. The conversion will reduce irrigation wastewater, sediment, nutrients, and bacteria contribution to the nearby Malheur River.	53,145	Malheur
223-5002	Owyhee WC	Oliver Phase I - South	Located near Jordan Valley, flood-irrigated land will be converted to corrugate irrigation. The conversion will improve flood irrigation management, and reduce irrigation wastewater, sediment, nutrients, and bacteria contribution to the nearby Owyhee River.	139,159	Malheur
223-5013	Owyhee WC	Small But Mighty Water Quality Improvement	Located near Adrian in the Big Bend Area, nine flood-irrigated acres will be converted to sprinkler irrigation. The conversion will reduce irrigation wastewater, sediment, nutrients, and bacteria contribution to the nearby Snake River.	56,384	Malheur

223-5001	High Desert Partnership	Cote In-stream Irrigation Diversion Structure Replacement - Fish Passage and Wet Meadow Restoration	An irrigation diversion and fish ladder on Silver Creek near Burns will be replaced to improve water quality, fish passage, and wet meadow habitat for Pacific Flyway migratory birds.	393,100	Harney
Total Restoration Projects Recommended for Funding by RRT and OWEB Staff				2,336,838	

Projects Recommended but Not Funded in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-5011	Malheur WC	Pivoting on South Road G	Located near the town of Willow Creek in the Willow Creek focus area, flood-irrigated land will be converted to sprinkler irrigation. The conversion will reduce irrigation wastewater, reduce sediment, nutrients, and bacteria contribution to Willow Creek, a tributary to the Malheur River.	101,360	Malheur
223-5004	Malheur SWCD	Pounds of Efficiency	Located near Ontario in the Morgan Bench priority area, wheel-line-irrigation will be converted to pivot irrigation and a leaking pipeline will be replaced. The conversion may reduce irrigation wastewater, sediment, nutrients, and bacteria from contributing to the nearby Malheur River.	112,939	Malheur

Projects *Not Recommended* for Funding by RRT				
Project #	Grantee	Project Title	**Amount Requested**	County
223-5009	Harney SWCD	Upper Hanley Canal Restoration	24,749	Harney
223-5014	Wallowa Resources	Instream and Riparian Area Habitat Protection on Wallowa Whitman Range Allotments	162,862	Wallowa

Region 5 - Eastern Oregon Technical Assistance

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-5018	Powder Basin WC	Uplifting Anthony Creek for Sensitive Trout and Beaver: Alternatives Assessment and Design	Designs will be created to improve instream habitat, streamside vegetation, and water quality. Improvements will benefit bull trout, redband trout, and beaver in Anthony Creek near Baker City.	74,666	Baker
223-5022	Harney County Watershed Council	Five Mile Dam Replacement Design	Designs will be created to improve fish passage and flood irrigation practices at the Five Mile Irrigation Dam. Improvements will benefit redband trout and Pacific Flyway migratory birds on the Silvies River near Burns.	64,550	Harney
223-5020	Tri-State Steelheaders	Mottet Creek Valley Restoration	Designs that address fish passage at a road crossing will be created to increase bull trout and Snake River steelhead productivity in Mottet Creek in the Grande Ronde Basin.	49,738	Union
223-5023	High Desert Partnership	RELATIONSHIP OF FLOOD MEADOW VEGETATION TO HABITAT VALUE IN THE FACE OF CLIMATE CHANGE	Bird species diversity and use of wet meadows will be evaluated to determine the effects of varying water flow and irrigation. This work will inform improved management practices that will benefit habitat for migratory waterfowl in the face of climate change.	74,996	Harney
223-5019	Harney SWCD	Trout Creek Diversion	Designs will be created to improve fish passage and flood irrigation practices at the Trout Creek irrigation diversion near Fields. Improvements will benefit water quality and habitat for fish and Pacific Flyway migratory birds.	75,000	Harney

223-5021	High Desert Partnership	Watershed Synthesis Model	Stream flow, irrigation diversion rates, and water quality data will be combined with existing data to develop a model that improves water management decisions for aquatic habitat on the Malheur National Wildlife Refuge.	54,868	Harney
Total Technical Assistance Projects Recommended for Funding by RRT and OWEB Staff				393,818	

Projects Recommended but Not Funded in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
None					

Projects *Not Recommended* for Funding by RRT				
Project #	Grantee	Project Title	**Amount Requested**	County
None				

Region 5 - Eastern Oregon Stakeholder Engagement

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-5025	Wallowa Resources	Creating Healthy and Resilient Forest in NE Oregon Through Local Engagement	Forest land managers and the public will be engaged to develop tools and resources needed to create healthy forests in northeast Oregon that are resilient to fire, insects, disease, and climate change.	116,143	Union

223-5024	High Desert Partnership	Harney Basin Wetlands Collaborative Stakeholder Engagement	Agricultural landowners and public land managers will be engaged to develop restoration methods to control invasive plants and non-native carp in the Harney Basin. The project is necessary to restore migratory bird habitat in the Pacific Flyway.	139,808	Harney
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				255,951	

Projects Recommended but Not Funded in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
None					

Projects *Not Recommended* for Funding by RRT				
Project #	Grantee	Project Title	**Amount Requested**	County
None				

Region 5 Total OWEB Staff Recommended Board Award	**2,986,607**

Region 1 - 6 Grand Total OWEB Staff Recommended Board Award	**13,027,997**

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5000-22576
Project Type: Restoration
Project Name: So Many Juniper, So Little Time
Applicant: Malheur WC
Region: Eastern Oregon
County: Malheur
OWEB Request: $61,322
Total Cost: $77,203

Application Description

1) The project is 11 air miles to Brogan, OR, and 12 air miles to Ironside, OR.

2)Juniper is shading out native vegetation on 350 acres which includes around 4.7 acres of wet meadows and 1.7 miles of ephemeral draw riparian area. The project area is in core sage-grouse habitat. Juniper out-compete native bunchgrass, forbs and shrub necessary habitats for sage grouse life cycle. And juniper provide perches for avian species predating on young sage-grouse. Riparian areas and wet meadows are critical for late-season, brood-rearing. Reduction of native vegetation not only negatively affects sage-grouse habitat and but also local hydrology. Several recent studies have shown that dense stands of juniper negatively affect infiltration of water to the ground, which affects wet-meadow function.

3) We are proposing to:
Remove juniper from 350 acres.
-- 21.5 acres are "medium" density (early Stage II -- concentrated in wet meadow areas and an un-named ephemeral draw)
    -- Slash to be piled and burned at an appropriate time
-- 328.5 acres are 'light" density (Stage I)
    -- Slash to be lop and scattered and limbs cut to keep the slash below 4-feet
Chainsaws will be used to cut the trees.

Post-Project Maintenance
On a yearly basis, the treated area will be inspected to determine if action needs to be taken. Criteria include counts of juniper trees per-acre. Action will be needed if there are 10 or more trees per acre. These actions could
include mechanical treatment of small or large areas with loppers and/or chainsaws. This monitoring will occur for a minimum of 10 years.

This project complements nearby juniper removal and riparian restoration projects and continues to implement a CCAA site specific plan.

4) Partners include the Juniper Mountain Ranch and the Malheur WSC

Review Team Evaluation

Strengths

- The project objectives are clearly stated, and a post project maintenance plan is provided with the application.
- The site description, photos, and overview map provided in the application are clear and demonstrate site conditions sufficient to understand the conservation benefits of the project.
- The selected methods are appropriate to treat juniper expansion in the project area. The landowner is enrolled in a Candidate Conservation Agreement with Assurances (CCAA) that has a site-specific management plan that includes the proposed work.
- Treatment alternatives are considered in the application and careful thought is given to techniques proposed in the different habitat types to minimize impacts on sensitive areas.
- The proposed work is in core sage-grouse habitat, is adjacent to similar sage-grouse conservation work, implements actions prioritized in several sage-grouse recovery plans, and builds on a watershed scale effort to improve sage-steppe habitat conditions.
- The applicant has a successful track record of implementing and monitoring juniper removal projects.
- The landowner manages grazing on the property appropriately to minimize ecological impacts and is dedicated to proper land management.
- The budget is informed by a contractor estimate and is realistic based on location, access, and juniper density considerations.

Concerns

- In the budget the same cutting rate is identified for both light and medium density juniper removal. More information is needed to explain how costs were determined for each density type, providing more budget clarity and context.

Concluding Analysis

The Malheur Watershed Council proposes to treat 350-acres of stage 1 and stage 2 juniper encroachment in sage-grouse habitat near Brogan. Treatments are site-specific by location and take into consideration upland, mesic, and riparian habitats, and impacts to those areas from juniper removal activities. The applicant is experienced, the landowner maintains prior projects effectively, and a monitoring plan is included, indicating a high likelihood of long-term success.

Review Team Recommendation to Staff

Fund

Review Team Priority

4 of 15

Review Team Recommended Amount

$61,322

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$61,322

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5001-22582

Project Type: Restoration

Project Name: Cote In-stream Irrigation Diversion Structure Replacement - Fish Passage and Wet Meadow Restoration

Applicant: High Desert Partnership

Region: Eastern Oregon

County: Harney

OWEB Request: $393,100

Total Cost: $504,880

Application Description The Cote In-stream Irrigation Diversion Structure Replacement is located immediately downstream of Moon Reservoir on Silver Creek in the Harney Basin of Harney County, Oregon, a priority subbasin of the Southern Oregon - Northeast California (SONEC) waterfowl priority landscape (Map Figures 1-4). The existing structure is in need of replacement and no longer adequately distributes surface water across the historical floodplain of Silver Creek. Replacement of the structure will restore floodplain hydrology, enhance wet meadow habitat, increase hyporheic exchange and subsequent cooler, late season flows. The existing structure also serves as an ODFW identified priority fish passage barrier where Redband Trout were historically present (Figure 5). The requested funds will be paired with awarded funds through a North American Wetlands Conservation Act grant and Ducks Unlimited in-kind service to implement the nearly completed design for a new Cote structure that will be compliant with OWRD statutes, provide fish passage, and will restore floodplain hydrology and more than 3,000 acres of wet meadow habitat. Implementation of the proposed structure is scheduled for Fall 2023. Project partners include Ducks Unlimited, High Desert Partnership, respective water users and landowners, Natural Resources Conservation Service, Harney County Watershed Council, Oregon Water Resources Department, and Oregon Watershed Enhancement Board.

Review Team Evaluation

Strengths

- The application has clearly stated objectives, compelling photos, and designs that are nearly complete, which indicates a project ready for implementation.
- The existing diversion has reached the end of its useful lifespan and does not allow for efficient and controlled flood irrigation management. The replacement diversion structure will address the cause of poor flood irrigation management and contribute to the restoration of 3000 acres of wet meadow habitat.
- Alternatives are addressed in the application and the selected alternative is the only feasible method to improve flood irrigation in the area without negatively impacting neighboring irrigation systems. The preferred alternative, a roughened chute, is not feasible due to the potential flooding of an upstream pivot irrigation system.
- A new diversion dam will restore hydrologic connection to the adjacent floodplain, include an Oregon Department of Fish and Wildlife (ODFW) approved fish ladder, and improve habitat conditions for native fish and wildlife, specifically Pacific Flyway migratory birds and redband trout.

- The dam replacement and fish ladder are a priority for ODFW.
- The proposed work is prioritized in many regional planning documents that identify flood irrigated wet meadow habitat restoration, is similar to other diversion structure replacement projects both completed and planned in the basin, and is located in a prioritized area for migratory waterfowl habitat restoration.
- The project team has the experience and capacity to manage and implement the work as proposed.

Concerns

- A mobilization cost of $75,000 is very high for a single project and it is questioned how this cost was determined.
- A revegetation plan for the construction area is not included, which is uncommon for a project of this type, and is important for the project to achieve its habitat restoration goals.
- It is unclear how the project will address erosion and channel incision downstream of the dam and whether the cause of this condition is addressed by the project.

Concluding Analysis

The High Desert Partnership proposes to replace the Cote irrigation diversion dam near Burns with a diversion structure that will facilitate effective wet meadow irrigation and provide fish passage. Improved wet meadow irrigation will improve habitat for Pacific Flyway migratory birds and is a restoration priority for the Harney Basin. The proposed work has a high likelihood to improve this habitat.

Review Team Recommendation to Staff
Fund

Review Team Priority
13 of 15

Review Team Recommended Amount
$393,100

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount

$393,100

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5002-22599
Project Type: Restoration
Project Name: Oliver Phase I - South
Applicant: Owyhee WC
Region: Eastern Oregon
County: Malheur
OWEB Request: $139,159
Total Cost: $198,413

Application Description The Oliver Phase One South project is located 15 miles NW of Jordan Valley near Cow Lakes and along Lower Cow Creek Road. The project area consists of 104 acres of hay/pastureland flood irrigated with a series of earthen ditches. This project will address water quality, irrigation efficiency, invasive noxious weeds, and Sage Grouse habitat watershed concerns in the Jordan Subbasin. The proposed work includes installation of 4,048 feet of mainline pipeline, 4,292 feet of gated pipe, control structures, and corrugates across the 104 acre project area. Project partners include the landowner, Owyhee Watershed Council and Agrilines Irrigation.

Review Team Evaluation

Strengths

- The application has clearly defined project goals and objectives.
- Maps included in the application provide ample detail for understanding the project vicinity and proposed restoration components, along with its proximity to prior implemented projects.
- Corrugation irrigation, a form of controlled flood irrigation, is appropriate for the topography in the project area.
- When managed properly, corrugation irrigation is an effective water conservation method that uses less water and reduces wastewater runoff. The irrigation system will serve as a demonstration to other landowners in the area and may encourage future water conservation projects.
- The proposed conversion to corrugation irrigation, which does not require electricity to operate, is appropriate for the Jordan Valley area where power to operate electric irrigation systems is limited.
- The project is in sage-grouse habitat. The irrigation improvements will reduce standing water and mosquito breeding habitat, thus limiting the transmission of West Nile Virus that can cause sage-grouse mortality.
- The new irrigation system will reduce sediment, nutrient, and bacteria runoff from the project site, and improve water quality in Cow Creek, Jordan Creek, and the Upper Owyhee River.
- The applicant has a proven track record implementing similar irrigation water management projects and the landowner has the ability to do the proposed work.

Concerns

- No concerns are identified.

Concluding Analysis

Converting 104 flood irrigated acres to corrugation irrigation will reduce irrigation wastewater in the project area and reduce sediment, nutrient, and bacteria runoff. The project is likely to succeed in continuing work in the Jordan Valley area that implements Oregon Department of Agriculture (ODA) and the Department of Environmental Quality (DEQ) water quality improvement objectives for the Upper Owyhee River.

Review Team Recommendation to Staff
Fund

Review Team Priority
11 of 15

Review Team Recommended Amount
$139,159

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$139,159

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5003-22605
Project Type: Restoration
Project Name: KWV LITE FM
Applicant: Malheur SWCD
Region: Eastern Oregon
County: Malheur
OWEB Request: $53,145
Total Cost: $123,080

Application Description 1) Nine miles southwest of Ontario, located in the Morgan Bench Focus Area between Ontario and Vale.
2) Runoff from the 21 acre project site is flood irrigation with a small cow/calf operation. Runoff from this farm is contributing to the sediment loads and e. coli in the Lee Road Drain where the SWCD has a sample site 389 to document sediment loads, that spills into the Nevada Ditch, Blanton Drain, then the Malheur River which is known to be the second dirtiest river in the state, ending in the Snake River, which both the Malheur and the Snake River has a TMDL (Total Maximum Daily Load).
3) Proposed Work:
• OID – Connect to Previously installed OID Delivery Pipe (OID will pipe Arabian Pipelin II project and install flow meter per the funded grant# 222-5010.
• Project On Farm Components:
o Remove current failing gated pipe system and bubbler
o Using a reducer Connect 620 ft of 8” 80# pipe from the main to the proposed pump station/phase converter site
o Install 1,230ft. of wire and conduit from power pole and Idaho power hookup to converter/ pump station.
o bury 720 ft of 6” 100# Pipe to deliver irrigation water for Wheel Lines and Irripods.
o Install and Bury 560 ft of 4” pipe for irropod sets on outer pasture edges
o Install irripod packs to service 7acres on outer field acres with a total of 33 pods.
o Install 2 wheel lines 920’ and 1,200ft on two fields 14 acres total
o Possible New Power Pole with Transformer on Morgan
o 3 Phase Converter
o Cornell 3WHA-15 3 Phase pump

Review Team Evaluation

Strengths

- The project objectives are clearly stated, irrigation conversion methods are defined and appropriate for the location, and the project is ready to implement.

- The project is in the Morgan Bench Priority Area, which is a focus area for Oregon Department of Agriculture (ODA), Department of Environmental Quality (DEQ), and Natural Resource Conservation Service (NRCS) to improve water quality in the Malheur River.
- Converting 21 flood irrigated acres to sprinkler application will address water conservation priorities in the Morgan Bench priority area.
- Reducing sediment, nutrient, and bacteria laden runoff from the property will contribute to water quality benefits to the Malheur River, and flood to sprinkler irrigation conversion is a DEQ Total Maximum Daily Load (TMDL) action plan priority.
- Ongoing water quality monitoring will document water quality trends in the watershed.
- The application describes how the project is near previous and future on-farm irrigation improvements and will connect to the recently completed Arabian Pipeline Project, OWEB grant #222-5010, which demonstrates the strategic nature of the proposed work.
- The project team has relevant experience and a proven track record implementing irrigation water management projects.
- The application budget is informed by an irrigation company bid and reflects current costs and rates necessary to implement the project.

Concerns

- The application narrative lacks clarity due to the apparent lack of proof reading, reviewing, and editing prior to application submission.
- Applications submitted by the Malheur SWCD that are capable of being implemented according to the application schedule will improve application review recommendation, efficiency, and conservation success.
- The application budget is overly detailed and will benefit by compiling similar small components into single line items.

Concluding Analysis

Converting 21 irrigated acres from flood to sprinkler application will reduce irrigation wastewater at the project site. The proposed irrigation conversion in the Morgan Bench Priority Area will further efforts to implement ODA and DEQ water quality improvement objectives by reducing sediment, nutrient, and bacteria delivery to the Malheur River. The project is likely to succeed in achieving the proposed water quality improvements.

Review Team Recommendation to Staff

Fund

Review Team Priority

10 of 15

Review Team Recommended Amount

$53,145

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$53,145

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5004-22609
Project Type: Restoration
Project Name: Pounds of Efficiency
Applicant: Malheur SWCD
Region: Eastern Oregon
County: Malheur
OWEB Request: $112,939
Total Cost: $276,578

Application Description 1. The Pounds of Efficiency project is located about 8 miles southwest of Ontario, Oregon and consists of approximately 40 acres of irrigable cropland. It lies within the NRCS 'Valley View Priority Area'. The Pounds of Efficiency project eventually drains into the Nevada Ditch to be used by other farmers or spilled into the Blanton Drain and into the Malheur River and into the Snake River. Sediments and nutrients that wash off fields are passed onto the downstream users and contribute to overall water quality impairments.

The NRCS 'Valley View Priority Area' is located from about 4 miles southwest of Ontario, Oregon, south of OR Highway 20-26 stretching from Cairo Junction 6.5 miles west and approximately 1 mile south. The NRCS 'Valley View Priority Area' consists of approximately 3275 acres with approximately 2000 acres of irrigable cropland. The entire area is in Malheur County.

2. Most of the sediment, nutrients, and bacteria in The Blanton Drain come from polluted irrigation return flows or livestock access to surface water. Historically farmers in the area fertilize their land and a residual amount of chemicals, e-coli and nutrients can be carried off the field with the runoff from flood irrigation. This farm is not typical and currently using 80% sprinkler irrigation.

3. By installing two partial swipe center pivots with the accompanying pipeline, pump and flowmeter, the landowner will be able to achieve a zero water runoff practice that will enhance the downstream water quality. 1320 feet of leaking irrigation lateral will be replaced.

4. The partners for this project are the landowner, Malheur County SWCD, NRCS and Owyhee Irrigation District.

Review Team Evaluation

Strengths

- Converting 40 wheel line irrigated acres to a pivot application system and replacing a 1,320-foot leaking irrigation lateral pipeline will address water conservation priorities in the area.

- The project is in the Morgan Bench Priority Area, which is a focus area for Oregon Department of Agriculture (ODA), Department of Environmental Quality (DEQ), and Natural Resource Conservation Service (NRCS) to improve water quality in the Malheur River.
- Reducing sediment, nutrient, and bacteria laden runoff from the property will result in water quality benefits to the Malheur River and flood to sprinkler irrigation conversion is a DEQ Total Maximum Daily Load (TMDL) action plan priority.
- Ongoing water quality monitoring will document water quality trends in the watershed.
- The project is near previous and future on-farm irrigation improvements demonstrating the strategic nature of the proposed work.
- The project team has relevant experience and a proven track record implementing irrigation water management projects.
- The application budget is informed by an irrigation company bid and reflects current costs and rates necessary to successfully implement the project.

Concerns

- The application narrative lacks clarity due to the apparent lack of proof reading, reviewing, and editing prior to application submission.
- Applications submitted by the Malheur SWCD that are capable of being implemented according to the application schedule will improve application review recommendation, efficiency, and conservation success.
- Water quality monitoring is mentioned in the application, but a summary of past water quality data is not present in the application, making unclear the extent to which project will address water quality impairments.
- A letter of support from the landowner expressing support for the proposed work is not included in the application.
- The application does not describe alternatives to the proposed work.
- A conversion from the existing sprinkler irrigation to a pivot will not result in a significant reduction in irrigation wastewater, making unclear whether the project will provide watershed benefits.

Concluding Analysis

Converting 40 irrigated acres from wheel line to pivot application will improve irrigation efficiency by a maximum of only 15%. The proposed irrigation conversion in the Morgan Bench Priority Area may further efforts to implement ODA and DEQ water quality improvement objectives by nominally reducing sediment, nutrient, and bacteria delivery to the Malheur River. Alternatives are not considered, and the magnitude of watershed benefit is unclear.

Review Team Recommendation to Staff

Fund

Review Team Priority

15 of 15

Review Team Recommended Amount
$112,939

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5006-22492
Project Type: Restoration
Project Name: Restoring The Powder Phase II
Applicant: Keating SWCD
Region: Eastern Oregon
County: Baker
OWEB Request: $100,400
Total Cost: $145,450

Application Description Located near Keating, Oregon, the Restoring the Powder Phase II will address the ongoing erosion and de-vegetation concerns along a section of the Powder River (a tributary to the Snake River) restoring two sections of severely eroding streambanks, a 500ft section and a 900ft section totalling 1,400ft by installing large root wads, logs, boulders and plant willow whips. Data shows significant bank movement has occurred at the project site, making it difficult for riparian vegetation to become established. Erosion has left the banks unstable, contributing large amounts of sediment, causing water quality and habitat concerns through increased embeddedness, rising water temperatures, and Dissolved Oxygen.
This project is a continuation of large grant #221-5010, Restoring the Powder Phase I, which was submitted for funding in 2020. But due to the rapidly rising costs of material and fuel, the first phase had funds to obtain all the required permits and 100% construction-ready design provided by an engineer for the entire project. Phase II will complete the remaining work outlined in Phase I by restoring 1,400 linear feet of eroding banks using large root wads, boulders, and newly planted willow whips and planting 400 trees and 1,000 shrubs throughout the riparian areas outlined in the project design. Idaho Power Company, using SRSP funding will install 11,466 ft. of fencing along 1.5 miles of the Powder, as well as establish two water gaps for livestock access. Phase II will improve the water gaps by enhancing them with gravel/rock to protect the impacted areas by livestock. Idaho Power Company will partner with SWCD and the landowner in Phase II to improve road access to the site and provide construction oversite.

Review Team Evaluation

Strengths

- The project objectives are clearly stated, restoration methods are defined and appropriate for the location, and the project is ready to implement.
- The landowner is actively working to improve watershed conditions and has converted several fields from flood to pivot irrigation, which conserves water and reduces contaminant laden irrigations wastewater influx to the Powder River.
- Fencing and planting actions described in the application treat the cause of streambank erosion by excluding livestock and replanting riparian vegetation, which will reduce erosion and sedimentation in the project reach.

- Oregon Department of Environmental Quality (DEQ) is developing a bacteria Total Maximum Daily Load (TMDL) for the Keating Valley and the proposed work will reduce bacteria contribution to the Powder River.
- The project is directly upstream of an Oregon Department of Agriculture (ODA) Strategic Implementation Area (SIA) and the proposed work contributes to sediment reduction, and an ODA SIA water quality improvement priority.
- The landowner and several others in the project reach are working to improve water quality, conserve irrigation water, and install infrastructure to facilitate improved livestock management. These efforts demonstrate positive momentum for conservation in this ODA and DEQ water quality improvement priority area.
- The project team, including the landowner, have the capacity to implement and maintain the project as proposed.
- The Keating SWCD has a proven track record of managing and completing projects as proposed and according to the project schedule.

Concerns

- Restoration alternatives considered in phase one of the project are not included in the application. This information would add helpful context to understand project development during review.
- Riparian planting at the streambank toe and on a river regulated by reservoirs with periodic high flows is locally untested, and the near-stream plantings may wash away.
- The project site visit demonstrated the project proximity to other projects in the Keating Valley, but the application did not articulate the strategic nature of conservation work in the area.

Concluding Analysis

The Powder River in the project reach has extreme erosion and very little vegetation, leading to high levels of sediment in the river. The project, with a new landowner, offers an opportunity to advance similar projects that will multiply the ecological benefits from increased riparian vegetation and improved water quality.

Review Team Recommendation to Staff

Fund

Review Team Priority

3 of 15

Review Team Recommended Amount

$100,400

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$100,400

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5007-22502
Project Type: Restoration
Project Name: Elmer Dam Fish Passage and Flow Improvement Construction
Applicant: Union SWCD
Region: Eastern Oregon
County: Union
OWEB Request: $521,001
Total Cost: $3,179,329

Application Description Elmer Dam is located on Catherine Creek (RM 13.1), Union County, Oregon. The dam significantly effects the creek's water quality, hydraulics, habitat complexity, and fish passage. The goal of this work at Elmer Dam is to improve fish passage for all native fishes at all water levels (with a focus on Chinook and steelhead), decrease the negative hydrologic effects associated with the dam in its current state, and increase the efficiency of the landowner's agricultural systems. Lengthy data collection and alternatives analysis concluded that the current fishway at Elmer Dam was no longer suitable for current fish passage standards and should be replaced.

The project team will construct new a new fishway structure around Elmer Dam that meets ODFW and NOAA fish passage standards. Improving the passage structure around Elmer Dam will allow for more suitable attractive flow, while also allowing for different passage options throughout many flow scenarios. The fishway and dam improvements coupled with on farm updates to off channel reservoirs and intakes will create more natural hydrologic scenarios through a key migration corridor for listed Catherine Creek Salmonids. All permitting is being completed under the ongoing TA project. The only exception is the construction contractor will be responsible for the DEQ 1200-C

Review Team Evaluation

Strengths

- The proposal is well written with clearly stated objectives and 95% complete designs, which indicate a project that is ready for implementation.
- A reconstructed Elmer Dam, new vertical slot fishway, and improved reservoir infrastructure will address the cause of degraded fish passage, entrainment of fish in irrigation reservoirs, and reduced juvenile fish outmigration in a 14.5-mile reach of Catherine Creek.
- The project design has gone through an extensive review process with Bonneville Power Administration (BPA), US Fish and Wildlife Service (USFWS), and National Marine Fisheries Service (NMFS), as well as local review through the Upper Grande Ronde Atlas prioritization and vetting process.
- Fish passage, entrainment, and juvenile outmigration are high priority restoration actions in the Grande Ronde Basin (GRB) where anadromous fisheries restoration is identified in many local and regional habitat restoration plans.

- The proposed work fits within the context of aquatic restoration completed in the GRB over the past 25-years and compliments similar completed and planned work in Catherine Creek.
- Catherine Creek is identified as impaired by Oregon Department of Environmental Quality (DEQ) for flow modification, elevated stream temperature, and aquatic habitat modification and the proposed work will improve these water quality parameters.
- The Union Soil and Water Conservation District (SWCD) and landowners have the capacity to implement and maintain the project as proposed.
- The Union SWCD has a proven track record of managing and completing projects as proposed and according to the project schedule.
- Many partners are engaged with this project and overall costs are leveraged from several funding sources, which demonstrates the high functioning capacity of the applicant.

Concerns

- No concerns are identified.

Concluding Analysis

The Union SWCD proposes to improve fish passage to 120-miles of Catherine Creek and reduce juvenile fish mortality in the 14.5-mile project reach. The restoration work presented in the proposal has been in design for several years, the actions are a high priority for restoration in the basin, and the project has broad support. At completion the project is likely to improve the survival and productivity of Snake River steelhead and Snake River Chinook salmon in the Grande Ronde Basin.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 15

Review Team Recommended Amount
$521,001

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$521,001

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5008-22503

Project Type: Restoration

Project Name: Upper Grande Ronde Invasive Weed Control Phase VII

Applicant: Tri-County CWMA

Region: Eastern Oregon

County: Union

OWEB Request: $37,102

Total Cost: $55,102

Application Description Located within the Upper Grande Ronde River Watershed, approximately 10 miles west of La Grande, the Upper Grande Ronde Invasive Weed Control Phase VII project seeks to contain and control leafy spurge, spotted knapweed, and diffuse knapweed. Since 2016, OWEB has continuously supported Tri-County's efforts to inventory, treat, and monitor leafy spurge, spotted knapweed, and diffuse knapweed in this watershed. Leafy spurge is the primary target of this project and due to its longevity, consistent herbicide treatments are necessary for effective control. Historic anthropogenic disturbances in this area have negatively impacted many fish and wildlife species, including Chinook salmon, steelhead, and bull trout. Many of these disturbances have introduced invasive species, such as leafy spurge, and have promoted the spread of these species throughout the watershed. This project began treating high priority areas, such as the Grand Ronde River, in Phase I, and has worked outwards towards the larger infestations by Phase V. The goal of Phase VII is to treat all known leafy spurge sites along the Grande Ronde River and provide follow-up treatments of leafy spurge in the Phase V project area. Tri-County is already contracted with the Confederated Tribes of the Umatilla Indian Reservation and the Oregon Parks Dept. to treat all noxious weeds within their project areas along the Grande Ronde River in 2023, and coordinates treatment efforts with the US Forest Service. Given the aggressive nature of leafy spurge, this project is more important than ever to continue given the recent large-scale efforts to restore native fish habitat in the Upper Grande Ronde Watershed.

Review Team Evaluation

Strengths

- The application is well written with clearly stated objectives, a systematic approach, and motivated landowners, indicating a project that is ready for implementation.
- The applicant continues to monitor past work, helping to inform upcoming work and measure program success.
- The selected approach is repeated over years with each phase having an inventory component, setting the stage for the next phase of treatments.
- The strategy of treating weed infestations from the outside perimeter towards the center over consecutive years is a sound approach to reducing weed extent and density on the landscape.
- Staff and hired contractors assess adjacent lands as well as the treatment areas, improving the effectiveness of the program.

- The proposed work is a priority for Oregon Department of Fish and Wildlife (ODFW), the US Forest Service (USFS), and the Confederated Tribes of the Umatilla Indian Reservation (CTUIR) who are actively restoring aquatic habitats in the project area.
- The applicant has successfully built relationships with private landowners through a systematic approach to developing and implementing projects.
- The project is cost-effective and has many components for the price including weed treatment, inventory, monitoring, and stakeholder engagement.
- The project team has the capacity to implement and maintain the project as proposed.
- The Tri-County Cooperative Weed Management Area (CWMA) has a proven track record of managing and completing projects as proposed and according to the proposed schedule.

Concerns

- The photos in the application are labelled by year only and do not have captions describing what each photo is conveying. Captions describing habitat condition and treatment progress will add to proposal clarity.
- The project approach is sound, but the applicant should consider planning more than one year of work with OWEB funding. A multi-year funding approach will provide project continuity and security.

Concluding Analysis

Tri-County CWMA proposes to continue treatment of several invasive weeds in the Upper Grande Ronde River Basin near La Grande. This is phase seven, and the prior six phases demonstrate effective inventory, treatment, and monitoring techniques, all leading to a successful and high functioning program. There are many relevant project partners working towards the success of the project including CTUIR, state and federal agencies, and private landowners.

Review Team Recommendation to Staff

Fund

Review Team Priority

5 of 15

Review Team Recommended Amount

$37,102

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation
Fund

Staff Recommended Amount
$37,102

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5009-22517
Project Type: Restoration
Project Name: Upper Hanley Canal Restoration
Applicant: Harney SWCD
Region: Eastern Oregon
County: Harney
OWEB Request: $24,749
Total Cost: $34,140

Application Description 1) The project area is located in Harney County, 3 miles east of Burns, Oregon, on the Bell A Grazing Cooperative property.

2) An ecological uplift is needed to the Upper Hanley Canal which is experiencing bankside erosion and increased wind erosion from exposed bed during low water years.

3) The work is to: 1) fence off the Upper Hanley Canal along the south shoreline from cattle to allow for riparian bank and nearshore emergent plant uplift during the growing season and canal downdraw to protect and improve sedimentation and bank stabilization. 2) Plant willows on the leading wind side of the canal to provide a wind break and lead to lower wind erosion and soil evaporation while improving the riparian habitat. 3) In combination with fencing off the Upper Hanley Canal, construct two offsite water troughs in southeastern field, to better distribute cattle to prevent erosion around the existing water trough. Water source for troughs will be an existing waterline 200 ft east of the fence line.

4) The partners include Harney County Soil and Water Conservation District and Casey and Dean Shelman of the Bell A Grazing Cooperative.

Review Team Evaluation

Strengths

- The application includes photos that help portray the past success of similar work on the property.
- If the willow plantings and improved livestock management infrastructure elements are successful the project may reduce soil erosion, improve water quality, and enhance wildlife habitat in the project area.
- The project cost is low for the potential watershed benefit and the proposed actions are less expensive than alternatives such as canal lining or piping to reduce soil erosion.

Concerns

- Watershed benefits are not clearly articulated in the proposal, especially how the proposed work will improve water quality and wet meadow hydrology, both important to improving Malheur Lake clarity and Pacific Flyway bird habitat.

- The uploaded maps do not show where planting is planned, which reduces proposal clarity and the ability to assess technical soundness.
- Fencing is described as barbed wire and is not designed as wildlife friendly. This could prove harmful to antelope and other wildlife that frequent the area.
- Other than examples of similar past restoration efforts on this property, it is unclear how the proposed work is strategic and fits in the context of past and planned watershed restoration in the project area.
- The application does not identify how the proposed work will implement actions identified within a specific geography or prioritized in a watershed restoration plan.
- Identified project partners include the landowner and the Harney SWCD. However, the project could benefit from support and guidance provided by water quality and wildlife management agencies.

Concluding Analysis

The Harney SWCD proposes to reduce erosion on the Upper Hanley Canal near Burns. Proposed methods include fencing, willow planting, installation of watering troughs, and improved livestock management. It is unclear how the project is strategic in the Harney Basin and if the application is resubmitted the applicant is encouraged to address the concerns identified in this evaluation, including the watershed context for the proposed work, how project addresses watershed functions and processes, and the strategic priority of the proposed work.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5010-22528
Project Type: Restoration
Project Name: Fiercely Fighting for Fopian Crk and the NF Malheur with Off-stream Water II
Applicant: Malheur WC
Region: Eastern Oregon
County: Baker
OWEB Request: $96,038
Total Cost: $160,738

Application Description

1) The project is located in the North Fork Grazing Allotment on USFS managed public land. The allotment covers 31,000 acres in the headwaters of the North Fork Malheur River, Little Malheur River, Bear Creek, and Swamp Creek. The center of the allotment is 15 air miles from Unity, Oregon.

2) Riparian and aquatic habitat in the allotment is substandard, which is affecting bull trout, redband trout, and water quality in the NF Malheur, and Fopian Creek. Part of the cause of the degraded riparian habitat is the poor/non-existing infrastructure available to properly manage grazing. In places riparian fencing and off-stream watering facilities have disappeared. Troughs have rotted out, pipelines are cracked, and spring boxes are broken. Without this infrastructure, cattle will continue to negatively impact riparian areas.

NF Malheur is a Priority for Bull Trout Recovery. Gunickel and Allen (2018) developed a model to prioritize areas for bull trout recovery efforts. The NF Malheur River was the number one priority core area.

3) We propose to improve grazing management by:

-- Installing 17,500 feet of fence along Fopian Creek to exclude cattle from 1.5 miles of creek and protect 14 acres of riparian area

--- Rehabilitating 6 off-stream watering facilities that will help draw cattle away from 21 miles of stream that impact bull trout spawning areas. This will entail installing:

-- 6 troughs
-- 720 feet of heavy fence to protect the springs
-- 380 feet of pipe to supply water to the troughs
-- Install 6 new spring boxes

4) The partners are the USFS, Permittee Rob Elder, RSI engineering, and the Malheur WSC.

Review Team Evaluation

Strengths

- The project objectives are clearly stated, fencing and watering trough construction methods are defined and appropriate for the location, and the project is ready to implement.
- The applicant addressed concerns from the last application by narrowing the project focus, improving the design clarity, and demonstrating support for the work by the US Forest Service (USFS).
- The applicant contracted an engineer to develop designs for the spring developments and watering troughs, indicating that the watering systems will function properly when the allotment is in use.
- Fencing Fopian Creek, spring protection, and watering trough installation will treat the cause of degraded riparian conditions, fish habitat, and water quality in this section of the North Fork Grazing Allotment.
- The proposed work will implement restoration actions identified by the US Fish and Wildlife Service (USFWS) and the Oregon Conservation Strategy to benefit bull trout and redband trout.
- Oregon Department of Environmental Quality (DEQ) lists tributary streams to the North Fork of the Malheur River as impaired for temperature, E. coli, and biological criteria, and the project actions will address these water quality concerns.
- The project team has the experience and capacity to manage and implement the work as proposed.
- The Malheur Watershed Council has a proven track record of managing and completing similar projects as proposed and according to the project schedule.
- Significant match is provided by the permittee and the USFS demonstrating an engaged partnership dedicated to completing the project.
- The budget is developed from an engineer’s estimate and reflects current costs necessary to implement the project.
- Spring protection cost is higher than normal, but materials specified are more robust and will last longer than other methods, which improves cost effectiveness.

Concerns

- The application does not include a maintenance plan for the spring developments, watering troughs, or the fence.

Concluding Analysis

The Malheur Watershed Council will improve domestic livestock management infrastructure around Fopian Creek near Unity. Fopian Creek provides habitat for bull trout and redband trout and both are priority species for conservation in the project area. The work described in the application is likely to improve riparian and aquatic habitats for native fish and wildlife.

Review Team Recommendation to Staff

Fund with Conditions

Review Team Priority

6 of 15

Review Team Recommended Amount
$96,038

Review Team Conditions

Prior to first payment the Malheur Watershed Council will provide OWEB with a plan that articulates how the fencing and watering systems will be managed and maintained by the permittee and the USFS.

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund with Conditions

Staff Recommended Amount
$96,038

Staff Conditions

Prior to first payment the Malheur Watershed Council will provide OWEB with a plan that articulates how the fencing and watering systems will be managed and maintained by the permittee and the USFS.

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5011-22530
Project Type: Restoration
Project Name: Pivoting on South Road G
Applicant: Malheur WC
Region: Eastern Oregon
County: Malheur
OWEB Request: $101,360
Total Cost: $228,781

Application Description 1) The project in the Willow Creek Focus Area. It is 0.9 miles from the town of Willow Creek.

2. Water quality improvement in the Malheur Basin is one of the top restoration priorities for the Malheur Watershed Council. Willow Creek has been a focus area for the Council and other agencies since the late 1990s. Improved water quality is achieved through on-farm irrigation infrastructure improvements and management. The Council in cooperation with irrigation districts and private landowners has been systematically improving water quality through irrigation system conversions over the past 20 plus years across the Malheur Basin. This project complements several recently completed and on-going water quality improvement projects in the area.

3. The proposed project will convert 122 acres of flood irrigated fields to sprinklers by installing:

-- One pivot
-- One Cornell 3 phase pump
-- 1,520 feet of 10 inch 100# PIP pipe
-- 1,540 feet Cable Wire
-- Connection to pipeline
-- Electrical Panel
-- Flow Meter and
-- Apply for a water right transfer if needed.

4. Partners are the landowner, Vale Irr. Dist, and the Malheur WSC.

Review Team Evaluation

Strengths

- The project objectives are clearly stated, the pivot installation methods are defined and appropriate for the location, and the project is ready to implement.

- The application includes information on work accomplished over the past 25 years in the Willow Creek area. This provides watershed context and demonstrates how this project will build upon a long standing and successful water quality improvement effort in the area.
- The new pivot irrigation system will connect to a piped lateral that replaced an open ditch delivery system, which demonstrates the strategic nature of the proposed work.
- Converting 122 flood irrigated acres to sprinklers will address water conservation priorities in the Willow Creek focus area.
- The project location is a focus area for the Oregon Department of Agriculture (ODA), the Department of Environmental Quality (DEQ), and the Natural Resource Conservation Service (NRCS) to improve water quality in the Malheur River basin.
- Reducing sediment, nutrient, and bacteria laden runoff from the property will contribute to water quality benefits to the Malheur River, and flood to sprinkler irrigation conversion is a DEQ Total Maximum Daily Load (TMDL) action plan priority.
- Ongoing water quality monitoring will document water quality trends in the watershed.
- The project team has relevant experience and a proven track record implementing irrigation water management projects.
- The application budget is informed by an irrigation company bid and reflects current costs and rates necessary to implement the project.

Concerns

- The pivot is nearly one quarter of a mile long and pivots longer than one thousand feet can result in over irrigation and runoff problems. The pivot design does not include a dry wheel package that will eliminate any water application to the pivot wheel tracks. The addition of a dry wheel package will further reduce irrigation runoff and contaminant laden water to Willow Creek.

Concluding Analysis

Converting 122 irrigated acres from flood to sprinklers may reduce irrigation wastewater if appropriately designed. Irrigation conversions in the Willow Creek focus area help to implement ODA and DEQ water quality improvement objectives by reducing sediment, nutrient, and bacteria delivery to Willow Creek and the Malheur River. The project could succeed in achieving water quality improvements with design modifications.

Review Team Recommendation to Staff

Fund with Conditions

Review Team Priority

14 of 15

Review Team Recommended Amount

$103,360

Review Team Conditions

The applicant will install a dry-wheel package on the pivot which is estimated to cost $400-500 per tower. Increase OWEB award by $2,000.

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5012-22538
Project Type: Restoration
Project Name: Mockingbird 3
Applicant: Malheur WC
Region: Eastern Oregon
County: Malheur
OWEB Request: $115,280
Total Cost: $288,543

Application Description The Mockingbird 3 project is located in Harper along the Malheur River. Water quality improvement in the Malheur Basin a top restoration priority and is achieved through on-farm irrigation infrastructure improvements and management. The Mockingbird 3 project is the third phase in a four-phase whole farm approach to convert 193 acres from flood to sprinkler irrigation. This proposal (phase III) will convert 46 acres from flood to sprinkler irrigation through the installation of 2 pivot systems, 5 solid set sprinklers and related water conveyance/electrical infrastructure. Project partners include: The private landowner, Harper South Side Ditch Company, Romans Irrigation and Malheur Watershed Council

Review Team Evaluation

Strengths

- Project objectives are clearly stated, the irrigation methods are defined and appropriate for the location, and the project is ready to implement.
- The irrigation conversion on this farm follows a logical and phased approach, irrigation alternatives are considered in the application, and this phase 3 project will convert 46 acres from flood to sprinkler irrigation.
- Irrigation water management in the Harper area is a priority for the Malheur Watershed Council because of the adjacent Malheur River and direct irrigation runoff impacts to water quality. This prioritization demonstrates the strategic nature of the proposed work.
- Converting 46 flood irrigated acres to sprinklers will address water conservation priorities in the Harper area.
- The project location is a priority for the Oregon Department of Agriculture (ODA) and the Department of Environmental Quality (DEQ) to improve water quality in the Malheur River basin.
- Reducing sediment, nutrient, and bacteria laden runoff from the property will contribute to water quality benefits to the Malheur River, and flood to sprinkler irrigation conversion is a DEQ Total Maximum Daily Load (TMDL) action plan priority.
- Ongoing water quality monitoring will document water quality trends in the watershed.
- The project team has relevant experience and a proven track record implementing irrigation water management projects.
- The application budget is informed by an irrigation company bid and reflects current costs and rates necessary to implement the project.

Concerns

- No concerns are identified.

Concluding Analysis

Converting 46 irrigated acres from flood to sprinkler application will reduce irrigation wastewater. The proposed irrigation conversion in the Harper area will further efforts to implement ODA and DEQ water quality improvement objectives by reducing sediment, nutrient, and bacteria delivery to the Malheur River. The project is likely to succeed in achieving water quality improvements.

Review Team Recommendation to Staff
Fund

Review Team Priority
9 of 15

Review Team Recommended Amount
$115,280

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$115,280

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5013-22542

Project Type: Restoration

Project Name: Small But Mighty Water Quality Improvement

Applicant: Owyhee WC

Region: Eastern Oregon

County: Malheur

OWEB Request: $56,384

Total Cost: $73,376

Application Description The Small But Mighty Water Quality Improvement project is located across the Snake River just East of Adrian in the Big Bend Area. The project area consists of 9 acres of pasture/hay/row crop land currently flood irrigated with earthen ditches. Tailwater containing sediment, nutrients, and bacteria flow off the project area into the Imbler Drain, South Alkali Drain, then into the Snake River approximately 1.5 miles from the project site. The proposed work includes converting 9 acres from flood to sprinkler irrigation through the installation of 58 solid set mag pie sprinklers and all required pressurized conveyance infrastructure. Project partners include: The landowner, Riverside Irrigation District, Owyhee Watershed Council, and Agrillines Irrigation.

Review Team Evaluation

Strengths

- Project objectives are clearly stated, the irrigation methods are defined and appropriate for the location, and the project is ready to implement.
- Irrigation alternatives are considered in the application and the selected approach will accommodate the irregular shaped field and reduce irrigation wastewater.
- Irrigation water management in the Big Bend area is a priority for the Owyhee Watershed Council (OWC) because of the adjacent Snake River and direct irrigation runoff impacts to water quality. This prioritization demonstrates the strategic nature of the proposed work.
- Converting nine flood irrigated acres to sprinklers will address water conservation priorities in the Big Bend area.
- The project location is a priority for the Oregon Department of Agriculture (ODA) and the Department of Environmental Quality (DEQ) to improve water quality in the Snake River basin.
- Reducing sediment, nutrient, and bacteria laden runoff from the property will contribute to water quality benefits to the Malheur River, and flood to sprinkler irrigation conversion is a DEQ Total Maximum Daily Load (TMDL) action plan priority.
- The OWC and the landowner have relevant experience and a proven track record implementing irrigation water management projects.
- The application budget is informed by an irrigation company bid and reflects current costs and rates necessary to implement the project.

Concerns

- The irrigation company bid uploaded with the application shows the new sprinkler system irrigating the Riverside Canal embankment and this will contribute sediment to the canal and the Snake River.

Concluding Analysis

Converting nine irrigated acres from flood to sprinklers will reduce irrigation wastewater. The proposed irrigation conversion near Adrian will further efforts to implement ODA and DEQ water quality improvement objectives by reducing sediment, nutrient, and bacteria delivery to the Snake River. If the project addresses the concern above, it is likely to succeed in achieving water quality improvements.

Review Team Recommendation to Staff
Fund

Review Team Priority
12 of 15

Review Team Recommended Amount
$56,384

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund with Conditions

Staff Recommended Amount
$56,384

Staff Conditions

The solid set irrigation system will be installed and operated to avoid irrigation of the adjacent Riverside Canal bank, which will further reduce sediment, nutrient, and bacteria delivery to the Snake River.

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5014-22545

Project Type: Restoration

Project Name: Instream and Riparian Area Habitat Protection on Wallowa Whitman Range Allotments

Applicant: Wallowa Resources

Region: Eastern Oregon

County: Wallowa

OWEB Request: $162,862

Total Cost: $355,422

Application Description Buck, Peavine, and Swamp Creek riparian fencing projects are located on the Wallowa Valley Ranger District, Wallowa Whitman National Forest inside the boundary of three allotments known as the Buck, Teepee Elk, and Swamp Creek. While maintaining working landscapes is a high priority for the National Forest, so is the management of streams and riparian areas. These allotments and specific stream reaches were selected as priority projects to protect valuable habitat for T&E listed species (Snake River steelhead, and Region 6 Sensitive species Redband trout), to protect riparian areas that contain sensitive plant species like (Trifolium douglasii), and to further compliment the Upper Joseph Creek Restoration project that focuses on enhancing forest health conditions and rangeland resiliency to natural disturbance. While management practices to reduce livestock impacts to riparian areas has been practiced for a number of years, spawning “redd’s” and sensitive riparian areas have continued to be affected by livestock use. To address concerns, project partners have determined that riparian area exclusion fencing is the best solution to restore, maintain and enhance these important areas

Project objectives are to reduce impacts to aquatic species, improve streambank vegetative cover, reduce grazing of streamside deciduous hardwoods, & limit livestock trampling of wetlands soil/features adjacent to stream channel. This project will control livestock access to 9.2 miles of stream and 626 acres of wet meadow and wetlands. The following will be constructed: 3.5 miles of fencing on Sled, Mud, Evans Creeks, 2) 3.5 miles of fencing on Peavine Creek., and 3) 2.2 miles of fencing on Swamp Creek.

Project partners include: Wallowa Valley Ranger District, 5 private landowners, Wallowa Resources, Title II

Review Team Evaluation

Strengths

- The riparian improvement objectives are clearly stated, fencing methods described in the application are appropriate, and the photos add to the proposal’s clarity.

- Excluding domestic livestock from sections of Buck, Peavine, and Swamp Creeks will treat the cause of degraded riparian conditions, fish habitat, and water quality in Northern Wallowa County.
- The proposed work will implement restoration actions identified by the National Marine Fisheries Service (NMFS) to benefit Snake River Basin steelhead.
- Redband trout, Columbia Spotted frog, and several rare plants, all priority species for conservation, will benefit from the proposed work.
- These tributary streams to the Lower Grande Ronde River are listed as impaired by the Oregon Department of Environmental Quality (DEQ) for temperature, bacteria, flow, channel condition, and erosion, and the project actions will address these water quality concerns.
- The project team has the experience and capacity to manage and implement the proposed work.
- Wallowa Resources has a proven track record of managing and completing projects as proposed and according to the project schedule.
- Significant match is provided by the permittee and the USFS demonstrating an engaged partnership dedicated to completing the project.
- Many partners are engaged with this project and costs are leveraged from several funding sources, which demonstrates the capacity of the applicant to meaningfully engage appropriate partners.

Concerns

- Livestock water gaps are discussed in the application; however, their locations, maintenance, and monitoring methods are not clearly defined in the narrative or the maps.
- Regulatory permitting is identified in the application as not needed; however, the proposed work is subject to the Aquatic Restoration Biological Opinion environmental compliance requirements. The status of this requirement is not described in the application.
- The budget requests eight miles of fence construction and the application narrative describes 9.2 miles of fence construction. It is unclear how many miles of fence will be built, or if the necessary costs are accurately reflected in the budget.

Concluding Analysis

Wallowa Resources proposes to improve domestic livestock management infrastructure in the Upper Joseph Creek watershed in Wallowa County. The watershed provides habitat for a variety of fish, wildlife, and plant species that are a priority for conservation as identified in regional planning documents; however, the application lacks necessary detail needed to fully evaluate the proposal. If the application is resubmitted, the applicant is encouraged to address the concerns identified in this evaluation.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

N/A

Review Team Recommended Amount

$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5015-22546

Project Type: Restoration

Project Name: Defend & Grow Core Grassland Vegetation in Wallowa County

Applicant: Wallowa Resources

Region: Eastern Oregon

County: Wallowa

OWEB Request: $167,537

Total Cost: $252,537

Application Description 1) The Wallowa County Invasive Annual Grass Partnership, managed by Wallowa Resources is focused on cooperatively initiating our recently completed Invasive Annual Grass Strategic Action Plan. This project will shift our management paradigm from focusing on undesirable vegetation to desirable vegetation. The plan embraces the regional strategy of defending and growing core vegetation in our prairie grasslands, which has been identified as our priority focal area. The Zumwalt Prairie, and surrounding area is rich in ecological diversity, known for its robust bunchgrass communities, and is home to a plethora of wildlife, insects, and bird species. It also happens to be a historical working landscape, which economically benefits the ranching community. This project emphasizes proactive and preventative management of large-scale threats within otherwise intact landscapes comprised mostly of native plant communities.

2) OWEB has identified invasive grasses as a limiting factor for terrestrial and riparian habitats in these areas. Invasive grasses reduce range resiliency, threaten fish and wildlife habitat by contributing to increased sedimentation rates, diminishing riparian structure and function, and by reducing forage quality and quantity.

3) Defending core perennial ecosystems is a priority for the Partnership. Our goal is to work adjacent to the core areas into the transition zones, containing intermediate levels of annual grass invasion, to strategically increase the amount of core across the prairie landscape. Aggressive management will be needed in transitional areas to halt spread into the cores. On-going management in the highly invaded areas will also be required to mitigate the most severe impacts of IAGs. OWEB funds will be used for aerial survey, aerial herbicide application, and monitoring.

4) Partners include: 20 landowners, TNC, NRCS, ODA, SWCD, Wallowa County, OSU Extension, USFS, Wallowa Resources

Review Team Evaluation

Strengths

- Project objectives are clearly stated, the invasive annual grass (IAG) treatment methods are defined

and appropriate for the location, and the project is ready to implement.

- The proposed work is a technically sound approach to engage landowners and treat the root cause of invasive annual grass spread in Wallowa County.
- The project objectives are comprehensive and include project planning, stakeholder engagement, inventory, assessment, IAG treatment, improved livestock management, and monitoring.
- The engagement approach is the result of stakeholder coordination between local, state, and federal rangeland management agencies and will be replicated across the landscape.
- The proposed work is identified in many watershed planning documents and the application explains how project objectives will address issues identified in those plans.
- Weed and IAG treatment in Wallowa County has a history of being reactive to invasive plants yet not addressing all the factors causing the decline of native perennial vegetation. The proposed approach will address the causes of the watershed management problems by creating range management plans that will holistically address the decline of perennial vegetation.
- The applicant and partners have a long history of successful weed and IAG control work in Wallowa County and have the capacity to implement the project as proposed.
- The partnership has long standing relationships with many landowners in the target area who are willing to make land management changes and are eager to start the work.
- Many partners are engaged with this project and project costs are leveraged with several funding sources, demonstrating the capacity of the applicant to meaningfully engage appropriate partners.
- The budget reflects costs necessary to achieve the expected watershed benefits.

Concerns

- It is unclear how this restoration project developed as a result of the stakeholder engagement grant 222-5051.

Concluding Analysis

After many years of agency coordination, landowner cooperation, and stakeholder engagement, Wallowa Resources and partners are proposing continued treatment of invasive annual grasses on the Zumwalt Prairie of Wallowa County. IAG control efforts over the past 25-years has focused on vegetation control rather than improved land management. This project focuses on engaging landowners to improve rangeland management and ranching practices combined with conventional IAG treatment, resulting in a higher likelihood of restoring native perennial vegetation over previous approaches that were limited to simply treating invasive plants.

Review Team Recommendation to Staff

Fund

Review Team Priority

7 of 15

Review Team Recommended Amount

$167,537

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$167,537

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5016-22547

Project Type: Restoration

Project Name: Improving Wildlife & Riparian Habitat Along the Malheur River

Applicant: Malheur WC

Region: Eastern Oregon

County: Malheur

OWEB Request: $199,989

Total Cost: $280,170

Application Description

1. The project is located approximately 6 miles west of Vale and south of Highway 20 on 980 acres.

2. This 2.6-mile section of the Malheur River was adversely affected by historic flooding and significant high-flow events in the 1980's and 2017. A large section of the bank is eroding from high-flow events and a berm constricting flow on the opposite bank. As a result, water quality, riparian habitat and streambank conditions are negatively impacted. The federally funded 500-foot berm was constructed during the 1980s to address multiple high-water years. The berm restricts channel migration, redirects flow to the opposite eroding bank, adversely affects downstream conditions and contributes to poor water quality.

3. OWEB funds are targeted for riparian and streambank enhancement. The berm will be removed to allow the Malheur River to reconnect with the floodplain. A 510-foot section on the south bank will have 10 revetments installed. These will be comprised of 21 whole trees, 29 willow clumps, 167 rocks, 4 extra-large, 13 large and 48 small rootwads, 4 large logs and 650 cubic yards of material from the berm to bind the components together. Revetments will enhance streambank and riparian conditions and provide aquatic habitat. The 3.75-acre berm area will be site prepped and seeded with tall wheatgrass, Great Basin wildrye, thickspike wheatgrass, birds-foot trefoil and alfalfa. In addition, milkweed will be added to seed to provide a food source for the Monarch butterfly. After successful milkweed germination and establishment, the area will be registered as a Monarch Waystation.

4. Project partners are Bully Creek LLC, Malheur Watershed Council and ODFW.

Review Team Evaluation

Strengths

- The application addresses concerns from the previous application evaluation by narrowing the project focus, providing additional information regarding the use of Russian Olive logs as an effective material for instream habitat restoration, and including rationale for the incorporation of existing rock

structures in the project design.

- The project design and proposed work are the result of a previously funded OWEB technical assistance grant.
- Oregon Department of Fish & Wildlife (ODFW) will monitor fish population, density, and diversity in the project area post construction.
- The project area has limited wetland habitat and the proposed work will restore this habitat to benefit native fish and wildlife, including Pacific Flyway migratory birds.
- Reducing erosion on the property will have water quality benefits to the Malheur River and this is a DEQ Total Maximum Daily Load (TMDL) action plan priority.
- The project team, consisting of the watershed council, landowner, and ODFW, are experienced and have a proven track record in partnering on similar projects.
- The engineer that developed the project design has appropriate experience with similar projects.
- The application budget is informed by the engineer's estimate and reflects current costs and rates necessary to implement the project.
- Russian Olive, a non-native tree species, is present on the property and the use of this tree to build instream habitat may be a cost-effective approach.

Concerns

- No concerns are identified.

Concluding Analysis

The Malheur Watershed Council is proposing to restore 1000 feet of the Malheur River near Vale on a farm managed for agricultural production and wildlife. The instream, floodplain, and riparian restoration work is informed by a diverse project team and experienced project engineer. The project is likely to improve aquatic, riparian, and floodplain habitats on the property.

Review Team Recommendation to Staff

Fund

Review Team Priority

8 of 15

Review Team Recommended Amount

$199,989

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation
Fund

Staff Recommended Amount
$199,989

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5017-22558
Project Type: Restoration
Project Name: Lostine River Mile 5.7 Floodplain and Side Channel Enhancement Project
Applicant: Nez Perce Tribe
Region: Eastern Oregon
County: Wallowa
OWEB Request: $396,381
Total Cost: $834,111

Application Description The Lostine River Mile (RM) 5.7 project area is located on the Lostine River immediately west of the town of Lostine in Wallowa County, Oregon. The project reach includes approximately 0.4 miles of Lostine River main channel and associated floodplain, which is exclusively on private land located upstream (south) of the Caudle Lane bridge.

Habitat conditions within the project reach have been negatively impacted by floodplain development, levee construction, and bank armoring, which have led to simplified channel conditions and floodplain disconnection over time. Additionally, a steep bluff is located midway along the project reach on river right, has been contributing fine sediment to the river, one of several documented limiting habitat factors to a multitude of fish and other aquatic species present in the Lostine River.

The goals of the project are to improve floodplain and instream habitat conditions for ESA-listed Chinook Salmon (Oncorhynchus tshawytscha), steelhead (Oncorhynchus mykiss), Bull Trout (Salvelinus confluentus), and potentially re-introduced Coho Salmon (Oncorhynchus kisutch) and Pacific Lamprey (Entosphenus tridentatus). Specifically, the project design intends to restore the Lostine River to a more natural condition by constructing a new, multi-threaded channel network in the floodplain, filling portions of the existing main channel, and adding large wood structures and riparian plantings. The manipulation of the sediment dynamics from the existing transport reach to that of a response reach is key to achieving and maintaining sustained change and channel dynamics over time. The proposed design would more closely resemble the historic channel and floodplain, and is expected to improve channel function and aquatic habitat quality.

Project partners include the Grande Ronde Model Watershed (GRMW) and Bonneville Power Administration (BPA).

Review Team Evaluation
Strengths

- Project objectives are clearly stated, instream and floodplain restoration methods are defined and

appropriate for the location, and the project is ready to implement.

- The project design and proposed work are the result of a previously funded OWEB technical assistance grant.
- The final designs and photos uploaded with the application are descriptive, demonstrate the project scope and scale, and add to proposal clarity.
- Providing river access to the adjacent floodplain, constructing instream habitat, and restoring the riparian forest addresses aquatic habitat limiting factors and focuses on the cause rather than symptoms of disturbance.
- The restored habitat will benefit Lower Columbia River coho salmon, Snake River steelhead, Snake River Chinook salmon, Pacific lamprey, and other resident native aquatic species.
- Restoration alternatives are considered in the design and the chosen alternative will result in the largest project footprint with the most restored instream, floodplain, and riparian habitat.
- The project team, including the design consultant, are experienced with this type of restoration, and have successfully implemented similar projects in the Wallowa subbasin.
- The project design has gone through an extensive review process with Bonneville Power Administration (BPA), US Fish and Wildlife Service (USFWS), and National Marine Fisheries Service (NMFS) as well as local review through the Wallowa Atlas prioritization and vetting process.
- Fish habitat and riparian restoration are high priority actions in the Wallowa Subbasin where anadromous fisheries restoration is identified in many local and regional habitat plans.
- The proposed work fits within the context of aquatic restoration completed in Wallowa County over the past 25 years and complements similar completed and planned work on the Lostine River.
- The Lostine River is a tributary to the Wallowa River which the Oregon Department of Environmental Quality (DEQ) lists as limited by flow, habitat modification, bacteria, dissolved oxygen, and sediment. This project will address these multiple water quality concerns.
- The project team, including the landowners, have the capacity to implement and maintain the project as proposed.
- The Nez Perce Tribe (NPT) has a proven track record of managing and completing projects as proposed and according to the project schedule.
- Match is leveraged from the Bonneville Power Administration and the Grande Ronde Model Watershed, demonstrating the capacity of the applicant to meaningfully engage appropriate partners.
- The budget is developed from an engineer estimate and reflects current costs necessary to implement the project.

Concerns

- No concerns are identified.

Concluding Analysis

The NPT proposes to improve fish habitat, floodplain connection, and riparian conditions on the Lostine River near the town of Lostine. The restoration work has been in design for several years, the actions are a high priority for restoration in the basin, and the project has broad support. At completion the project is likely to improve the survival and productivity of Snake River steelhead, Snake River Chinook salmon, and other priority aquatic species in the Wallowa Subbasin.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 15

Review Team Recommended Amount
$396,381

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$396,381

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5018-22501

Project Type: Technical Assistance

Project Name: Uplifting Anthony Creek for Sensitive Trout and Beaver: Alternatives Assessment and Design

Applicant: Powder Basin WC

Region: Eastern Oregon

County: Baker

OWEB Request: $74,666

Total Cost: $96,666

Application Description The proposed project is located on a 1.5-mile reach of Anthony Creek, a tributary to the North Powder River within the Oregon Department of Fish and Wildlife Elkhorn Wildlife Area, approximately 7.5 miles west of the community of North Powder, Oregon. Anthony Creek is occupied by several species of trout including native Bull Trout and Columbia Basin Redband Trout (CBRT)and non-native Brook Trout. The project reach is primarily utilized by CBRT and bull trout are documented to occupy Anthony Creek approximately two miles upstream from the project site. It is likely beaver occupied the reach historically, but their presence is not currently evident. Implementation of this project has potential to extend Bull Trout occupancy downstream to the project reach, which will be a focus of the design. Documented water quality impairments include 303 (d) listings for temperature and E. coli bacteria in summer months. Habitat impairments for native trout include lack of instream habitat quantity and diversity and impaired fish passage. We propose to address water quality and aquatic habitat deficiencies in Anthony Creek by designing actions to improve livestock grazing management and in-channel restoration actions to: reconnect the incised stream with the historic floodplain; increase the number of quality pools; increase the loading of large wood material in the channel and encourage beaver recolonization . We will expand the existing riparian buffer fence based the designed project footprint. We will assess opportunities for accomplishing our goals and objectives through collection of geomorphic/hydrologic/habitat data, development/assessment of alternatives, selection of preferred alternative(s) and design of the preferred alternative for accomplishing all objectives. The Oregon Department of Fish and Wildlife has committed to both in-kind and cash support of the project.

Review Team Evaluation

Strengths

- The application describes a clear need to design a restoration project that will improve riparian, floodplain, and instream habitats for bull trout, redband trout, and beaver in Anthony Creek on property managed by Oregon Department of Fish and Wildlife (ODFW).
- The proposal is clearly written with sequential objectives and has descriptive photos.
- The proposed design approach is appropriate and includes a site investigation, an alternatives analysis, design review intervals at 30%, 60%, and 90%, and the acquisition of necessary construction permits.

- The level of survey, design, and engineering described in the proposal is necessary to substantiate and obtain all permits required for restoration work in Anthony Creek and the adjacent floodplain.
- The resulting design will lead to a restoration project that addresses elevated stream temperature and bacteria concentrations in Anthony Creek, which are identified as limiting factors in the Powder Basin TMDL (Total Maximum Daily Load).
- An experienced team, including the Powder Basin Watershed Council, ODFW wildlife area management staff, ODFW habitat restoration staff, and contractual engineering assistance, have the capacity to manage and implement the design and permitting work as proposed.
- Two engineering quotes and one wetland assessment quote are included in the application demonstrating that costs align with the work necessary to accomplish project objectives.

Concerns

- The photos in the application are labelled by location but do not have captions describing what each photo is conveying. Captions describing habitat condition and reasons for restoration need will add to the proposal's clarity.

Concluding Analysis

The Powder Basin Watershed Council proposes to complete 90% design and all permitting requirements for a project addressing degraded aquatic, floodplain, and riparian habitat on Anthony Creek near North Powder. The resulting restoration guided by this design work will occur in bull trout and redband trout habitat, restore habitat necessary for beaver colonization, and guide future restoration that addresses identified TMDL concerns.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 6

Review Team Recommended Amount
$74,666

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount

$74,666

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5019-22541
Project Type: Technical Assistance
Project Name: Trout Creek Diversion
Applicant: Harney SWCD
Region: Eastern Oregon
County: Harney
OWEB Request: $75,000
Total Cost: $94,441

Application Description 1) The Trout Creek diversion structure is located on Trout Creek just north of mile marker 5 of the Whitehorse Ranch Road in southern Harney County southeast of Fields, Oregon.

2) The existing structure needs replacement due to its (a) inability to adequately distribute surface water to historical wet meadow floodplains; (b) the structure's continuous adverse impacts to streambank stability and associated contributions to turbidity; (c) and to meet fish passage standards.

3) The requested funds will support survey and design for a replacement structure. Funding will support a topographic survey and development of a digital elevation model, draft engineering design sufficient for permitting and cost estimating, and initiation of regulatory compliance.

4) Project partners include Ducks Unlimited, Harney Soil and Water Conservation District and the landowners/irrigators.

Review Team Evaluation

Strengths

- The application describes a clear need to design a restoration project to replace the Trout Creek diversion structure with a diversion that distributes water to the adjacent wet meadow floodplain, reduces streambank erosion, and meets the Oregon Department of Fish and Wildlife's (ODFW) fish passage standards.
- The application is clearly written with sequential objectives and has descriptive photos and relevant maps of the work area.
- The design work proposed in the application is supported by several assessments stating that flood irrigated wet meadow restoration is critical in this area for Pacific Flyway migratory birds.
- The proposed design approach is appropriate and includes a topographic survey and the development of a digital elevation model, design elements necessary for an accurate construction cost estimate and initiation of regulatory permits.
- An experienced team, including Ducks Unlimited, Harney Soil and Water Conservation District (SWCD), and the landowners, have the capacity to manage and implement the design work as proposed.

Concerns

- Trout Creek is a small stream, design costs appear high, and it is unclear how costs align with the work necessary to accomplish the project objectives for this small irrigation diversion structure.

Concluding Analysis

The Harney SWCD proposes to complete designs sufficient to inform a restoration project budget and initiate regulatory compliance for an irrigation diversion replacement on Trout Creek near Fields. Trout Creek provides habitat for Alvord Chub and beaver and flood irrigation hydrates nearby wet meadows that are critical in the survival of migrating waterfowl. The proposed technical assistance has a high likelihood to inform improved fish passage in Trout Creek and effective wet meadow hydrology restoration.

Review Team Recommendation to Staff
Fund

Review Team Priority
5 of 6

Review Team Recommended Amount
$75,000

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$75,000

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5020-22544
Project Type: Technical Assistance
Project Name: Mottet Creek Valley Restoration
Applicant: Tri-State Steelheaders
Region: Eastern Oregon
County: Union
OWEB Request: $49,738
Total Cost: $70,542

Application Description Mottet Creek flows under Forest Road 63 in Union County, about 16 miles by road east of Tollgate. It is a tributary of the Little Lookingglass Creek, which flows to the Lookingglass Creek, a tributary of the Grande Ronde River. Mottet Creek at a high elevation provides cold temperature spawning and rearing habitat for bull trout, and the National Marine Fisheries Service has identified Mottet Creek as critical spawning habitat for Snake River Steelhead. The culvert at Forest Road 63 and Mottet Creek is undersized and over-steepened, leading to passage problems for steelhead and bull trout. There are seven step-logs below the culvert presenting additional low-flow passage barriers. The stream is incised and lacks its historic floodplain connectivity. The culvert is also being undermined by scouring, which will eventually lead to road failure. This correction is identified as an essential project in The USFS Little Lookingglass Creek Watershed Restoration Action Plan.
The Tri-State Steelheaders propose to partner with the US Forest Service, Walla Walla Ranger District, to complete a conceptual design project to restore valley's physical, biological, and chemical processes associated with a depositional valley that promotes and sustain river and floodplain habitats as described in the 2021 Mottet Creek Restoration Assistance Team Review (RAT) attached. This project will complete an alternative analysis of road crossing options to determine the best crossing to facilitate the valley restoration. The project will deliver a conceptual design report and drawings as well as construction quantities and cost estimate of a preferred alternative agreed upon by a select committee of local stakeholders.

Review Team Evaluation

Strengths

- The application describes a need to restore fish passage at a culvert on Forest Road 63 on Mottet Creek, east of Tollgate in the Grande Ronde Basin. Mottet Creek provides spawning and rearing habitat for bull trout and critical spawning habitat for Snake River Steelhead.
- Located on US Forest Service (USFS) managed lands, the Walla Walla Ranger District invited their Restoration Assistance Team (RAT) to review the project concept, and the project is vetted through the Forest Service approval process as well.
- The application is clearly written with sequential objectives and has descriptive photos, relevant maps of the work area, and an uploaded summary of recommendations provided by the RAT.

- The design approach is technically sound, will result in a conceptual design report, alternatives analysis, drawings, construction quantities, and a cost estimate of the preferred alternative.
- An experienced team, including Tri-State Steelheaders, US Forest Service personnel from the Walla Walla Ranger District, the US Forest Service RAT, and a qualified design consultant, have the capacity to manage and complete the design work as proposed.

Concerns

- The application indicates stage 0 restoration is a desired objective in the project area. It is unclear how restoring fish passage in Mottet Creek at the 63 Road crossing will complement stage 0 restoration and the two methods may not be compatible.

Concluding Analysis

The Tri-State Steelheaders propose to complete a preliminary design to restore fish passage in upper Mottet Creek. The preliminary design results will inform final passage design and how the work may complement future stage 0 restoration. Led by US Forest Service personnel, the proposed technical assistance has a high likelihood to inform aquatic restoration in upper Mottet Creek.

Review Team Recommendation to Staff
Fund

Review Team Priority
3 of 6

Review Team Recommended Amount
$49,738

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$49,738

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5021-22557
Project Type: Technical Assistance
Project Name: Watershed Synthesis Model
Applicant: High Desert Partnership
Region: Eastern Oregon
County: Harney
OWEB Request: $54,868
Total Cost: $68,868

Application Description 1) Malheur Lake watershed in southeast Oregon
2) Currently, it is unclear how water management decisions on the Malheur National Wildlife Refuge are affecting aquatic habitat types and habitat quality. The various bird guilds that utilize the refuge for breeding and migration have different habitat needs, including water depths. How water is managed on the refuge determines the water depths available for birds in wet meadows and in Malheur Lake. Over the past few years, the drought in this semi-arid region has limited the amount of water available, emphasizing the importance of informed water management.
3) This technical assistance grant would support a Watershed Synthesis Model that identifies how water management actions are affecting habitat types and quality on the refuge. The model will integrate multiple existing datasets and models from past studies. In addition, this model will incorporate new data collected by the Malheur National Wildlife Refuge staff that measures the water quantity being diverted from the Donner und Blitzen River. The Watershed Synthesis Model will include datasets from the headwaters (Steens Mountain) to the terminus (Malheur Lake).
4) Key project partners include High Desert Partnership, USGS, and US Fish and Wildlife Service.

Review Team Evaluation

Strengths

- The application is concise, the project objectives are clearly stated, and the application narrative describes the need to develop a model that informs tributary water management to Malheur Lake.
- The High Desert Partnership (HDP), United States Geological Survey (USGS) and US Fish and Wildlife Service (USFWS) have demonstrated the ability for collaborative work at this scale, as demonstrated by past OWEB Focused Investment Partnership (FIP) technical assistance grants with similar scope.
- The technical assistance focus is to develop a model that identifies how water management actions affect migratory bird habitat types on the Malheur National Wildlife Refuge (MNWR). Stream flow, irrigation diversion amounts, and water quality data will be collected and combined with existing data collection efforts using accepted methods to develop the model.
- Led by USGS with support from USFWS and HDP, the project team has the experience and capacity to develop, manage, and implement the model as proposed.

Concerns

- The application does not articulate how the database will be used to manage water resources; how the database will be managed; or how data will be gathered beyond the proposed schedule.

Concluding Analysis

HDP proposes to develop a model to inform how water management actions affect Pacific Flyway bird habitat types on the MNWR. The project team has the experience and capacity to develop the model as proposed.

Review Team Recommendation to Staff
Fund

Review Team Priority
6 of 6

Review Team Recommended Amount
$54,868

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$54,868

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering

Eastern Oregon (Region 5)

Application Number: 223-5022-22578 **Project Type:** Technical Assistance

Project Name: Five Mile Dam Replacement Design

Applicant: Harney County Watershed Council

Region: Eastern Oregon **County:** Harney

OWEB Request: $64,550 **Total Cost:** $82,398

Application Description The Five Mile Dam is the first major irrigation diversion on the Silvies River as the river enters the Harney Valley. The dam is failing and does not provide for fish passage. It is listed as a high priority fish passage barrier as identified by ODFW on their statewide fish passage priority list. This project would develop a 60% design for a replacement after working with OWRD and the irrigators served by the diversion to select an alternative design for a structure that provides for the diversion and provides for the potential for fish passage. The diverted irrigation water provides some 1,600 acres of flood irrigated wet meadow habitat for migratory waterbirds. This project is an important keystone for maintaining wet meadows and managing water in the Harney Valley and allowing fish passage into the lower Silvies River.

Review Team Evaluation

Strengths

- The application describes a clear need to design a restoration project that will replace the Five Mile Dam diversion structure with one that distributes water to the adjacent wet meadow floodplain, reduces streambank erosion, and meets Oregon Department of Fish and Wildlife's (ODFW) fish passage standards.
- The proposal is clearly written with sequential objectives, has descriptive photos, and a letter of support from Oregon Water Resources Department (OWRD).
- Restoring fish passage is an Oregon Department of Fish and Wildlife (ODFW) priority at the Five Mile Dam.
- The design work proposed in the application is supported by several assessments stating that flood irrigated wet meadow restoration is critical in this area for Pacific Flyway migratory birds.
- The proposed design approach is appropriate and will result in a 60% design set that is sufficient for an accurate construction cost estimate and initiation of regulatory permits.
- An experienced team, including Harney County Watershed Council (HCWC), Bierly & Assoc., LLC, OWRD, ODFW, and an engineering firm, have the capacity to manage and complete the design work as proposed.
- The proposed design and resultant diversion structure replacement will complement past diversion structure replacement work on the Silvies River that improved flood irrigated wet meadow hydrology, restored fish passage, and improved Pacific Flyway migratory bird habitat.
- OWRD will install a continuous stream flow gauge at the project site as part of the project that will assist in improved irrigation water management capability.
- Project costs align with the work necessary to complete a 60% design and to initiate regulatory permits.

Concerns

- While the Five Mile Dam is located on public land, the diversion serves 1,600 irrigated acres and landowner support for the work is not apparent in the proposal.

Concluding Analysis

The HCWC proposes to complete a 60% design sufficient to inform a restoration project budget and initiate regulatory compliance for an irrigation diversion replacement on the Silvies River near Burns. The Silvies River provides habitat for redband trout and flood irrigation hydrates nearby flood irrigated wet meadows important for the survival of migrating waterfowl. The proposed technical assistance has a high likelihood to inform improved fish passage in the Silvies River and effective wet meadow hydrology restoration.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 6

Review Team Recommended Amount
$64,550

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$64,550

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5023-22591

Project Type: Technical Assistance

Project Name: RELATIONSHIP OF FLOOD MEADOW VEGETATION TO HABITAT VALUE IN THE FACE OF CLIMATE CHANGE

Applicant: High Desert Partnership

Region: Eastern Oregon

County: Harney

OWEB Request: $74,996

Total Cost: $99,402

Application Description The effects of spring water flow variability and corresponding irrigation management on wet meadow conditions and plant community composition in the Harney Basin has never been thoroughly evaluated. As focus on water management becomes more critical with changing snowpack, flood timing, and flood regimes, the ability to manage flood water will become paramount. Recent efforts to document water regime-plant community relationships have built base knowledge to address the management of water to benefit plant communities that support wet meadow hay production and spring migrant bird populations. The unfolding impacts of climate change and annual weather conditions on water availability for wet meadow flood irrigation is of grave concern to private land agricultural producers and public land wildlife managers. The need to address water scarcity and to understand the changing hydrologic regime across these habitats is vital for sustainable resource management for both socioeconomics and for the diverse species of wildlife in the Harney Basin. Furthermore, known water resource issues in other areas of the Southern Oregon North Eastern California (SONEC) a region of the Pacific Flyway, such as the Klamath Basin lend added urgency to the importance of conservation efforts for Harney Basin's water resources.
Coordinated sampling to allow better assessments of how water and vegetation impact individual bird species use and overall species diversity will be conducted at three Harney Basin sites. These sites represent diverse surface water inputs, elevation variations, mosaic of wetland and riparian habitat type and quality and past management strategies and actions. (see map). Wet Meadow Partners, Portland Audubon, Malheur National Wildlife Refuge, High Desert Partnership, Mitch Baker and Bell A Ranch and the Burns High School Biology Class will work together to develop vegetation and water management recommendations to enhance flood irrigated wet meadow habitat

Review Team Evaluation

Strengths

- The High Desert Partnership (HDP), Wet Meadow Partners, Audubon Society of Portland, and US Fish and Wildlife Service (USFWS) have demonstrated the ability for collaborative work at this scale, as demonstrated by past OWEB Focused Investment Partnership (FIP) technical assistance grants with similar scope.

- The USFWS has many years of bird use and vegetation data independent of each other and the application proposes to collect vegetation data at the same time and location as bird use data. The resulting information will be used to develop management concepts and strategies that promote native wet meadow vegetation.
- The technical assistance results will help land managers reduce non-native meadow foxtail and Reed Canary grass through improved flood irrigation water management and altered grass hay harvest timing.
- The project team, including Burns High School, has the experience and capacity to manage and implement the work as proposed.
- Project costs align with the work necessary to accomplish the project objectives and methods are transferable to other locations, which improves cost effectiveness.

Concerns

- The application is unclear whether one or two years of data will be collected, and a single year of data collection is not enough information to understand results.
- The contracted services budget identifies names rather than skill sets or roles, and it is unknown what task each person will perform.

Concluding Analysis

HDP proposes to collect bird use and wet meadow vegetation data to determine management strategies that promote native wet meadow vegetation in the Harney Basin. The study results will help build community understanding and support for managing wet meadow water and vegetation for both wildlife and agriculture. The project team is comprised of wet meadow and migratory bird experts and the technical assistance results are likely to inform adjusted wet meadow management as climate changes.

Review Team Recommendation to Staff
Fund

Review Team Priority
4 of 6

Review Team Recommended Amount
$74,996

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team
N/A

Staff Recommendation

Fund

Staff Recommended Amount

$74,996

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5024-22543

Project Type: Stakeholder Engagement

Project Name: Harney Basin Wetlands Collaborative Stakeholder Engagement

Applicant: High Desert Partnership

Region: Eastern Oregon

County: Harney

OWEB Request: $139,808

Total Cost: $200,008

Application Description Project location. The Harney Basin Wetland Collaborative (HBWC) partners work throughout the closed lake basin of Malheur Lake; this project location includes mixed (public and private) land ownership and management, including Malheur National Wildlife Refuge, where many members of the general public come to view wildlife. The sister communities of Burns and Hines is the main population base of Harney County with 4,300 residents. The entire county has approx. 7,400 residents including just over 200 members of the Burns Paiute Tribe.

Project need. Engaging diverse stakeholders in this significant and large landscape is necessary to gain consensus to implement innovative solutions to control invasive species - both plants and fish in order to restore migratory bird habitat on the Pacific Flyway. This is the work of the Harney Basin Wetlands Collaborative.

Proposed work. This stakeholder engagement project takes a number of actions that are designed to strategically bring together and build relationships to help restore this large landscape. Activities include field tours, workshops, an information stewardship website, a migratory bird festival, a film created to capture a virtual bird festival tour, management guides for changing conditions in the flood wet meadows, series of informational articles and photography. Each of these activities are part of Harney Basin Wetland Collaborative's comprehensive communication plan that follows their stakeholder engagement results chain.

Project partners. HBWC partners include a variety of community organizations and government agencies. Supported by High Desert Partnership specific partners are Harney County Court, US Fish and Wildlife, USDA Agricultural Research Services, Portland Audubon, Ducks Unlimited, Harney Soil and Water Conservation District, Wet Meadows Partners, Eastern Oregon Agricultural Research Center at OSU, many private landowners, and more.

Review Team Evaluation

Strengths

- The High Desert Partnership (HDP) will engage appropriate stakeholders in the Harney Basin through a variety of methods including local events, print media, social media, the HDP website, videography, and photography.
- Stakeholder engagement methods are designed to reach local, state, and federal agencies, private landowners, and public land managers, as well as interested parties outside of the Harney Basin.
- The engagement methods described in the application encourage multi-directional communication between HDP and stakeholders. The proposed work builds on work ongoing since 2011, when the Partnership was established.
- The Partnership studies the Harney Basin hydrology, flood irrigated wet meadow habitat, and Malheur Lake conditions and conveys this information to the local community, which leads to OWEB-eligible restoration projects to improve native fish and wildlife habitats, specifically Pacific Flyway migratory bird habitats.
- The application is clearly written, the objectives describe the proposed work, and a broad array of specific actions are identified to be implemented to engage the Harney Basin community.
- The proposed work is a continuation of stakeholder engagement momentum realized from the Harney Basin Wetlands Initiative FIP (Focused Investment Partnership) and will lead to additional restoration work.
- HDP has the necessary experience and a proven track record of implementing the proposed stakeholder engagement activities.

Concerns

- The application does not describe the past success of similar stakeholder engagement work; however, knowledge of this success came from reviewers familiar with the HDP and their stakeholder engagement results.
- The contracted services portion of the budget does not provide sufficient detail to determine if costs are reasonable and necessary to complete the proposed work. The line-item descriptions do not articulate each task and lump sums do not describe the amount of work to be accomplished.

Concluding Analysis

The High Desert Partnership proposes to continue stakeholder engagement efforts in Harney County regarding the restoration of Malheur Lake and flood irrigated wet meadow habitats. The proposed work will highlight habitat restoration benefits to Pacific Flyway migratory water birds, explain why these habitats are essential to the flyway, and how private landowners and public land managers can facilitate these habitat improvements. The Partnership has ample experience conducting this work and likelihood of success is high.

Review Team Recommendation to Staff

Fund

Review Team Priority

2 of 2

Review Team Recommended Amount

$139,808

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$139,808

Staff Conditions

N/A

Open Solicitation-2022 Fall Offering
Eastern Oregon (Region 5)

Application Number: 223-5025-22574

Project Type: Stakeholder Engagement

Project Name: Creating Healthy and Resilient Forest in NE Oregon Through Local Engagement

Applicant: Wallowa Resources

Region: Eastern Oregon

County: Union

OWEB Request: $116,143

Total Cost: $231,143

Application Description Healthy forests provide critical habitat for fish and wildlife species, provide recreational opportunities, support local economies, and help to mitigate the impacts of climate change. Northeastern Oregon relies heavily on our two national forests (Umatilla and Wallowa-Whitman), that make up more than 50% of the ownership of several counties, for essential watershed health and function. Forest management is a complex system that requires the engagement of numerous stakeholders in addition to support from the public. The Northern Blues Forest Collaborative (NBFC) is a group of diverse stakeholders committed to developing and implementing a shared vision of forest resilience and community vitality across the Northern Blue Mountains in Oregon. Funding for this Stakeholder Engagement project has two key target audiences: land managers (current and potential stakeholders) and the general public, which influences local politics, NEPA actions, and are impacted forest management decisions. The overarching goal for this project is to work with a diverse group of stakeholders at the landscape and community level to develop the tools and resources needed to create healthy forested ecosystems in the Northern Blues that support native fish and wildlife habitat and are resilient to fire, insects/disease, and climate change. This will be accomplished through public engagement strategies, working with District Rangers to identify local needs and projects, completion of Climate Change Zones of Agreement project, and development of a NBFC Strategic Plan. Outcomes from this Stakeholder Engagement project will directly impact current and upcoming forest restoration projects and increase the pace and scale of future projects. The NBFC is part of a much larger effort across the Northern Blues to implement landscape scale restoration projects that build healthy watersheds and create more resilient forests.

Review Team Evaluation

Strengths

- Wallowa Resources will work with the Blue Mountain Forest Partners (BMFP) to engage the Umatilla and Wallowa Whitman Malheur National Forests to finalize a climate change zone of agreement, develop a strategic action plan, expand engagement across ranger districts, increase engagement with researchers, and develop additional methods to engage local communities, to increase the pace and scale of forest restoration.
- The Partnership will develop and hold eight workshops to engage the ranger districts, including those who have not engaged in past efforts, to facilitate multi-directional communication amongst the Partnership, public land managers, and the public.

- The Partnership was awarded the Collaborative Forest Landscape Restoration Program (CFLRP) award in 2020 with funds eligible for work on federal lands. This award leveraged additional funds to restore forests across property boundaries on private lands leading to landscape scale forest treatments.
- The proposed work to coordinate with ranger districts and the public will lead to forest restoration work that improves native fish and wildlife habitat, watershed function, and water quality as well as watershed resiliency in the face of climate change.
- Staff turnover has been high amongst the BMFP making this application timely to maintain collaborative momentum, achieve collaborative objectives, and facilitate the development of forest restoration work.
- BMFP stakeholder engagement and collaboration efforts facilitate timely forest restoration work in the Umatilla and Wallowa Whitman National Forests.
- The applicant and partners have a long history of successful forest collaboration work in Northeast Oregon and have the capacity to implement the project as proposed.

Concerns

- No significant concerns were identified.

Concluding Analysis

Wallowa Resources proposes to continue stakeholder engagement with the Northern Blues Forest Collaborative in Northeast Oregon. The proposed work will facilitate collaboration between diverse forest stakeholders and encourage timely forest restoration at an increased scale and across property ownership boundaries. The Partnership is experienced and the likelihood of achieving project objectives is high.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 2

Review Team Recommended Amount
$116,143

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team
N/A

Staff Recommendation

Fund

Staff Recommended Amount

$116,143

Staff Conditions

N/A

Region 6: Mid-Columbia

Mid-Columbia - Region 6 Fall 2022 Funding Recommendations



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Funding Recommendation

- Staff Recommendation For Funding (SRF)
- Below Funding Line (BFL)

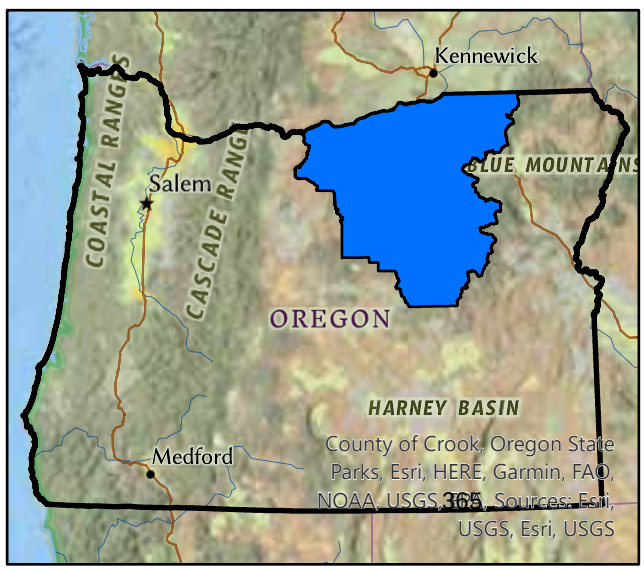
Previous Grants 1998 - Spring 2022

- Land Acquisition
- Restoration
- Region 6 Cities
- Region 6 Streams
- OWEB Region 6 Boundary

OREGON WATERSHED ENHANCEMENT BOARD

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Region 6 - Mid-Columbia Basin Restoration

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-6003	Gillam SWCD	Wet Fork Hat Creek Low-Tech Process-Based Restoration	Low-tech log structures and beaver dam analogs (man-made) will be installed along six miles of the Wet Fork of Hay Creek. The structures will help sustain streamflow, expand the floodplain, and encourage streamside vegetation to create better living conditions for fish and wildlife in the area.	78,344	Gilliam
223-6000	Confederated Tribes Umatilla Indian Reservation	South Fork Walla Walla River RM5 Post Flood Adaptive Management	Banks eroded from a 100-year flood event in 2020, that nearly took out a county road, will be fixed to improve stream conditions for fish and wildlife in the South Fork Walla Walla River corridor.	60,000	Umatilla
223-6001	South Fork John Day WC	Lewis Creek Headwaters Restoration	Rangeland health and conditions for wildlife, including redband trout, will be improved in the Lewis Creek watershed, a tributary of the South Fork John Day River. An upland water source will be developed for both wildlife and livestock in this semi-arid landscape. To help struggling aspen communities, buck and pole fencing will be added and encroaching juniper removed.	67,187	Grant
223-6002	Wheeler SWCD	Headwaters of Keyes Creek	Wildlife living conditions will be improved in the headwater area of Keyes Creek. Improvements include encroaching juniper removed, clean water sources at two sites provided, and one aspen grove protected.	80,886	Wheeler
223-6006	Bridge Creek WC	Mac Creek Watershed Improvement	Forest and rangeland health will be improved by removing acres of encroaching juniper and thinning crowded and diseased timber along Mac Creek in southeast Wheeler County.	223,284	Wheeler

223-6008	North Fork John Day WC	Hughes Water Development	Installing three solar-powered units to fill off-channel livestock watering troughs will reduce the carbon footprint by removing the need to use generators to power pumps. This project will aid to improve grazing management and increase the protection of streamside vegetation along Pine Creek, a tributary of Camas Creek, home to native steelhead.	108,717	Umatilla
Total Restoration Projects Recommended for Funding by RRT and OWEB Staff				618,418	

Projects Recommended but Not Funded in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
None					

Projects *Not Recommended* for Funding by RRT				
Project #	Grantee	Project Title	Amount Recommended	County
223-6004	Wheeler SWCD	Quant Rant Upland Restoration	148,721	Wheeler
223-6005	Grant SWCD	Belshaw Creek Passage Improvement Phase I	318,202	Grant
223-6007	Morrow SWCD	Canyon Farm II Biodiversity Enhancement Project	106,430	Morrow

Region 6 - Mid-Columbia Basin Technical Assistance

Projects Recommended for Funding in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-6009	Monument SWCD	Vardanega Conservation Assessment	Multiple inventory tools will contribute to a whole-ranch conservation assessment, and prioritize restoration in the uplands, wet meadows, and on multiple streams located in the Lower Fox Creek & Upper Cottonwood Creek watersheds.	17,833	Grant

223-6010	Oregon Natural Desert Association	Pine Creek Conservation Area Robinson Creek Riparian Restoration Plan	An assessment will result in a restoration plan and conceptual designs to help increase year-round stream flows, improve streamside vegetation, and benefit living conditions for both fish and wildlife along Robinson Creek in Wheeler County.	30,243	Wheeler
223-6012	Walla Walla Basin Watershed Foundation	Cup Gulch Assessment and Action Plan	Assessing the Cup Gulch watershed will help identify and prioritize future restoration opportunities, including strategies to remove a fish passage barrier where Cup Gulch enters the North Fork Walla Walla River.	46,181	Umatilla
Total Technical Assistance Projects Recommended for Funding by RRT and OWEB Staff				94,257	

Projects Recommended but Not Funded in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
None					

Projects *Not Recommended* for Funding by RRT				
Project #	Grantee	Project Title	Amount Requested	County
223-6011	Umatilla SWCD	McKay Creek Restoration Phase II	70,671	Umatilla
223-6013	City of Pendleton	Umatilla River Riparian Area Restoration Assessment	75,000	Umatilla

Region 6 - Mid-Columbia Basin Stakeholder Engagement

Projects Recommended for Funding in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
None					
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				0	

Projects Recommended but Not Funded in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
None					

Projects *Not Recommended* for Funding by RRT				
Project #	Grantee	Project Title	Amount Requested	County
223-6014	Walla Walla Basin Watershed Foundation	Watershed Stewardship Workshops	101,598	Umatilla

Region 6 Total OWEB Staff Recommended Board Award	**712,675**

Region 1 - 6 Grand Total OWEB Staff Recommended Board	**13,027,997**

Open Solicitation-2022 Fall Offering
Mid Columbia (Region 6)

Application Number: 223-6000-22507

Project Type: Restoration

Project Name: South Fork Walla Walla River RM5 Post Flood Adaptive Management

Applicant: Confederated Tribes Umatilla Indian Reservation

Region: Mid Columbia

County: Umatilla

OWEB Request: $60,000

Total Cost: $77,950

Application Description The Confederated Tribes of the Umatilla Indian Reservation (CTUIR) has developed a design to adaptively manage a previously constructed project site on the South Fork Walla Walla River in response to changes that occurred during the February 2020 flood event. This grant application is to fund adaptive management actions at the South Fork Walla Walla River RM 5.0 - 6.0 Project constructed in 2015 (2015 Project). The adaptive management action is located at located on the South Fork Walla Walla River at the upstream end of the 2015 Project, in Umatilla County, Oregon.

A large flood event that occurred in February 2020 caused the channel to migrate towards the road. The outside of the meander is a near vertical bank and the channel is now within 5.5 feet of the South Fork Walla Walla Road. This triggers action in accordance with the adaptive management plan developed for the 2015 Project (GeoEngineers 2015). The adaptive management plan identifies the proximity of the river to the roadway as a risk that needs to be actively monitored and immediately addressed if the river were to encroach too close to the road, as the road is the only access to the homes upstream of the project site. The adaptive management plan identifies a 4O-foot minimum buffer distance between the edge of the channel and the edge of the roadway. The channel's proximity to the roadway and risk of further bank erosion triggers immediate adaptive management actions to protect this infrastructure. Direct bank stabilization is not a goal, but in order to ensure the success of the 2015 Project we are proposing actions to encourage the thalweg away from the roadway. The intent of this adaptive management action is to increase habitat complexity and pool habitat availability while also protecting the roadway from being impacted from future channel migration. This will be achieved by strategic placement of large wood to encourage sedimentation behind the structures on the outside of the bend.

Review Team Evaluation

Strengths

- The application provides a clear and concise description of the proposed project objectives.
- Instream wood structures will be installed to encourage the river to move away from the county road and back into the available floodplain, pre-empting a more aggressive action by the county such as bank armoring with boulders.

- The 2020 100-year floods resulted in channel migration of the South Fork Walla Walla River toward a county road, within the reach of a previous restoration project completed in 2015. The adaptive management plan, a component of the original project, triggered restoration actions in this proposal to reverse that potentially damaging stream trajectory.
- The restoration method is appropriate for the site, and the costs outlined in the budget are reasonable for the actions described.
- Partner support is demonstrated by the forest service providing logs and the Bonneville Power Administration (BPA) contributing match funding and technical oversite.
- The proposed restoration is ready for implementation and urgent due to the erosional forces impacting the county road stability and the potential of future high-water events causing more severe damage, including increased sediment loading to the river.
- Allowing natural riverine processes to occur while at the same time protecting infrastructure on the Walla Walla River may prove to be a valuable restoration outreach tool.
- The applicant has a successful track record of implementing large-scale, complex instream restoration that require permitting, sourcing materials, and implementation oversite.
- Construction-ready designs are included in the application.

Concerns

- The application lacks a comprehensive discussion on alternative restoration techniques that were considered to address the problem. Also, an explanation of lessons learned from the original 2015 project implementation would provide important context for understanding the proposed adaptive fix. For example, a description of what worked and what the applicant would have done differently.
- The structures that will be located directly in the river bend may create undue scour. This may be mitigated by adding one more log structure upstream of the start of the bend to increase the likelihood of moving stream flows away from the roadway and into the floodplain.

Concluding Analysis

The Confederated Tribes of the Umatilla Indian Reservation (CTUIR) completed an extensive dike removal and floodplain reconnection project back in 2015 funded primarily by BPA. Floods in 2020 resulted in the river severely eroding the bank and migrating within 5½ feet of the county road. The project adaptive management plan identifies stream proximity to the road as a risk that needs to be actively monitored and immediately addressed. This proposed project addresses those concerns by using strategic placement of large wood to encourage sedimentation behind the structures and protect the roadway from further erosion without heavy armoring of the bank. With BPA's technical oversite during implementation, the project is likely to succeed in achieving habitat restoration goals while protecting the roadway.

Review Team Recommendation to Staff

Fund

Review Team Priority

2 of 6

Review Team Recommended Amount
$60,000

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Fund

Staff Recommended Amount
$60,000

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
Mid Columbia (Region 6)

Application Number: 223-6001-22537
Project Type: Restoration
Project Name: Lewis Creek Headwaters Restoration
Applicant: South Fork John Day WC
Region: Mid Columbia
County: Grant
OWEB Request: $67,187
Total Cost: $123,206

Application Description The Lewis Creek Headwaters Restoration project is located at the headwaters of Lewis creek, on the Double R Ranch, in Izee, Oregon. Lewis Creek drains into the headwaters of the South Fork John Day River. Lewis Creek is listed as a redband bearing stream, and within the Murderers Creek Mule Deer Initiative Area, as well as the South Fork John Day River Conservation Opportunity Area. Lewis Creek is on the DEQ's 303d list for temperature and sedimentation. This project will compliment watershed wide treatments throughout the entire Lewis Creek Watershed.

The Ranch has been working on their own to improve the uplands of this watershed through removing Juniper, Forestry Pre-Commercial Thinning, upland water developments, and constructing pasture fencing as well as Aspen protective fencing. They have partnered with multiple entities as well, beginning with forest health thinning through NRCS Environmental Quality Incentives Program, and the South Fork John Day Regional Conservation Partnership Program.

They have also partnered with the South Fork John Day Watershed Council to complete Juniper removal through OWEB grant #: 221-6005, and the SFJDWC secured Oregon Wildlife Heritage Foundation funding for installation of 1 upland water development in conjunction with this OWEB project. SFJDWC secured an OWEB small grant #25-18-004 to provide Aspen protection using a buck and pole fence for an aspen stand located between the 221-6005 project. SFJDWC also secured OWEB funding, grant #: 213-6057, for aspen caging and Juniper removal at the headwaters of Lewis creek.

We are proposing to compliment previous work, increase water availability and improve mule deer habitat through mulching, or cutting and piling 80 acres of Juniper, developing 1 upland water source, and buck and pole fencing 600 feet of Aspen. Project partners include Double R Ranch, SFJDWC, and NRCS.

Review Team Evaluation
Strengths

- The application provides comprehensive, detailed information needed to understand the project

objectives, including easy to understand maps, a grazing management plan, and a long-term juniper management plan.

- The landowner and land manager have a history of implementing a sustainable, ecologically focused grazing program, which is evident by existing healthy rangeland ecosystems across the ranch.
- Removing junipers from the floodplain will benefit the willow communities by taking away competition for moisture and nutrients.
- The upland water developments are an important element of the holistic restoration approach and will improve livestock distribution in the uplands as well as water availability to wildlife in a semi-arid landscape.
- The application includes lessons learned from previous work done to eradicate juniper, develop off-channel water supply, and protect and encourage aspen to proliferate.
- The budget is appropriate for the proposed work.
- Partner support is demonstrated by Natural Resources Conservation Service (NRCS) Regional Conservation Partnership Program (RCPP) funding secured for the project.

Concerns

- The application lacks photos of the proposed sites that would be helpful for understanding existing conditions.
- Although the application includes descriptions about the water development in the abstract, budget, and metrics, it is not included as an element in the list of objectives.

Concluding Analysis

The project builds on previous restoration implemented in the Lewis Creek watershed as well as other locations on the ranch property. The ranch manager continues to prevent junipers from re-establishing on previously treated ground, which indicates that habitat restoration maintenance is an on-going priority. Many aspen clones on the ranch have been restored and protected and have been used as examples to help other landowners better understand how to save aspen on their property and the multiple benefits of doing so. The project is located on a large-scale livestock operation that is a model for showing how grazing can be managed to benefit wildlife and improve the watershed functions of the landscape.

Review Team Recommendation to Staff

Fund

Review Team Priority

3 of 6

Review Team Recommended Amount

$67,187

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team

n/a

Staff Recommendation

Fund

Staff Recommended Amount

$67,187

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
Mid Columbia (Region 6)

Application Number: 223-6002-22552
Project Type: Restoration
Project Name: Headwaters of Keyes Creek
Applicant: Wheeler SWCD
Region: Mid Columbia
County: Wheeler
OWEB Request: $80,886
Total Cost: $116,311

Application Description 1.)This project is located on one landowners private property in the Bridge Creek Watershed at the headwaters of Keyes Creek, approximately 5 miles east of the town of Mitchell, OR in southern Wheeler County. Keyes Creek is a direct tributary to Bridge Creek, which is listed as a high priority watershed by the Mid C Recovery Plan and the John Day Basin Partnership Atlas for restoration efforts to improve fish habitat, specifically O. mykiss. 2.) Increased invasive species and unlimited access for livestock in the riparian corridor has led to a loss of native vegetation resulting in disconnected floodplains and unstabilized banks increasing sediment inputs into the stream systems. The lack of upland stockwater developments on the property has resulted in Keyes Creek being the main water source for wildlife habitat, which has lead to heavy browse on the limited riparian woody species currently there and creating gullies, rills, and headcuts along the stream. Additionally, the uplands have been compromised as historic fire suppression have increased Western Juniper encroachment creating a decline in upland habitat, bunchgrass communities, Quaking Aspen stands, and ultimately reducing water quality and quantity in the Bridge Creek Watershed. 3.)This project proposes to address the negative impacts Western Juniper imposes by mechanically cutting and piling 115 acres, hand cutting 20 acres on slopes greater than 20%, develop 3 springs (2 of which will be combined to feed one trough) to provide stockwater sources, protect one declining Quaking Aspen stand, and apply weed treatment on disturbed areas within the mechanical treatment of Western Juniper. Additionally, Keyes Creeks that runs all the way through the property will be enrolled into the USDA FSA CREP program in 2023. 4.) Project partners include OWEB, USDA FSA, Wheeler SWCD , and the landowner.

Review Team Evaluation

Strengths

- Keyes Creek, a perennial stream that flows through the project area, provides habitat for redband trout.
- The riparian area along Keyes Creek will be protected by a USDA Conservation Riparian Enhancement Program (CREP).
- The prioritized sites selected for juniper removal are appropriate for the largest ecological benefit, factoring in aspect, soils, and slope to maximize the investment return.
- The landowner is new to both the property and to restoration. They are working with a qualified natural resource consultant and the applicant to identify the best locations and methods to restore the property for wildlife using a phased, whole-ranch restoration approach.

- The portion of Keyes Creek located in the project area is near its properly functioning condition with minimal incision and diverse riparian vegetation, making it a key location for protection.
- The Keyes Creek watershed has been identified by the applicant as a focus area for future restoration. Removing juniper in the headwater area may help both water quality and potentially water quantity downstream.
- The applicant plans to complete a whole watershed barrier assessment to identify and prioritize potential downstream fish passage barriers for future restoration that will allow steelhead to access this improved habitat.

Concerns

- It is unclear from the application whether project sites will be grazed. However, the landowner clarified during the site visit that restoring wildlife habitat is the goal and the restoration project area will not be grazed in order to achieve that goal.
- Using Rejuvra© to combat invasive annual grasses will require careful attention to make sure the herbicide stays where it is applied and does not wash or drift to other sites.
- The project approach misses an opportunity to blend proposed treatments with instream habitat enhancement, such as installing juniper carcasses or beaver dam analogs (BDAs) in the stream to help catch sediment and aggrade the channel in locations where it is minimally incised.

Concluding Analysis

A new landowner located in the headwaters of Keyes Creek brings new opportunities to plan and implement restoration in the entire headwater area of this creek. The proposed upland improvements will serve as a beginning phase for a whole watershed focus.

Review Team Recommendation to Staff
Fund

Review Team Priority
4 of 6

Review Team Recommended Amount
$80,886

Review Team Conditions

n/a

Staff Recommendation
Staff Follow-Up to Review Team
n/a

Staff Recommendation

Fund

Staff Recommended Amount

$80,886

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
Mid Columbia (Region 6)

Application Number: 223-6003-22556

Project Type: Restoration

Project Name: Wet Fork Hay Creek Low-Tech Process-Based Restoration

Applicant: Gilliam SWCD

Region: Mid Columbia

County: Gilliam

OWEB Request: $78,344

Total Cost: $129,514

Application Description The project is located on Hay Creek, approximately 11 miles from the mouth. Hay Creek is a tributary to the John Day River and the John Day River is drains into the Columbia River. It is approximately 9 miles north of Condon in Gilliam County. The major watershed issue for this reach is intermittent flow during the summer months. The project will seek to create beaver habitat, expand the floodplain, initiate incision recovery, promote existing vegetation, and increase physical complexity. This will be done by installing Beaver Dam Analogs and Post-Assisted Log Structures. Half of the structures will be funded by NRCS through the Lower John Canyon Restoration Initiative Regional Conservation Partnership Program. Once perennial flow is established, riparian plantings will begin. A portion of the reach is currently protected by a riparian fence, and the remaining portions will have riparian fencing installed using a federal program. Project partners include NRCS, CTWS, ODFW, USACE, and DSL.

Review Team Evaluation

Strengths

- The clear and concise application describes a well-developed project that will result in installing beaver dam analogs (BDAs) and post assisted log structures (PALs).
- Including an Oregon State University hydrologist as a technical advisor increases the likelihood the BDA and PAL structures will be installed in appropriate locations and result in maximum floodplain benefit.
- The project focuses on the inset floodplain, with the ultimate goal of extending perennial flow in this steelhead stream and benefit both aquatic species and encourage a more robust riparian vegetation component.
- LiDAR and hydrologic modeling were used to design the restoration project to ensure each BDA and PAL structure placement is site appropriate and likely to succeed in restoring stream functions.
- Structures will be installed utilizing some materials found onsite, such as willows and big sagebrush found in the historic riparian zones, resulting in cost savings from having to haul into this remote location.
- The project will expand ecological benefits realized by the numerous projects completed nearby and planned future restoration within the same watershed.
- The applicant has successfully implemented similar type projects, installing over 1,000 low-tech, process-based structures in the county on priority streams.
- The contractor working with the applicant has experience implementing similar projects. This previous

- experience will be used to integrate adaptive learning to ensure instream structures are installed using techniques that have worked best in lower elevation streams in the John Day Basin like Hay Creek.
- NRCS funds will be leveraged to increase the scope of the project to cover this Hay Creek tributary and include significant exclusion fencing to protect riparian vegetation.
- Low-tech, process-based restoration techniques are appropriate and cost effective on low elevation stream systems like Hay Creek.

Concerns

- The application does not include photos that show site conditions.
- While there are beaver colonies in the Hay Creek system down in the lower stream sections, encouraging beaver establishment through the creation of habitat may prove difficult due to the distance between the project site and existing downstream beaver colonies on Hay Creek.

Concluding Analysis

Low-tech, process-based structures will be installed at locations on Hay Creek that will maximize floodplain connectivity. This will soak up and store high flows and slow down and catch sediment to aggrade the stream channel, which will help address stream incision that has occurred. This will restore ecological function by increasing perennial flows, improving riparian vegetation, and creating suitable habitat for beavers. The proposed project will build on extensive restoration already completed on the Hay Creek system in Gilliam County, which will leverage the watershed benefits from this investment.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 6

Review Team Recommended Amount
$78,344

Review Team Conditions

n/a

Staff Recommendation
Staff Follow-Up to Review Team
n/a

Staff Recommendation
Fund

Staff Recommended Amount
$78,344

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
Mid Columbia (Region 6)

Application Number: 223-6004-22571
Project Type: Restoration
Project Name: Quant Ranch Upland Restoration
Applicant: Wheeler SWCD
Region: Mid Columbia
County: Wheeler
OWEB Request: $148,721
Total Cost: $211,375

Application Description 1.) Located in central Wheeler County, the project is located on privately property approximately 17 miles north of the town of Mitchell, Oregon. This projected lies within the Service Creek Watershed, along Girds Creek, a south tributary to the John Day River. This tributary is very critical as it is one of the few main water courses found in the watershed. 2.) Historical wildfire suppression and reduced precipitation infiltration has lead to Juniper encroachment, which has a negative effect on water resources for both upland and riparian habitat. Juniper encroachment, with an effect of reduced precipitation infiltration, has increased over the years due to historical wildfire suppression. This has created a limitation on stream and aquifer availability resulting in water quality and quantity issues, as well as a loss of native vegetation with increasing annual grass invasions that degrade wildlife habitat and their food source. In addition, riparian habitats lack protection which has resulted in the limited riparian woody species suffering from browse and the lack of root structure/establish has contributed to degraded and unstabilized banks leading to additional sediments inputs into the stream. 3.) This project seeks to address the negative impacts that Western Juniper imposes on watershed functions and enhance wildlife habitat in the upland and riparian zones. There will be a total of 475 acres of Western Juniper removed, 320 acres of mechanical treatment and 155 acres of hand cuts, 5 spring developments (2 of which will be combined to feed one trough) for livestock and wildlife use, and enroll a portion of Girds Creek into the USDA Farm Service Agency CREP Program for wildlife habitat. 4.) Project partners include OWEB, CTWS, FSA, Wheeler SWCD, and the landowner.

Review Team Evaluation

Strengths

- Using a feller buncher to cut and pile the juniper is a technically sound and proven approach to economically mechanically remove juniper on the appropriately selected sites.
- The application includes a basic grazing management plan and has matching funds in the budget to train SWCD staff so they are able to prepare more comprehensive plans in the future.
- Objectives of the proposed work are appropriately wildlife centric with maps showing the sites are both mule deer and elk critical winter habitat.
- The land manager has gained the capacity and experience to implement successful OWEB funded restoration from projects done on other ranch properties he manages.

Concerns

- The application lacks specific detail describing plans for each water development. For example, the design for the pond, which will be the source for one of the water developments, is missing. The design provided in the application is generic and not specific to each water development location. Details such as elevation change between the spring source and the trough, method of water collection and conveyance, and water source protection are especially important to determine overall technical feasibility of water developments.
- Using hog panels to isolate the spring sources to protect them from livestock is not known to be wildlife friendly. Additional information describing the alternative methods that were considered and why the chosen method was selected would be helpful for understanding the project design approach.
- The proposed phasing for removing juniper in dry drainages and installing water developments in locations scheduled for a later juniper treatment may not result in the highest ecological benefit. Amore technically sound approach would be to focus treating juniper in the headwater basins where spring developments are located, resulting in a positive impact to increased groundwater and spring outputs.
- While Girds Creek may have redband trout that would benefit from restoration efforts, there are multiple barriers below the project site that restrict steelhead from accessing any upstream habitat. The distance of the project location to known steelhead habitat may limit potential benefits to fish from the improved water quality or quantity expected from this project.
- To better understand the water quality potential of the project, more information describing influxes of sediment from Girds Creek into the John Day River would be helpful for understanding the scale of the problem and the potential for the proposed restoration actions to improve water quality.
- The application budget is unclear because there appears to be duplicate line items related to the spring developments. Identifying components in the budget description, such as spring #1 and #2, could clarify costs that look like duplication instead of separate project components.

Concluding Analysis

The application improved from the first submittal by providing a higher level of prioritization of restoration sites, including a grazing management plan and long-term juniper maintenance plan, however, still lacks enough detail needed to determine the likelihood for the project to succeed in improving water quality and quantity.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

Review Team Recommended Amount

$0

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team

n/a

Staff Recommendation

Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
Mid Columbia (Region 6)

Application Number: 223-6005-22580

Project Type: Restoration

Project Name: Belshaw Creek Passage Improvement Phase I

Applicant: Grant SWCD

Region: Mid Columbia

County: Grant

OWEB Request: $318,202

Total Cost: $670,197

Application Description

Belshaw Creek is a tributary to the Upper John Day River located approximately 9.5 miles west (downstream) of Mt Vernon, OR.

The majority of the creek runs through a narrow canyon until the last 0.7 mile where it enters an alluvial fan; all active irrigation in the drainage occurs in this lower section. There are currently four active irrigation diversions on Belshaw Creek consisting of gravel, tarps, and plywood; these structures impede migration of ESA-listed summer steelhead for some life stages certain times of the year. Based on GIS information obtained via ODFW, summer steelhead use this reach for spawning and rearing as well as by resident redband trout. The associated ditches are extensive; losses create supply issues for all landowners and require additional maintenance for proper operation.

The proposed project will combine the five active and inactive diversions into two. New low head structures consisting of engineered rock riffles and submerged inlet boxes will create consistent fish passage opportunities of all life stages through the structure and remove the annual channel disturbance required by push-up dam operations. The ditches will be individually piped with a headgate and measurement device to improve delivery and isolate water for each landowner; wild flood irrigation will be replaced by irrigation through risers from the pipe.

Due to the recent rise in material and contracting costs, the project will occur in two phases. This request solicits funding to address passage at the upper diversion as well as address efficiencies on lands east of the creek. A map of the locations of the areas included in each phase is attached to this proposal.

The project partners include landowners Tirico Ranch Inc., Tim Nodine, Rick & Cindi Hufstader (land managed by Mike Martin), the Bureau of Reclamation, the Confederated Tribes of the Warm Springs Reservation of Oregon, and the Natural Resource Conservation Service.

Review Team Evaluation

Strengths

- Belshaw Creek is a perennial stream that provides habitat for steelhead, west slope cutthroat, and juvenile Chinook.
- Land management recently changed to second generation owners that are more interested in pursuing restoration, this support increases the likelihood the project will succeed.
- The applicant is engaging appropriate partners by coordinating with three landowners, the Oregon Department of Fish and Wildlife (ODFW), Bureau of Reclamation (BOR), the Confederated Tribes of Warm Springs (CTWS), and the Natural Resources Conservation Service (NRCS) Regional Conservation Partners Program (RCPP).
- The proposed project will result in consolidating five irrigation diversions into two, reducing the number of barriers fish currently have to pass.

Concerns

- The quantifiable ecological benefit expected from the proposed investment is difficult to determine without information describing any ditch loss or water savings studies that may have been conducted. This information would be helpful for understanding the potential for increased instream flow likely to result from the project.
- It is unclear from the application whether Oregon's Conserved Water Program was considered by project partners or is a feasible option to protect instream flow benefits that will result from the project.
- There is a deep headcut located right below the highest irrigation diversion that significantly limits fish passage for juveniles. The headcut was a distinct stream feature seen during the application site visit; however, it is not addressed in the application narrative or project designs. Addressing the headcut to ensure effective fish passage for juvenile fish could impact permitting requirements and increase the project budget. This may limit the likelihood of success for the project as proposed in the application.
- The proposed project strategy will address fish passage on Belshaw Creek starting with the two highest irrigation diversions. This strategy will have limited ecological benefits because it does not readily address fish passage lower in the system. A more technically sound approach would be to begin correcting passage at barriers located at the confluence of Belshaw Creek with the John Day River, and then work upstream to the last and highest diversion.
- The application lacks information describing how grazing management will be structured to improve existing degraded riparian areas or how the adjacent fields watered with the new irrigation diversion and pipeline system will be managed. Improper management practices may negate any potential water quality or quantity improvements likely to result from the proposed restoration actions. Additional information is needed to evaluate whether the project is likely to succeed in achieving the expected ecological benefits.
- While the application indicates design comments from Bonneville Power Administration (BPA) and the National Oceanic Atmospheric Administration (NOAA) will be incorporated into design revisions, itis not clear if BPA and NOAA have already reviewed the designs. If not, the 60% design supplied with the application could significantly change as a result of their review.
- The application lacks an irrigation water management plan or information about the irrigation use. Without this information, it is difficult to assess the overall ecological benefits expected from the project because it is unclear how much water will be used, when water will be used, and how much water will be left in stream.
- Because of the significant impact of fish barriers below the project site, more detail about the phase two schedule would add significant context to the overall benefit.
- The application lacked detail on how the timing of the RCPP funding could impact the timeline for phase two.

Concluding Analysis

Consolidating multiple irrigation diversions can be a technically sound approach to mitigating fish passage if the ecological benefits can be quantified. Without more information on actual water use, it is difficult to determine if Belshaw Creek will sustain adequate flow during the time of critical fish use as a result of the proposed irrigation infrastructure improvements. The riparian area around the top two diversions is severely degraded; however, addressing this declining function is not included in the project scope of work. The application lacks information needed to determine whether the proposed project is likely to provide significant ecological benefits for the cost.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority

Review Team Recommended Amount
$0

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
Mid Columbia (Region 6)

Application Number: 223-6006-22583
Project Type: Restoration
Project Name: Mac Creek Watershed Improvement
Applicant: Bridge Creek WC
Region: Mid Columbia
County: Wheeler
OWEB Request: $223,284
Total Cost: $350,908

Application Description This project is located in the Mac Creek watershed in southeast Wheeler County. Mac Creek flows into Mountain Creek, an important tributary in the Rock Creek watershed, meeting the John Day River near Picture Gorge.
Western Juniper encroachment and overstocked forests have contributed to degraded watershed health and pose a risk factor for high intensity wildfires. Overabundance of western juniper decreases the effective precipitation that reaches the soil, impacting hydrologic function and cover of shrubs and grasses. Bark beetles, mistletoe, fir engraver beetle, and drought are further impacting forest health in the watershed. Much work has been completed on stream restoration in the Mountain Creek Watershed, including fish passage projects, riparian buffers, and replacement of irrigation diversions. Previous upland projects , instream and riparian projects, converting open ditch to pipe and replacing undersized or failing culverts have all been completed on this and adjacent properties. The long-term lessee has enrolled approximately 1200 meters of Mac Creek and 3500 meters of Mountain Creek in the Conservation Reserve Enhancement Program.
This project will cut and pile western juniper on 132 acres and implement 363 acres of pre-commercial thinning. In addition this application includes 32 acres of noxious weed treatment including medusahead and diffuse knapweed and 32 acres for reseeding treated and disturbed areas.
Project partners are OWEB, the landowner, and NRCS.

Review Team Evaluation

Strengths

- All the concerns summarized in the previous application evaluation are addressed by taking a more holistic approach that addresses multiple resource concerns, including juniper removal out of the riparian zone, and combining timber thinning with juniper removal to maximize the investment.
- The project builds on similar timber thinning and juniper removal projects on adjacent private lands along the Ochoco National Forest border as well as pre-commercial thinning completed near the project area that was funded by Natural Resource Conservation Service (NRCS).
- Mac Creek is identified as steelhead habitat. Removing juniper and overstocked conifers may add critical flows and improve water quality to the lower reaches that will provide benefits for these fish.
- The treatment sites selected for this project currently suffer from overstocked stands as well as disease and insect damage.

- The landowner currently has a careful grazing management approach that is reflected in the existing healthy understory of native shrub, grass, and forb communities.
- The budget is appropriate based on the current density of both timber and juniper stands.
- Oregon Department of Forestry provided technical assistance for the timber thinning prescription and a letter of support for the project is included in the application.

Concerns

- The application has some metrics that do not align with the current proposed work and may have been left over from a previous application that was cloned.

Concluding Analysis

The project focuses on timber health and treating invasive juniper to open up the overstory canopy, minimize the negative impacts of potential wildfire, and reduce competition from invasive and dominant conifers. This project builds on restoration completed on the project property and neighboring ranches. In times of extreme weather events, mitigating catastrophic wildfire impacts and improving precipitation infiltration are key to maintaining a healthy functioning forest landscape.

Review Team Recommendation to Staff
Fund

Review Team Priority
5 of 6

Review Team Recommended Amount
$223,284

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Fund

Staff Recommended Amount
$223,284

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
Mid Columbia (Region 6)

Application Number: 223-6007-22584

Project Type: Restoration

Project Name: Canyon Farm II Biodiversity Enhancement Project

Applicant: Morrow SWCD

Region: Mid Columbia

County: Morrow

OWEB Request: $106,430

Total Cost: $174,498

Application Description This project will take place on Canyon Farm II, which is owned by Canyon Farm II LLC since March of 2019. The property was formerly owned by Easterday Farms and Lost Valley Dairy, and Greenwood Resources before that. The storied tenure of the previous ownership was tenuous after acquisition from the tree farm. The trees were removed, and now dairy buildings and irrigated circles are the predominate features of the landscape. Canyon Farm II is 6,552.9 acres of irrigated circles and associated corners. Canyon Farm II does not own the adjacent unoccupied dairy.

The new owners have experienced a lot of erosion, both wind and water, in the field corners and would like to seed a wildlife friendly grass mix, as well as plant trees and shrubs to shore up the sandy/loamy soils on the property and sequester carbon as well. They are also concerned about noxious and invasive weed encroachment on the property. There are low-lying areas where irrigation water runoff is heavier than they would like. The hope is to avoid any potential leaching of nutrients through the porous soils into the sensitive groundwater.

This project looks to restore circle pivot field corners, planting 30 acres of trees and shrubs and seeding 500 acres to grass. This perennial and diverse grass stand with trees and shrubs will serve as filter strips to reduce or remove organic material and other pollutants from potential irrigation runoff, by slowing the velocity of water, allowing the adsorption of pollutants on soil and plant surfaces, and uptake of soluble pollutants by plants. These plantings should reduce concentrations of carbon dioxide in the atmosphere through photosynthesis, fixing it into organic forms in the soil thus increasing carbon sequestration. This project will also provide essential food and cover for wildlife and could enhance connectivity of habitat corridors. The site capable mix of grasses and woody plants will hold the soil to lessen erosion and suppress noxious weeds.

Review Team Evaluation

Strengths

- The grass species that will be seeded aligns with the precipitation zone for the project location.

- New landowners and managers on the property are engaged in addressing wind and water erosion by creating grass borders that will also support the local wildlife.
- The budget is appropriate for the identified project components. Estimates from contractors and local seed companies were sought to develop accurate costs.
- Innovative monitoring of insects and birds is described in the application and will be done by a company focused on enhancing biodiversity.
- If successful, the project may be a showcase for local farms dealing with similar erosion issues.

Concerns

- Although claiming to benefit steelhead, the impact will be minimal because the project location does not appear to be anywhere near a stream identified as steelhead habitat.
- While the application does provide detailed information on the farm's numerous irrigation and nutrient management systems, it lacks monitoring data analysis that show how current irrigation run-off and nitrate issues are reduced as a result of these systems. This information would add context for understanding the overall ecological benefits of the project.
- Establishment of riparian species in low-lying areas may rely on irrigation run-off, which will differ depending on the crops grown and may limit overall planting viability.
- The soils in the project area are porous, fast draining, and located above a high nitrate groundwater zone. The source of nitrogen at the project site will likely come off the adjacent crop fields. The application lacks necessary detail describing the types of crops grown, crop rotation, and fertilizer application within the project area, all needed to better understand the sources and amounts of nitrogen in this critical Lower Umatilla Basin Ground Water Management Area (LUBGWMA) where groundwater nitrate levels are extreme.
- Improving habitat for wildlife in an area of high-dollar crops may create a conflict with farmers. The application does not address how those issues will be handled and could impact the project's likelihood to succeed in creating wildlife habitat.
- Treating weeds by spraying adjacent crop fields will likely jeopardize the success of planting pollinator species, reducing the level of biodiversity benefits that could be gained by the project.
- Treating and controlling the weeds prior to seeding native grass will improve the likelihood of success. However, the application notes that field corners are currently annual grasses and noxious weeds, and continued herbicide treatment could be detrimental to the success of the proposed seeded native grass stands.

Concluding Analysis

The project is an innovative approach to help reduce wind erosion, weed monocultures, and nitrate issues in a large farm located in the Lower Umatilla Basin Ground Water Management Area (LUBGWMA). New landowners are working to farm in an environmentally sensitive manner; however, the proposed seeding of native grasses may be premature. The density of the weed communities in the project sites and on adjacent fields have not been treated and will remain a seed source that will impact the success of native grass stands. Weed treatments are never a one and done type practice and will require long term action to successfully achieve restoration objectives for establishing native plant communities.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

Review Team Recommended Amount
$0

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
Mid Columbia (Region 6)

Application Number: 223-6008-22586
Project Type: Restoration
Project Name: Hughes Water Development
Applicant: North Fork John Day WC
Region: Mid Columbia
County: Umatilla
OWEB Request: $108,717
Total Cost: $174,627

Application Description 1) This project is located on private property (Hughes Ranch) in Umatilla County, just outside of Ukiah, Oregon. This 4,000 acres property takes in 1 mile of Pine Creek (HUC #170702020605), a tributary of Camas Creek (HUC # 1707020206). Pine Creek provides critical spawning, rearing, and migratory habitat for ESA listed Mid-C summer steelhead. The North Fork John Day River is 1 of 8 salmon strongholds in the state of Oregon.

2) Productive streams provide refugia for native salmonids from warming water temperatures in the summer and protection from harsh winter conditions. On the Hughes Ranch, the ability to water cattle is dependent on Pine Creek, a handful of ephemeral ponds, and a single well running off of a diesel generator. This limits the ability of the landowner to manage grazing beyond shifting livestock between a few large pastures and has resulted in cattle spending disproportionate time in sensitive riparian areas. The limiting factors this project addresses are (1) degraded riparian area (2) water temperature and (3) increased sedimentation.

3) This project proposes the development of 3 solar powered pump stations (wells are already drilled and registered with OWRD). Each station would include a solar powered pump, solar array, a 2,000 or 3,000 gallon cistern, and 2-1,200 gallon troughs.

The ultimate goal of this project is to pull cattle off of Pine Creek. The establishment of these new grazing locations with alternative water sources will allow the landowner to split existing pastures into smaller units and provide reliable alternative water sources within those pastures. Restoration efforts aim to help the landowner manage grazing more effectively and preserve water quality and quantity.

4) This will be a cooperative effort between the North Fork John Day Watershed Council and the private landowners.

Review Team Evaluation

Strengths

- The applicant and landowner are working with both a qualified contractor and Natural Resources Conservation Service (NRCS) technicians to determine best solutions for off-channel water developments that increases the technical feasibility of the project.

- By developing the existing wells into sustainable water sources for livestock, the riparian areas of Pine Creek can be safely excluded from grazing.
- Including cisterns as components of these water developments is an ancillary benefit as sources of water to fight wildfire, which during these times of severe drought could negatively impact ecological health on both these sites and on neighboring properties.
- Pine Creek is identified as steelhead habitat and will benefit from the proposed restoration and protection.
- The budget uses NRCS rates and design standards and reflects current market values for the project components.

Concerns

- Additional photos and narrative that describes the existing riparian area condition would provide helpful context for understanding the extent of potential benefits that could be gained from the project. Including a riparian planting component to the project would provide a more holistic approach and increase the ecological benefits that could be achieved.

Concluding Analysis

The project is located near Ukiah where the landowner's family has been on the property since 1956. Livestock only use the property in the summer and early fall. Then livestock are moved offsite to a ranch in Heppner. This allows for the rangeland in the project area to rest and regrowth to occur, which is evident from the photos included in the application. Currently, the gates to Pine Creek must be left open during drier times so livestock are not stranded without access to water. Utilizing solar technology and storing significant amounts of water in cisterns will allow the landowner to keep the gates closed to Pine Creek and exclude livestock from the riparian areas, allowing vegetation to re-establish and water quality to improve. By developing existing wells using solar pumps and cisterns, systems can be maintained without using generators and extensive travel, lowering the carbon footprint while assuring livestock always have water.

Review Team Recommendation to Staff
Fund

Review Team Priority
6 of 6

Review Team Recommended Amount
$108,717

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Fund

Staff Recommended Amount
$108,717

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
Mid Columbia (Region 6)

Application Number: 223-6009-22509
Project Type: Technical Assistance
Project Name: Vardanega Conservation Assessment
Applicant: Monument SWCD
Region: Mid Columbia
County: Grant
OWEB Request: $17,833
Total Cost: $28,071

Application Description 1) This project will take place in the Lower Fox Creek & Upper Cottonwood Creek Subwatersheds (HUC 12 - 170702020904 & 170702020905). Fox/Cottonwood Creek is a tributary of the North Fork John Day River with an arbitrary name change near Fox Valley, OR. The confluence is near the town of Monument, OR.
2) The Circle V ranch was purchased late in 2021 as a portion of Vaughan Ranches in Fox Valley. The 8,800 acre parcel was managed with high intensity grazing and little rotational grazing due to a lack of resources by the previous land owner. Range, riparian and boundary fencing, irrigation diversions, forestry, and in-stream habitat have been impacted. The ranch is situated in an area of Fox/Cottonwood that supports ESA listed Mid-Columbia steelhead at high enough elevations that populations are more resilient to late-season high water temperatures and smallmouth bass encroachment. A property conservation assessment is needed to evaluate and prioritize cattle related infrastructure, in-stream habitat condition, diversion passage and function, noxious weed distributions, upland watering sources, upland and forestry related resources.
3) The proposed project would conduct a conservation assessment using the following tools: 1) the North Fork John Day Watershed Council's Stewardship Planning Framework, 2) A physical geographic survey of natural resource and infrastructure location and condition, 3) A Rapid Geomorphic Assessment and 4) Aquatic prioritization from the John Day Basin Partnership's ATLAS program. The project would result in a property wide assessment that would assist the landowner and conservation partners in prioritizing resource management projects.
4) Partners for this project include: The North Fork John Day Watershed Council - Stewardship Plan guidance and assessment assembly. The Confederated Tribes of Warm Springs - Fiscal support and consultation. Grant Soil and Water Conservation District - Consultation.

Review Team Evaluation

Strengths

- The application is well thought out and clearly describes the project approach, how the property conservation assessment tools will be used, and the expected deliverables that will result from the project.
- The budget is appropriate for the proposed technical assistance and is based on the applicant’s previous experience using these tools on other properties.

- One half of the large ranch property where the project will occur is within the Oregon Department of Agriculture (ODA) Focus Area.
- The assessment will result in an action plan that identifies and prioritizes restoration that builds on significant aquatic and terrestrial habitat restoration already completed both up and downstream of the property.
- Cottonwood and Fox Creeks are home to numerous priority native aquatic species, including steelhead and freshwater mussels.
- A new landowner on the property provides fresh opportunities for restoration. The phased approach of first doing an assessment on the ranch and then prioritizing actions is technically sound and will likely lead to successful restoration.
- Besides the assessment document, the landowner will be provided with interactive Avenza© map layers to use as they navigate and document infrastructure and restoration projects on their property.
- Appropriate technical partnerships support the project.
- The applicant has experience using the same proposed protocols on other ranches in the area and has the capacity to complete the tasks as outlined in the application.

Concerns

- The application does not include a letter of support from the landowner, which would lend clear indication the project is likely to succeed in leading to future restoration implementation.

Concluding Analysis

New landowners often provide opportunities for restoration. When approached by the landowner for assistance in improving habitat conditions on their ranch, the applicant suggested this phased approach, by first creating a conservation assessment across the 8,800-acre ranch. This is technically sound by first inventorying the multiple types of ecosystem conditions and infrastructure on the ranch, and then prioritizing restoration actions to holistically improve the watershed functions across the entire landscape. The project uses several different accepted protocols to gather and analyze the information, and results in user-friendly tools to both restoration partners and the landowner as they begin to plan and implement projects.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 3

Review Team Recommended Amount
$17,833

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team

n/a

Staff Recommendation

Fund

Staff Recommended Amount

$17,833

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
Mid Columbia (Region 6)

Application Number: 223-6010-22548

Project Type: Technical Assistance

Project Name: Pine Creek Conservation Area Robinson Creek Riparian Restoration Plan

Applicant: Oregon Natural Desert Association

Region: Mid Columbia

County: Wheeler

OWEB Request: $30,243

Total Cost: $56,742

Application Description Robinson Creek is located within the Pine Creek Conservation Area (PCCA), a 34,012 acre property in Wheeler County owned and managed by the Confederated Tribes of Warm Springs. Robinson Creek, one of the largest tributaries of Pine Creek and the Lower John Day River, contains designated Critical Habitat for Mid-Columbia steelhead trout and essential salmonid habitat, and serves as a connective corridor for fish and wildlife moving from the lower elevations of the John Day Basin to the higher elevation ponderosa pine forest. Historic livestock grazing and other agricultural activities coupled with climate change impacts have severely degraded natural processes and habitat function on Robinson Creek, leaving it deeply incised with poor instream and riparian habitat and reduced instream flow.

In partnership with the Confederated Tribes of Warm Springs, ONDA will develop a restoration plan and design restoration treatments for approximately three miles of high priority stream on Robinson Creek to improve hydrological function, increase year-round flows, increase vegetation abundance and diversity, improve habitat conditions for Mid-Columbia steelhead and other native fish and wildlife.

Review Team Evaluation

Strengths

- There is a clear need for the proposed assessment to understand existing conditions on Robinson Creek and to develop a comprehensive stream and riparian restoration project design.
- Robinson Creek is an appropriate location for using low-tech, process-based restoration techniques to extend wetted reaches and maximize spring inputs. Resulting restoration will benefit wildlife and potentially improve the water quality and flow into Pine Creek.
- The project is located on a tribal conservation property, which provides an opportunity for restoration and long-term management that focuses entirely on fish and wildlife habitat and water quality improvements.
- The budget aligns with the work necessary to accomplish the project objectives.
- The applicant has the capacity to implement the proposed project actions and has implemented similar project types.
- Mapping spring inputs and minimally incised channels is a technically sound approach to identify future restoration locations for riparian plantings, beaver dam analogs (BDAs) and post assisted log structures (PALS).

Concerns

- The application lacks information describing other restoration activities completed in the Robinson drainage, specifically how much juniper has been and will be removed upslope and in the headwaters of Robinson Creek. Heavy infestation of juniper could be reducing the groundwater inputs into the intermittent reaches of the creek. Including this additional information in the application would provide important context for understanding the project benefits long-term.
- Although listed as critical habitat, steelhead use at the confluence of Robinson Creek and Pine Creek is uncertain without data verifying their presence, and steelhead use is highly unlikely in the upper reaches of Robinson Creek because of low or no flow. Consequently, stream improvements may provide limited habitat benefits for steelhead.

Concluding Analysis

The Pine Creek Conservation Area is a large tribal holding specifically purchased for fish and wildlife habitat. Other than juniper removal, not a lot of restoration has been completed up Robinson Canyon. Robinson is the largest tributary to Pine Creek, an identified steelhead stream that also is home to large communities of beavers. Assessing existing conditions on Robinson Creek is a reasonable first step to determine ideal locations for restoration to occur and site-appropriate designs. The applicant is encouraged to work with the Oregon Department of Fish and Wildlife (ODFW) fish biologist to determine what restoration treatments are appropriate based on potential fish use in Robinson Creek.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 3

Review Team Recommended Amount
$30,243

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Fund

Staff Recommended Amount

$30,243

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
Mid Columbia (Region 6)

Application Number: 223-6011-22577
Project Type: Technical Assistance
Project Name: McKay Creek Restoration Phase II
Applicant: Umatilla SWCD
Region: Mid Columbia
County: Umatilla
OWEB Request: $70,671
Total Cost: $88,371

Application Description The McKay Creek Habitat Restoration Phase II project seeks to continue the process of restoring habitat that was severely damaged by the major flooding events that occurred in spring of 2019 on lower McKay Creek.

The project is located directly south and southwest of the city of Pendleton, and encompasses the reach from the base of the McKay Creek Reservoir to the mouth where McKay Creek connects into the Umatilla River. This reach
of McKay Creek flows through a rapidly developing small farm community, and eventually passes into the City of Pendleton's Urban Growth Boundary before flowing back into more agricultural ground. The highly-developed
nature of the riparian area creates a challenge for floodplain re-connectivity, as the stream is constrained to protect the infrastructure that lines its banks.

The unexpected rains in 2019 caused an unprecedented flow of water into McKay reservoir. To prevent compromising the structural integrity of the dam, Bureau of Reclamation was forced to release high flows for over
two weeks. The amount of sedimentation and erosion that occurred was significant. Existing riparian vegetation was ripped away, leaving bare and cut banks that promised additional erosion. Phase I of this project identified the locations that are in need of restoration, and set forth a trajectory that this project hopes to capitalize on.

This project proposes to build on the report and design data on project sites that was collected in the previous grant phase, bringing them to 100% design. The majority of funds for this phase will go towards contracting with Anderson and Perry to bring the identified sites to design and permit completion.

Partners include City of Pendleton, Umatilla County, Bureau of Reclamation, and Lower McKay Creek Water Control District.

Review Team Evaluation
Strengths

- The application presents a clear need for the proposed technical assistance with a concise narrative

and photos that demonstrate the extent of the Spring 2019 flooding events.

- The proposed restoration design approach is a logical next step following the previous technical assistance grant that funded outreach and an assessment.
- There is a high rate of landowner project participation in a populated area of Pendleton.
- The application presents a proactive attempt to find workable solutions in an area presenting erosion problems exacerbated by high flows released from the dam.
- The previously completed conceptual design includes using logs and bioengineering to stabilize banks rather than traditional armoring with boulders and rip rap.
- Support from multiple stakeholders in the area are indicated by letters of support and match.

Concerns

- Reservoir management appears to be key in the issues on McKay Creek and seems to be a significant factor contributing to impacts of flooding below the dam. If not resolved, it is uncertain whether the proposed bank stabilization actions will effectively provide a long-term solution. The next large release of water from the reservoir could undermine or destroy any bank stabilization investment.
- There are multiple ongoing assessments associated with the McKay Dam and flooding issues across the Umatilla Basin. It is unclear from the application whether the proposed project fits into a timely, collaborative solution connecting these various efforts or how the resulting restoration projects will fit into the overall goals of the multiple studies.
- Although the proposed side channel design element is a technically sound restoration alternative, the application indicates it will not be designed to offset high flows, reduce flooding, or reduce erosional forces. This would likely limit the benefits of the side channel in addressing the watershed problem impacting the project site. More information about the intent and objective of each design element within the application narrative would add helpful context needed to determine whether design approaches are site appropriate.

Concluding Analysis

McKay Creek is a known contributor of high sediment loads into the Umatilla River, especially after destabilizing events such as the 2019 and 2020 floods. However, there could be a missed opportunity to participate in a sustainable and collaborative pathway that integrates the various ongoing efforts to assess conditions and determine solutions that address the limiting factors affecting McKay Creek, specifically the issues of large erosive releases from McKay dam. This broader approach is more likely to succeed in restoring stream function and addressing the cause of watershed degradation rather than the symptoms.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

Review Team Recommended Amount

$0

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team

n/a

Staff Recommendation

Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
Mid Columbia (Region 6)

Application Number: 223-6012-22614

Project Type: Technical Assistance

Project Name: Cup Gulch Assessment and Action Plan

Applicant: Walla Walla Basin Watershed Foundation

Region: Mid Columbia

County: Umatilla

OWEB Request: $46,181

Total Cost: $90,427

Application Description Cup Gulch is located approximately six miles southeast of Milton-Freewater in Umatilla County, Oregon. Cup Gulch is a tributary of the North Fork Walla Walla River, which flows into the mainstem Walla Walla River three miles downstream of its confluence with Cup Gulch. The assessment area encompasses 3.3 square miles from the confluence with the North Fork Walla Walla River up to the top of the dividing ridge with Cottonwood Creek (see Cup Gulch Location attachment).

The Cup Gulch Assessment will complement other water quality and habitat improvement efforts in the basin. Several floodplain and habitat restoration, spring reconnection, fish passage, and riparian restoration projects upstream and downstream of this assessment area have been completed or are in the design stage, including the North Fork Sam's Rea five-mile restoration project.

Cup Gulch has the potential to provide off-channel rearing habitat for ESA-listed steelhead and redband trout and deliver additional spring and summer flow to the North Fork Walla Walla River. A culvert is identified by the Oregon Department of Fish and Wildlife (ODFW) as a barrier to "some fish some of the time." The culvert is located on the North Fork River Road, less than 500' from the confluence with the North Fork Walla Walla River (see culvert location map attachment). This assessment will develop a strategy to remedy the passage barrier and assess the potential habitat upstream of the passage barrier. This assessment area is also located in a Strategic Implementation Area (SIA) designated by the Oregon Department of Agriculture, which focuses on implementing projects that improve water quality in local watersheds.
Bonneville Power Administration will be assisting in funding this work and will be a project partner.

Review Team Evaluation

Strengths

- The application clearly identifies the need to assess Cup Gulch and identify future restoration opportunities, including opening passage to three miles of potential steelhead habitat, increasing cold

water inputs to the North Fork Walla Walla River, and restoring riparian vegetation that has been scoured out by high flows.

- The project site is located within one of Oregon Department of Agriculture's (ODA) Strategic Implementation Areas (SIA).
- Water quality information gleaned from the assessment will be uploaded to the Department of Environmental Quality (DEQ) database and be available to the public.
- The budget is reasonable for the identified work elements.
- The application includes letters of support from restoration partners, indicating appropriate stakeholders are involved in the project.
- The assessment and resulting prioritized restoration will build on other stream restoration projects along the North Fork Walla Walla River, extending the overall positive ecological impact.
- The applicant has successfully implemented stream assessments and complex restoration projects and has the necessary capacity and technical expertise on staff.

Concerns

- Irrigation use in Cup Gulch is not described in the application. Over allocation could impact potential ecological benefits from future habitat restoration efforts if flow diverted for agricultural use dries up the stream.
- The application does not include information on the current land use, specifically grazing management within the drainage. Heavy livestock use will likely impact future efforts to re-establish riparian vegetation and improve water quality inputs to the North Fork Walla Walla River.

Concluding Analysis

The watershed council continues to focus restoration and monitoring on the South and North Fork Walla Walla Rivers and their significant tributaries. By first completing an assessment and identifying priorities, restoration opportunities can lead to more successful projects on the ground. The councils history ineffectively working with private landowners to implement stream restoration indicates the project is likely to succeed.

Review Team Recommendation to Staff

Fund

Review Team Priority

3 of 3

Review Team Recommended Amount

$46,181

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team

n/a

Staff Recommendation

Fund with Conditions

Staff Recommended Amount

$46,181

Staff Conditions

Final Project Completion Report shall include information on grazing management within the Cup Gulch drainage and details relating to water rights from Cup Gulch Creek, if any.

Open Solicitation-2022 Fall Offering
Mid Columbia (Region 6)

Application Number: 223-6013-22622

Project Type: Technical Assistance

Project Name: Umatilla River Riparian Area Restoration Assessment

Applicant: City of Pendleton

Region: Mid Columbia

County: Umatilla

OWEB Request: $75,000

Total Cost: $100,000

Application Description 1) The project scope includes the North shore of the Umatilla River from the Main Street Bridge downstream to the Bedford Bridge within the City of Pendleton corporate boundaries. The project area is approximately 2 miles in length.
2) The riparian area along the north bank of the Umatilla River is inundated with invasive plants negatively impacting native plant life and animal habitat. OWEB funds would be used to procure a team of environmental scientists to assess current riparian conditions and make recommendations for removal invasive species for restoration and replanting.
3) City of Pendleton, Blue Mountain Land Trust, & Confederated Tribes of the Umatilla Indian Reservation.

Review Team Evaluation

Strengths

- The project reach located in the Umatilla River is a migratory corridor for steelhead and Chinook.

Concerns

- The project scope of work is unclear in the application. For example, the application narrative indicates the project will occur over a two mile stretch of the Umatilla River; however, maps provided with the application indicate the reach is only one mile long. Also, it is unclear what specific technical assistance tasks will be completed or where that work will be done.
- The project will focus on a reach of the Umatilla River that flows through downtown Pendleton without considering what invasive plant species are occurring upstream. Many riparian weeds use the river as a vector to populate downstream sites. If the objective of future restoration is weed abatement, upstream sources of invasive plant species will likely reduce the likelihood of success.
- The application lacks photos showing current site characteristics that would provide helpful context for understanding the need for the proposed technical assistance. Photos were included as a part of the virtual site visit, which did provide some perspective.
- It is unclear if qualified experts will be involved in the project. For example, the assessment surveys will focus on vegetation to plan restoration that will address invasive plant species in the riparian area; however, it is unclear whether the Umatilla County Weed Department had been contacted for technical input or as a collaborative partner.
- It is unclear if appropriate stakeholders will be engaged in the project. For example, the Umatilla SWCD is listed as the only member of the technical advisory committee in the Project Management section of the application; however, there is no letter of support included in the application nor any in-kind match from the SWCD in the budget to indicate their commitment to participate in the project.

- The budget only provides a lump sum for contracted services and lacks detail needed to evaluate whether costs are reasonable and necessary for achieving the proposed goals and outcomes of this project. The application indicates that budget estimates are based on work done in McKay Creek; however, McKay Creek is a six-mile reach of a much different riverine system that may not be comparable to the more shorter proposed project reach on the Umatilla River.

Concluding Analysis

The proposal lacks sufficient detail needed to understand and evaluate the proposed project. If resubmitted, the applicant is encouraged to work with technical experts in watershed restoration from the region to address the concerns noted in this evaluation.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority

Review Team Recommended Amount
$0

Review Team Conditions

n/a

Staff Recommendation
Staff Follow-Up to Review Team
n/a

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

n/a

Open Solicitation-2022 Fall Offering
Mid Columbia (Region 6)

Application Number: 223-6014-22613
Project Type: Stakeholder Engagement
Project Name: Watershed Stewardship Workshops
Applicant: Walla Walla Basin Watershed Foundation
Region: Mid Columbia
County: Umatilla
OWEB Request: $101,598
Total Cost: $159,310

Application Description For over 28 years the Walla Walla Basin Watershed Council (WWBWC) has partnered with funders, state and local organizations, water districts, and landowners to address critical water issues within the basin. However, despite the success of these projects, the WWBWC recognizes the need to diversify our engagement in the community in order to holistically address the basin's water issues. In an effort to reach underserved communities, the WWBWC seeks funding to provide a series of monthly workshops addressing a wide-range of water topics affecting the health of the Walla Walla River basin in and around the city of Milton-Freewater, in Umatilla County, Oregon.

Inadequate stream flow, high summer water temperatures, high sediment loads, limited instream habitat complexity, groundwater declines, insufficient riparian vegetation, and fish passage obstructions limit the basin's healthy populations of ESA-listed summer steelhead, bull trout and reintroduced spring Chinook salmon. The proposed workshops will not only inform the community on these commonly overlooked issues, but also provide landowners and area residents with opportunities to engage with WWBWC staff and partnering organizations who can help them identify ways of enhancing the watershed through future projects, volunteerism, and ecologically safe practices.

The WWBWC will partner with local, state, and tribal organizations who will present on topics that will include water trusts and transactions, water rights, river habitat restoration, basin groundwater, working with beavers, urban water conservation through water wise landscaping, pesticide stewardship, and living in a changing climate.

The City of Milton-Freewater, Umatilla County, and local businesses will be providing funding support. Workshops will be free of cost to the attendee, cover topics of concern, and be held in both English and Spanish.

Review Team Evaluation

Strengths

- The project focuses on outreach to an underserved community in Milton-Freewater that makes up a

large percentage of the population.

- The application has clear and concise objectives and provides detail on how communication will occur among the applicant, restoration stakeholders, and target audiences.
- Workshops are designed to encourage multi-directional communications with stakeholders. A bilingual staff person will be hired to aid in communication with the largely Hispanic population and isa critical component for the workshops to be successful.
- The applicant has a history of successful outreach, is respected in the community as restoration experts, and has implemented a variety of restoration and monitoring projects.
- The watershed council has the capacity to implement the project with its existing staff and the recently hired community engagement specialist.
- Eight letters of support and a mix of in-kind and cash match from a wide array of stakeholders in the area indicate the project is important to the community.
- The budget is reasonable for the proposed work elements and detail is provided in the budget development section of the application that explains how costs were determined.

Concerns

- Twenty-two monthly workshops may be more than is needed to effectively work in a small community like Milton-Freewater. Also, there may not be sufficient time allotted to develop and host these 22 monthly workshops, which could impact the success of the project. It may be more cost effective to host fewer workshops and allow for more development time.
- Surveys will be completed; however, it would be useful to add information on successful surveys completed in the past to provide context for understanding how this method has been an effective mode of communication in this community.
- The application lacks information on how the stakeholder engagement approach will differentiate between landowners versus renter audiences and the potential paths from outreach to future restoration or water acquisition projects for each.
- More explanation about the restoration approaches within an urban setting is needed to better understand the likelihood that restoration will result from the workshops and events.
- The map included in the application lacks detail, such as the streams noted in the application, distribution of urban versus rural residential land use, and locations that may have potential for floodplain reconnection or barriers to fish passage removed.
- Nine staff positions are included in the budget; however, only three staff are listed under Project Management in the Wrap-Up section of the application. It is unclear how each position will be involved in the project and whether these costs are reasonable and necessary for the proposed work without additional information explaining the roles of each staff.

Concluding Analysis

Incorporating efforts to expand diversity, equity, and inclusion outreach is an admirable goal of this proposal. However, the timing and number of the proposed events appear overly ambitious for the size of the community and project timeline, which could limit the likelihood of the project to succeed. If resubmitted, the applicant is encouraged to address the concerns noted above and reduce the number of workshops.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

Review Team Recommended Amount
$0

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

n/a

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item I

Stage 0 Effectiveness Monitoring Funding

Board Meeting April 25-26, 2023

Oregon
Tina Kotek, Governor

OREGON WATERSHED ENHANCEMENT BOARD

775 Summer Street NE, Suite 360
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Agenda Item I supports OWEB's Strategic Plan priority #6: Coordinated monitoring and shared learning to advance watershed restoration effectiveness.

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Ken Fetcho, Effectiveness Monitoring Coordinator
Courtney Shaff, Monitoring and Reporting Manager

SUBJECT: Agenda Item I. Stage 0 Restoration Effectiveness Monitoring Funding Request
April 25-26, 2023, Board Meeting

I. Introduction

Staff and partners from the Upper Deschutes Watershed Council and the McKenzie Watershed Council will provide a progress update and describe monitoring proposals to continue effectiveness monitoring Stage 0 restoration in Whychus Creek and the South Fork McKenzie River.

II. Background

There has been increased interest in approaches that create complex river channels and floodplains. One approach for wide alluvial valleys is referred to as Stage 0 restoration, which restores fluvial processes at the valley scale. The intent of this approach is to restore geomorphic processes that encourage and maintain deposition and habitat development over time rather than designing and dictating a channel pattern, profile, and dimension.

Restoring stream reaches to a Stage 0 condition have recently taken place in western and central Oregon, including several large-scale, multi-phased restoration projects in Whychus Creek and the South Fork McKenzie River sub-basins that have been supported with OWEB funding. This is a relatively new practice, and the evaluation of long-term responses including riparian vegetation, aquatic species habitat availability, and the dynamic geomorphic responses over time, need to be assessed. For more information on Stage 0 and the benefits of restoring to this condition please visit the Stage Zero Information Hub.

At the July 2019 meeting, the board approved a staff request for up to $360,000 for monitoring and information sharing associated with restoring a stream channel to a Stage 0 condition. This award was framed as a staged funding request for these work items, with initial funding requested during the 2019-21 biennium and subsequent funding to be provided to continue monitoring in the 2021-2023 biennium, based on progress reporting to the board. Three grants were awarded in the initial grant offering:

1. A monitoring grant to the McKenzie Watershed Council (MWC) for effectiveness monitoring of a multi-phased restoration project in the South Fork McKenzie River (Upper Willamette Basin) and data compilation and synthesis of existing data about restoring to a Stage 0 condition;

2. A monitoring grant to the Upper Deschutes Watershed Council (UDWC) for effectiveness monitoring—including developing and implementing remote sensing approaches—of a multi-phased restoration project in Whychus Creek (Upper Deschutes Basin); and

3. A stakeholder engagement grant to the Institute for Natural Resources at Oregon State University to plan and convene a workshop to bring together a range of partners to share knowledge, describe concerns and considerations about this restoration approach, identify monitoring and information needs, and articulate best practices for restoration to a Stage 0 condition.

At the July 2021 meeting, the board received a progress report presentation from OWEB staff, the MWC, and the UDWC. Both restoration and monitoring efforts were impacted by the COVID-19 pandemic and the restoration timing was significantly delayed in the SF McKenzie

III. Overview of the Funding Request

OWEB staff has continued to work with the grantees to discuss the need for a second phase of funding for effectiveness monitoring during the 2021-23 biennium. Staff provided the summary below of the two funding proposals at the March 21, 2023, Grants Committee meeting and members expressed support for bringing this funding request to the full board for consideration.

Whychus Creek

OWEB proposes to provide $295,000 to the UDWC to continue this monitoring effort from November 2023 to December 2026. OWEB funding will support the UDWC to assess the effects of restoration on up to four reaches along Whychus Creek. This monitoring proposal will directly build on information gained through monitoring efforts co-funded by OWEB in 2020 and by interim funding provided by The Nature Conservancy and Portland General Electric in 2022.

The proposed work will support effectiveness monitoring project development, contracting, imagery acquisition and processing, ground-based field measurements and analysis, and reporting for up to 3.2 miles of Whychus Creek. It also includes two years of macroinvertebrate monitoring to support the evaluation of the biological response to post-restoration conditions in these reaches. See Attachment A for more information.

South Fork McKenzie River

OWEB proposes to provide $175,000 to the MWC to continue this monitoring effort from July 2023 to September 2025. OWEB funding will support MWC to assess the effects of restoration on three reaches along the SF McKenzie River. This monitoring proposal will provide support to continue monitoring before a third phase of habitat restoration is anticipated to be completed in 2025. The proposed work will continue ODFW's monitoring of juvenile Chinook salmon, remote sensing and ground-based monitoring activities and ensure long-term public availability

of remote sensing data collected during the initial monitoring phase as well as those data collected during this proposed work. See Attachment B for more information.

The September 2020 Holiday Farm Fire (HFF) dramatically altered short- and long-term planning for restoration and associated effectiveness monitoring on the SF McKenzie River. The HFF has caused a delay in a future phase of restoration that is to be monitored with OWEB funds and is likely to be implemented in 2025. Due to this delay, there is a need to maintain key datasets by continuing monitoring and applying lessons learned during the initial phase of effectiveness monitoring so that long-term responses to the restoration can be better evaluated. After restoration is completed in 2025, we envision that there will be an additional monitoring grant provided to the MWC to support a final phase of effectiveness monitoring in 2026 to measure the effects of that subsequent phase of restoration to maintain the original monitoring design that was initially funded in 2020.

The results from both of these effectiveness monitoring projects will 1) build on the geospatial monitoring and analysis methods piloted from 2020 - 2022 and advance their utility for monitoring Stage 0 stream restoration projects across Oregon and the Pacific Northwest, 2) incorporate ground-based physical and biological data with low elevation imagery to document valley scale changes, and 3) continue to advance the state of knowledge regarding the effectiveness of restoration designed to achieve a Stage 0 condition and the resulting benefits.

IV. Recommendation

Staff recommends the board award up to $470,000 for effectiveness monitoring of large-scale restoration projects in Whychus Creek and the SF McKenzie River with funds from the Quantifying Conservation Outputs and Outcomes line item of the OWEB spending plan, and delegate to the Executive Director the authority to distribute the funds through appropriate agreements with an award date of April 25, 2023.

Attachments

A. Whychus Creek Stage 0 Effectiveness Monitoring Proposal
B. South Fork McKenzie Stage 0 Effectiveness Monitoring Proposal

UPPER DESCHUTES WATERSHED COUNCIL

Whychus Creek Phase 2 Stage 0 Restoration Geomorphic and Habitat Analysis Study

Submitted by Upper Deschutes Watershed Council
Bend, Oregon
January 26, 2023

Problem Statement

Stream habitat along Whychus Creek, a tributary to the Deschutes River, has been degraded and simplified by more than a century of flow diversions for irrigation along with channel and floodplain modification for homesteading, agriculture, and flood control. The Upper Deschutes Watershed Council (UDWC) has worked with non-profit and agency partners, including the Deschutes Land Trust and USFS, for over a decade to restore stream habitat on Whychus Creek in key ecologically important, low-gradient, historically depositional valley reaches.

In 2016, UDWC, in partnership with USFS and Deschutes Land Trust, implemented our first restoration project designed to re-activate the valley bottom, re-establish geomorphic processes, and ultimately promote evolution of a Stage 0 condition, in Reach 4 of Deschutes Land Trust's Whychus Canyon Preserve. Process-based restoration toward Stage 0 aims to improve the outcomes of stream restoration projects by restoring reach- and watershed-scale stream processes to create abundant, complex, self-sustaining stream habitat. Stage 0 refers to an anastomosing stage of stream evolution proposed by Cluer and Thorne (2013) as a precursor to the sinuous, single-thread Stage 1 channel described in Simon and Hupp's (1986) Channel Evolution Model. Cluer and Thorne's analyses of habitat and ecosystem benefits in nine stages of stream evolution suggest that anastomosing Stage 0 streams provide far greater habitat and ecosystem benefits and are more resilient to climate change and disturbances such as floods and droughts when compared to the sinuous single-thread Stage 1 channel which in past decades has often represented the desired outcome of stream restoration projects.

Practitioners across the Pacific Northwest have started using an active, high-tech Geomorphic Gradeline design approach (Powers et al 2019) to restore stream and floodplain function in depositional valleys, with over 20 projects implemented to date throughout Oregon. The Geomorphic Gradeline approach determines the historic valley slope and elevation and identifies areas within a project reach to be graded (lowered) or filled relative to that historic, now target, elevation for the purpose of constructing a new, connected floodplain surface. In contrast to other habitat restoration methods that focus on restoring form through construction of single-thread channels with specific channel geometry and habitat features, process-based restoration projects that aim to restore a Stage 0 condition are designed to address root causes of channel and ecological degradation and rely on re-establishing stream processes such as floodplain connectivity, floodplain-wide riparian cover, erosion, deposition, and avulsion to create and maintain resilient riparian and aquatic habitat that can support all life stages of fish and wildlife species over time. This approach promotes channel, bedform and geomorphic unit evolution by allowing the river system to easily access and dynamically move across its floodplain. The goal of this method is to restore the underlying natural processes necessary for sustained evolution of a dynamic, complex network of anastomosing channels. A building body of evidence from projects throughout the Pacific Northwest and Rocky Mountains suggests this type of restoration approach can lead to increased quantity, diversity, and quality of aquatic and riparian habitat at an equivalent or lower cost per acre of stream and floodplain habitat restored compared to form-based restoration approaches.

The complexity and large, typically valley-wide spatial extent of resulting habitat presents challenges for monitoring geomorphic, fish habitat, and biological outcomes of this restoration approach. Additionally, researchers and practitioners hypothesize that traditional stream habitat monitoring metrics (e.g. deep pools per mile, LWD per mile, % fines in riffles), which were developed from simplified, degraded, single-channel streams, likely describe an impoverished, minimum set of habitat features (forms) that provide

the physical conditions necessary for fish life stages, and conversely do not describe the diversity of habitat features and functioning processes (e.g. hyporheic exchange) that anadromous and native resident fish utilize at various life-history stages (e.g. spawning and rearing) in remnant or restored anastomosing systems. As more large-scale Stage 0 projects continue to be implemented across the Pacific Northwest, monitoring methods that incorporate remote sensing and geospatial analysis to quantify key hydrogeomorphic conditions across large spatial extents are proving to be essential to learning about the geomorphic and habitat conditions and biological responses resulting from this restoration approach.

Proposed Solution

In 2019, to advance learning about the geomorphic, habitat and biological outcomes of Stage 0 restoration in depositional valleys, UDWC submitted a successful grant proposal and application to OWEB to further development of methods for using geospatial analysis of remotely sensed data to quantify hydrogeomorphic and habitat conditions in Stage 0 stream restoration projects. The proposed project aimed to:

1) Recruit the expertise of remote sensing and geospatial analysts to identify key geomorphic and habitat metrics characterizing Stage 0 restoration for which preliminary remote sensing methods existed;
2) Through development and application of those methods, determine which methods were well-suited for quantifying key Stage 0 metrics while accelerating learning about design and monitoring of Stage 0 restoration;
3) Produce data to support longer-term analysis of fish habitat and ecosystem benefits of Whychus Creek and other Stage 0 projects; and, in so doing, to
4) Increase the pace, scale, and effectiveness of stream habitat restoration that will benefit salmon, steelhead, and native resident fish populations throughout the Pacific Northwest.

During the spring of 2020, UDWC convened and met with a Technical Advisory Committee (TAC) of remote sensing experts and consulted with our restoration design team to identify a set of highest-priority geomorphic and habitat metrics that showed promise for analysis from imagery based on published methods. The TAC included, among others, Steve Wondzell, research riparian ecologist and Jon Burnett, research forester with the USFS PNW Research Station, and Matt Barker, a graduate student in the OSU Aerial Information Systems lab collaborating with Willamette National Forest on remote sensing, to allow for shared learning across Stage 0 restoration projects east and west of the Cascades and to create efficiencies and consistency in development and application of imagery acquisition and analysis methods. Through this process we identified 6 metrics for analysis from imagery that represent key characteristics of Stage 0 systems. These included wetted area, wood, riparian vegetation, geomorphic units, velocity, and sediment grain size. UDWC worked with TAC members and contractors in summer 2020 to acquire multi-spectral imagery and true-color video, conduct ground-based surveys to complement and inform metrics to be analyzed from imagery, and guide development of an analysis approach for the selected metrics. Five metrics (wetted area, wood, riparian vegetation, geomorphic units, and velocity) were analyzed successfully from imagery; methods for riparian vegetation and velocity especially warrant continued development. Geomorphic unit and wood survey data from ground-based surveys were used to complement data from imagery where tree canopy obscured active channels and the floodplain surface. Analysis of sediment grain size from imagery using the methods employed was found to be less accurate and effective than conducting pebble counts. A final report from UDWC's 2020, Phase 1 Stage 0 Effectiveness Monitoring project on Whychus Creek is forthcoming in April 2023.

UDWC secured external funding to refine imagery and video acquisition, riparian vegetation classification, and velocity analysis methods in 2022 in Whychus Canyon Phase IIa, where a GGL Stage 0 restoration project had been implemented in 2021 subsequent to pre-restoration imagery acquisition and data collection during the 2020 Phase 1 Stage 0 Effectiveness Monitoring project. We worked with Wolf Water Resources to acquire multi-spectral and Red-Green-Blue (RGB) imagery, and in consultation with USGS to acquire overlapping video frames and ground-based velocity and flow direction measurements to support velocity analysis. This 2022 effort allowed UDWC and partners to acquire imagery and video and collect ground-based measurements to capture and describe geomorphic and habitat conditions in this project reach one year post-restoration. The 2022 project also further advanced 2020 methods for analyzing metrics, including piloting a new analysis approach to classify riparian vegetation communities; using classification instead of manual digitization to map and quantify wood in this newly restored reach; and achieving preliminary spatially continuous mapping of velocity and flow direction from video.

The Phase 2 Stage 0 Effectiveness Monitoring (EM) project we are proposing for summer 2024 will allow UDWC to acquire and analyze post-restoration imagery for up to four restoration reaches along Whychus Creek (Figure 1; Table 1). These include Camp Polk Reaches 1 and 2, implemented following a modified Natural Channel Design but where a Stage 0 condition has evolved, and Whychus Canyon Phases I and IIa, where restoration was implemented following a GGL Stage 0 restoration design in 2016 and in 2021, respectively. The fourth reach, Whychus Canyon Phase IIb, is slated to be restored in 2023 or 2024 pending permitting, and we will tailor 2024 Stage 0 effectiveness monitoring under this project for this reach in response to the restoration status of the reach and need for monitoring data as of summer 2024; one option could be to collect imagery and perform analysis for reaches restored as of 2024, and defer imagery acquisition and analysis for Phase IIb only until 2025 if the reach remains unrestored as of 2024. A fifth Whychus Creek restoration reach included in UDWC's Phase 1 Stage 0 Effectiveness Monitoring project, Willow Springs, was implemented in 2022 using a Low-Tech Process Based Restoration Design. This project experienced high flows (> 600 cfs) in November 2022, triggering monitoring of medium-term project response in summer 2023 for physical indicator metrics. This monitoring effort, to be led by Anabranch Solutions in consultation with UDWC, will produce geomorphic metrics consistent with those produced through Phase 1 Stage 0 effectiveness monitoring and support a change detection analysis for metrics including wetted area, riparian vegetation, wood and wood aggregate density, and geomorphic units. This reach will not be included in this proposal unless restoration of Phase IIb has not been implemented as of 2024, in which case contracted services funding for imagery acquisition, processing, and analysis may be re-allocated to highest-priority information needs in Phase IIb, Willow Springs, or restoration reaches already included in the Phase 2 Stage 0 EM project.

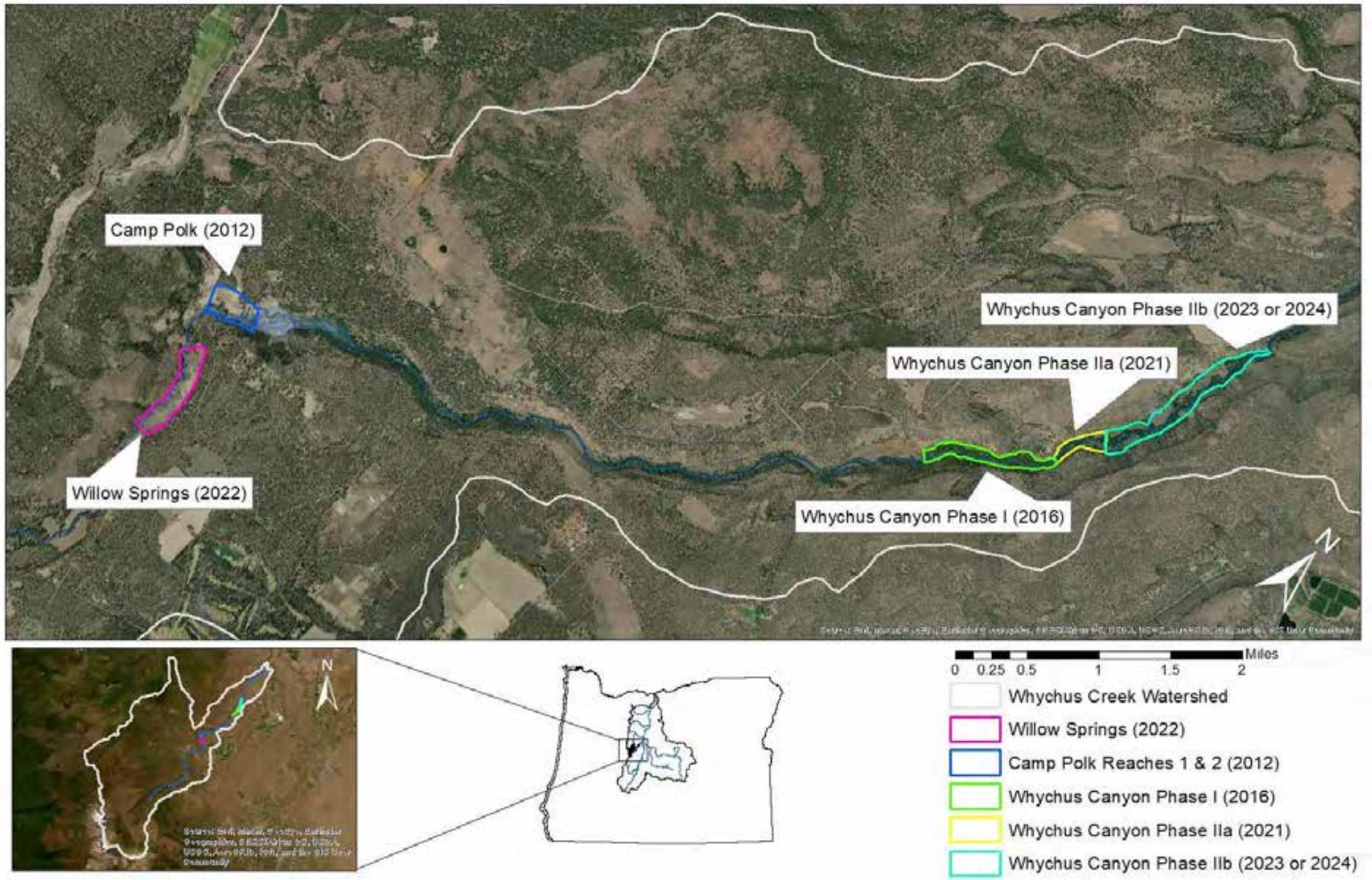


Figure 1. Five Whychus Creek restoration reaches included in Phase 1 Stage 0 Effectiveness Monitoring. Imagery acquisition and data analysis will be completed in the four downstream reaches in 2024 or 2025. Imagery acquisition will occur at Willow Springs in 2023 to evaluate effects of a November 2022 high flow event; analysis from imagery for this reach will occur in 2023 and 2024.

Table 1. Restoration reaches, miles, acres, year restored or to be restored, and phases of Stage 0 Effectiveness Monitoring in which each reach was or will be included in imagery acquisition and data analysis.

Restoration Reach	Miles	Acres	Year Restored	2020 Stage 0 EM Phase 1	2022 Stage 0 EM Interim	2023 Willow Springs EM	2024 Stage 0 EM Phase 2
Camp Polk Reaches 1-2	0.2	16	2012	x			x
Whychus Canyon R4 Phase I	1	68	2016	x	x		x
Whychus Canyon Phase IIa	0.5	26	2021	x	x		x
Willow Springs	1	59	2022	x		x	
Whychus Canyon Phase IIb	1.5	100	2023 or 2024	x			tbd

Through the proposed project, we will build on information gained through 2020 and 2022 imagery and video acquisition and analysis to continue to refine specifications for acquisition to better support analysis from imagery; especially so for velocity analysis from video, for which methods and software packages available have been dramatically improved since 2020. We will also build on 2020 and 2022 analysis methods and products for wetted area, wood, vegetation (with a focus on differentiation of riparian from upland communities), geomorphic units, and velocity. For velocity, the proposed project will apply analysis methods developed since 2020 to 2020 and 2022 videos to complete analysis and assess accuracy for these years and refine specifications for 2024 video and imagery acquisition and ground-based measurements, but will not include velocity analysis from 2024 video, pending funding not requested under this proposal. For all other metrics, we will evaluate change in metrics since 2020 and since 2022 for the reaches monitored using these methods in these years under our Phase 1 Stage 0 Effectiveness Monitoring project and our 2022 interim effort.

Collection and analysis of macroinvertebrate community data in 2024 and 2025 will add to a long-term dataset and support continued evaluation of the biological response to the geomorphic and habitat conditions that are evolving in Stage 0 restoration projects on Whychus Creek as documented through Stage 0 effectiveness monitoring in 2020, 2022, and 2024. Similarly, continuous stream temperature monitoring at 11 established sites along Whychus, to be funded through matching grants for 2024 and 2025, will contribute to that long-term dataset, and provide data to evaluate rate of change in stream temperature through Whychus Creek restoration project reaches, a metric that supports programmatic Biological Opinion compliance with UDWC's bull trout adaptive management plan for Whychus Canyon Phase I and IIa restoration projects.

Goals and Objectives

The goal of the proposed project is to repeat and continue to refine imagery and video acquisition and analysis and complementary ground-based sampling design and measurements to better characterize and quantify pre- and post-project hydrogeomorphic and habitat conditions in Whychus Creek Stage 0 stream restoration reaches, and to evaluate the biological response to those conditions using macroinvertebrate and other available biological data. Hydrogeomorphic, habitat, and biological data

will also be evaluated in the context of data produced through ongoing monitoring of additional metrics (see Complementary Monitoring Efforts below).

This project represents Phase 2 of UDWC's Stage 0 Effectiveness Monitoring project and builds on UDWC's and the SFMR's Phase 1 Stage 0 Effectiveness Monitoring projects concurrently funded by OWEB and developed and implemented beginning in 2020. The current effort is also informed by a refined definition of and measures for characterizing a Stage 0 condition, developed in collaboration with Stage 0 researchers and practitioners through the parallel Stage 0 Practitioners Workshops also funded by OWEB and hosted by USFS's PNW Research Station in late 2019 and early 2020. Metrics to be analyzed under UDWC's Phase 2 project are aligned with those identified in the Structured Decision Model produced through the Practitioners Workshops. The proposed Phase 2 project presents a valuable opportunity to repeat the remote sensing methods developed in Phase 1 to compare pre- and post-restoration conditions at Camp Polk Reaches 1 & 2, Whychus Canyon Phase I and IIa, and possibly in Whychus Canyon Phase IIb depending on restoration status as of 2024.

Specific Phase 2 project objectives and monitoring tasks are as follows:

Objective 1. Apply findings from Phase 1 (2020) and interim, 2022 project implementation (i.e. metrics to be analyzed from imagery; flight planning, imagery and video acquisition and processing; ground-based measurements to provide complementary data and for training and validation as needed; and data analysis) to Phase 2 Stage 0 imagery and video acquisition and remote sensing analysis at Camp Polk Reaches 1 & 2 (~0.2 mi), Whychus Canyon Phase I (1 mi), IIa (0.5 mi), and possibly IIb (1.5 mi) depending on restoration status as of 2024.

Monitoring task 1.1. Identify and recruit or re-engage 2024 Stage 0 EM technical experts to serve as 2024 monitoring technical team including consulting and advising on final 2024 imagery acquisition specifications, ground-based sampling design, and ground-based survey methods to train and validate data as needed (November 2023 – January 2024).

Monitoring task 1.2. Review 2020 and 2022 Stage 0 EM findings and recommendations and discuss with technical experts to incorporate and build on Phase 1 findings and recommendations (November 2023 – January 2024).

Monitoring task 1.3. With monitoring team, finalize imagery and video specifications, ground-based sampling design, and ground-based survey methods for 2024 Stage 0 EM (January - June 2024).

Monitoring task 1.4. Refine scopes of work and establish contracts with contractors (January - June 2024).

Monitoring task 1.5. Develop imagery acquisition and ground-based survey schedule with contractors and UDWC staff (March - April 2024).

Monitoring task 1.6. Communicate and work with contractors to acquire imagery along up to 3.2 miles of Whychus Creek restoration reaches at base flow (July 2024)

Monitoring task 1.7. Collect ground-based measurements to complement analysis from imagery and as needed train and validate classification and other analyses from imagery (June – August 2024).

Monitoring task 1.8. Transfer and manage imagery, data, and data products (August 2024 – September 2025).

Monitoring task 1.9. Consult with contractors and provide guidance on classification and analysis specifications and progress, data summarization, and reporting (August 2024 – September 2025).

Monitoring task 1.10. Analyze ground-based data from 2020, 2022, and 2024 and summarize findings in technical memo (October 2024 – September 2025).

Monitoring task 1.11. Compile reports from individual geomorphic and habitat analyses, synthesize and integrate with macroinvertebrate, stream temperature, and other complementary monitoring data, and interpret results in final project report (October 2025 – March 2026).

Monitoring task 1.12. Final project and grant reporting (January 2026 – June 2026).

Objective 2. Collect up to nineteen macroinvertebrate samples in August 2024 and 2025 in established and as needed new restoration reach and Whychus Creek index sites to support comparison of macroinvertebrate community metrics pre- and post-restoration, in untreated restoration reaches, and in Whychus Creek index sites, and inform biological response to restoration.

Monitoring task 2.1. Contract with CASM Environmental, LLC in 2024 and 2025 to: plan and prepare for two-day macroinvertebrate sampling event in each of two years; manage samples and sample identification by sub-contractor Cole Ecological; manage and analyze data; and report on macroinvertebrate community metrics in the context of restoration projects along Whychus Creek.

Monitoring task 2.2. Identify macroinvertebrate sampling reaches, recruit agency and non-profit partner staff and community volunteers, and create sampling teams for two-day macroinvertebrate sampling event in each of two years.

Monitoring task 2.3. With UDWC monitoring staff, flag up to nineteen sampling reaches along Whychus Creek, record and manage reach location data, prepare sampling reach maps and Google Maps location links for each sampling reach, and provide to volunteers.

Monitoring task 2.4. With CASM Environmental, LLC, volunteers, and UDWC staff, collect macroinvertebrate samples from up to nineteen sampling reaches over two-day sampling event in each of two years.

Monitoring task 2.5. Consult with CASM Environmental, LLC during report preparation as needed and provide review of draft and final macroinvertebrate reports (1 per year in 2024 and 2025).

Monitoring task 2.6. Format macroinvertebrate data for submittal to DEQ, submit macroinvertebrate data to DEQ, and request confirmation of data submittal.

Objective 3. Monitor continuous stream temperature at 11 established monitoring stations from Whychus Creek River Mile 0.25 to 38.00 in 2024 and 2025 to support evaluation of rate of stream temperature change through Stage 0 restoration project reaches and comparison to stream temperature at index monitoring stations. *This objective will be completed with match funding and will not be funded under the OWEB dollar amount requested in this proposal.*

Monitoring task 3.1. Prepare continuous temperature monitoring equipment and deployment assemblies, including managing datalogger inventory, returning NIST-certified equipment to DEQ for certification, and as needed fabricating new deployment assemblies.

Monitoring task 3.2. Perform pre-deployment audits and initialize dataloggers for continuous temperature monitoring.

Monitoring task 3.3. Deploy dataloggers at 11 monitoring stations along Whychus Creek and perform deployment audit.

Monitoring task 3.4. Perform field audits monthly, and bi-weekly at key stations in key months.

Monitoring task 3.5. Retrieve dataloggers and perform retrieval audit.

Monitoring task 3.6. Download data, perform post-deployment audits, and complete QC for dataloggers and data.

Monitoring task 3.7. Manage datalogger inventory, including decommissioning and returning to DEQ loggers that do not meet QA/QC criteria and requesting and receiving loggers for subsequent monitoring, and store deployment assemblies for winter.

Monitoring task 3.8. Manage data, including populating DEQ continuous temperature data submittal form, submitting data to DEQ, and requesting confirmation of data submittal.

Monitoring task 3.9. Analyze 2024 and 2025 data and summarize monitoring methods and results in one technical report for both years.

Products for Phase 2 are projected to include:

1) Multi-spectral and RGB imagery; videos to support velocity analysis; ground-based measurements for training and validation of remote sensing analysis and to complement metrics analyzed from imagery; and analysis data products for up to ~3.2 miles of Stage 0 restoration project reaches;
2) Technical memos summarizing:
    a. Imagery and video acquisition, imagery processing, semi-automated classification of wetted area and vegetation, and wood where methods are well-suited, and results;
    b. Video processing and LSPIV velocity analysis and results;
    c. Geomorphic unit digitization and wood digitization where semi-automated classification of wood is less well-suited (restoration reaches older than 5 years); and
    d. Sampling design, data collection and analysis methods and results for sediment grain size and associated geomorphic and habitat ground-based measurements;
3) A final project report compiling technical memos and integrating and interpreting monitoring findings in the context of information from complementary monitoring efforts to describe how habitat, geomorphic, and biological conditions as measured by these datasets differ before and after restoration;
4) Macroinvertebrate community data and reports for 2024 and 2025 detailing monitoring methods, data analysis, and findings with a focus on macroinvertebrate community response in Whychus Creek Stage 0 restoration project reaches (two reports).

Continuous stream temperature monitoring in 2024 and 2025 will be funded through matching grants. Stream temperature monitoring products will include:

1) Continuous stream temperature data from 11 monitoring stations from Whychus Creek, including from stations upstream and downstream of restoration reaches that support evaluation of rate of temperature change through restoration project reaches;
2) A 2024-2025 stream temperature report summarizing monitoring methods and discussing stream temperature status, trends, and restoration needs on Whychus Creek; and
3) An analysis of change in rate of warming pre- and post-restoration for reaches restored as of 2024, including Camp Polk, Whychus Canyon Phases I and IIa and possibly IIb, and Willow Springs.

A potential additional product, to be funded through a separate, future grant, could be a 2-4 page fact sheet or story map to communicate project findings.

Complementary Monitoring Efforts

The proposed project will leverage macroinvertebrate, fish, continuous stream temperature, ODFW AIP stream habitat survey, and other physical and biological data collected through completed and ongoing monitoring efforts described below to provide additional information about the habitat and ecosystem benefits associated with remote sensing results (Table 2).

Macroinvertebrate and fish sampling

UDWC has contracted with consultants in 2005, 2009, and every year from 2011 to present to collect macroinvertebrate samples from sites along Whychus Creek using a targeted riffle sampling protocol. Beginning in 2017 UDWC added a multi-habitat sampling protocol to support description of the macroinvertebrate community in the diverse habitats created by Stage 0 restoration projects. Since 2017 macroinvertebrate community data analysis has included a focus on describing and quantifying changes in key macroinvertebrate community metrics in restored reaches compared to before restoration and compared to index sites.

ODFW and USFS and other basin partners continue to collaborate to conduct pre- and post-restoration fish sampling in restoration project reaches along Whychus Creek, and have produced juvenile densities and length distributions for steelhead and redband trout (*Oncorhynchus mykiss*) and spring Chinook salmon in project reaches. PGE, ODFW, and USFS compile data from redd counts conducted annually at up to 18 sites along Whychus Creek. PGE additionally tracks returning adult Chinook salmon and steelhead using radio telemetry, providing valuable data about fish movement to and through restoration project reaches.

Pre- and post-restoration macroinvertebrate and fish data provide information about the habitat benefits associated with the geomorphic attributes of Stage 0 projects that will be quantified through the proposed remote sensing project.

Water quality

UDWC has conducted continuous stream temperature monitoring at 11 sites along Whychus Creek since 2009. Data from these sites support evaluation of rate of temperature change through restoration project reaches pre- and post-project and provide information about suitability and quality of stream temperatures for native fish including reintroduced salmon and steelhead and resident redband and bull trout.

Macroinvertebrate community data, specifically the temperature and amount of fine sediment preferred by macroinvertebrate taxa present in the community, provide information about the stream temperature and amount of fine suspended sediment experienced by the macroinvertebrate community.

Stream habitat surveys

As co-licensee of the Portland Round Butte Hydroelectric Project, Portland General Electric (PGE) contracts with ODFW to conduct stream habitat surveys using ODFW's Aquatic Inventory Project (AIP) methods. The resulting data provide information about channel length and complexity, wetted area, and geomorphic or habitat units including pool and wood metrics.

Metrics derived from remotely sensed imagery, such as wetted area, woody vegetation, and wood on the floodplain and in active channels, can be used in place of AIP stream habitat survey data when these data are not available, and provide more detailed spatially referenced information than is provided by

AIP data. AIP survey data were last collected in Whychus Canyon and Camp Polk reaches in 2022 (but not in Willow Springs). In Whychus Canyon Phase IIa especially we expect to see dynamic evolution between 2022 and 2024 as geomorphic and biological processes build a network of stream channels, geomorphic units, bars, and vegetated islands. AIP survey data can also be used to provide measures UDWC is not analyzing from imagery, such as depth and wood volume.

Groundwater monitoring

Groundwater wells installed in restoration project reaches provide continuous depth to groundwater data pre- and post-restoration in Whychus Canyon Phase I and IIb and in Willow Springs. Depth to groundwater is an indicator of vertical hydrologic connectivity, a hallmark of a Stage 0 stream condition.

Riparian vegetation monitoring

The proposed project will continue to build on 2017, 2020, and 2022 efforts on Whychus Creek to map and measure riparian vegetation communities from imagery.

In 2017, under OWEB grant (216-8200-15458), UDWC contracted with Earth Designs Consultants, Inc. (EDC), to acquire high-resolution true-color (Red-Green-Blue) aerial imagery and produce a cover classification from the resulting orthomosaic images using heads-up digitization to manually delineate cover classes. Aerial imagery was flown in 2017 and a cover classification was completed during 2017 and 2018, as well as a historic cover classification and riparian vegetation change analysis for restoration projects implemented prior to 2017 totaling ~4.5 miles valley length. Vegetation plot survey data to validate the classification from 2017 imagery were collected in 2019 with a focus on herbaceous vegetation, perceived to present the greatest challenge and uncertainty for accurately classifying the community as riparian or upland. Although analysis of these data showed relatively good accuracy (71-78%) in some restored reaches, in a third, unrestored reach, accuracy was low (47%); classification of trees as riparian versus upland from pre- to post-restoration imagery also showed some discrepancies in consistency. For the 2017 project a decision had been made to acquire more cost-effective true color imagery for the large target spatial extent (~16 mi), even though this imagery would not support an automated or semi-automated classification approach that requires spectral bands included in multi-spectral imagery. As a result the classification process relied on human interpretation of classification rules, introducing subjectivity and a need for local knowledge into the classification and limiting the repeatability of the approach.

For the 2020, Phase 1 Stage 0 Effectiveness Monitoring project, UDWC worked with the USFS Geospatial Technology and Applications Center (GTAC) to create a workflow for semi-automated classification of vegetation classes as well as wetted area from imagery. Vegetation classes included riparian tree and shrub, upland tree and shrub, herbaceous, and other. GTAC used elevation bands provided by UDWC, representing height above the target floodplain elevation or the water surface depending on reach, to differentiate riparian from upland vegetation, and used vegetation rapid assessment survey data to assess the accuracy of the classification. The accuracy assessment showed wide variation in accurately assigning vegetation to cover classes, with average accuracy for riparian tree and shrub at 68%. Misclassification was attributed in part to use of height and elevation thresholds for differentiating between shrubs and herbaceous vegetation and between riparian and upland vegetation. GTAC recommended revising elevation bands to better define riparian zones, but also recognized dynamically changing vegetation conditions in response to restoration as a potential factor in misclassification using elevation bands.

In 2022 UDWC worked with Wolf Water Resources to acquire imagery in Whychus Canyon Phase IIa and pilot a work flow to use data from individual riparian and upland indicator tree species identified and spatially referenced in the field concurrent with imagery acquisition to inform classification of riparian and upland communities from imagery. The initial model showed promising results with 90% accuracy with the training dataset and 60% accuracy with the validation dataset. The small size of the training and validation dataset from field (ground-based) measurements limited the ability to improve the model.

Riparian vegetation monitoring proposed under this project will incorporate information from 2020 and 2022 efforts to continue to advance a cost-effective, semi-automated approach to differentiating riparian woody vegetation from upland woody vegetation from multi-spectral data. Spatial extent (proportion of valley bottom) of riparian vegetation is a key attribute of a Stage 0 condition; in combination with a network of channels and shallow groundwater, riparian vegetation indicates continued vertical hydrologic connectivity. Although upland trees and shrubs are less likely than riparian trees and shrubs to be present or abundant in post-restoration reaches, it is important to be able to differentiate between riparian and upland trees and shrubs in a vegetation classification to be able to compare change in vegetation communities after restoration.

Ground-based survey data (vegetation transects) from Whychus Canyon Phases I and IIa and from Camp Polk pre- and post-restoration, as well as from Whychus Canyon Phase IIb and Willow Springs pre-restoration, describe or will support description of changes in native riparian and wetland species abundance and richness as well as any change in non-native species.

2022 Topographic-bathymetric LiDAR and thermal imagery

In 2022, USFS acquired topographic and bathymetric ("topo-bathy") LiDAR and thermal imagery along Whychus Creek restoration reaches including Whychus Canyon Phases I, IIa, and IIb. There may be opportunities to leverage this imagery to better inform or improve 2024 analyses from imagery, recognizing that topo-bathy LiDAR and thermal imagery currently remain expensive to acquire and are not expected to be available on a regular basis. Data products from thermal imagery will include a color ramp that visualizes spatial variability of stream temperatures, longitudinal temperature profiles, significant thermal features, and temperature statistics including mean, median, maximum, minimum, and standard deviation. LiDAR data products remain to be determined. Examples of applications for measuring Stage 0 restoration outcomes include: using canopy heights from LiDAR to inform riparian vegetation classification; using bathymetric LiDAR to analyze depths; and using significant thermal features from imagery to identify and further investigate areas that are cooler and warmer.

Table 2. Summary of existing monitoring data from Whychus Creek Stage 0 restoration reaches. “X” indicates pre- and/or post-restoration data have been collected in the specified reach. Stage 0 Effectiveness Monitoring data from imagery and from ground-based measurements are from the Phase 1 Stage 0 EM project and were collected in 2020; ODFW AIP stream habitat survey data were collected in 2022 for all reaches except for Willow Springs, where they were collected in 2020. Data from complementary UDWC and partner monitoring have been collected in multiple years and include pre- and post-restoration data, except for adult fish access data which were only collected post-restoration.

Monitoring	What it tells us about	Camp Polk	Whychus Canyon Phase I	Whychus Canyon Phase IIa	Willow Springs	Whychus Canyon Phase IIb
Stage 0 Effectiveness Monitoring: Metrics from imagery						
Wetted area	Lateral and vertical connectivity and amount of aquatic habitat at low flow	x	x	x	x	x
Woody riparian vegetation	Area of woody riparian vegetation; topographic roughness; wood supply	x	x	x	x	x
Wood (area)	Topographic roughness on floodplain, structure in active channels, and aquatic habitat complexity	x	x	x	x	x
Velocity	Geomorphic and hydrologic complexity, diversity of velocity and flow direction	x	x	x	x	x
Geomorphic units	Bedform evolution, structural complexity, fish habitat diversity	x	x	x	x	x
Stage 0 Effectiveness Monitoring: Ground-based measurements						
Sediment size	Sediment sizes for spawning and rearing, stream energy, geomorphic and hydrologic heterogeneity	x	x	x	x	x
Depth	Depth distribution	x	x	x	x	x
Unit	Provides additional information about habitat and stream energy associated with sediment size	x	x	x	x	x
Wood (presence in plot)	Provides additional information about habitat and stream energy associated with sediment size	x	x	x	x	x
Velocity & flow direction	Velocity measurements to provide complementary dataset and train and validate velocity analysis from imagery	x	x	x	x	x
Vegetation surveys	Used to train and validate classification from imagery	x	x	x	x	x
Metrics from ODFW AIP stream habitat survey data						
Sediment size	Sediment sizes for spawning and rearing, stream energy, geomorphic and hydrologic heterogeneity	x	x	x	x	x
Depth distribution at baseflow	Depth distribution	x	x	x	x	x
Geomorphic units	Bedform evolution, structural complexity, fish habitat diversity	x	x	x	x	x
Secondary channel to primary channel ratio	Channel network complexity, velocity diversity, habitat diversity	x	x	x	x	x
Wood (key pieces & volume)	Wood as fish habitat and structure in active channels	x	x	x	x	x
Metrics from complementary UDWC & partner monitoring						
Deposition and erosion	Channel elevations relative to GGL and/or floodplain, vertical hydrologic connectivity, access to floodplain	x	x			
Groundwater	Vertical hydrologic connectivity, ability to support riparian species	x	x		x	x
Stream temperature	Rate of change in stream temperature through project reach, suitability for native fish	x	x	x	x	x
Riparian plant community	Species richness, proportions of native and wetland indicator, community structure	x	x	x	x	x
Benthic macroinvertebrate community	Biological response to stream conditions e.g. temperature and sediment, taxa richness, biological integrity	x	x	x	x	x
Adult fish access	Total length along a continuous flow path through project reach that does not provide sufficient depth for steelhead and bull trout migration		x	x		
Adult fish spawning	Chinook spawning	x	x		x	x
Fish density	Fish density, habitat use, natural production of brown trout and Chinook		x			

Project Success Measures and Benefits

This project aims to build on the progress made through 2020 and interim 2022 Stage 0 Effectiveness Monitoring on Whychus Creek to continue to advance the state of knowledge and practice regarding monitoring the complex geomorphic and habitat conditions resulting from large-scale Stage 0 stream restoration projects. We will do this by continuing to test and refine applications of remotely sensed data, including: acquiring imagery and video using specifications refined through 2020 and 2022 acquisitions and analysis in post-restoration reaches; repeating classifications of wetted area and vegetation, and wood in reaches where restoration was implemented within five years; repeating manual digitization of geomorphic units, and wood in reaches where restoration was implemented more than five years prior; collecting ground-based measurements needed to train and validate analysis from imagery (velocity, vegetation, possibly wood) and supplemental ground-based measurements in dynamically evolving reaches where change is expected to have occurred since these measurements were last collected (sediment size, depth, unit, and wood presence and influence); and comparing metrics pre- and post- restoration and over time since restoration using 2020 and 2022 data products. We will also summarize available biological data including macroinvertebrate community data in the context of Stage 0 geomorphic and habitat metrics produced in 2020, 2022, and 2024 to evaluate biological response to the conditions described. Individual technical memos and reports summarizing components of this effort will be compiled into a final report that will be submitted to OWEB and available on the UDWC website. The project will be considered successful when these items have been completed.

The results of this Phase 2 Stage 0 Effectiveness Monitoring project will 1) provide new information about the geospatial analysis methods piloted in 2020 and 2022 and advance their utility for monitoring Stage 0 stream restoration projects across the Pacific Northwest region, 2) provide methods for acquiring imagery and performing these analyses, and 3) continue to advance the state of knowledge regarding the effectiveness of restoration designed to achieve a Stage 0 condition and benefits.

Cost Estimate

UDWC proposes to complete Phase 2 at a cost of $374,620 over 3 years from November 2023 to December 2026, with the work largely concentrated within 2.5 years from January 2024 to June 2026, including $295,000 in OWEB funding and $79,620 (27%) in match funding. This estimate allocates OWEB funding for Stage 0 Effectiveness Monitoring project development, contracting, imagery acquisition and processing, ground-based field measurements for training and validation of remote sensing analysis, and analysis and reporting for up to 3.2 miles of Whychus Creek restored or to be restored toward a Stage 0 condition. It also fully funds two years of macroinvertebrate monitoring including staff time and contracting, with a focus on the reaches to be monitored under the Stage 0 Effectiveness Monitoring project and additional Whychus Creek restoration reaches and index sites, to support evaluation of the biological response to post-restoration conditions in these reaches. Matching grants will fund continuous stream temperature monitoring at 11 Whychus Creek monitoring stations over two years as well as analysis and reporting. The OWEB amount includes indirect costs associated with grant administration expenses.

We based our cost estimate for Phase 2 project implementation on UDWC staff time expended during Phase 1 project implementation and for annual macroinvertebrate and continuous stream temperature monitoring, and on estimates from contractors with whom we have worked previously and who are familiar with Whychus Creek restoration reaches and planned analyses. There is potential for UDWC to work with a PGE Project Zero intern or with a student intern from institutions with which we have

established relationships (e.g., OSU Cascades) in summer 2024 to support collection of field measurements required to train and validate remote sensing analyses.

Phase 2 Budget

	External Amount	OWEB Amount	Project Total
Salaries, Wages and Benefits			
[1]UDWC monitoring program manager	$49,700	$137,500	$187,200
[2]UDWC monitoring technician	$14,400	$0	$14,400
[3]UDWC habitat restoration manager	$6,400	$0	$6,400
[4]UDWC restoration program manager	$6,000	$0	$6,000
[5]UDWC executive director	$3,120	$0	$3,120
Contracted Services			
RGB & multi-spectral imagery acquisition and processing; video acquisition (3.2 mi)	$0	$6,750	$6,750
Imagery analysis: Wetted area, vegetation; wood - reaches < 5 years old)	$0	$25,172	$25,172
Technical report preparation	$0	$11,600	$11,600
USGS video processing & velocity analysis	$0	$21,000	$21,000
Imagery analysis: Geomorphic units; wood - reaches > 5 years old	$0	$12,000	$12,000
Macroinvertebrate sampling, analysis & reporting 2024 & 2025	$0	$40,000	$40,000
Contracted Services TOTAL		$116,522	
Materials and Supplies			
Field measurement supplies	$0	$500	$500
Travel			
[6]Mileage for site visits	$0	$2,000	$2,000
Sub-total	$79,620	$256,522	$336,142
Indirect Costs			
OWEB Negotiated Indirect Cost Rate: Cost Allocation	$0	$38,478	$38,478
Total	$79,620	**$295,000**	**$374,620**

[1]UDWC monitoring program manager hours calculated as 0.6 FTE over 30 months for Stage 0 Effectiveness, macroinvertebrate, and continuous temperature monitoring, including: grant and contract management; project development; preparing for, scheduling, and meeting with staff, contractors and technical experts; supervising water quality equipment and data management and continuous temperature monitoring schedule; daily project implementation over two months including consulting with and supporting contractors and training and supervising field staff (flight planning, imagery acquisition, ground-based measurements); actively recruiting and managing volunteers over 6 months; preparing maps, directions, and datasheets for sampling and surveying; preparing for and supervising macroinvertebrate sampling (10 field days over 2 years); consulting with contractors and advising on and reviewing analyses and reports; data management; analysis and reporting for Stage 0 Effectiveness monitoring ground-based measurements and continuous temperature and associated data; synthesis, interpretation, and reporting of geomorphic and habitat conditions and biological responses; compilation of technical memos and reports for various project elements; and project completion reporting.

[2]UDWC monitoring technician hours calculated as 300 hours per year over two years including: water quality equipment management, performing water quality QA/QC, deploying stream temperature dataloggers, auditing dataloggers monthly over 7 months per year over two years, retrieving dataloggers, downloading and managing data; assisting with all macroinvertebrate sampling field preparation and sampling; and participating in all ground-based data collection for Stage 0 Effectiveness monitoring in summer 2024.

[3]UDWC restoration project manager hours calculated as ten, 8-hour field days per year over two years to assist with data collection for Stage 0 Effectiveness and macroinvertebrate monitoring.

[4]UDWC restoration program manager hours calculated as four, 8-hour field days per year over two years for site visits to evaluate and discuss conditions on the ground in light of monitoring findings; and 18 hours per year over two years to consult with monitoring program manager on Stage 0 Effectiveness monitoring, monitoring results, and implications for restoration design and adaptive management.

[5]UDWC executive director hours calculated as 20 hours per year over 2 years including: oversight and management;

[6]Mileage for site visits calculated as 40, 70-mile trips from Bend to Whychus Canyon over 2 years at $0.655 per mile.

Phase 2 Timeline

Task	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026	Q3 2026	Q4 2026
Phase 2 Stage 0 Effectiveness Monitoring													
Identify and recruit or re-engage 2024 Stage 0 EM monitoring team													
Review 2020 and 2022 Stage 0 EM findings and recommendations													
With monitoring team, finalize imagery acquisition specifications, ground-based sampling design, and ground-based survey methods for 2024 Stage 0 EM													
Refine scope of work and establish contracts with contractors													
Develop imagery acquisition and ground-based survey schedule with contractors and UDWC staff													
Work with contractors to acquire imagery along 7.2 miles of Whychus Creek restoration reaches at base flow													
Collect ground-based measurements to complement analysis from imagery and as needed train classification													
Transfer and manage imagery, data, and data products													
Consult with contractors and provide guidance on classification and analysis specifications and progress, data summarization, and reporting													
Analyze ground-based data from 2020, 2022, and 2024 and summarize findings in technical memo													
Compile reports from individual analyses and integrate and interpret results in final project report													
Final project and grant reporting													
Macroinvertebrate and Stream Temperature Monitoring													
Macroinvertebrate monitoring year 1													
Macroinvertebrate sample identification, data delivery, management and analysis, and reporting year 1													
Macroinvertebrate report review year 1													
Macroinvertebrate monitoring year 2													
Macroinvertebrate sample identification, data delivery, management and analysis, and reporting year 2													
Macroinvertebrate report review year 2													
Stream temperature monitoring year 1													
Stream temperature equipment and data management year 1													
Stream temperature monitoring year 2													
Stream temperature equipment and data management year 2; data analysis and reporting (2024 and 2025 data)													

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Evaluating Ecological and Geomorphic Responses to Stage 0 Restoration Monitoring Project
2023-2025 Interim Funding Request
March 6, 2023

1.0 Background and Watershed Context

Over the past several decades, stream habitat restoration practitioners throughout the Pacific Northwest have developed and implemented numerous valley-scale projects focusing on restoring natural processes. The intent of this design approach is to restore geomorphic processes that encourage and maintain deposition and habitat development over time rather than designing and dictating a channel pattern, profile, and dimension. The desired outcome is well described in the literature by Cluer and Thorne (2014) as Stage 0 of the Stream Evolution Model (Figure 1). Powers et al. (2018) describe the development and application of Stage 0 design methodology. Much of this work has taken place in Western and Central Oregon, including several large-scale projects in the McKenzie River sub-basin.

In early 2020, OWEB funded a project to monitor the effectiveness of the largest Stage 0 restoration project completed to date on the lower South Fork McKenzie River (SFMR). The *Evaluating Ecological and Geomorphic Responses to Stage 0 Restoration Monitoring Project* (220-7000-17342) is a multi-disciplinary study to examine the linked physical and ecological responses to the multi-phase Stage 0 SFMR restoration project (Figure 2). Partners include the US Forest Service Pacific Northwest Research Station (PNWRS), US Forest Service (USFS) Willamette National Forest (WNF), Oregon Department of Fish and Wildlife (ODFW), Oregon State University (OSU), and the McKenzie Watershed Alliance (MWA). The MWA is the fiscal sponsor of the McKenzie Watershed Council.

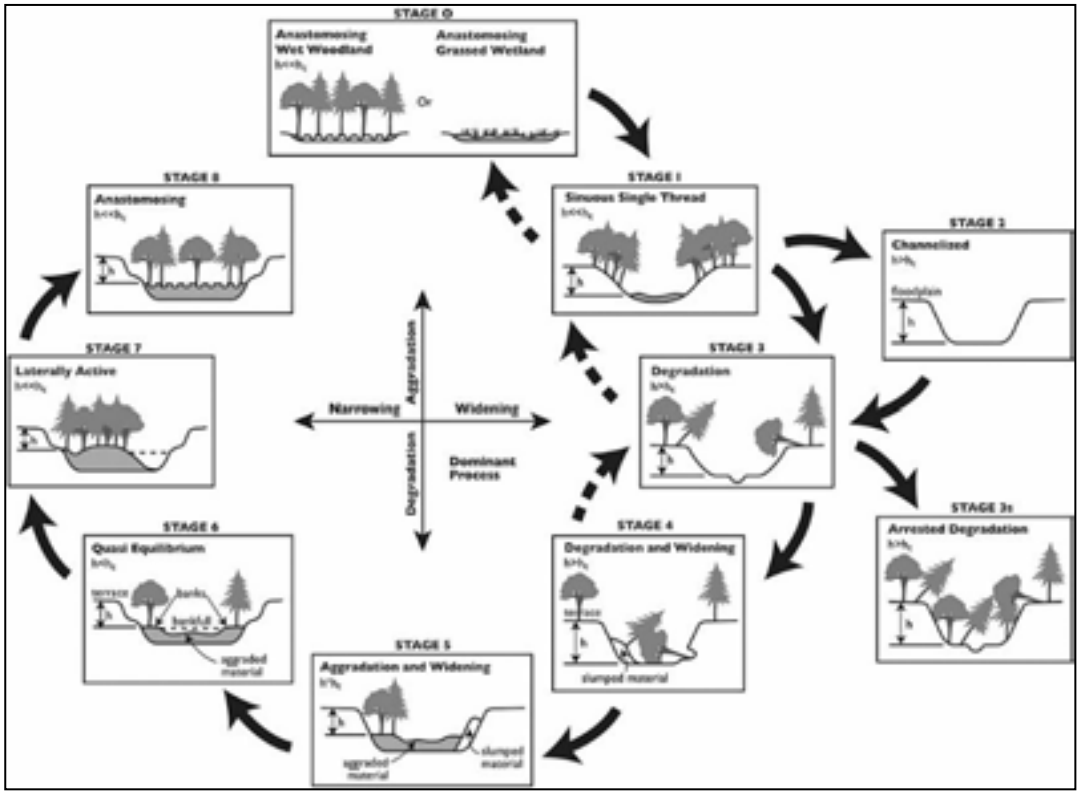


Figure 1. Cluer and Thorne Stream Evolution Model (SEM)

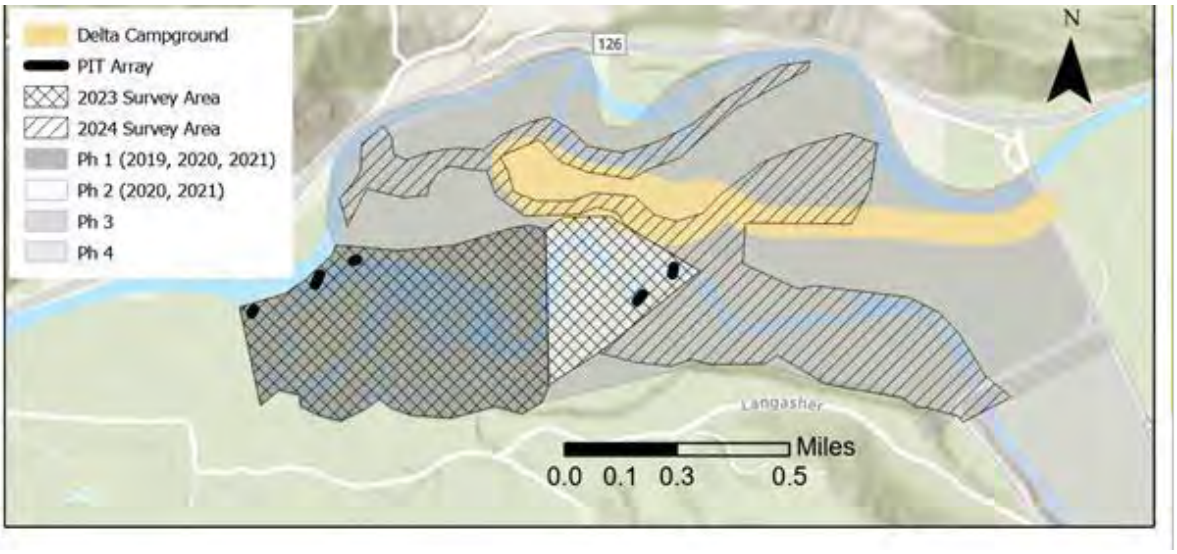


Figure 2. South Fork McKenzie River Floodplain Restoration project by phase (Ph) with proposed monitoring 2023 and 2024 survey areas.

The initial phase of the monitoring project was completed in 2022 after an extended delay caused by the 2020 Holiday Farm Fire. Results of the initial study documented rapid water table recovery, increased salmonid spawning and rearing habitat and increases in the abundance and diversity of macroinvertebrates within project sites (Flitcroft et al. 2022). These results corroborate several hypotheses regarding short-term restoration responses and represent years of coordination among partners to develop and integrate a range of monitoring approaches.

The September 2020 Holiday Farm Fire dramatically altered short- and long-term planning for restoration and associated effectiveness monitoring on the SFMR. The fire encompassed over 173,000 acres in the McKenzie River sub-basin, destroyed over 500 homes, and burned the entirety of the SFMR project area. The Phase 1 and Phase 2 project areas (Figure 2) experienced relatively low intensity burns and exhibited a substantial degree of resilience to the wildfire (Pugh et al. 2022). Wildfire impacts to surrounding riparian forests were more severe, including on the USFS-operated Delta Campground in the Phase 3 project area along the NF-400 road (Figure 2).

In 2021, after an extended public comment period, the WNF chose to decommission Delta Campground due to safety risks posed by hazardous trees and extensive damage to campground infrastructure. The decommissioning created an opportunity to restore over 200 acres in and around the campground by removing roads, campsites, stream crossings, and streamside berms. The decommissioning of Delta Campground began in January 2023 through a partnership between the MWA and WNF and is expected to be completed by March 2023 (Figure 2). The former Delta Campground area is now part of the Phase 3 project area and designs for the restoration are currently under development with restoration slated to begin in 2025.

The delay caused by the Holiday Farm Fire is an opportunity to expand baseline monitoring and apply lessons learned during the initial phase of effectiveness monitoring so that long-term responses to the restoration can be better evaluated. Project partners are seeking $175,000 of OWEB funding (Section 5)

to continue baseline monitoring on the South Fork McKenzie River in 2023 – 2024 while a third phase of habitat restoration is developed. The proposed work will continue ODFW's monitoring of juvenile Chinook salmon, OSU and PNWRS's remote sensing activities, and ensure long-term public availability of remote sensing data collected during the initial monitoring phase as well as those data collected during this proposed work.

2.0 Purpose and Need

Restoration to a Stage 0 condition is a relatively new practice, and the evaluation of long-term responses including riparian vegetation, aquatic species habitat availability, and the geomorphic dynamism over time, still need to be assessed. Further, the unforeseen 2020 Holiday Farm Fire altered on-site conditions and is likely to complicate the long-term restoration response. The delay of the Phase 3 restoration activity to 2025 and continuation of monitoring on the SFMR through this bridge funding proposal will provide an opportunity to address limitations of the initial 2019 - 2022 monitoring effort and further expand the tool chest of monitoring and analytical methods that will support valley bottom restoration monitoring in the years to come. These products will provide valuable insight to land stewards regarding restoration effectiveness and best practices for implementing, monitoring, and analyzing valley bottom transformation.

The OSU Aerial Information Survey (AIS) lab has collected imagery for effectiveness monitoring at SFMR since 2019. These data currently reside on servers at OSU and are only available by contacting AIS staff and requesting data transfer permissions. These data need to be preserved and documented with appropriate metadata to ensure they are available in the future for scientists and managers. The development of a spatial database for the imagery products collected over the SFMR will ensure the long-term availability of the data in a public-facing research data archive for future research on Stage 0 restoration.

The collection of additional imagery on the SFMR Phase 1 and Phase 2 project areas (Figure 2) during the low-flow 2023 period is necessary to fill a gap in the remote sensing monitoring record as additional remote sensing monitoring would not otherwise occur until 2026. Given the history of disturbance on the site via the restoration activity itself and the Holiday Farm Fire, remote sensing monitoring to date has been capturing influences from these two disturbances. As time since disturbance increases, the dynamic response of the river to the disturbances is expected to decrease, allowing the more subtle influences from natural processes to become more evident. Continuing to fill in the remote sensing monitoring record is key to understanding the timing of cross-over to a process-dominated response and thus a better understanding of the trajectory of the restored reaches through time.

Restoration practitioners and managers need to understand how the system is changing across space and through time to understand the degree of wood mobility, the variability of surface temperature change, and how inundated area is changing as a function of subtle geomorphic changes. This aspect of the restoration response was not specifically examined through the initial monitoring effort. The previously published analyses on wood area (Barker et al. 2022), surface temperature (Barker et al. In Prep), and inundated area (Flitcroft et al. 2022) were limited by virtue of the fact that they were focused on the 2020 post-restoration low-flow condition. Applying the wood area, inundated area, and surface temperature processing methods to the remotely sensed survey data for the entire monitoring record would facilitate a spatio-temporal change analysis. The results would improve our understanding of how these characteristics are changing in the system and provide much desired feedback on approach and design that would inform future Stage 0 implementations elsewhere.

A remote sensing survey of the Phase 3 restoration area needs to occur during a low-flow period prior to the onset of restoration activities. Establishment of pre-restoration baseline conditions using consistent remote sensing monitoring methods that will be applied in the post-restoration surveys is a critical component in effectiveness monitoring. Such consistency facilitates an 'apples-to-apples' comparison between pre- and post-restoration conditions. The previous remote sensing monitoring campaign (2019-2021) was limited because the first remote sensing surveys did not take place until after restoration occurred, making a pre- to post-restoration analysis using identical methods impossible. Expansion of the remote sensing survey methods into the Phase 3 survey area will facilitate additional refinement of the remote sensing and analysis practices. It will also provide an enhanced understanding of the broad applicability of the methods by testing the developed methods on a stream component that is different from the previously surveyed Phase 1 and Phase 2 areas.

While ODFW has collected extensive juvenile fish monitoring data specific to the SFMR restoration site, a combination of site conditions and study design challenges have limited the effectiveness of data evaluation. River conditions in the SFMR and water releases from Cougar Dam varied considerably in 2020, 2021, and 2022, presenting challenges for collecting juvenile Chinook salmon. Significant changes in discharge and river temperatures each year require additional data and ongoing analysis to better isolate and understand the effects of restoration on the growth and survival of juvenile Chinook salmon. Adding a second antenna at the upstream end of Phase 2 (Figure 2) in 2021 significantly improved OFDW's understanding of Chinook salmon residency in the restoration area. Collection of additional data before subsequent phases of restoration are completed will help ODFW better evaluate the effects of restoration and restoration activities on juvenile Chinook salmon.

3.0 Methods

3.1 Spatial Data Archive

Monitoring projects utilizing small Unoccupied Aircraft System (sUAS) remote sensing, like the OWEB-funded SFMR monitoring project, need a persistent spatial data archive that allows online public access to remote sensing survey products. The OSU AIS lab will submit data products collected from 2019-2021 during the first phase of monitoring, and data products produced under this proposal, to the USDA Forest Service Research Data Archive (USDA 2022). The AIS lab will perform the necessary formatting and metadata documentation steps in accordance with the requirements of the Research Data Archive (RDA). The anticipated spatial database files would be a collection of TIF (georeferenced tag image file format) and geodatabase (GDB) files. All GDB features, attributes, and entities will be documented in accordance with the Federal Geographic Data Committee (FGDC) Biological Data Profile (BDP) of the Content Standard for Digital Geospatial Metadata (FGDC 1999).

The RDA is a persistent actively managed database that produces a permanent digital object identifier (DOI) for all accepted data. A primary advantage of creating a DOI includes the databases being citable for researchers or other interested parties that want to use them and refer to them in a publication or other form of media. A DOI also provides a link to where a database can be accessed and helps raise the database's visibility. The authors of the DOIs in the resulting citations will be Jonathan Burnett (USFS), Matt Barker (OSU), Michael Wing (OSU), Steve Wondzell (USFS), and any other applicable contributors. This task will complete by fall of 2023.

3.2 Remote Sensing Monitoring

The OSU AIS lab will continue remote sensing monitoring at the SFMR Phase 1, 2, and expand into Phase 3 by conducting sUAS low-flow surveys using multispectral sensors capable of producing sub-meter resolution imagery. These data will support the measurement of three monitoring indicators: 1)

inundated area, 2) in-stream wood, and 3) surface temperature. A single low-flow survey will be flown for the Phase 1 and 2 project areas in 2023. In addition, high-flow surveys will be conducted in spring 2024 if possible. In the past, we have found it difficult to fly high-flow surveys in the spring. We need a settled weather window to fly the sUAS during a high-flow period. However, flows are regulated by the USACE dam operations which are governed by legal accords. We will be unable to acquire this imagery if high flows do not occur under suitable sUAS flying conditions but can also target spring 2025 if conditions are unacceptable in 2024. These data will be used in conjunction with the 2019 – 2021 sUAS data to conduct a time series analysis of spatio-temporal trends in an effort to answer questions about wood mobility, surface temperature heterogeneity, and variability in inundated areas.

Pre-restoration low-flow condition sUAS surveys will be conducted summer 2024 in a pre-defined subset of the Phase 3 area (Figure 2). This subset of Phase 3 monitoring is necessary to maximize the efficiency by limiting remote sensing surveys to areas that are anticipated to be inundated following restoration. These surveys will be complemented with contemporaneous field surveys to validate the remote sensing data of the three monitoring indicators. Field surveys will document sub-canopy inundated conditions in an effort to improve remote sensing estimates in areas where ground and stream are obscured. The in-stream wood area will be measured and quantified, and both long-term and in-situ stream temperature data will be recorded to facilitate the validation of modeled outputs. Field work for temperature and wood will be adapted from existing methods (Flitcroft et al. 2022, Hinshaw et al. 2022). This task will complete in 2025 with the completion of a manuscript and the final report.

3.3 Juvenile Chinook Salmon Monitoring

Juvenile Chinook monitoring will use a mark-recapture sampling design to estimate abundance and detection timing at multiple PIT tag arrays to calculate residence time, migration timing, and survival estimates of different groups of juvenile Chinook. ODFW will target 2,000 juvenile spring Chinook salmon collections annually throughout the lower SFMR in 2023 and 2024. Field crews will collect juveniles using seines at multiple locations and immediately anesthetize them, implant them with a PIT tag, and release them. Three separate PIT tag arrays were established at the SFMR/McKenzie River confluence in 2019 and two above the Phase 2 project area in 2021 (Figure 2). ODFW will install and maintain the PIT antennae at these sites on a seasonal basis (June – mid-October), with the goal of having them in place before sampling and tagging begin. Existing detection facilities at the downstream fish bypass for Eugene Water & Electric Board-operated Walterville Canal and in the outlet channels from USACE-operated Cougar Dam will provide additional data from fish tagged during this study. In addition, ODFW will be testing a sampling trap in the Walterville bypass canal, which may provide other data on fish from SF McKenzie once they move to the mainstem McKenzie.

4.0 Project Deliverables

- A final summary report documenting juvenile Chinook salmon abundance, migration time, life history, and habitat use in 2023 and 2024.
- Spatial data archive of 2018 – 2021 orthomosaics (fall 2023)
- Phase 1 and 2 sUAS multispectral orthomosaics of 2023 low flow (summer 2023)
- Phase 1 and 2 sUAS high flow orthomosaics (spring 2024 or spring 2025)
- Phase 3 sUAS multispectral orthomosaics of 2024 low flow (summer 2024)
- Spatial data archive of 2023 – 2024 orthomosaics (summer 2025)
- Multitemporal change analysis on wood, surface temperature, and inundated area Phase 1 and Phase 2 (summer 2025).

- Characterization of Phase 3 existing conditions as it relates to wood area, surface temperature, and inundated area prior to restoration (summer 2025)
- Final summary report (summer 2025)

5.0 Timeline

The project will begin in April 2023 and end in September 2025. The project timeline includes proposed monitoring elements (3.1 – 3.3) and associated restoration project elements on the South Fork McKenzie River. Juvenile Chinook tagging and monitoring will ideally take place in 2023 and 2024. The timeline includes an additional in-stream monitoring period in 2025 as a contingency if unforeseen events preclude juvenile Chinook monitoring in 2023 or 2024.

Table 1. Timeline

Project Element	Description	Start	End
Restoration	Delta Campground Decommissioning	January 2023	March 2023
Restoration	Delta Campground Floodplain Restoration Design (Phase 3) Development	January 2023	December 2023
Monitoring (3.1)	Data release of 2018 – 2021 remote sensing data	April 2023	October 2023
Monitoring (3.2)	Phase 1 and Phase 2 sUAS survey	July 2023	September 2023
Monitoring (3.3)	Juvenile Chinook tagging and monitoring	June 2023	September 2023
Monitoring (3.2)	Phase 1 and Phase 2 sUAS high-flow survey	Spring 2024	June 2024
Monitoring (3.3)	Juvenile Chinook tagging and monitoring	June 2024	September 2024
Monitoring (3.2)	Phase 3 Pre-restoration sUAS survey	June 2024	September 2024
Monitoring (3.3)	Juvenile Chinook tagging and monitoring (Contingency monitoring season)	June 2025	September 2025
Monitoring (3.2)	Add to 2023 & 2024 remote sensing data to data release	October 2024	June 2025
	Final Report of Monitoring Results	May 2025	September 2025
Restoration	South Fork Phase 3 Project Implementation	May 2025	August 2025
Monitoring	Evaluating Ecological and Geomorphic Responses to Stage 0 Restoration Monitoring Project Phase 2	2026	2027 or 2028

5.0 Budget

The MWA is requesting $175,000 in OWEB funding to support the proposed scope of work. Partners will provide $69,690 of in-kind match and the MWA will provide $5,223 of cash match. All match can be considered secured. Total project cost is $249,913. The proposed project budget is listed in Table 2.

Table 2. Project Budget

Line Item	Unit	Unit Type	Unit Cost	OWEB	In-kind	Cash Match	Total
Project Management							
MWA Executive Director	50	hrs	$67	-	-	$3,350	$3,350
MWA Restoration Program Manager	100	hrs	$55	$3,955	-	$1,545	$5,500
Project Management Subtotals				$3,955	$0	$4,895	$8,850
Contracted Services							
ODFW Crew Lead	4	months	$11,500	$23,000	$23,000	-	$46,000
ODFW Season Crew (3 person)	9	months	$6,500	$30,000	$28,500	-	$58,500
PIT tags	4000	each	$2.50	$5,000	$5,000	-	$10,000
OSU graduate student (AIS lab)	9	months	$5,998	$53,982	-	-	$53,982
OSU AIS lab analysis	400	hrs	$51	$20,400	-	-	$20,400
OSU AIS lab piloting	80	hrs	$175	$14,000	-	-	$14,000
OSU AIS seasonal field support	80	hrs	$35	$2,800	-	-	$2,800
OSU vehicle rental	12	days	$35	$420	-	-	$420
OSU vehicle mileage	1000	miles	$0.28	$280	-	-	$280
OSU lodging	12	days	$140	$1,680	-	-	$1,680
OSU per diem (2 people)	12	days	$120	$1,440	-	-	$1,440
Piezometers	2	each	$817	$1,634	-	-	$1,634
Temp loggers	8	each	$125	$500	$500	-	$1,000
USDA Forest Service PNWRS - J. Burnett	15	days	$550	-	$8,250	-	$8,250
USDA Forest Service PNWRS - S. Wondzell	6	days	$740	-	$4,440	-	$4,440
Contracted Services Subtotals				$155,136	$69,690	$0	$224,826
Travel							
MWA staff travel	500	Miles	0.655	-	-	$328	$328
Travel Subtotals				$0	$0	$328	$328
Total Direct Cost Subtotals				**$159,091**	**$69,690**	**$5,223**	**$234,004**
Indirect							
MWA				$15,909	-	-	$15,909
Project Total				**$175,000**	**$69,690**	**$5,223**	**$249,913**

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item J

Partnership Technical Assistance Grant Awards

Board Meeting April 25-26, 2023

Tina Kotek, Governor

OREGON WATERSHED ENHANCEMENT BOARD

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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, Monitoring and Reporting Manager
Theresa DeBardelaben, Drought Programs Specialist

SUBJECT: Agenda Item J. Partnership Technical Assistance (TA) Grant Awards
April 25-26, 2023, Board Meeting

I. Introduction

This staff report provides an overview of the 2022 Partnership TA grant offering and funding recommendations. Staff requests the board approve the funding recommendations outlined in Attachment C to the staff report.

II. Background

At the July 2021 meeting, the board adopted its 2021-2023 spending plan and allocated $1.5 million for Partnership TA grants, and approved staff to offer two grant cycles this biennium, with $750,000 being available for each offering. The first offering was awarded in January 2022. There are two project types within the Partnership TA grants, Development, and Capacity. Development applications can develop a strategic action plan (SAP), enhance an existing SAP, and elevate the partnership's performance through the development of governance documents. Capacity applications must have a SAP that aligns with OWEB's template and can support partnership coordination in implementation of the plan.

III. Summary of Solicitation and Review Process

A. Solicitation

In January 2022, staff solicited the second round of Partnership TA grants for the 2021-2023 biennium. Prior to submitting a proposal, applicants were required to participate in a consultation with staff. The purpose of the consultation is to review the program's purpose, allowable activities, evaluation criteria, and timing with applicants.

B. Applications Submitted

Nine applications were received by the deadline requesting $1.09 million. Four applications applied for Capacity funding and five applications applied for Development funding. Applications were submitted from three of OWEB's six regions; a map of the applications can be found in Attachment A to the staff report.

C. Review Process

Applications were evaluated based on the evaluation criteria included in the technical assistance rule OAR 695-030-0045(3), which contains criteria relating to:1) stakeholder engagement, 2) proposal clarity, 3) technical soundness, and 4) organizational capacity. Reviewers provided a 'fund', 'fund with conditions, or 'do not fund' recommendation, and ranked applications. The application evaluations are in Attachment B to the staff report.

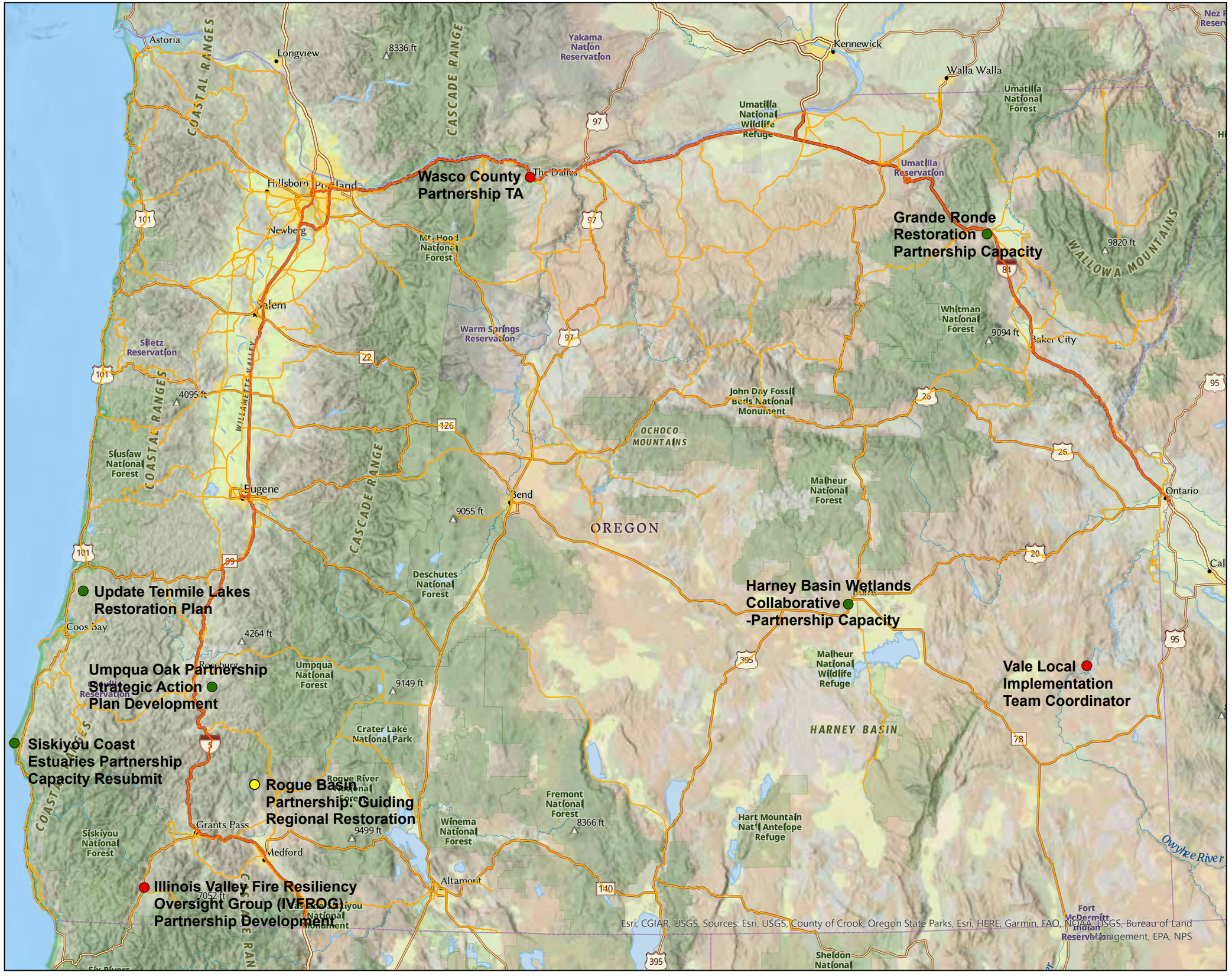
IV. Funding Recommendation

Staff recommends the board award Partnership TA grants as shown in Attachment C.

Attachments

A. Application Map
B. Evaluations
C. Staff Funding Recommendations

Partnership Technical Assistance Grants 2022-2023



Funding Recommendations

Status

- Staff Recommended for Funding
- Below Funding Line
- Not Recommended for Funding
- Interstate Highways
- Oregon State Highways

OREGON WATERSHED ENHANCEMENT BOARD

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2022 Partnership Technical Assistance Grant Cycle

Application Number: 223-8301-22663
Application Name: Illinois Valley Fire Resiliency Oversight Group (IVFROG) Partnership Development
Applicant: Illinois Valley SWCD
OWEB Request: $139,180
Total Cost: $239,288

Application Description:

The project location includes public and private lands within the Illinois River watershed in Josephine County. This area encompasses the rural hubs of Cave Junction, Selma, and Takilma. Specific sub-watersheds are prioritized within the greater basin for landowner engagement and fuels reduction work (see Priority Watersheds attachment).

The mission of the Illinois Valley Fire Resiliency Oversight Group (IV-FROG) is to achieve clear and measurable outcomes relating to the mitigation of catastrophic wildfire risk to the community and improvement of forest health through related silvicultural activities. IV-FROG, now past its initial formation, seeks to increase its durability, sustainability, operational efficiency, and sense of direction. Moreover, IV-FROG aims to increase its competitive advantage in leveraging funding opportunities to achieve our goal of expanding project reach to a landscape scale. This project will maximize the performance of the Illinois Valley Fire Resiliency Oversight Group (IV-FROG) through development of a strategic action plan. This document will be developed cooperatively with a contracted strategic planner, guided by the leadership of the engagement coordinator, and be informed by diversity, equity, inclusion and justice (DEIJ) principles.

Project partners include: Grayback Forestry, Illinois Valley Community Development Organization (IVCDO), Illinois Valley Fire District, Illinois Valley Soil and Water Conservation District (IVSWCD), Illinois Valley Watershed Council (IVWC), KS Wild, National Park Service (NPS), Natural Resources Conservation Service (NRCS), Office of the State Fire Marshal (OSFM), Oregon Department of Forestry (ODF), OSU Extension Service, Rogue Basin Partnership (RBP), Rogue Valley Integrated Fire Plan (RVIFP), Southern Oregon Forest Restoration Collaborative (SOFRC), USFS - Wild Rivers Rangers District, Wilson Biochar, Lomakatsi, as well as local community groups and stakeholders.

Review Team Evaluation

Strengths:

- The partnership has a comprehensive list of partners, representing federal and state agencies, local organizations, and technical experts.

- The partnership recognizes the critical role of partners in project success and proposes an approach to ensure quality engagement in planning by financially compensating partners for their time.
- The project provides measurable outcomes relating to the mitigation of catastrophic wildfires and improvement of forest health.

Concerns:

- The application lacks contextual detail about the project deliverables and goals, as well as timelines specific to the Strategic Action Plan (SAP).
- The application would have benefitted from more information on consultant deliverables.
- More information on the connection with forest and watershed health would have benefited the application.
- The application is lacking detail on current and future tribal coordination.

Concluding Analysis:

The Illinois Valley Fire Resiliency Oversight Group (IVFROG) Partnership is a new partnership comprised of a diverse array of appropriate groups that have worked together informally in the past. Their collective momentum is building, and this proposal is an important next step towards formalizing their partnership. The partners have the right technical and collaborative skills to successfully execute a strategic planning effort. The inclusion of key stakeholders for implementation and development of a Strategic Action Plan demonstrates the partnership's forward-thinking towards future restoration actions. However, the application would have benefited from additional detail on goals and timelines.

Review Team Recommendation to Staff: Recommend

Review Team Priority: 7 of 8

Review Team Recommended Amount: $139,180

Review Team Conditions: N/A

Staff Recommendation: Do Not Recommend; falls below staff-recommended funding line

Staff Follow-up to Review Team: N/A

Staff Recommended Amount: $0

Staff Conditions: N/A

2022 Partnership Technical Assistance Grant Cycle

Application Number: 223-8302-22657
Application Name: Update Tenmile Lakes Restoration Plan
Applicant: Willamette Partnership
OWEB Request: $149,758
Total Cost: $187,269

Application Description:

The Tenmile Lakes basin (HUC 1710030404) is located on the Oregon South Coast and encompasses approximately 98 square miles. There are ten named lakes within the watershed with a combined surface area of 4.7 square miles. The City of Lakeside is adjacent to North Tenmile Lake. The watershed spans Coos and Douglas Counties.

The Tenmile Lakes Basin Partnership (TLBP) has been convening the Tenmile Lakes watershed group (Partnership) for several years with the goal of restoring water quality in this premiere coho fisheries habitat. In 2021 they completed the Tenmile Lakes Native Fisheries and Water Quality Restoration Plan (Plan) to guide watershed restoration and seek funding for implementation, however, the Plan lacks key components to meet OWEB's Strategic Action Plan (SAP) criteria and the group faces significant capacity constraints. These gaps have been identified by OWEB as significant barriers to successful SAP implementation and to securing funding from state agencies. The Plan therefore needs to be updated to support the Plan's coordinated implementation among partners and to secure the investments needed to restore coho habitat and improve water quality to reduce the frequency and severity of recurring harmful algal blooms.

Proposed Work: Willamette Partnership will update the current Tenmile Lakes Native Fisheries and Water Quality Restoration Plan, develop governance documents, and build local capacity of the Partnership to implement it. Watershed group partners (Partnership) will support this project: Tenmile Lakes Basin Partnership, Confederated Tribes of the Coos, Lower Umpqua, and Siuslaw Indians (CTCLUSI), Coos County, City of Lakeside, OR DSL, OR DFW, OR DLCD, and Cascade Pacific Resource Conservation & Development.

Review Team Evaluation

Strengths:

- The detailed description of roles and responsibilities demonstrates the capacity of the applicant to implement the project.

The use of an external facilitator will allow the participants to focus on the work and allow another entity to manage the coordination.

- The application demonstrates significant collaboration with local, tribal, and federal partners and represents a continuation of the Partnership's commitment to community engagement in addressing restoration needs and water quality issues in the basin
- The applicant has a proven track record of successful project implementation and facilitation.
- The application provides detail on how project fits into the overall watershed context.

Concerns:

- The application lacks detail regarding building capacity where it has been challenging in the past and how that capacity will be maintained.
- Providing contextual details about the organization and committee operations would have benefitted the application.
- The application lacks details on how teams would communicate with each other.

Concluding Analysis:

The Willamette Partnership has a proven track record of successful project implementation and has the expertise to coordinate an update to the Tenmile Lakes Strategic Action Plan, develop governance documents, and build local capacity of the Partnership to implement it.

This proposal is an important next step towards improving watershed health. The partners have the technical and collaborative skills to update their strategic action plan to align with OWEB's guidance. The inclusion of key stakeholders for implementation and development of the restoration plan demonstrates the partnership's forward-thinking towards future restoration actions

Review Team Recommendation to Staff: Recommend

Review Team Priority: 2 of 8

Review Team Recommended Amount: $149,758

Review Team Conditions: N/A

Staff Recommendation: Recommend

Staff Follow-up to Review Team: N/A

Staff Recommended Amount: $149,758

Staff Conditions: N/A

2022 Partnership Technical Assistance Grant Cycle

Application Number: 223-8303-22661
Application Name: Grande Ronde Restoration Partnership Capacity
Applicant: Grande Ronde Model WS Foundation
OWEB Request: $149,810
Total Cost: $316,860

Application Description:

This Upper Grande Ronde Partnership Capacity grant is located in the Grande Ronde River Basin in Northeast Oregon. The Upper Grande Ronde Initiative seeks to continue our high functioning partnership as our Focused Investment Partnership grant nears completion. OWEB funds will provide capacity at the Grande Ronde Model Watershed (GRMW) to continue to facilitate the partnership and the process of updating our strategic action plan, The Restoration Atlas. Key management objectives for the Atlases include increase salmonid carrying capacity, reduce juvenile mortality in the Grande Ronde Valley, reduce Chinook pre-spawn mortality, improve flow, and reduce temperatures. Overall key performance indicators for these objectives at the population level include juvenile Chinook and steelhead capacity and survival. The grant funding will be used to provide a 0.4 FTE at GRMW for 3 years to lead the partnership in updating the Catherine Creek and Upper Grande Ronde Atlases, community engagement for new high priority areas, coordinate monitoring efforts, prepare technical reports on findings and bridge the gap between the end of the Upper Grande Ronde Initiative FIP and the application for another FIP within the GRMW geographic coverage area (map of coverage area attached). This Partnership Capacity grant will be matched with our restoration partners time and Bonneville Power Administration funding. There is a clear need within the partnership to expand, improve and maintain communication to the restoration partners, researchers, and landowners in high priority areas in the Grande Ronde River subbasin. The Core Partners (GRMW, ODFW, USWCD, USFS and CTUIR), from the Grande Ronde FIP were incredibly successful in collaborating and putting the available FIP funds to design and restoration work on the ground and guided monitoring efforts using FIP supplemental monitoring funds. Project partners will likely expand as the partnership has grown since 2015.

Review Team Evaluation

Strengths:

- The application includes a detailed list of appropriately scoped and scaled products to be developed.
- Partner roles are well described, and appropriate partners are engaged including production, funding, and research partners.
- The timeline is appropriate and demonstrates the partners understand the level of effort that will be needed to conduct the work.

- Supporting documents for governance and conflict resolution demonstrate how decisions are made and core partners agree to a code of conduct.
- Partners are very engaged with a robust process to prioritize, implement, and monitor efforts.
- This project builds on a successful, recently completed Focused Investment Partnership (FIP) initiative level grant, demonstrating that the partners have ample experience and expertise to lead this next phase of project development.

Concerns:

- Additional detail in the budget would have been helpful to understand how funding will be allocated between the proposed project objectives.
- The application would have benefited from a description of local community engagement.

Concluding Analysis:

The Grande Ronde Restoration Partnership is a long-standing partnership with a history of successfully implemented restoration work. Partner roles are well described and the attached partnership letter documents support. The proposed work supports staff to continue coordination of the Partnership, updating the Atlas, as well as maintaining monitoring and adaptive management efforts. The Partnership has recently completed implementation of a FIP initiative level grant. The proposed work will set the stage for the partnership to build on their successful efforts within a new geography in their basin and update the partnership documents to incorporate lessons learned from their first FIP award.

Review Team Recommendation to Staff: Recommend

Review Team Priority: 1 of 8

Review Team Recommended Amount: $149,810

Review Team Conditions: N/A

Staff Recommendation: Recommend

Staff Follow-up to Review Team: N/A

Staff Recommended Amount: $149,810

Staff Conditions: N/A

2022 Partnership Technical Assistance Grant Cycle

Application Number: 223-8304-22655
Application Name: Siskiyou Coast Estuaries Partnership Capacity Resubmit
Applicant: Curry SWCD
OWEB Request: $ 96,875
Total Cost: $145,351

Application Description:

The Siskiyou Coast Estuaries Partnership (SCEP) consists of the Curry Watersheds Partnership (CWP; which is made up of the Curry Soil & Water Conservation District, the South Coast Watershed Council, the Lower Rogue Watershed Council, and the Curry Watersheds Nonprofit), Wild Rivers Land Trust (WRLT), and the Oregon Department of Fish and Wildlife (ODFW). The partnership's geography covers the nine major south coast watersheds in Curry County, Oregon, but the focus of this project is on the Sixes River watershed. The SCEP completed a Strategic Action Plan for the Sixes River watershed in 2019 and we are seeking capacity funds to implement and enhance portions of this SAP, and improve partner coordination for project implementation and monitoring. The specific capacity needs that this application seeks to address are: 1. Implementation of the Sixes SAP outreach plan, and 2. Enhancement of the Sixes SAP Progress Monitoring Framework. Through implementation of the outreach plan, we are proposing to: a) Increase engagement with regional tribes around the Sixes SAP and explore opportunities to bring them on as core or supporting partners; b) Increase engagement with other natural resource organizations around the Sixes SAP and explore opportunities to bring them on as core or supporting partners; and c) develop project ideas with landowners and stakeholders, which will enable us to engage with relevant permitting agencies and funders. We are proposing to enhance the SAP Progress Monitoring Framework through the development of a comprehensive monitoring plan. The SAP currently does not include specific ecological outcomes due to the lack of baseline data and expert knowledge available during the initial development process. The monitoring plan will identify specific ecological outcomes, how they will be monitored, and will be developed collaboratively by the SCEP and additional technical experts from DEQ, USFS, USGS, BLM, and South Slough Estuarine Research Reserve.

Review Team Evaluation

Strengths:

- The application includes a detailed description of outreach and monitoring efforts that will support implementation of the Sixes Strategic Action Plan (SAP).
- The partnership has an existing strategic action plan and governance documents that were developed through a previous Partnership TA grant.
- The applicant and partners have a proven track record of successful coordination and project implementation.
- The budget for the project is clear and aligns with the proposed work.

- The project is timely and builds off the momentum of existing action plans and lessons learned.
- Timeline for completing the objectives identified in the application is appropriate.
- Project staff and partners have the technical expertise to successfully complete the proposed work.

Concerns:

- Application did not explain why the Partnership is just now developing their outreach plan given their SAP was completed in 2019.
- There are two tasks in the project's schedule (develop SAP project ideas and create online project tracker) that are not included in the Project Management table, making it unclear who is responsible for delivering these tasks.

Concluding Analysis:

The resubmitted application addresses reviewer concerns raised in the previous submittal particularly around how Tribes will be engaged. Curry SWCD and partners have a proven track record of successful coordination and project implementation. Capable and knowledgeable staff are involved with appropriate leadership roles. This proposal is an important next step towards improving watershed health. The partners have the right technical and collaborative skills to successfully execute the proposed work. The inclusion of lessons learned and referencing existing action plans demonstrates the partnership's forward-thinking towards future restoration actions.

Review Team Recommendation to Staff: Recommend

Review Team Priority: 4 of 8

Review Team Recommended Amount: $96,875

Review Team Conditions: N/A

Staff Recommendation: Recommend

Staff Follow-up to Review Team: N/A

Staff Recommended Amount: $96,875

Staff Conditions: N/A

2022 Partnership Technical Assistance Grant Cycle

Application Number: 223-8305-2266
Application Name: Vale Local Implementation Team Coordinator
Applicant: Pheasants Forever Inc
OWEB Request: $149,877
Total Cost: $264,668

Application Description:

Pheasants Forever seeks funding to support a position to oversee coordination capacity for the Vale Local Implementation Team (LIT) located within Malheur County (Ontario, Oregon). LITs are locally driven, collaborative groups, convened by the ODFW and use local input and guidance to meet goals and objectives identified within the Oregon Sage-grouse State Action Plan. Five LITs were identified in 2005 within the Oregon Sage-Grouse Conservation Assessment and Strategy and their jurisdictions align with BLM District and Resource Area boundaries.

The LIT program is intended to be flexible to accommodate local interests and challenges, but the overall purpose of each LIT is threefold: 1) provide a central platform to increase communication among stakeholders; 2) identify existing efforts with regard to sage-grouse and shrub-steppe conservation to develop a strategic plan moving forward that streamlines future efforts; and, 3) procure funding for project implementation.

The coordinator is essential to LIT development and will foster effective collaboration among interest groups across the Vale LIT area by hosting one-on-one meetings, small focus groups, and other outreach events. The coordinator will help Vale LIT establish a collaborative forum to develop landscape-scale strategies that set shared priorities to address threats to sage-grouse; work with the group to procure funding to implement their strategy; and host field tours to encourage future conservation-minded collaborations. Vale LIT partners include BPT, CWMAs, DSL, landowners, Malheur SWCD, MWC, OWC, NRCS, ODFW, OSU, USFWS, Vale District BLM.

Review Team Evaluation

Strengths:

- The application includes a detailed description of the Strategic Action Plan (SAP), governance, and coordination needed to advance the Partnership's work to benefit sage grouse.
- There is demonstrated collaboration and support with key partners such as public lands managers, local entities, and technical experts.
- Partners have a proven track record of successful coordination and project implementation.
- Strategies identified are appropriate and reasonable given the large geographic area.
- The proposal is informed by similar Local Implementation Teams working on projects to benefit sage grouse habitat.

Concerns:

- The application lacks details on the roles and responsibilities of the partners.
- The timeline for completing the SAP may not be achievable in such a short timeframe.
- There is a lack of detail on project implementation once the SAP is complete.
- A position description for the proposed coordinator to be hired with these funds would add clarity to the expectations of the role.
- The proposed work heavily relies on the ability to recruit and hire the right person for the proposed coordinator position who can both coordinate the Partnership and author the SAP and governance documents.

Concluding Analysis:

Project partners have a proven track record of successful coordination and project implementation. This proposal is timely and describes the limits the Partnership has reached by having a part-time coordinator housed outside the Basin. The partners have the engaged the right technical partners to collaborate on development of a Vale SAP. The proposed timeline is ambitious and unclear if all the work will be completed. The success of the work relies heavily on a to be hired coordinator to facilitate and prepare all the proposed deliverables.

Review Team Recommendation to Staff: Recommend

Review Team Priority: 6 of 8

Review Team Recommended Amount: $149,877

Review Team Conditions: N/A

Staff Recommendation: Do Not Recommend; falls below staff-recommended funding line

Staff Follow-up to Review Team: N/A

Staff Recommended Amount: $0

Staff Conditions: N/A

2022 Partnership Technical Assistance Grant Cycle

Application Number: 223-8306-22652
Application Name: Wasco County Partnership TA
Applicant: Wasco SWCD
OWEB Request: $95,150
Total Cost: $121,850

Application Description:

Wasco County SWCD and Area Watershed Councils work in a close, informal partnership with WyEast RC&D on projects relating to water conservation and remote data collection to support working lands and healthy watersheds. We intend to continue working together toward our common goals and need a strategic action plan to support the work long term. With ongoing drought and climate change, we are seeing increasing demands on our time and resources and need to be strategic in our planning and develop our Partnership's capacity with an eye towards the future.

Our primary goal is to develop a Strategic Action Plan (SAP). We also seek to elevate our partnership's performance through effective governance by using the SAP to create a Memorandum of Understanding (MOU) between the three core entities, and develop both a communications plan and long-term funding plan. Core partners include Wasco County SWCD, Wasco County Area Watershed Councils, and WyEast Resource Conservation & Development Council. Other partners we work with include Wasco County, Mid Columbia Economic Development Council, USDA NRCS, ODFW, CTWS, ODA, DEQ, ODF, USFS, local electrical utilities, Oregon Department of Energy, University of Oregon through the RARE AmeriCorps program, and the OWEB Lower Deschutes Small Grant team.

Review Team Evaluation

Strengths:

- The project is timely and identified the need for coordination to maintain the momentum of the partners.
- The Strategic Action Plan will build off previous watershed assessments.
- The applicant has a proven track record of successful engagement, collaboration, and communication.
- The Strategic Action Plan will assist the Partners with theirability to anticipate, prepare for, and respond to hazardous events, and disturbances related to changing climate conditions.
- The timeline is realistic for the proposed work.
- The budget includes stipends to partners to support the Strategic Action Plan development.

Concerns:

- The application lacks contextual details about how updating existing assessments for individual partners will be rolled up into a singular Strategic Action Plan for the Partnership.
- The application does not describe what ecological limiting factors the partners will be working to address via development of a Strategic Action Plan.
- The included lump sum budget lacks sufficient detail to understand the facilitator roles and responsibilities.
- There is a lack of detail regarding long-term implementation of action plan once the project is complete.
- The process for developing the memorandum of understanding should be prioritized to outline partnership roles.

Concluding Analysis:

The Wasco SWCD and Wy'East RC&D have a proven track record of successful coordination and project implementation. This proposal is an important next step towards improving watershed health. The partners have the right technical and collaborative skills to successfully execute the action plan. The inclusion of key stakeholders for implementation and refinements of the action plan demonstrates the partnership's forward-thinking towards future restoration actions. Including more detail on how the partners will use the SAP and how the plan would assist the partnership would have benefitted the application.

Review Team Recommendation to Staff: Recommend

Review Team Priority: 8 of 8

Review Team Recommended Amount: $95,150

Review Team Conditions: N/A

Staff Recommendation: Do Not Recommend; falls below staff-recommended funding line

Staff Follow-up to Review Team: N/A

Staff Recommended Amount: $0

Staff Conditions: N/A

2022 Partnership Technical Assistance Grant Cycle

Application Number: 223-8309-22658
Application Name: Harney Basin Wetlands Collaborative -Partnership Capacity
Applicant: High Desert Partnership
OWEB Request: $147,216
Total Cost: $209,775

Application Description:

The Harney Basin Wetlands Collaborative (HBWC) works across the entire area of the closed lake basin located in Harney County, facilitating collaborative work with public land managers and private landowners in order to steward a healthy wetlands ecosystem. Harney County is about 25% privately owned and 75% publicly owned land, and this crucial ecosystem supports wildlife habitat for fish, migrating birds, and livestock production.

This technical assistance project would provide capacity support for HBWC to strengthen the individual and collective work of the partners. This collaborative is a long-standing collaborative group (over 10 years working together) and the partners are supported by High Desert Partnership (HDP). Recently, the collaborative has seen notable turnover, with longtime partners retiring or moving into other work. There is a significant and growing need to support the development of new partners and ensure that institutional knowledge is developed and maintained. This grant project would support staff salary for the HBWC Coordinator, whose work includes coordinating SAP implementation, conducting HBWC meetings with facilitation, grant tracking and management, and supporting partners with a variety of other needs. The HBWC Coordinator holds valuable institutional knowledge of this work, which is especially important given the collaboration's recent partner turnover.

Project partners include, Harney County Watershed Council, Ducks Unlimited, The Wetlands Conservancy, Portland Audubon, Malheur National Wildlife Refuge, Harney County Soil and Water Conservation District, Intermountain West Joint Venture, Natural Resource Conservation Service, Oregon Department of Fish and Wildlife, Friends of Malheur National Wildlife Refuge, Eastern Oregon Ag Research Center and private landowners and ranchers in the basin.

Review Team Evaluation

Strengths:

- The applicant has a proven track record of successful collaboration, implementation, and communication via their implementation of an OWEB funded Focused Investment Partnership Initiative level grant.
- The applicant demonstrates collaboration with partners including local, state, and federal government entities as well as public lands managers and private landowners.

- The project is timely and maintains the momentum of the Partnership to complete on-going projects funded in the FIP.

Concerns:

- The application does not include detail regarding long-term planning.
- The application mentioned tribal support but wasn't clear how tribes are engaged in the Partnership.
- The budget for facilitation lacks detail and is unclear how often facilitation occurs.
- The proposal would benefit from inclusion of lessons learned during their six years of experience as an OWEB Focused Investment Partnership.
- The proposal would benefit from loading a scope of work description for each of the three identified roles: Ecological Coordinator, Admin Coordinator and Facilitation.

Concluding Analysis:

The High Desert Partnership has a proven track record of successful project implementation. This proposal is an important next step towards achieving the goals of the partnership. The partners have the technical and collaborative skills to achieve the outcomes described in the proposal.

Review Team Recommendation to Staff: Recommend

Review Team Priority: 5 of 8

Review Team Recommended Amount: $147,216

Review Team Conditions: N/A

Staff Recommendation: Recommend

Staff Follow-up to Review Team: N/A

Staff Recommended Amount: $147,216

Staff Conditions: N/A

2022 Partnership Technical Assistance Grant Cycle

Application Number: 223-8308-2265
Application Name: Umpqua Oak Partnership Strategic Action Plan Development
Applicant: Ducks Unlimited Inc
OWEB Request: $95,614
Total Cost: $149,184

Application Description:
The Umpqua Oak Partnership (UOP) works in the Umpqua River basin that is generally described by the Douglas County boundary. The Umpqua River Basin contains some of the largest remaining tracks of Oregon White Oak (Quercus garryana) forests and savannas in the Pacific Northwest. Oak and prairie habitats are among the Pacific Northwest's most threatened habitats with estimates as low as 4-7% remaining (ODFW 2006). However, oak forests and prairies in the Basin are under the same human stresses found in other portions of Washington, Oregon, and California. Oak landscapes are a part of the Basin's natural and cultural heritage. Umpqua Basin tribes were the original land stewards of oak habitats and the First Peoples of the Umpqua River Basin, including the Cow Creek Band of Umpqua Tribe of Indians, used fire and other methods to manage oak habitats providing tribal members with food, medicine, tools, home materials, decorations, and cultural needs. With this funding we will continue to collaborate with partners, finalize governance documents, complete our strategic action plan, develop a monitoring plan that aligns with the Klamath-Siskiyou Oak Network's plan, and create oak distribution and prioritization maps to guide conservation initiatives.

The UOP is a high functioning group with a dedicated and engaged core of participants that make up the Steering Committee. Partners are committed to completing the planning processes and eagerly anticipate moving forward with several restoration projects and conservation initiatives in the coming years.
Core Partners: Cow Creek Band of Umpqua Tribe of Indians, Federal: BLM, NRCS, USFWS, USFS, State: ODF, ODFW, OWEB, TNC, Douglas SWCD, Douglas Small Woodland Association Douglas Forest Protective Association, Douglas County, Klamath Bird Observatory, OSU Extension, Pacific Birds, Partnership for the Umpqua Rivers, Landowners, University of Oregon Friends of Kanipe Ranch, The Elkton Reserve, Yew Creek Preserve.

Review Team Evaluation

Strengths:

- The project is timely and maintains the momentum of the partnership to transfer to an action group.
- The partnership has a proven track record of successful engagement, collaboration, and communication.

- The application identifies future collaboration with partners including local, state, and federal government entities as well as private landowners.
- The proposed plan, if implemented, is likely to result in multiple ecological benefits, including improved plant productivity and health of oak habitat.
- In addition to developing a strategic action plan (SAP), the proposed project will also finalize governance documents and develop a monitoring plan that aligns with the Klamath-Siskiyou Oak Network's plan.
- The budget for the partnership is clear and aligns with the activities and staffing needed to develop the SAP.

Concerns:

- There is a lack of detail regarding the timeline for deliverables and long-term solutions once the project is complete.
- The application documents tribal support but was not clear how they are involved and to what extent.

Concluding Analysis:

The Umpqua Oak Partnership has a proven track record of successful engagement, collaboration, and communication. This proposal is an important next step towards improving watershed health and oak habitat. The partners have the right technical and collaborative skills to successfully to develop and execute the SAP. The committees are well thought out with clear tasks; communication and leadership roles are established. The inclusion of key stakeholders for implementation and refinements of the SAP demonstrates the partnership's forward-thinking towards future restoration actions. However, the application lacks information on long-term solutions once the SAP is complete.

Review Team Recommendation to Staff: Recommend

Review Team Priority: 3 of 8

Review Team Recommended Amount: $95,614

Review Team Conditions: N/A

Staff Recommendation: Recommend

Staff Follow-up to Review Team: N/A

Staff Recommended Amount: $95,614

Staff Conditions: N/A

2022 Partnership Technical Assistance Grant Cycle

Application Number: 223-8309-22662
Application Name: Rogue Basin Partnership: Guiding Regional Restoration
Applicant: Rogue Basin Partnership
OWEB Request: $74,707
Total Cost: $97,596

Application Description:

The Rogue Basin Partnership (RBP) seek Partnership Capacity funding to update our strategic action plan (SAP) and to continue to facilitate coordination among Members. Engaging in these activities will further the implementation of the restoration strategies described in our SAP – the Rogue Restoration Action Plan (RRAP). Made up of 23 members, RBP is the regional natural resources planning entity for the Rogue River Basin, located in southern Oregon. Motivated by a deep commitment to regional planning, environmental entities and municipalities organized themselves to form RBP in 2015 – the RRAP soon followed as the Basin-wide SAP. RBP has a history of coordinating restoration activities across the Basin; prior to RBP, regional partners known as the Rogue Basin Coordinating Council gathered to engage in regional restoration planning. As our Partnership matures and our RRAP (SAP) ages, we find that we need to elevate our performance in RRAP implementation through: 1) strategic plan updates to maintain relevance, 2) an improved online dashboard to monitor and report progress and achievements, and 3) increased coordination among our working groups (WG) and Members. Further, RBP Members will fortify its Partnership's mission through increased WG coordination, communications, member engagement, peer-to-peer learning, restoration project planning, and RRAP project monitoring. RBP continues to regularly convene to strategize and work Basin-wide to support RRAP implementation. Capacity funding is necessary for RBP to continue to mature and support the unique regional relationships found in the Rogue Basin. OWEB funding will allow RBP to leverage existing secured funding so it can: continue to coordinate RRAP implementation; strengthen communication, networking, and regional project implementation between Members and Working Groups; plan, track, and report to RBP Members the status of implementation actions; and seek additional, non-OWEB Partnership funding.

Review Team Evaluation

Strengths:

- The project maintains the momentum of the partnership to complete ongoing projects identified in the previous action plan.
- The partnership represents a spectrum of state agencies, local organizations, and technical experts.

Concerns:

- The application is unclear on the longevity for the group membership to ensure successful implementation of the Strategic Action Plan (SAP).
- The application would have benefitted from a description on what has been achieved during implementation of the existing SAP.
- The benefit of the partner retreat is unclear regarding how it will enhance the SAP update.
- The application is unclear on specifics for the project tracker, monitoring, and who will complete data entry.
- The qualifications needed to successfully develop and implement the plan are not clearly outlined.
- The application is unclear how the action plan complements current restoration and acquisitions projects.

Concluding Analysis:

The Rogue Basin Partnership is a large partnership with a 10-year history. The vision of updating the SAP to assist in prioritizing restoration is an important next step to continue to improve watershed health. The partners have the right technical and collaborative skills to successfully update and execute the action plan; however, the application lacks comprehensive detail on projects that were a result of the previous action plan. The application does not adequately provide an overview of how the action plan integrates on-going restoration.

Review Team Recommendation to Staff: Do Not Recommend

Review Team Priority: N/A

Review Team Recommended Amount: $0

Review Team Conditions: N/A

Staff Recommendation: Do Not Recommend

Staff Follow-up to Review Team: N/A

Staff Recommended Amount: $0

Staff Conditions: N/A

Partnership TA Projects Recommended for Funding in Priority Order				
Application Number	**Applicant**	**Project Title**	**Amount Recommended**	**Priority**
223-8303-22661	Grande Ronde Model WS Foundation	Grande Ronde Restoration Partnership Capacity	$ 149,810	1
223-8302-22657	Cascade Pacific RC&D	Update Tenmile Lakes Restoration Plan	$ 149,758	2
223-8308-22656	Ducks Unlimited	Umpqua Oak Partnership Strategic Action Plan Development	$ 95,614	3
223-8304-22655	Curry SWCD	Siskiyou Coast Estuaries Partnership Capacity Resubmit	$ 96,875	4
223-8307-22658	High Desert Partnership	Harney Basin Wetlands Collaborative - Partnership Capacity	$ 147,216	5
Total Partnership TA Projects Recommended for Funding by TRT and OWEB Staff			**$ 639,273**	

Partnership TA Projects Recommended by TRT but Not Funded (in Priority Order)				
223-8305-22660	Pheasants Forever	Vale Local Implementation Team Coordinator	$ 149,877	6
223-8301-22663	Illinnois Valley SWCD	Illinois Valley Fire Resiliency Oversight Group Partnership Development	$ 139,180	7
223-8306-22652	Wasco SWCD	Wasco County Partnership	$ 95,150	8
Total Partnership TA Projects Recommended by TRT but Not Funded			**$ 384,207**	

Partnership TA Projects Not Recommended for Funding by TRT			
Project Number	**Applicant**	**Project Title**	**OWEB Request**
223-8309-22662	Rogue Basin Partnerhsip	Rogue Basin Partnership: Guiding Regional Restoration	$ 74,707
Total Partnership TA Projects Not Recommended for funding by TRT			**$ 74,707**

TOTAL: All Partnership TA Project Requests	**$ 1,098,187**

Agenda Item K

Public Comment

Board Meeting April 25-26, 2023

PLACEHOLDER

OREGON WATERSHED ENHANCEMENT BOARD

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item L

FIP Carry Forward Approval

Board Meeting April 25-26, 2023

Oregon
Tina Kotek, Governor

OREGON WATERSHED ENHANCEMENT BOARD

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Agenda Item L supports OWEB's Strategic Plan priority #4 – Watershed organizations have access to a diverse and stable funding portfolio.

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Eric Williams, Grant Program Manager

SUBJECT: Agenda Item L – Approval of Focused Investment Partnerships (FIP) Carry Forward Funding
April 25-26, 2023 Board Meeting

I. Introduction

The board awards funds for FIP initiatives for up to three consecutive biennia. OWEB's internal policy for managing these funds allows for the funds to be carried forward into the next biennium following the board awards . This item requests board approval to carry over FIP funds for an additional biennium.

II. Background

While FIP funds are available for two biennia, funds are not always obligated by the end of the second biennium. This situation arises for several reasons: projects are completed under budget with excess funds returned to the holding account; projects are cancelled due to circumstances beyond the grantee's control; or project development and permitting takes longer than anticipated.

Under current policy, funds in FIP holding accounts expire at the end of the second biennium, following board award, and require board approval to carry funds over to a third biennium. The table below includes FIP holding accounts requested for carryover:

Holding Account #	FIP Name
220-8205	Upper Grande Ronde
220-8206	Baker Sage-grouse
220-8207	Clackamas Partnership
220-8208	John Day Basin Partnership
220-8213	Rogue Forest
220-8215	Warner Basin Aquatic Habitat Partnership

As this approval is administrative in nature, staff will be requesting authority to carryover all FIP funds for three consecutive biennia when the board approves the 2023-2025 spending plan in July in order to preclude similar requests in the future.

III. Recommendation

Staff request the board approve carry forward of funds in the six FIP holding accounts identified in this report.

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item M

OAHP Grant Awards

Board Meeting April 25-26, 2023

Oregon
Tina Kotek, Governor

OREGON WATERSHED ENHANCEMENT BOARD

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Agenda Item M 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: Eric Williams, Grants Program Manager
Taylor Larson, OAHP Coordinator
Robin Meacher, OAHP Easement Specialist

SUBJECT: Agenda Item M. Oregon Agricultural Heritage Program (OAHP) Grant Awards
April 25-26, 2023, Board Meeting

I. Introduction

This staff report provides an overview of the 2022 OAHP grant offerings and funding recommendations. Staff request the board approve the funding recommendations from the Oregon Agricultural Heritage Commission outlined in Attachment E to the staff report.

II. Background

In March 2022, the Oregon Legislature approved $5 million in funding for the OAHP. At the July 2022 meeting, the board amended its 2021-2023 spending plan and allocated $4.315 million for OAHP conservation covenant and easement grants and$150,000 for OAHP conservation management plan grants.

The Governor's Recommended Budget for OWEB was released at the end of January. State agencies must support the Governor's Budget. The Governor's Recommended Budget for OWEB reallocated available OAHP funds, reducing the amount available for grants, and increasing the operations budget so that the program can operate for the full biennium. With anticipated interest revenue and carry forward, $4,200,000 is available for grants. The Governor's Recommended Budget continues OAHP staffing capacity in the 2023-2025 biennium without allocating new funds. With $66,308 requested (and recommended) for conservation management plan grants, $4,133,692 is now available for conservation covenant and easement grants.

III. Summary of Solicitation and Review Process

A. Solicitation

In August 2022, staff solicited applications for both conservation covenant and easement grants as well as conservation management plan grants. Prior to submitting a proposal, applicants participated in a consultation with staff. The purpose of the consultation is to review the program's purpose, allowable activities, evaluation criteria, and timing with applicants.

B. Applications Submitted

Nine applications were received by the October 31, 2022 deadline requesting $5,556,125. Seven applications applied for conservation easement funding ($5,489,817) and two applications applied for conservation management plan development funding ($66,308). Applications were submitted from five of OWEB's six regions; a map of the conservation easement applications can be found in Attachment A and a map of the conservation management plan applications can be found in Attachment B to this staff report.

C. Technical Review Process

The conservation management plan development applications were reviewed in accordance with administrative rules for the program established in 2019. Staff recruited a technical review team comprised of nine experts from throughout the state with expertise in conservation and agriculture. Staff met with each reviewer individually to orient them to the program and help familiarize them with the evaluation criteria. The technical review team was then given access to both conservation management plan applications, asked to read them and attend a December 19, 2022 meeting. The technical review team discussed strengths and concerns as they related to the evaluation criteria, voted on whether to recommend each project for funding, and then ranked those applications recommended for funding. The technical review team meeting informed the development of a staff evaluation for each project found in Attachment C.

The conservation covenant and easement applications were reviewed in accordance with administrative rules for the program, adopted in 2019. The process utilizes technical experts to evaluate agricultural and natural resource values and outcomes and project soundness as defined in the application evaluation criteria in the administrative rules. Each application was reviewed by a team of experts with specific knowledge of the type of working land and natural resource values described, as well as statewide experts in land use and soil science. All applicants were provided the opportunity to host site visits for their project review teams.

A team consisting of staff, OWEB's due diligence contractor, and the Oregon Department of Justice conducted project soundness reviews. The reviews included identifying transaction soundness concerns and whether those concerns are likely to be resolvable in the 18-month timeframe allowed for closing transactions after the OWEB Board awards funding. Organizational capacity was evaluated by OWEB's due diligence contractor and OWEB staff, utilizing the review criteria included in the administrative rules.

Technical feedback from review team members, OWEB's due diligence contractor, and DOJ was used by OWEB staff to develop the application evaluations in Attachment D.

D. Oregon Agricultural Heritage Commission Meeting

The Oregon Agricultural Heritage Commission consists of 12 members appointed by the board representing a diverse set of agricultural and conservation expertise. The commission is charged with providing the board with funding recommendations for OAHP grant offerings based on the availability of funding from the Oregon Agricultural Heritage Fund.

The commission met March 16, 2023 to deliberate and make a formal funding recommendation to the board. The commission voted to fund both conservation management plan grant applications received in full, and all seven conservation easement grant applications—six at the full amount requested and one at 67% of the requested funding. The requested and recommended funding amounts are outlined in Attachment E.

IV. Funding Recommendation

Staff recommend the board award OAHP grants as shown in Attachment E as recommended by the Oregon Agricultural Heritage Commission with project-specific conditions detailed in Attachment F.

Attachments

A. OAHP Conservation Easement Application Map
B. OAHP Conservation Management Application Map
C. OAHP Conservation Management Plan Staff Evaluations
D. OAHP Conservation Easement Staff Evaluations
E. Oregon Agricultural Heritage Commission Funding Recommendations
F. OAHP Conservation Easement Project Specific Funding Conditions (to be provided to the board in advance of the meeting)

Attachment A

Proposed Conservation Easement Projects

Fall 2022 OAHP Applications

Project Type

- Conservation Easement
- Conservation Management Plan
- Counties



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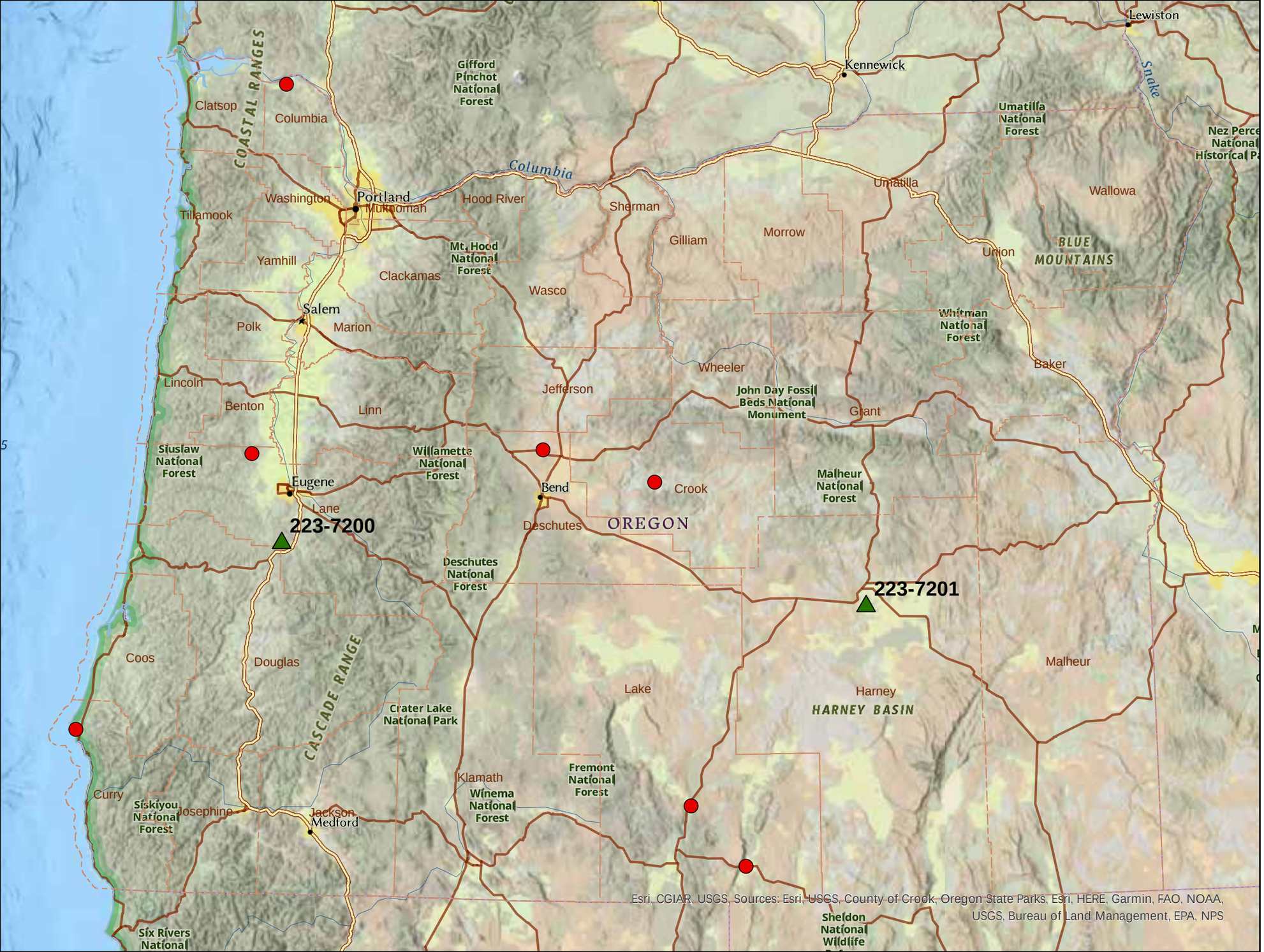
Attachment B

Proposed Conservation Management Plan Projects

Fall 2022 OAHP Applications

Project Type

- Conservation Management Plan
- Conservation Easement
- Counties



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FALL 2022 OWEB Grant Offering

Oregon Agricultural Heritage Program

Conservation Management Plan

Application No.:	223-7201-22602	**Project Type:**	Conservation Management Plan
Project Name:	Baker and EOARC Wet Meadow Management Plans		
Applicant:	High Desert Partnership		
Region:	Eastern Oregon	**County:**	Harney
OWEB Request:	$41,366	**Total Cost:**	$70,913

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

Flood meadows of the Harney Basin are a critical forage resource for ranches in the area and support abundant bird diversity. In rancher workshops to discuss flood meadow management, there was a consensus that most ranches would not be sustainable without the flood irrigated wet meadow forage base. The meadows are irrigated by spreading stream and river flows derived from snowpack melt. However, snowpacks have been declining since the 1950s and recent climate shifts are likely to place even more pressure on water management. There is a pressing need to better understand how existing water resources may be used more efficiently. Invasive species such as reed canary grass (Phalaris arundinacea) represent an additional threat to both hay production and bird habitat. While some ranchers like the high productivity of reed canary grass. Many are concerned about the low forage quality. Bird biologists are concerned that this species reduces diversity of associated plants, insects, and bird species. Given the serious reduction in extent of wetlands in the Pacific Flyway and the Southern Oregon Northeastern California (SONEC) region in particular, improved efficiency in water management is a pressing issue.

Coordinated sampling to allow better assessments of how water and vegetation impact individual bird species use, and overall species diversity will be conducted at one Upper Silvies and a second Lower Silvies flood irrigated wet meadow sites. (see map). Wet Meadow Partners, Portland Audubon, High Desert Partnership, Baker Ranch, Eastern Oregon Agricultural Research Center (EOARC), Burns High School Biology Class and Malheur National Wildlife Refuge will work together to develop vegetation and water management recommendations to enhance flood irrigated wet meadow habitat values, suppress invasive species, sustain, and increase bird use and optimize agricultural production in concert with a changing climate and water patterns.

REVIEW

The review below is the staff evaluation of the project based on the evaluation criteria described for conservation management plan applications in OAR 698-010-0090.

SIGNIFICANCE OF THE WORKING LAND

Summary of staff's assessment of project's responsiveness to application criteria.		
Low	***Medium***	***High***

The significance of the agricultural, natural resource, and related social values of the working land subject to the conservation management plan(s). (OAR 698-010-0090(1))

Strengths

- The application demonstrates that wet meadows are an important forage production resource for many ranches in the region, including on the two properties proposed for Conservation Management Plan (CMP) development.
- The extent to which wet meadows provide critical food and habitat for waterbirds is well described.

- Baker Ranch is representative of many commercial ranching operations in the area and has a long history of integrating conservation practices into their ranching business.
- The Eastern Oregon Agricultural Research Center is managed as a "typical Great Basin ranch" and is well positioned to communicate findings associated with vegetation and water management best practices to a wide audience in the surrounding community and throughout the region.

Concerns

- The significance of the of the agricultural, natural resource and social values of the two agricultural operations subject to the proposed CMPs are not discussed in detail in the application.

PROTECTING, MAINTAINING, ENHANCING FARMING OR RANCHING ON SIGNIFICANT WORKING LAND

Low	*Medium*	*High*

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: ((OAR 698-010-0090(2)(a),(b))

(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.

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. (OAR 698-010-0090(4))

Strengths

- The uncertainties and challenges associated with maintaining agricultural viability on Baker Ranch in the face of a drying climate are well described. The project has potential to help with climate change resiliency of ranches reliant on wet meadows for forage.
- The connection between the hydrologic regime and resulting forage quality are well articulated and the proposed approach of monitoring to better understand how a change in hydrology will impact the composition and abundance of the forage stand is justified in the application.
- The threat of conversion from native grasses to reed canary grass monocultures and the degree to which this would have a detrimental impact on long-term agricultural outcomes is well supported in the application.
- The application describes an approach to developing conservation management plans that is designed to be adaptable and addresses the problem at a systems level as opposed to farm level.
- The importance of wet meadows to ranching operations in the region is well documented. The resulting CMPs proposed in the application would enhance the ability of the operations to consistently produce high quality hay in their wet meadow pastures.
- The application describes an ongoing risk of conversion from diverse stands of native grasses to monocultures of poor quality, invasive grasses as well as the potential for increased conversion risk associated with a changing climate and how the proposed CMPs will support the development of adaptive management strategies.

Concerns

- It is somewhat unclear that all the work proposed in the application is in support of the development of conservation management plans and that the resulting CMPs will lead toward desired future conditions on the two subject properties.
- The application lacks detail as to what the current agricultural management practices and goals are on the properties subject to the proposed CMPs.
- The application in unclear as to whether desired future conditions have already been determined at the two properties subject to the proposed CMPs, or if these still need to be developed.

PROTECTING, MAINTAINING, ENHANCING HABITAT, WATER, AND OTHER NATURAL RESOURCE VALUES ON SIGNIFICANT WORKING LAND

Low	*Medium*	*High*

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: (OAR 698-010-0090(3)(a)-(e))

(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 and/or quantity; and
(e) Sustaining ecological values, as evidenced by the conservation management plan or inherent site condition.

Strengths

- The proposal clearly articulates how the proposed CMPs will support balancing habitat needs of waterfowl with those of grazing cattle in wet meadows on Baker Ranch and the EOARC.
- The proposal describes the basis for seeking more information to inform the plan for the adoption of conservation practices that will benefit wildlife and support the production of forage for livestock, while improving water quality, quantity and soil health in wet meadows on ranches throughout the region, advancing knowledge about agricultural water management and its relation to climate change.
- The proposal describes an approach that could help inform future CMPs throughout the Great Basin by defining desired future conditions and effective management actions to support forage production, wildlife habitat and water quality in wet meadows.
- Both properties subject to the proposed CMPs are within the Upper Silvies River Conservation Opportunity Area of the Oregon Conservation Strategy, contain identified strategy habitats, and are considered Important Bird Areas by the Audubon Society.
- The proposal describes how the project will collect water quantity data informing the development of management practices that will address the protection, maintenance or improvement of water quality and/or quantity.
- The proposed project intends to collect flora and fauna data to inform the development of two CMPs, recognizing that more information is needed to inform the development of CMPs in wet meadows.

Concerns

- The application does not reference how water quality affects vegetation and forage production on the properties and whether the proposed CMPs will incorporate this aspect.
- It is unclear from the application how all aspects of the proposed data collection and inventory work will support the development conservation management plans on Baker Ranch and the EOARC.
- The application lacks source information in its discussion of climate change and desired future conditions.

ORGANIZATIONAL CAPACITY

Low	Medium	High

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: (OAR 698-010-0090(5)(a)-(c))
(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.

Strengths

- The High Desert Partnership is well networked in the region and has a strong legacy facilitating public/private partnerships.

Concerns

- The application does not describe the financial capability of the applicant (High Desert Partnership).
- The application does not describe the commitment, expertise or track record of the applicant (High Desert Partnership).
- The application does not describe the strength and governance model of the conservation management plan holder (High Desert Partnership).

CAPITALIZING ON STATE INVESTMENTS

Low	*Medium*	*High*

The extent to which the benefit to the state from the investment may be maximized, based on: (OAR 698-010-0090(6)(a)-(c))
(a) The ability to leverage grant moneys with 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.

Strengths

- The application budget details a variety of in-kind match from a variety of individuals, governments and organizations.
- Oregon State University Extension participation in the project is beneficial for reaching the broader community, basin wide.
- The application proposes to develop two conservation management plans for ~$30K
- Many partners are included in the project, increasing the likelihood that the project will encourage additional working land projects in the future.
- The proposed conservation management plans will cover over 800 acres.
- Both properties proposed for CMP development can be seen from the road and have the potential to be good showcase properties.

Concerns

- The proposed CMPs have a duration of six years, too short to qualify them for future OAHP implementation funding (20 year minimum).
- The application budget does not include any cash match.

IMPACT TO NEIGHBORING LANDS

Low	*Medium*	*High*

The impacts of plan implementation on owners or operators of neighboring lands, including: (OAR 698-010-0090(7)(a), (b))
(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.

Strengths

- The application is for the development of a CMP while the criteria is applicable to CMP implementation; however, the application describes, in general, a plan for communicating the goals for the project and lessons learned/any concerns arising from implementation of the CMPs with neighboring landowners.
- The Eastern Oregon Agricultural Research Center intends to share findings from project with Harney County flood irrigated wet meadow managers.
- The applicant indicates they plan to share the resulting CMPs with their local NRCS office.

Concerns

- The plan for communicating with neighboring landowners would benefit from more detail as to who will be contacted and how/when that communication will take place.

THREAT OF CONVERSION OR FRAGMENTATION

Low	*Medium*	*High*

The level of threat of conversion or fragmentation of the working land. (OAR 698-010-0090(8))

Strengths

- The application describes the potential for changes in plant communities to affect the productivity of wet meadows and ultimately the economic viability of ranching in the region. This could increase the pressure on larger ranches, like the Baker Ranch, to sell or transition the use on portions of the property to provide an alternative source of income when agricultural productivity is down. The project has potential to help other ranches find ways to maintain agricultural productivity.

Concerns

- The urgency of the threat of conversion to non-agricultural use is not discussed in detail for either location.

EVALUATION SUMMARY

This application proposes developing two Conservation Management Plans (CMPs) across 800 acres on two ranching properties that will complement one another. The properties are agriculturally and ecologically significant to the region in both scale and influence. It is clear from the application that wet meadows are an important forage production resource for many ranches in the region, including the two properties proposed for CMP development.

It is somewhat unclear that all the work proposed in the application will directly support the development of Conservation Management Plans or how the resulting CMPs will lead toward desired future conditions on the two subject properties. Similarly, the impacts of climate change on the ability of wet meadows to persist in the region is not well explored and may impact the long-term significance of wet meadow agroecosystems throughout the Great Basin over the coming decades.

Overall, the proposed development of these Conservation Management Plans will likely support long term agricultural viability as well as enhance fish and wildlife habitat and water quality on the two properties. The project also has a high potential to lead to the development of future CMPs in the region through the development of management best practices and desired future conditions for wet meadows across the region.

STAFF RECOMMENDATION

Staff recommend the Commission recommend application #223-7201-22602 received through the 2022 conservation management plan grant solicitation for funding to the OWEB Board at the amount of $41,366 in accordance with OWEB's grant agreement for OAHP conservation management plan projects, including project-specific conditions specified in the grant agreement.

FALL 2022 OWEB Grant Offering

Oregon Agricultural Heritage Program

Conservation Management Plan

Application No.:	223-7200-22539	**Project Type:**	Conservation Management Plan
Project Name:	Branch Road Conservation Management Plan		
Applicant:	Coast Fork Willamette Watershed Council		
Region:	Willamette Basin	**County:**	Willamette
OWEB Request:	$24,942	**Total Cost:**	$25,441

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

Branch Foard Farm, is a property of 72.66 acres (map and tax lot 20-04-23-00-01000) located at 79442 Repsleger Road, Cottage Grove, in Lane County, Oregon. The property has been in a conservation easement for over 5 years, with areas designated for sustainable agricultural operations. The Farm Operator runs a diversified small farm operation with a mix of market vegetables and livestock for direct-to-consumer markets. The farm acts as a classroom for community workshops in rural living skills, a site for children's programs, and an event venue for large group gatherings.

Climate change and has brought increased pressures on soil and water resources in recent years, with longer dry seasons in the summer, and greater frequency of extreme weather events. Concerns about continued sustainability of farming practices have led the Farm Operator to seek strategies and efficiency improvements to conserve and enhance available soil and water resources, as well as natural areas located on the property's forests and riparian zones.
The work being proposed includes the creation of a comprehensive conservation management plan for the entire property that will address natural resource management needs in the interests of agricultural sustainability, economic viability of the farm operation, and enhancement and stewardship of natural habitat.

The Farm Operator of Branch Road Farm, Andhi Reyna, and the property's Landowner, Jerry Russel, seek to partner with the Coast Fork Willamette Watershed Council to create a Conservation Management Plan that will address water resource concerns, soil conservation priorities, and natural habitat maintenance and restoration in the coming decades.

REVIEW

The review below is the staff evaluation of the project based on the evaluation criteria described for conservation management plan applications in OAR 698-010-0090.

SIGNIFICANCE OF THE WORKING LAND

Summary of staff's assessment of project's responsiveness to application criteria.		
Low	***Medium***	***High***

The significance of the agricultural, natural resource, and related social values of the working land subject to the conservation management plan(s). (OAR 698-010-0090(1))

Strengths

- The operation managing the property subject to the proposed Conservation Management Plan (CMP) is an active participant in the local food economy and is often open to the public.
- The property has a diversity of habitats including wetlands, riparian areas, oak woodlands and conifer forests.
- The property supports the production of a variety of agricultural products for the local market including livestock and vegetables.

- The property supports multiple viable agricultural business that include crop production, livestock, value added food processing and agritourism.
- The farm level management described in the application demonstrates an attentiveness to both agricultural and natural resources on the site.

Concerns

- The property may be too small to support some types of agricultural production and provide meaningful contributions to all habitat types present on the property.
- Slopes and soil types on the property may limit the types of agricultural production possible which may impact the ability of future operators to respond to a changing climate and economic conditions.

PROTECTING, MAINTAINING, ENHANCING FARMING OR RANCHING ON SIGNIFICANT WORKING LAND

Low	*Medium*	*High*

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: ((OAR 698-010-0090(2)(a),(b))

(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;

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. (OAR 698-010-0090(4))

Strengths

- The application describes how the proposed CMP could lead to better "control" of water across the property, including the installation of a pond. This would support the economic viability of the agricultural operation by improving soil infiltration and reducing erosion leading to better forage production for livestock.
- The proposed CMP will address challenges resulting from climate change, including prolonged dry seasons, which limit water availability later in the summer.
- The proposed CMP will serve as the management plan for an existing conservation easement on the property, ensuring conservation benefits resulting from this project are secure.
- The application clearly describes the challenges facing the operation presented by the interaction between grazing management objective and water quantity across the property.
- The proposed CMP will build on a previous forest management plan that focused on the forested sections of the property, demonstrating a proactive commitment by the land manager to natural resource planning.
- The application describes how the implementation of a CMP would increase the long-term sustainability of diversified agriculture on the property, and how that would decrease pressures to convert the land to non-agricultural use.

Concerns

- Steep slopes on the property may present erosion challenges when it comes to some of the proposed outcomes, including objectives that require thinning the forest and grazing livestock.
- The application lacks specific details as to what conservation actions the proposed CMP will lead to and how success will be measured.
- There is little detail in the application describing what has been achieved at the site during the life of the previous management plan (forest management plan). Additional detail would provide context on the extent to which the farm operator is able to follow through on management plan objectives and the extent to which implementation of the proposed CMP would lead to significant agricultural outcomes.
- Current agricultural practices being implemented on the property are described at a high level, but more detail would be helpful to understand how the proposed CMP will lead to the desired future condition.

PROTECTING, MAINTAINING, ENHANCING HABITAT, WATER, AND OTHER NATURAL RESOURCE VALUES ON SIGNIFICANT WORKING LAND

Low	*Medium*	*High*

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: (OAR 698-015-0090(3)(a)-(e))

(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.

Strengths

- The application demonstrates that the project team has detailed knowledge of the overall ecology on the property including species of concern.
- The proposed CMP will address the goals of the Agricultural Water Quality Management Program area plan including strategies for riparian areas.
- The property is just outside (<1mile) the Upper Siuslaw Conservation Opportunity Area of the Oregon Conservation Strategy, and the proposed CMP would include actions to benefit oak woodland, riparian and wetland habitats all priority habitats according to the OCS.
- The application describes that the property is located near two known spotted owl nesting sites and provides habitat for Fender's Blue Butterfly, Kincaid's Lupin, and Oregon White Oak.
- A clear connection is made in the application between grazing management and impacts to water quality. This connection is then used to justify the need for a CMP.
- The proposed CMP will keep conservation momentum going on the property by building from a forest management plan to a more holistic conservation management plan.

Concerns

- The proposed CMP puts an emphasis on enhancing oak habitat, but the acreage may be too small to benefit many species reliant on oak habitat.
- The application lacks detail about the actions taken in the last decade to improve the oak habitat in the forest management plan.
- The application lacks detail about any logistical challenges that led to complications implementing 2014 EQIP funding and the extent to which those conditions still exist.
- The desired future conditions in the forested areas of the property are not well described.

ORGANIZATIONAL CAPACITY

Low	*Medium*	*High*

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: (OAR 698-010-0090(5)(a)-(c))

(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.

Strengths

- The plan holder (Coast Fork Willamette Watershed Council) has a track record of successfully integrating conservation actions into working landscapes through several projects in their service area.
- The plan holder describes their new Working Lands Program and how it builds on legacy programs at the organization, demonstrating a commitment to supporting agricultural landowners carry out conservation actions on their land.
- The applicant demonstrates ongoing growth in the budget of the organization and extensive grant management experience at the executive level

Concerns

- None

CAPITALIZING ON STATE INVESTMENTS

Low	*Medium*	*High*

The extent to which the benefit to the state from the investment may be maximized, based on: (OAR 698-010-0090(6)(a)-(c))

(a) The ability to leverage grant moneys with 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.

Strengths

- The application describes how the CMP will support the farm operator in accessing NRCS conservation funding to implement portions of the plan.
- The farm and local conservation community are already using this property as a showcase for conservation actions in the community, increasing the likelihood that successful implementation of a CMP will lead to other working landowners in the region adopting their own CMPs.
- The proposed CMP has a time horizon of 20 years and will cover the entire property. This will facilitate holistic, long-term thinking and will qualify the applicant to apply for implementation funding through a future OAHP CMP implementation grant.

Concerns

- The application does not describe how the proposed CMP will incorporate the previous NRCS Forest Management Plan in order to show progress.
- It is unclear to what extent the applicant demonstrates an ability to leverage grant moneys with other funding sources, as the application only identifies NRCS and OAHP as potential CMP implementation funders

IMPACT TO NEIGHBORING LANDS

Low	*Medium*	*High*

The impacts of plan implementation on owners or operators of neighboring lands, including: (OAR 698-010-0090(7)(a), (b))

(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.

Strengths

- The application is for the development of a CMP while the criteria is applicable to CMP implementation. Nevertheless, the application describes previous successes communicating about conservation projects happening on the property with neighbors.
- The farm operator intends to keep neighbors abreast of developments in the CMP's implementation and invite them to a tour of the property as projects are completed.

Concerns

- None

THREAT OF CONVERSION OR FRAGMENTATION

Low	*Medium*	*High*

The level of threat of conversion or fragmentation of the working land. (OAR 698-010-0090(8))

Strengths

- The application describes how the implementation of a CMP will increase the long-term sustainability of diversified agriculture on the property and how this will decrease pressures to convert the land to non-agricultural use.
- There is an existing perpetual conservation easement on the property.

Concerns

- There is not much detail provided in the application about the surrounding landscape, which would help to understand what is happening around the farm in order to better understand the threat of fragmentation of habitat and farmland beyond the property itself.

EVALUATION SUMMARY

The property proposed for development of a Conservation Management Plan (CMP) is 73 acres of diverse habitat including wetlands, riparian areas, oak woodlands and open farmland that support the production of a variety of agricultural products for local markets in the upper Willamette Valley. The application demonstrates that slopes and water quantity present challenges to the operation, and that the development of a CMP would help the operator make better use of the land while reducing erosion, increasing water quality, and improving habitat for fish and wildlife.

The application is vague when it comes to the specifics of what will be included in the CMP proposed for development; however, the applicant has a record of successful project development. The CMP is intended to serve as the management plan for an existing perpetual easement on the property, inspiring confidence that the resulting CMP will further the goals of the agricultural operator, as well as the OAHP program over the coming decades.

The interaction between grazing management and water management are at the heart of the proposed CMP. The application makes a clear connection between water quantity, grazing impacts, and water quality. The need for a CMP is justified throughout the application in order to balance the needs of the agricultural operation with those of the ecosystem upon which the business is reliant. The property is somewhat limiting when it comes to agriculture due to slopes, soils, size, and water availability; however, the operation is similar in this regard to many farms in the region producing for local markets. This, combined with the operation's commitment to sharing their practices with the surrounding community and the applicant's recent establishment of a working lands program to promote conservation opportunities throughout the watershed, demonstrate a high potential that an investment in developing a CMP for this property would support the development of additional high-quality projects in the future.

STAFF RECOMMENDATION

Staff recommend the Commission recommend application #223-7200-22539 received through the 2022 conservation management plan grant solicitation for funding to the OWEB Board at the amount of $24,942 in accordance with OWEB's grant agreement for OAHP conservation management plan projects, including project-specific conditions specified in the grant agreement.

FALL 2022 OWEB Grant Offering

Oregon Agricultural Heritage Program

Conservation Covenants and Easements

Application No.:	223-7104-22600	**Project Type:**	Conservation Easement
Project Name:	Wahl Ranch Conservation Easement		
Applicant:	Wild Rivers Land Trust		
Region:	Southwest Oregon	**County:**	Curry
OWEB Request:	$4,008,000	**Total Cost:**	$10,323,000

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

The Wahl Ranch Conservation Easement Project is the purchase of a conservation easement on the 775-acre Wahl Ranch, located on the southern Oregon coast in the lower Elk River watershed. The Ranch is located about three miles north of Port Orford, about ½ mile west of Hwy 101, and immediately southeast of Cape Blanco, which is the western most point in Oregon and one of the most western points in the contiguous United States of America. The Project will perpetually protect 775 acres, including ~250 acres of fish and wildlife habitat, ~1.1 miles of the Elk River including the Elk River estuary, large portions of two low-gradient tributaries to Elk River, several wildlife ponds, and 0.6 miles of Oregon coastline.

This project presents an opportunity to protect a large family ranch and an ecologically critical piece of this remarkable landscape for generations to come. The Ranch is in a 20 mile stretch of scenic coastline consisting of ten ranches owned by eight families interspersed with public parks and natural areas. It is the longest stretch like it left on the Oregon coast, and is known as the “dark coast” by sailors for lack of lights from development. None of the ten ranches has converted out of ranching in four generations, but significant residential and commercial development pressures have now reached Oregon’s south coast. The project will also ensure that investments made by the Ranch to restore and protect ecological areas supporting fish and wildlife are secured, including major restorations on Cedar and Swamp Creeks, with additional restoration work planned for both.

Partners include the Wahl Ranch, Wild Rivers Land Trust, The Conservation Fund and the Natural Resources Conservation Service through their Agricultural Conservation Easement Program. The project supports the recommendations of the Southern Oregon Northern California Coast recovery plan and the Elk River Strategic Action Plan for Coho Salmon Recovery.

REVIEW

The review below is the staff evaluation of the project based on the evaluation criteria described for conservation easement applications in OAR 698-015-0090, feedback from the application’s technical review team, and OWEB’s due diligence contractor.

SIGNIFICANCE OF THE WORKING LAND; EASEMENT SPECIFICS

Summary of staff’s assessment of project’s responsiveness to application criteria.		
Low	***Medium***	***High***

The significance of the agricultural, natural resource, and related social values of the working land subject to the working land conservation covenant or easement. (OAR 698-015-0090(1))

Strengths

- The application describes the property as a locally and regionally important agricultural operation, and that the operation is internationally known.
- The ranch is Curry County's first designated century farm and has been in the same family since 1874 (148 years) demonstrating the land's ability to support a variety of viable agricultural operations through changing economic conditions.
- The property is positioned in a critical area of the Elk River that provides habitat for humans, livestock and wildlife. While the threat of development is variable, the need for conservation in this area of the Elk River will always be high and a project of this size with these resources can help the area get ahead of the curve.
- The property hosts a diversity of habitats including coastal conifer forest, coastal bluffs, riparian areas, coastal dune/beach/estuary, and wetlands.
- Approximately 30% of the property is designated for fish and wildlife habitat supporting the long-term integration of agriculture and habitat values.
- The property is comprised of a large tract of agriculturally and ecologically productive land. The project parcels are part of a large multi-generational operation that has demonstrated sustainable animal husbandry and land stewardship for decades.
- The property supports a leading ranch operation in the region that provides employment and contributes to the local social fabric of the rural community, offering a prime example of how watershed restoration and ranching can co-exist.
- Two of the streams on the property, Cedar and Swamp Creeks, offer high-quality Coho salmon overwintering and rearing habitat in the Elk River system.
- The property contains approximately one-third of the Elk River estuary, which is a limited and important resource to many species of concern in the Elk River Watershed. Interior portions of the Ranch include approximately 59 acres of freshwater wetland including emergent marsh and lowland riparian woodland. These wetlands and riparian areas are fenced off from grazing and there have been several restoration and protection projects in cooperation with the Curry Watersheds Partnership over the past few decades to restore the fish habitat functions to these systems.
- The lower Elk River is a key corridor for migrating birds and has high plant and animal diversity, leading the Elk River to be recognized as a globally Important Bird Area in 2019.

Concerns

- The application presents the regional significance of the property in its current operation, but there is little discussion regarding the ability of the property to support alternative agricultural commodities and whether the agricultural significance would remain if the current use ceased.

PROTECTING, MAINTAINING, ENHANCING FARMING OR RANCHING ON SIGNIFICANT WORKING LAND

Low	*Medium*	*High*

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: ((OAR 698-015-0090(2)(a)-(d))

(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.

Strengths

- The proposed conservation easement eliminates the possibility of subdivision, residential development and limits non-farm uses, reducing the potential for future conversion and fragmentation of the property, facilitating the likelihood that the property will remain in agricultural use.
- The property is currently an intact working ranch with existing water rights leased to the State. The pastures do not currently require irrigation due to the climate in this coastal area, as well as how they are currently managed. This demonstrates that the viability of the operation will not require reactivating the water rights to

irrigation from the current instream lease in the immediate future. The existence of irrigation rights provides for continued agricultural viability should operations need to change or a change in the overall climate of the area.

- The proposed conservation easement will maintain the ability of the property to continue in productive agricultural use by allowing flexibility in the type of agricultural commodity that can be produced and solidifying the right to conduct agricultural operations across the property. The land has served as a sheep ranch, but also has the soils and water needed to potentially grow crops or other livestock in the future.
- Currently, the property has farm infrastructure that supports the sheep operation, which will be a continued allowable use once the proposed conservation easement is in place, but there is no onsite residence to support the operator itself. The proposed easement will allow the development of one homesite, not associated with a subdivision right, further supporting the ease of running the operation where it is located.
- The proposed conservation easement would significantly reduce the real estate value of the land, making it more affordable for an agricultural operator to purchase by removing speculative value around development potential.
- Proceeds from the sale of the proposed conservation easement would address financial needs of the Ranch partners, allowing them to continue implementing additional maintenance, enhancement and restoration projects.

Concerns

- Absent a transaction agreement and more detailed conservation easement draft defining commitments and terms, a discussion regarding the landowners' decision making, both during the transaction and during the LLC's ownership of the property, would have provided more clarity on the commitment from the parties and the specifics of easement administration.
- The proposed conservation easement does not empower the land trust to require ongoing agricultural use of the property.

PROTECTING, MAINTAINING, ENHANCING HABITAT, WATER, AND OTHER NATURAL RESOURCE VALUES ON SIGNIFICANT WORKING LAND

Low	*Medium*	*High*

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: (OAR 698-015-0090(3)(a)-(e))

(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.

Strengths

- The proposed conservation easement maintains the property as a large intact ranch with approximately 30% of the ranch designated as reserves for fish and wildlife habitat benefits. The primary beneficiary species include aquatic species and Pacific Flyway migratory bird species. The landowners plan to continue restoration actions to enhance these benefits on the property.
- The proposed conservation easement would protect important habitat features for a variety of species including rearing habitat for SONCC Coho in Swamp and Cedar Creeks, habitat for Chinook, Coho, and other aquatic species in the Elk River estuary, and a Pacific Flyway migratory bird area of significance.
- The agricultural operation is managed in a way that protects water quality by utilizing rotational grazing and maintaining riparian buffers. These practices are intended to be encompassed in the proposed conservation easement itself, either by the utilization of the Habitat Management Zones to maintain the riparian buffers, or the intended management plan. There is no indication of water quality problems associated with the current agricultural practices.

- The ranch has leased the water rights associated with the property to the State to support aquatic species conservation, demonstrating a commitment to the ongoing conservation of the water resources of the property.
- The property is within a large stretch of the Oregon coast known as the "dark coast" for lack of lights from development. The proposed conservation easement would remove the risk of fragmentation and conversion of this property. The property could reasonably be divided into multiple units, fragmenting the natural resources and potentially reducing the comprehensive approach to restoration and habitat maintenance.

Concerns

- The proposed conservation easement is intended to build the current management regime into the ongoing operations of the land, which is labor intensive, requiring a similarly motivated landowner into perpetuity, which may be challenging.
- More detail supporting the specific history, partners, and funding for the restoration work would have been valuable to confirm claims regarding fish population response and determine whether specific actions are appropriate to carry forward into the management plan.
- The application includes statements regarding the importance of the water resources for Coho salmon, such as "Swamp Creek consistently produces the highest number of Coho smolts of any winter rearing habitat in the Elk River watershed," but does not provide evidence or source information for these claims.
- The management plan outline provided in the application lacks detail regarding the specific approach to managing the agricultural resources in a manner that will sustain the significant natural resource values.
- The application has little discussion on the extent to which the proposed conservation easement would lead to water quality improvements such as water temperature reduction or enhanced manure and bacteria control.
- The application claims that the past and planned restoration work on the property supports the Oregon's Agricultural Water Quality Management Program, but there is no detail provided as to which specific actions support specific goals in the program in this region.
- Certain allowable uses in the proposed conservation easement template (e.g., renewable energy development) may conflict with the specific agricultural and natural resource values on the site. While the applicant intends to use the OWEB provided template, more detail on the specific reserved rights acceptable to the landowner and the land trust would have provided a better understanding regarding the specific interaction between flexibility and maintaining the resources.

PROTECTING, MAINTAINING, ENHANCING SIGNIFICANT AGRICULTURAL OUTCOMES OR REGIONALLY IMPORTANT VALUES

Low	*Medium*	*High*

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: (OAR 698-015-0090(4)(a)-(b))

(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.

Strengths

- The landowners and their family have been managing this land for agriculture for nearly 150 years. There is a strong dedication and commitment to preserving the property as a working land and the existing ranching operation is viable and a leader in the region.
- The current operation, a large-scale sheep operation, is unique in an area dominated by small calf-cow operations. The ongoing viability of this operation is supported by the landowners' extensive work developing the soil health and organic matter content across the property's pastures.
- The Wahl Ranch is a key part of the area agricultural infrastructure needs, supporting the businesses that provide resources to area farms and ranches.

- The proposed conservation easement would protect a significant working property in the region, considered a keystone parcel to the region's agricultural base, maintaining a landscape that has remained mostly intact. The proposed conservation easement will limit subdivision and conversion of the subject parcel, which will ensure that the land is available for agricultural use beyond the current landowner, maintaining a large amount of acreage for continued contribution to the agricultural land base.

Concerns

- The proposed conservation easement retains rights to another residence, with no description of siting restrictions. There is no detail in the application regarding discussions with the landowner to ensure placement of the house is not detrimental to conservation of the significant natural resources and/or agricultural operations.
- The proposed easement does not guarantee that the property will remain in agricultural use (i.e., potential wildlife habitat), though it does make ongoing agricultural use more likely because of the land management restrictions.

ORGANIZATIONAL CAPACITY

Low	*Medium*	*High*

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: OAR 698-015-0090(5)(a)-(e)

(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.

Strengths

- Wild Rivers Land Trust (WRLT) is accredited by the Land Trust Alliance Land Trust Accreditation Commission, which means they have met the highest national standards for excellence and conservation permanence.
- WRLT is the main land trust that serves the southern coast area and is developing the relevant expertise and track record of a land trust with a proven approach to accomplishing conservation transactions and to hold, monitor, and steward complex conservation easements.
- The Conservation Fund's commitment to partnership in the project adds additional capacity to the organization's ability to complete the transaction and fundraising needs.
- The applicant utilizes TerraFirma insurance for its conservation investments.

Concerns

- The project budget has a gap of $1,200,000 to fund the purchase of the conservation easement. The application states there is a commitment by the applicant, Wild Rivers Land Trust, and The Conservation Fund, to launching a private fundraising campaign to close this gap. There is no detail provided about the timing, feasibility, or organizational capacity of either organization to conduct such a significant campaign within the 18-month funding window. There is no discussion around contingencies if this campaign is unsuccessful, creating uncertainty about the overall likelihood of success of the project as currently designed.
- The application lacks clarity regarding the transaction mechanics and roles and responsibilities between the organizations. It appears the applicant is intended to be the long-term holder of the conservation easement, but The Conservation Fund is managing the transaction. As the applicant will be the recipient of any OAHP award and party to any grant agreement, a thorough description of the roles and transaction mechanics would have provided more clarity as to the overall capacity of the two groups working together to manage a project.

- The proposed conservation easement will nearly double the number of acres in the applicant's conservation portfolio, a significant jump in stewardship obligation. Additional detail would be helpful to determine that the land trust's stewardship fund is maintained in a manner that is not outpaced by its stewardship obligations, including a funding plan considering that the project needs additional unaccounted for acquisition dollars as well as stewardship funding.
- The application does not describe whether conservation of agricultural land is in its organizational mission, vision, or other organizational documents.

CAPITALIZING ON STATE INVESTMENTS

Low	*Medium*	*High*

The extent to which the benefit to the state from the investment may be maximized, based on: OAR 698-015-0090(6)(a)-(f)

(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 OAHP 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.

Strengths

- The project proposes a perpetual conservation easement.
- The proposed project could set a precedent for other working ranches in the Elk River area, serving as an "early-adopter" model for the other seven local ranching families along this stretch of coast facing similar development pressures and generational transfer.
- The proposed conservation easement builds upon previous conservation investments, guaranteeing the preservation of the outcomes of extensive conservation and watershed restoration projects that have occurred on the land, primarily funded with public dollars.
- The project described in the application is consistent with the local comprehensive plan and statewide planning goals.
- The property is zoned Forestry Grazing (FG). The purpose of the Forestry Grazing Zone is to implement the forest land policies of the Curry County Comprehensive Plan, to implement Statewide Planning Goal 4 with respect to protection of working forest lands, to implement the agricultural land policies of the Curry County Comprehensive Plan and to implement Statewide Planning Goal 3 with respect to protecting intermixed farm and forest land.
- The Wahl family is well known locally and are considered community and agricultural leaders in their field.

Concerns

- There is no Conservation Management Plan as defined by the OAHP currently associated with the project and the application does not describe plans to develop one.

IMPACT TO NEIGHBORING LANDS

Low	*Medium*	*High*

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. (OAR 698-015-0090(7))

Strengths

- The application describes the extent to which it attempted to understand potential impacts on neighboring landowners through outreach to community groups, adjacent neighbors, federal and state national resource agencies. It further describes an intention to continue outreach activities.

- Wild Rivers Land Trust applied to the OWEB Land Acquisition funding opportunity in 2021 for funding to place a conservation easement on the Wahl Ranch. As a part of that application process, they reached out to eight adjacent neighbors, Curry County, Curry Watersheds Partnership, Oregon Department of Fish and Wildlife, National Marine Fisheries Service, Natural Resources Conservation Service, US Forest Service, Wild Rivers Coast Alliance, Kalmiopsis Audubon Society, Trout Unlimited, Native Fish Society, Oregon Department of Parks and Recreation, US Fish and Wildlife Service, Bureau of Land Management and the Curry Soil and Water Conservation District.
- The applicant discussed agricultural conservation easements and the proposed Wahl Ranch project with the board of the Curry Soil and Water Conservation District.
- As a part of the public comment period associated with the applicant's previous application to the OWEB Land Acquisition Program, it received written comments from the Coos-Curry Farm Bureau and the Curry County Planning Department. The applicant responded to each of these letters to provide clarifying information about various aspects of the project.

Concerns

- There is no conservation management plan associated with the project, and therefore the applicant does not describe engagement efforts and any efforts to address impacts.
- It appears the community engagement done to date has been responsive to funder needs and not necessarily proactive.
- Despite the outreach, the application is unclear on whether any potential impacts were raised in discussions with neighbors.

THREAT OF CONVERSION OR FRAGMENTATION

Low	*Medium*	*High*

The level of threat of conversion or fragmentation of the working land. (OAR 698-015-0090(8))

Strengths

- The property is within a section of Oregon coast that is relatively undeveloped but facing pressure from a variety of non-agricultural uses including golf courses and residential development. There are 8 ranching families that own 10 ranches along the 30-45 miles of coastline. There is pressure to subdivide, sell, and/or develop these lands that will likely increase in the future.
- Subsequent heirs to the property will likely face steep taxes at the time of generational transfer increasing the pressure to sell off fragments of the ranch.
- Climate change will lead to population density shifts, economic changes and continued development that will threaten continuous landownership patterns on the Oregon South coast as competing needs for available private lands will grow.
- The application discusses the major threats, including subdivision, nonfarm dwellings and commercial recreation, such as golf course development. Oregon Department of Agriculture concurs that these threats are real and ongoing.
- Speculative land values relating to nonfarm development potential is driving development and conversion pressure along the south coast, the cumulative impacts of which are detrimental to the ability of farms and ranches to operate and the availability of agricultural infrastructure.
- There are significant gravel resources on the property that the landowner intends to extinguish development rights to with the proposed conservation easement. Future circumstances may lead the current landowners or a future landowner to an alternative outcome absent the removal of these rights through the proposed conservation easement.

Concerns

- More specific information about development trends and the number of approved applications for non-farm uses in the area would have allowed a more thorough understanding of the rate and scale of conversion to non-farm use threatening the region's working lands and this property specifically.

SOUNDNESS OF TRANSACTION

Low	*Medium*	*High*

The soundness of the legal and financial terms of the proposed real estate transaction. (OAR 698-015-0090(9)

Strengths

- A conservation easement is the proposed property interest to be acquired, which is an appropriate legal tool in this instance. The applicant is using the OWEB conservation easement template. The proposed easement creates agricultural, building envelope, and habitat management zones, each with its own permitted uses and restrictions, which is a good framework for this kind of easement.
- The Wahl family recently consolidated ownership of the land from a partnership composed of eight siblings to an Oregon limited liability company, via a bargain and sale deed recorded on November 16, 2022, with instrument number 2022-03959. This is a positive step because it unified the ownership group into one single entity. The AmeriTitle preliminary title report from September 7, 2022 does not include this change, since it predates the conveyance.
- There are no access issues. The property has access via McKenzie Road, a public road, which connects to US Highway 101.
- There are no apparent boundary issues with the property.
- There are six certified water rights on the property, five being for irrigation. The irrigation rights totaling 401.9 acres currently are leased at no cost for instream use with the Oregon Department of Water Resources. The instream lease is renewed every five years. The sixth water right is for livestock use. The conservation easement allows WRLT to act to retain the validity of the water rights if the landowner fails to do so. If this were the case, WRLT's preference would be to continue the instream lease with OWRD.

Concerns

- The estimated easement purchase price of $10,000,000 lacks substantial justification, raising concerns as to whether the appraisal will support the expected purchase price. This concern was raised during the review of the project in a previous application to OWEB's land acquisition program and the current application still lacks sufficient detail regarding the foundations for the purchase price and the landowner's commitment if the appraisal results in a lower value.
- The overall mechanics of the transaction and the partnership between Wild Rivers Land Trust and The Conservation Fund are uncertain. While it is not uncommon for a project not to have a transaction agreement at this stage, the expectations and obligations of each party is unclear, including the obligations of the landowner. It is unclear whether the applicant, Wild Rivers Land Trust, or The Conservation Fund will be the initial grantee of the conservation easement, or if The Conservation Fund intends to transfer its interest in the conservation easement to WRLT, necessitating a conveyance agreement, and additional title insurance.
- Uncertainty exists surrounding the nature of rights and ramifications of a historic colonial burial site present on the property. The issue is not thoroughly explored in the application materials and is a concern that was raised in a previous application to OWEB's land acquisition program. A quiet title action, as identified in the application, may not be sufficient to settle the issue and additional due diligence and legal analysis is needed to determine the extent of the issue and the application would have benefited from a detailed path toward resolution to provide confidence that the issue can be resolved in the 18-month OWEB timeline.

EVALUATION SUMMARY

The property is part of a century farm that has been in the same family since 1874. Over the years it has supported various agricultural operations, changing overtime as the landowners/operators have responded to changing market conditions. The land has supported the farm business, contributed to the local economy by providing jobs, and contributes to the scenic quality of the southern Oregon Coast. The property hosts significant natural resource values, including productive agricultural soils, habitat reserves that include riparian areas along the Elk River and tributary streams, coastal bluffs, forests and wildlife ponds. The Elk River is a significant source of Coho salmon habitat, with Cedar and Swamp Creeks (both on the property) offering high quality overwintering and rearing habitat. The property also hosts one-third of the Elk River estuary.

There is significant threat of conversion given the pressures facing large oceanfront landowners on the southern Oregon coast. There is significant potential for land division and the current zoning allows several uses that would have negative impacts on the significant agricultural and natural resource values – including certain divisions and residential uses as well as destination resorts, landfills, and aggregate exploration and extraction. The easement will prohibit the development of more than one residence, and the restrictions on subdivision will also function to maintain and protect the connectivity of habitat across the working land, facilitating ongoing compatible management and restoration opportunities due to unified ownership throughout the stream channels. The proposed easement is not designed with affirmative obligations to continue farm uses, but agricultural productivity is built into the purpose and supported by the restriction of non-agricultural uses.

Given the uncertainty over the suggested easement value, it is unclear whether the landowner would accept a purchase price below the amount proposed in the application. Even with the NRCS funding and if awarded OAHP funding, the project will have a funding gap of $1,200,000, intended to be raised through a private fundraising campaign, details of which are not identified. The mechanics of the transaction are not clearly described, including whether The Conservation Fund or Wild Rivers Land Trust will initially purchase the conservation easement and the rights and obligations of the two parties under this grant proposal and the project mechanics in general. Further complicating the transaction is lack of clarity regarding the status of title to ½ acre referenced in a historic deed as the site of a historic grave.

Overall, the project presents a significant property for agricultural and natural resources values, facing well documented threat of fragmentation and conversion, and a proposed conservation easement that would address these issues. The working land in the proposal is significant in scale, in its contribution to the working landscape of its region, and for its natural resource values. The proposed conservation easement protects the resources, facilitates ongoing viability of the agricultural operation and sustains the viability of the property for agriculture.

STAFF RECOMMENDATION

Staff recommend the Commission recommend the OWEB Board fund in accordance with OWEB's grant agreement for OAHP conservation easement projects, including project-specific conditions specified in the grant agreement.

FALL 2022 OWEB Grant Offering

Oregon Agricultural Heritage Program

Conservation Covenants and Easements

Application No.:	223-7106-22616	**Project Type:**	Conservation Easement
Project Name:	Aspen Valley Ranch – Rim Tract		
Applicant:	Deschutes Land Trust		
Region:	Central Oregon	**County:**	Crook
OWEB Request:	$286,280	**Total Cost:**	$701,021

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

The proposed Aspen Valley Ranch, Rim Tract Conservation Easement (Project) is located in Crook County near Post, Oregon. The Project sits among other large ranches and public land in an undeveloped valley, consisting primarily of upland rangeland and valley-bottom cultivated farmlands, stretching from Post to Paulina, OR.

This valley is an important wildlife corridor for pronghorn antelope, Rocky Mountain elk, and mule deer and includes critical winter range for the latter two species. Native sagebrush uplands also provide important greater sage grouse habitat, and the Project includes one known lek site. The Nature Conservancy's report on Resilient Terrestrial Landscapes has identified most of the Project as "resilient private land," supporting moderate to moderate-high Topoclimate Diversity, which provides high resiliency in the face of climate change.

The area around Aspen Valley Ranch has been subject to conversion and fragmentation pressure for many years due to its proximity to Prineville and the relatively low proportion of private lands in Crook County. Evidence of this includes a residential subdivision, which lies a couple of properties to the west of Aspen Valley Ranch, and an increase in low-density residential development from the division of larger ownerships.

Protection of this area from development is crucial to protecting habitat connectivity between the Ochoco and Maury Mountains and maintaining Crook County's agricultural community. The Land Trust proposes to work with Aspen Valley Ranch, LLC to implement a conservation easement on 3,907 acres of Aspen Valley Ranch, known as the Rim Tract. This Project is the second phase of a four-phase project that seeks to place a conservation easement over the entire Aspen Valley Ranch. Phase I, the Butte Tract, was completed in 2019.

Project partners include Natural Resources Conservation Service, Rocky Mountain Elk Foundation, ODFW, Crook County SWCD and the Crooked River Watershed Council.

REVIEW

The review below is the staff evaluation of the project based on the evaluation criteria described for conservation easement applications in OAR 698-015-0090, feedback from the project's technical review team, and OWEB due diligence contractors.

SIGNIFICANCE OF THE WORKING LAND; EASEMENT SPECIFICS

Summary of project's responsiveness to application criteria.		
Low	***Medium***	***High***

The significance of the agricultural, natural resource, and related social values of the working land subject to the working land conservation covenant or easement. (OAR 698-015-0090(1))

Strengths

- The property subject to the proposed conservation easement is 3,907 acres of undeveloped rangeland situated in the Post-Paulina corridor, which contains some of the most intact large ranches and farms in the region.
- The property is near or adjacent to other protected working lands and federally managed natural resource land (USFS), contributing to a conservation and agricultural foothold in the Post area.
- The property is within an important travel corridor for multiple species of concern including pronghorn and rocky mountain elk, and provides winter range for mule deer and elk.
- The property is one of the northern most extents of remnant sage grouse habitat and provides a large, intact tract of legacy sage brush stands.

Concerns

- On its own, the acreage in this proposed conservation easement is on the low end of what is needed to independently support a cattle operation.
- The extent to which sage grouse currently utilize the property has not been documented.

PROTECTING, MAINTAINING, ENHANCING FARMING OR RANCHING ON SIGNIFICANT WORKING LAND

Low	*Medium*	*High*

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: ((OAR 698-015-0090(2)(a)-(d))

(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.

Strengths

- The application describes a proposed conservation easement that would prohibit or restrict subdivision of the property, reducing the potential for fragmentation of the working landscape.
- The proposed conservation easement would eliminate or restrict uses that would conflict with agricultural use, while specifically reserving rights to conduct agricultural activities, primarily those that support ongoing ranch activities and livestock grazing.
- The proposed conservation easement will reduce the fragmentation of the 3,700+ acres within the proposal, adding to the connectivity between neighboring ranches with strong wildlife habitat values (Bonneview Ranch, Shotgun Ranch and the Nature Conservancy's Juniper Hills Ranch), contributing significantly to the aggregated amount of land available for ongoing rangeland use.
- The property is adequate in size to support ranching and has soils consistent with maintaining forage coverage, providing the foundation for ongoing viability of the property for agriculture.

Concerns

- The property's agricultural utility is significantly benefited by its inclusion in a larger ranching operation and landholding, but the larger project is designed in a manner that essentially places four individual easements on the 15,696-acre ranch, potentially complicating management beyond the proposed easement's first-generation landowner.
- Infrastructure supporting the property is located outside the proposed conservation easement area, which may result in this property being isolated from vital infrastructure. This may impact long-term viability of the land to support profitable agriculture.
- Additional agricultural uses that may be conducted on the property are not discussed, and the limited water resources, topography, and soils may limit the land's ability to provide more than forage for livestock. This could reduce the viability of the operation if raising beef cattle is no longer economical and other agricultural uses are not supported.
- The proposed conservation easement does not empower the land trust to require ongoing agricultural use of the property.

PROTECTING, MAINTAINING, ENHANCING HABITAT, WATER, AND OTHER NATURAL RESOURCE VALUES ON SIGNIFICANT WORKING LAND

Low	*Medium*	*High*

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: (OAR 698-015-0090(3)(a)-(e))

(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.

Strengths

- The property is within mapped mule deer, sage grouse low density, and pronghorn winter ranges, and is host to habitat for other sage brush obligate land birds like the sage sparrow and sage thrasher.
- The proposed conservation easement will reduce or remove risk of conversion and fragmentation of the wildlife habitat on and around the property, aiding in maintaining and protecting plant and wildlife habitat and migration corridors. The property adds to the connectivity between neighboring ranches with strong wildlife habitat values (Bonneview Ranch, Shotgun Ranch and the Nature Conservancy's Juniper Hills Ranch), and the Ochoco National Forest and the Maury Mountains, providing important wildlife connectivity from higher elevation to lower elevation habitat types.
- The proposed conservation easement supports the implementation of the ODFW Oregon Conservation Strategy (OCS), by maintaining high priority patches and improving habitat connectivity.
- The continued use of the property as rangeland supports the sagebrush habitat present on the property through the grazing practices described in the proposed management plan. The applicant states the management plan will specifically include a grazing plan that includes utilization of rotational grazing, a practice that aids the maintenance of native vegetation communities.
- This property has been actively involved with ODFW, NRCS, and Crook SWCD projects aimed at enhancing the landscape for ranching and wildlife by restoring thousands of acres of habitat through removal of western juniper and improving springs. Much of the restoration work that has been completed is compatible with the Management Objective identified in Ochoco National Forest Land and Resource Management Plan and/or best available science and guidance.

Concerns

- The application lacks detail regarding the interaction between the proposed easement and the management plan, and the extent either will address the interaction between allowable agricultural practices and wildlife and plant conservation values.
- The application describes several significant botanical resources on the property, but the specific vegetation objectives, other than those related to forage, are undefined and will need to be further established if a purpose of the project is to maintain botanical diversity.
- There is a gap along the Crooked River between Phase 1, protected in 2019, and the proposed project area that could result in fragmentation of management objectives if future conservation projects in that area do not come to fruition.
- The application lacks detail on whether there are goals regarding management opportunities to build climate change resiliency measures and restoration opportunities into the project area to support water quality and quantity objectives.

PROTECTING, MAINTAINING, ENHANCING SIGNIFICANT AGRICULTURAL OUTCOMES OR REGIONALLY IMPORTANT VALUES

Low	Medium	High

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: (OAR 698-015-0090(4)(a)-(b))

(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.

Strengths

- The property is of adequate size to support a ranching operation on its own and is adjacent to an additional 3,755-acre conserved rangeland parcel.
- The proposed conservation easement will limit subdivision and conversion of the subject property, which will ensure that the land is available for agricultural use beyond the current landowner, maintaining a large amount of acreage for continued contribution to the agricultural land base.
- Coupled with the first phase of the project, executed in 2019, the project adds significantly to the long-term availability of agricultural land in the region.
- The property's soils are not unique on their own, but support the uses highlighted on the property – the maintenance of sagebrush and grassland vegetation communities to support a variety of botanical, wildlife, and agricultural forage needs.
- The property is currently associated with an operation that has additional farm infrastructure, primarily barns and corrals, as well as the homestead. The project proposes to allow limited infrastructure on the proposed easement, specifically a corral. This supports maintaining an unfragmented and unobstructed landscape for use by livestock and wildlife.
- The project has a grazing permit on the Ochoco National Forest which has an Annual Operating Management Plan and identifies the number of head of livestock they are allowed to run on the public lands. This plan also provides cumulative value to the project area and increases the value of the agricultural operation beyond just the capacity of the project area, supporting the economic viability of the operation.

Concerns

- The property marginally meets the threshold of acreage needed to support a viable ranch operation on its own.
- The proposed easement does not guarantee that the property will remain in agricultural use (i.e., potential wildlife habitat), though it does make ongoing agricultural use more likely because of the restrictions of land management activities.
- Drought conditions may present a challenge to maintaining forage production. Future drought conditions remain uncertain. The property is in a water-limited landscape, given the general climate, persistent drought in eastern Oregon and lack of water rights. Continued increase in aridity may limit the landscape's potential for sustaining cattle.
- The 'developed springs' and other stock ponds on the easement are an unreliable source of water. This could mean the producer will need to rely on transporting water into various pastures for the cows.

ORGANIZATIONAL CAPACITY

Low	Medium	High

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: OAR 698-015-0090(5)(a)-(e)

(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.

Strengths

- Deschutes Land Trust (DLT) is accredited by the Land Trust Alliance which means they have met the highest national standards for excellence and conservation permanence.
- DLT stewards over 8,000 acres of land in conservation easements, demonstrating a commitment to, and a track record of, following best practices for conservation acquisitions, land and easement stewardship, and organizational and financial governance.
- The applicant has a proven track record of accomplishing conservation transactions and demonstrates a general approach to funding conservation easement stewardship that is typical of land trusts of its size.
- The land trust utilizes Terrafirma Insurance, which provides support for the legal defense of a conservation easement up to $500k for each claim.

Concerns

- The applicant does not describe in the application whether conservation of agricultural land is in its organizational mission, vision, or other organizational documents.
- The application is inconsistent regarding the expected annual stewardship obligations and associated costs. The narrative describes an annual cost reasonable for an easement of this nature, though the uploaded documentation is possibly for a project other than the subject and would be substantially higher for the project described in the application.
- Clarification and additional detail is necessary to determine that the land trusts stewardship fund is maintained in a manner that is not outpaced by its stewardship obligations.

CAPITALIZING ON STATE INVESTMENTS

Low	*Medium*	*High*

The extent to which the benefit to the state from the investment may be maximized, based on: OAR 698-015-0090(6)(a)-(f)

(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 OAHP 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.

Strengths

- The project budget demonstrates a diverse funding stream, with multiple public and private partners contributing financially to the purchase of the conservation easement.
- The project proposes a perpetual conservation easement.
- The proposed easement is intended to build on the conservation of 3,755 acres of land protected with a conservation easement in 2019 by the same landowner and in the immediate vicinity. The proposed project is considered the second phase of a four-phase project, eventually resulting in the conservation of the full 15,000 deeded acres owned by the current landowner.
- The applicant demonstrates the project's consistency with Crook County's approach to Statewide Planning Goal 3.
- The land trust refers to the project area as their Post-Paulina focus area and continues to actively discuss conservation projects with neighboring landowners. The applicant suggests that continued success with this landowner will demonstrate the value of working lands conservation, which could lead to additional projects in the area.
- The property in the proposal has historically received funding from both state and federal entities to accomplish important restoration goals and objectives and sets an example for neighbors in the watershed to do similar work.

- Based on ongoing conservation initiatives, such as the Mule Deer Initiative, the project provides a platform to continue to leverage additional conservation dollars.

Concerns

- There are no current plans to develop a Conservation Management Plan as described in the OAHP.

IMPACT TO NEIGHBORING LANDS

Low	*Medium*	*High*

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. (OAR 698-015-0090(7))

Strengths

- The application describes that the local community is knowledgeable of the land trust's relationship with the landowner and its plans for additional conservation in the Post-Paulina area.
- The applicant states it is unaware of any opposition to the project outside the general opposition to public funding to acquire any interest in property.

Concerns

- The long-term benefits of additional investments and any negative impacts along with ways to mitigate them were not described in detail. The applicant did not conduct significant local outreach related specifically to the project, resulting in limited knowledge of any potential impacts to neighboring lands. The application does not identify any impacts the easement would have on owners or operators on neighboring lands and the land trust did not discuss any attempts to determine impacts.
- The land trust did not discuss any attempts to determine impacts and states that they did not do any community engagement around this proposed project.
- There is no conservation management plan associated with the project, and therefore the applicant does not describe efforts to address impacts.

THREAT OF CONVERSION OR FRAGMENTATION

Low	*Medium*	*High*

The level of threat of conversion or fragmentation of the working land. (OAR 698-015-0090(8))

Strengths

- The property is located within Crook County which experienced the greatest percentage of population growth in central Oregon in 2021. This increased population growth poses a risk of potential loss not only of working lands for agriculture but also the benefits they provide to wildlife dependent on upland habitats.
- Low density residential is the most prominent type of development in the area, which contributes to disruption of neighboring farms. A nearby low-density residential subdivision demonstrates the development trends in the area and provides an example of an alternative trajectory for this property without permanent protection.
- A significant amount of the Crook County is in public land ownership, leaving less land available for development, putting greater pressure on the remaining private landowners.
- While the current landowner does not currently have any intention of subdivision or conversion, it can be assumed that the trends in the county and region could extend to the property if under a different ownership or if the current landowner were presented with need/desire to liquidate any of their land.
- There are multiple uses (solar energy, wind energy, solid waste facility, etc.) allowed on the property under current zoning that could negatively impact the viability of the property for agriculture and negatively impact water quality and wildlife habitat.

Concerns

- The proposal references the "sage brush subdivisions" in the form of Riverside Ranches and Paulina Ranches as evidence of the potential future for Aspen Valley Ranch without the proposed conservation easement. These subdivisions, however, were prior to the establishment of land use planning in the area and the property's current zoning is much more restrictive.
- There is a lack of detail regarding the present trends of development in the area and specific threats to the property.

SOUNDNESS OF TRANSACTION

Low	*Medium*	*High*

The soundness of the legal and financial terms of the proposed real estate transaction. (OAR 698-015-0090(9)

Strengths

- The transaction mechanics appear to be relatively sound, though specifics of the transaction itself, beyond the proposed conservation easement terms, were not provided.
- The applicant provided a copy of an offer to the landowner, which describes the financial terms of the proposed conservation easement, but specifically states it is not a binding commitment by either party, rather a description of intent. A binding commitment will be required as part of OWEB's standard funding conditions incorporated into the grant agreement if the project is awarded funding.
- There are no access issues with the property. A significant portion of the eastern boundary of the property borders Newsome Creek Road, which is apparently a public road that connects to State Highway 380. According to the applicant, the property has four points of legal access via Newsome Creek Road.

Concerns

- The land trust states that the Phase I easement on the Aspen Valley Ranch was used to estimate the proposed purchase price, since that portion of the ranch is similar in character to the subject property. Whether the final appraisal will support the purchase price is uncertain.
- There are multiple individuals holding severed mineral rights on the property. The applicant provided a preliminary title report from January 11, 2007 (Title Number 0080054), and based on the tax lots listed, it is unclear if it includes all or more than the subject property. Two title exceptions pertain to oil, gas, and other mineral rights granted or reserved to the individual holders recorded in deeds in multiple deeds from 1955, 1958, 1968, and 1974, respectively. Title Exceptions 22 and 23 are statements of a claim of mineral rights in two recorded deeds in 1990. The application does not include the corresponding exception documents. An updated PTR and title exception documents for the subject property need to be provided. The status of these mineral rights and their impacts on the conservation purpose of the conservation easement is unclear. The resolution of these outstanding rights, through quitclaim deeds or a remoteness evaluation, may be cumbersome and time consuming, delaying closing of the transaction.
- The 2007 title report shows a conveyance of a timber deed in 2004, which presumably severed the timber rights to a portion of the property. More information is needed to understand if and how this affects the agricultural operations on the subject property.

EVALUATION SUMMARY

The 3,907 acres of Aspen Valley Ranch in this proposal, known as the Rim Tract, is part of a larger ranching operation that sits within a mosaic of federally managed lands and other conserved working lands. The property contributes to the region's agricultural landscape and builds upon previous conservation investments targeted at preserving agricultural spaces while protecting habitat for species of concern – primarily the greater sage grouse, pronghorn antelope, and mule deer. The property has the foundations of a productive range property – soils capable of growing forage for livestock – and is large enough to support a viable ranching operation. The property provides an important corridor between high quality habitat for multiple plant and wildlife species. There is a moderate level of threat of conversion to non-farm uses, either residential or extractive uses such as mining or energy development.

By restricting future subdivision and eliminating uses incompatible with agriculture, the proposed conservation easement would protect the ability of the property to remain viable for agriculture into the future. The viability of the property for agriculture on its own is somewhat limited by its size and lack of infrastructure. Water scarcity may prove a limiting factor to viability if extended drought occurs into the future. The application does not discuss a mechanism for the land trust to intervene if agricultural use is no longer employed on the property, and the draft easement does not include detail on this issue.

The restriction on subdivision and uses incompatible with agriculture will also protect and maintain the significant wildlife and other natural resource values present on the property. This will maintain the property in a condition that will continue to contribute to significant habitat connectivity, supporting the implementation of the Oregon Conservation Strategy and other natural resource plans in the area. The proposed easement will incorporate a management plan that will address grazing impacts and other management objectives, though the amount of detail in the management plan outline did not provide sufficient information to understand the applicant's approach to vegetation management beyond forage production. The project area itself provides important habitat connectivity between public and private lands, for mule deer migration, elk and pronghorn, and several other wildlife species, and the proposed conservation easement would guarantee it continues to do so. Overall, the project area has been a key area for providing habitat connectivity between public and private land and has been instrumental in maintaining and restoring shrub steppe and bunchgrass ecosystems.

The property is situated among other large ranches within the Post-Paulina Valley and in conjunction with other protected working lands, will contribute substantial acreage to the agricultural land base. The suitability of the soils, slope and water availability for growing forage supports livestock production—a critical component of the ranching economy in the region.

Deschutes Land Trust (DLT) is an experienced entity with a significant track-record in implementing conservation land acquisitions in Central Oregon since 1995. To date, DLT has conserved 8,900 acres through fee title acquisition and 8,200 acres through conservation easements. DLT is also accredited by Land Trust Alliance, which means DLT has met the highest national standards for excellence and conservation permanence. Overall, the transaction appears to be a relatively standard conservation easement transaction, though there is a lack of detail regarding the transaction document itself and the draft conservation easement appears to be a draft of the easement executed in Phase 1 of the project. There are no concerns regarding access to the property or boundary issues, but further title examination is needed to fully understand the exceptions to title relevant to the subject parcel and any potential impacts to the agricultural and habitat uses of the property. The mineral interests, as evidenced by the preliminary title report submitted by the applicant, are complex and include reservations held by the federal government, and more importantly, interests severed and conveyed among private individuals. Further evaluation and explanation are needed to fully understand the risks associated with these rights and the potential avenues for resolution.

The proposal presents a diverse funding plan for the transaction itself, demonstrating an ability to leverage multiple funding sources to fund the purchase price. The project builds on multiple other conservation investments in the region, including restoration, land preservation, and enhancements to the agricultural infrastructure. The applicant's approach to stewardship funding calculations is reasonable, though the accompanying documentation to support the figure needed to administer the easement is confusing and does not appear to apply to this project. The applicant did not describe its approach to funding the stewardship need for this conservation easement, only its general approach to funding stewardship needs across its conservation portfolio.

STAFF RECOMMENDATION

Staff recommend the Commission recommend the OWEB Board fund in accordance with OWEB's grant agreement for OAHP conservation easement projects, including project-specific conditions specified in the grant agreement.

FALL 2022 OWEB Grant Offering

Oregon Agricultural Heritage Program

Conservation Covenants and Easements

Application No.:	223-7100-22521	**Project Type:**	Conservation Easement
Project Name:	Seely Farm Phase 1		
Applicant:	Oregon Agricultural Trust		
Region:	North Coast	**County:**	Columbia
OWEB Request:	$276,297	**Total Cost:**	$429,896

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

The Seely Farm Phase 1 conservation easement project is located in Clatskanie, Columbia County. This conservation easement project will permanently preserve 385 acres of high value farmland and keep it in active agricultural management. The property is located within the Beaver Drainage Improvement Company's operating region and has well-maintained infrastructure and sufficient water rights to ensure ongoing agricultural use.

The Seely Farm, like many neighboring properties, is threatened by rezoning of local farmland to industrial use by Columbia County. This project area is adjacent to Port Westward, which has been a prospective site for coal export terminals, oil-by-rail trans shipment facilities, a fracked gas-to-methanol refinery, and - currently - a biofuel refinery and export terminal. Each of these development proposals and associated rezones have been hard fought by the local farming community due to concerns of direct and indirect negative impacts on farming and water management on the lands surrounding Port Westward.

In addition to ongoing production of agricultural products, this conservation easement will protect the habitat of the Lower Columbia white-tailed deer, a Federally-threatened species, and numerous avian and amphibian species of state concern listed later in this application. The property also contributes to the network of protected lands in the lower Columbia River region of the Pacific Flyway used by 150,000 migrating shorebirds for migratory and breeding habitat. Oregon Agricultural Trust is the project manager and will be the long-term conservation easement holder.

REVIEW

The review below is the staff evaluation of the project based on the evaluation criteria described for conservation easement applications in OAR 698-015-0090, feedback from the project technical review teams, and soundness review from OWEB due diligence contractors.

SIGNIFICANCE OF THE WORKING LAND

Summary of staff's assessment of project's responsiveness to application criteria.		
Low	***Medium***	***High***

The significance of the agricultural, natural resource, and related social values of the working land subject to the working land conservation covenant or easement. (OAR 698-015-0090(1))

Strengths

- The property subject to the proposed conservation easement is 385 acres, which is about seven times larger than the average farm in the area and will serve as an anchor for future conservation easement projects on nearby farms.

- The property has unique, highly productive soils with high biomass. The high capability of the soil coupled with drainage infrastructure and available irrigation water enables the property to produce high value commodities such as mint, blueberries, and cattle. Climate change may increase the "growing degree days" making the site suited to a wider range of intensive crops in the future.
- Approximately 2,700 acres of land in the area is serviced by the Beaver Drainage Improvement Company which maintains infrastructure utilized to manage excess water during periods of high precipitation and provide irrigation water during the dry summer months. All farms in the area are interconnected to the system. The property is a significant land base within that system, supporting the ongoing functionality of the District, facilitating this and adjacent land to continue producing agricultural products.

Concerns

- The Port of Columbia County has purchased ~830 acres of PA-80 land (a zoning designation of Primarily Agriculture, meaning an agriculture district with a minimum lot or parcel size of 80 acres) to add to its Port Westward Industrial Park, which totals 1,700 acres adjacent to the Seeley Property. That would remove 15% of the 5,800-acre irrigation District from agricultural zoning and potentially challenging the Beaver District's capacity to manage for agriculture and likely remove more land from agriculture with a large mitigation requirement within the District. If agricultural land continues to be transitioned to other uses within the irrigation district, the district itself may struggle to function, eliminating much of the drainage and water management capacity benefitting the property in this proposal.
- There is little evidence specific to this property provided in the application regarding the significance of natural resource values associated with fish and wildlife habitat – specifically the Columbia white tailed deer, which is identified by the applicant as a species of concern that has been identified on the site.

PROTECTING, MAINTAINING, ENHANCING FARMING OR RANCHING ON SIGNIFICANT WORKING LAND

Low	*Medium*	*High*

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: ((OAR 698-015-0090(2)(a)-(d))

(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.

Strengths

- The proposed conservation easement would reduce subdivision of the property, allowing one division rather than the four potentially allowed under the current zoning, maintaining a larger than average acreage in agricultural use. This reduces fragmentation of the property itself, but also can help support ongoing agricultural use of neighboring land by continuing the pattern of land use that supports farm uses over a large area.
- The property has high productivity soils, ample water resources and infrastructure—all of which support the long-term potential viability of the property for agriculture.
- The applicant mentions that the easement would allow the owner to reduce their debts and reinvest in the operation, supporting the ongoing economic viability of the operation.
- The proposed conservation easement protects this property from conversion to uses other than agriculture, which helps the Beaver Drainage District remain viable as an entity. Otherwise, the District may not be able to adequately maintain the water management infrastructure that supports the agricultural production on the land, resulting in increased pressure on neighboring properties to convert to non-agricultural uses, fragmenting the agricultural landscape in the area.
- The proposed conservation easement utilizes affirmative obligations to maintain agricultural use on the property, triggering intervention if agricultural use ceases on a significant portion of the property for a duration of 3 years. The land trust (OAT) also includes easement provisions that provide them with a right of first refusal and the option to purchase at agricultural value, as well as the right to lease the land to resume agricultural use. These provisions, if activated by the land trust (the easement provides the right but not the obligation for the land trust to activate these provisions) significantly increase the likelihood that the land will remain in agricultural use regardless of the landowner. It also encourages any future transfer of ownership to be to an agricultural operator.

Concerns

- Limited subdivision of the property will be allowed under the terms of the easement, but there is not sufficient detail in the application to determine where and what any resulting property configuration will be if the right is activated and the resulting impacts on the agricultural values.

PROTECTING, MAINTAINING, ENHANCING HABITAT, WATER, AND OTHER NATURAL RESOURCE VALUES ON SIGNIFICANT WORKING LAND

Low	*Medium*	*High*

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: (OAR 698-015-0090(3)(a)-(e))

(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.

Strengths

- The proposed conservation easement would keep highly productive agricultural soils, that also contribute to water filtration and microbial habitat, from being converted to non-agricultural use.
- The proposed conservation easement would maintain the status quo for wildlife natural resource values on the property through guaranteeing continued agricultural uses. Maintaining agricultural conditions on the site would provide greater habitat and water quality opportunities for many bird and mammalian species, including the federally endangered Columbia white-tailed deer, as compared to the impacts that may result from industrial or residential developments.
- The property is within the ODFW Oregon Conservation Strategy Columbia River-Blind Slough Swamp Conservation Opportunity Area. This COA encompasses the Julia B Hanson Refuge for Columbia white-tailed deer and Lewis and Clark National Wildlife Refuge, the lower Columbia River region of the Pacific Flyway and is important to migratory and wintering waterfowl. The Federally endangered Lower Columbia population of the Columbia white-tailed deer has been observed in the area. The proposed conservation easement would maintain the property in open space, providing a larger contribution to the connectivity of wildlife habitat for terrestrial and avian species than residential or industrial use.

Concerns

- There is a lack of detail regarding the project's potential impacts on water quality and how the proposed conservation easement may mitigate or exacerbate those impacts, given the ample surface water resources present on the site.
- The application does not address the extent to which the proposed conservation easement would address Oregon's Agricultural Water Quality Management Program goals.
- As open space, the property provides habitat connectivity, but lacks high-quality habitat itself for Columbia white-tailed deer, migratory birds, and aquatic species.
- Columbia White tailed deer, specifically the Columbia River Distinct Population Segment (DPS) is strongly associated with riparian habitat along the lower Columbia, and habitat fragmentation due to agricultural and residential development is specifically called out in the Oregon Conservation Strategy as a limiting factor for habitat. The OCS recommended actions regarding Columbia White tailed deer, are to restore and manage floodplain wetlands and tidal wetlands. The application does not address how the project will benefit the species other than the continued availability of open space provided by the agricultural use at the current level. Specifically, there is little detail to demonstrate that the agricultural practices will not conflict with this habitat and there is nothing presented that demonstrates how the applicant intends to balance potential conflicting goals regarding the agricultural use and the habitat needs for the deer.
- The application, the draft of the proposed conservation easement, and the management plan outline lack sufficient detail to determine the extent to which the landowner and applicant are committed to a conservation easement that will maintain the natural resource goals presented in the application – primarily regarding livestock stocking rates, perimeter and cross fencing, and promotion and maintenance of riparian buffers.

PROTECTING, MAINTAINING, ENHANCING SIGNIFICANT AGRICULTURAL OUTCOMES OR REGIONALLY IMPORTANT VALUES

Low	*Medium*	*High*

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: (OAR 698-015-0090(4)(a)-(b))

(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.

Strengths

- The property has ample water, productive soils, mild topography and is well suited to a variety of high-value crops. The property could support a variety of agricultural products—including short-term high value crops (vegetables or other) and livestock grazing.
- Cattle (beef and dairy) from the Beaver Drainage District area have historically been important to the region. The current cattle operation is revitalizing this use under management that appears sensitive to the challenges of maintaining a grazing regime that supports the unique soil and water resources considering the high organic content in the soil, high water table and substantial annual rainfall leading to high amounts of surface water throughout the seasons.
- The sub-irrigation available on the property produces high rates of spring through fall forage growth, leading to high rates of weight gain of grazing cattle and the ability to grow winter feed.
- The proposed conservation easement would strengthen the viability of the subject operation and helps maintain the land base of farming operations within the drainage district, where a critical mass of "members" is needed to maintain the District as a functioning entity providing water management critical to all agricultural operations within the drainage district.
- The property is part of the largest agricultural land base in Columbia County and is a buffer between the industrial ownership of the nearby Port and the surrounding agricultural uses. Conservation of the property as a working land will be a significant contribution to the long-term conservation of the agricultural land base.

Concerns

- Currently, the property is not growing the productive forage that is the focal point for the outcomes associated with the current management. It will take time to get the fields transitioned from the recent poplar harvest into high-quality pastures that produce the valuable soil and water quality outcomes sought by the project.
- Management limitations due to the transition from poplar plantation toward pasture establishment, such as maintaining an appropriate stocking level to not damage the soil resources, may limit the short-term income potential of the property.
- While the land is suitable to a wide variety of crops, it is isolated from the farm infrastructure in the Willamette Valley and other ag-based regions of the state. There are currently few other cattle producers in the region, limited custom operators for plowing and planting, no nearby equipment repair operations, and no nearby farm supply sources. This requires the operation to be highly self-sufficient and/or able to absorb the costs of traveling for these resources.
- The property is reliant on the Beaver Drainage District to manage its water infrastructure. If the District were to fail to operate its system of ditches and pumps, maintaining the viability of the farm would become challenging.

ORGANIZATIONAL CAPACITY

Low	*Medium*	*High*

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: OAR 698-015-0090(5)(a)-(e)
(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.

Strengths

- Though not accredited with the Land Trust Accreditation Commission, the land trust implements practices like one that is eligible for accreditation. OAT also describes sound governance principles in the application.
- OAT is the only agricultural land trust working on a statewide basis. They have a staff of seven employees with extensive experience in acquiring and stewarding conservation easements for agricultural purposes. This property is within one of the applicant's specific investment zones in their Farm and Ranch Protection Plan, demonstrating that the applicant is

committed to stewarding this easement and establishing a significant foothold for agricultural conservation in the region through the successful implementation of this large project.

- The organization shows a commitment to easement stewardship by establishing a stewardship fund of $500,000 prior to the organization holding its first easements. The fund is invested and has a stated target return rate of 6%. The applicant intends to grow the stewardship fund with each easement it acquires.

Concerns

- Oregon Agricultural Trust is a relatively young land trust and does not yet hold any conservation easements.
- The acquisition of this conservation easement will significantly increase the organizations stewardship obligations, going from 0 to hundreds of acres to monitor.

CAPITALIZING ON STATE INVESTMENTS

Low	*Medium*	*High*

The extent to which the benefit to the state from the investment may be maximized, based on: OAR 698-015-0090(6)(a)-(f)

(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 OAHP 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.

Strengths

- The applicant has secured a 50% funding match of for the project through the NRCS ACEP-ALE program.
- The landowners have committed to providing $16,600 to a stewardship fund for the property.
- The project proposes a perpetual conservation easement.
- The project is consistent with local and state goals for environmental protection, enhancement of water quality and providing habitat for wildlife.
- The project is consistent with the Oregon Conservation Strategy and would provide an example of the benefits of utilizing long-term conservation tools.
- The project is consistent with the PA-80 ag zoning.

Concerns

- There is no Conservation Management Plan as defined by the OAHP associated with the property.

IMPACT TO NEIGHBORING LANDS

Low	*Medium*	*High*

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. (OAR 698-015-0090(7))

Strengths

- The applicant discussed the project with leadership at the Beaver Drainage District and the District expressed its support for the project.
- The proposed conservation easement on Seely Farm Phase 1 land would help protect the infrastructure necessary to support many farms in the area.

Concerns

- The applicant did not conduct significant local outreach, outside the leadership of the Beaver Drainage District, resulting in limited discussion of any potential impacts to neighboring lands in the application.
- There is no conservation management plan associated with the project, and therefore the applicant does not describe efforts to address impacts.

THREAT OF CONVERSION OR FRAGMENTATION

Low	*Medium*	*High*

The level of threat of conversion or fragmentation of the working land. (OAR 698-015-0090(8))

Strengths

- The application clearly describes the industrial expansion nearby the property, including a biofuels refinery currently in permitting on land currently used for agriculture. This demonstrates a demand for industrial land in the area, which could eventually lead to the subject property's conversion to such use if the ownership changes or the goals of the current owners change. The adjacent landowner, the Port of Columbia County, recently signed a 30-year lease with an organization to develop a biofuels refinery on property adjacent to the Seely property.
- Columbia County supported the increased development of the Port Westward facility by approving the rezoning of 837 acres owned by the Port from Exclusive Farm Use (EFU) to Resource Industrial Planned Development. This demonstrates a trend toward elevating non-farm uses on agricultural lands.
- There is land in the area that will likely generationally transition in the next decade. The presence of larger blocks of land are important for many of the crops that fit this area.
- While the PA-80 zoning provides some level of security from fragmentation, there is the potential for the property to be divided into up to four separate parcels, each with a homesite, if the appropriate development standards are met.

Concerns

- The urgency of the development threat is unclear, as there are no immediate proposals to rezone the property outside of agricultural land designation.

SOUNDNESS OF TRANSACTION

Low	*Medium*	*High*

The soundness of the legal and financial terms of the proposed real estate transaction. (OAR 698-015-0090(9)

Strengths

- The overall approach to the conservation easement is sound. In addition to keeping the land in agricultural use and limiting subdivision to one additional lot with a residence, the easement also grants OAT the right to lease the property for an agricultural purpose if it is unused for agriculture by the current and future owners.
- There is a deed of trust that will need to be subordinated to the proposed conservation easement and the applicant states the financial institution is willing to do so.
- There are no apparent boundary issues.
- There are no apparent access issues, though access rights across the unencumbered section of the landowner's property may be necessary to have access to the easement area.

Concerns

- The draft conservation easement accompanying the application is confusing, particularly in relation to the required NRCS terms that are attached as an exhibit to the document. The proposed conservation easement will need substantial revisions prior to OWEB approval.
- The applicant used a general formula to estimate the purchase price, which may not be supported by an appraisal.

EVALUATION SUMMARY

The property is 385 acres of farmland with uniquely productive soils in the lower Columbia River drainage that is part of a larger farm operation and the first phase of an expected 1000-acre conservation project. The property is an agricultural anchor in the area, particularly because of its contribution to maintaining the land base within the Beaver Drainage District, which provides crucial water management services to a significant amount of farm operations in the immediate region. Ongoing interest of the nearby Port of Columbia to purchase and rezone land to industrial uses indicates a trend toward conversion to non-agricultural uses in the area and puts pressure on the property and adjacent agricultural operations.

The property contributes to an overall network of open space and habitat sites in the vicinity. There is limited wildlife habitat directly onsite, though the property is part of a network of open space utilized by Columbia white tailed deer and migrating birds traveling along the Pacific Flyway. The property has significant soil resources, consisting of prime agricultural soils with high organic matter, making them highly productive agriculturally, as well as providing water

storage capacity. The application does not contain significant detail regarding the proposed easement's approach to maintaining habitat for the Columbia white tailed deer, despite the species being identified as a significant natural resource value of the property. Specifically, there is little detail to demonstrate that the agricultural practices will not conflict with this habitat and there is nothing presented that demonstrates how the applicant intends to balance conflicting needs regarding the agricultural use and the habitat needs for the deer.

The proposed conservation easement will reduce subdivision of the property, maintaining a larger than average acreage in agricultural use, providing important open space. This reduces fragmentation of the property itself, but also can help support ongoing agricultural use of neighboring land by continuing the pattern of land use that supports farm uses over a large area. The proposed conservation easement includes provisions that facilitate ongoing agricultural use, including affirmative requirements to maintain farm use on the property and allows the land trust to step in to facilitate that requirement. The easement will prohibit conversion to non-agricultural uses, reduce infrastructure that does not support the agricultural purposes, and eliminate uses that would have significant adverse impacts to the soil and water resources that support a productive agricultural operation.

A discussion of the interaction between the use of the property for migrating birds and the necessity to drain the land to make productive for agricultural use would have been useful to determine how the value of the property for migrating birds would be protected or maintained. The application gives a general description that the area where the property is located is important to migrating birds, but the specific use and the benefits from maintaining the property as working land are not discussed in sufficient detail to determine what impacts the project will have on this natural resource value.

More detail regarding the location and configuration of the limited allowable division of the property and the permitted residential uses, both before and after the subdivision, and a discussion on how these uses will interact with the stated goals of unfragmented agricultural land would have been helpful. The easement draft's allowable uses also include a building zone, the location and size of which is not discussed further in the application. The building zone would allow for uses such as animal feeding operations, residential, and additional infrastructure. There is limited discussion regarding these uses and the impacts to the values of the working land or the viability of the farm operation and the management plan outline does not include a level of detail to fully evaluate how the protection of the significant agricultural and natural resources will balance with these allowable uses.

STAFF RECOMMENDATION

Staff recommend the Commission recommend the OWEB Board fund in accordance with OWEB's grant agreement for OAHP conservation easement projects, including project-specific conditions specified in the grant agreement.

FALL 2022 OWEB Grant Offering

Oregon Agricultural Heritage Program

Conservation Covenants and Easements

Application No.:	223-7105-22611	**Project Type:**	Conservation Easement
Project Name:	Pitchfork T		
Applicant:	Deschutes Land Trust		
Region:	Central Oregon	**County:**	Deschutes
OWEB Request:	$129,175	**Total Cost:**	$387,189

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

The proposed Pitchfork T Conservation Easement (Project or Pitchfork T) is located in Deschutes County between the City of Sisters and community of Terrebonne, Oregon. Although the land immediately surrounding the Project remains primarily in agricultural production, it is located within a fast-growing area of the county where landownership is becoming increasingly fragmented due to its proximity to the Cities of Sisters, Redmond and Bend, the low proportion of private lands available in the County and the aging population of farmers. The Project is proximate to BLM and U.S. Forest Service managed land—including the Crooked River National Grasslands—as well as two Deschutes Land Trust Preserves (see uploaded map).

The Property is within a core wildlife migration area for elk and a declining mule deer population and is mapped as having a relatively high probability of use during migration. Although the Project is not, in isolation, sufficient to support large game, it represents a potential "foothold" or starting point for future acquisition projects that would collectively represent meaningful habitat conservation, improving impeded wildlife movement and helping to connect migrating wildlife with larger, undeveloped landscapes.

Development or fragmentation of the Project area would further impede wildlife use and migration and compromise Deschutes County's rural, agricultural community. The Deschutes Land Trust will work with the landowners to implement a conservation easement on 170 acres of Pitchfork T that would prohibit development of the property and include a management plan that prescribes regenerative grazing and farming practices, and wildlife friendly fencing. This Project is the first phase of an intended two-phase project that seeks to place a conservation easement over neighboring landowner land holdings, further enhancing wildlife habitat and agricultural communities.

Project partners include NRCS, Metolius Winter Rang Working Group, UVE.

REVIEW

The review below is the staff evaluation of the project based on the evaluation criteria described for conservation easement applications in OAR 698-015-0090, feedback from the project technical review teams, and soundness review from OWEB due diligence contractors.

SIGNIFICANCE OF THE WORKING LAND; EASEMENT SPECIFICS

Summary of the project's responsiveness to application criteria.		
Low	***Medium***	***High***

The significance of the agricultural, natural resource, and related social values of the working land subject to the working land conservation covenant or easement. (OAR 698-015-0090(1))

Strengths

- The property subject to the proposed conservation easement is one of the larger agricultural tracts in the area between Sisters and Redmond that remains in primarily farm use. The average farm in Deschutes County is 91 acres and this property is 170.5 acres.
- The property has relatively senior water rights serviced by the Three Sisters Water District, which relies on modernized piping irrigation infrastructure.
- The property functions as open space that provides a foundation for the maintenance of soil resources, pasture and rangeland, and a wildlife migration corridor.
- An easement on the property could serve as a starting point for additional conservation opportunity within the area to permanently protect the corridor, connecting federal lands through private lands conservation easements, supporting the goal of the Metolius Winter Range Group – a collaborative group working to improve habitat for wildlife utilizing the winter range that overlays the project area.
- The property has the foundations for a productive agricultural operation – productive soils, water infrastructure, and access to markets. Most soils on the property are classified as "prime farmland if irrigated" indicating that any future farms will be on good soil, especially given the care and soil-centric practices by the current producers.
- The current landowners are committed to producing local food in a sustainable manner. They are involved in the community through their business selling to local restaurants and CSA members. Ensuring the property remains available for agriculture through an easement will help support the continuation of cattle production or other agricultural practices contributing to the local food economy.

Concerns

- Pitchfork T is 170 acres surrounded by fragmented farmlands, public lands, and rural housing development. Therefore, on its own, the property may be too small to independently have real agricultural significance in the area and may not provide a great amount of wildlife conservation due to its relatively small contribution to open space independent of adjacent lands.
- The property's soils are primarily dependent on irrigation for significant agricultural production.
- There is no direct access to water on the property, but it is entirely irrigated from the Three Sisters Irrigation District. Although they have an efficient system and run a water-conscious practice, water shortage and drought pose a potential threat to this property.
- Significance of the property for ungulates and as an agricultural stronghold is dependent on the acquisition of easements on neighboring lands and a complimentary management scheme across any future conservation across the landscape. This makes desirable outcomes in terms of agricultural viability and wildlife habitat dependent on factors outside the scope of this specific project, including the need for future funding.

PROTECTING, MAINTAINING, ENHANCING FARMING OR RANCHING ON SIGNIFICANT WORKING LAND

Low	*Medium*	*High*

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: ((OAR 698-015-0090(2)(a)-(d))

(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.

Strengths

- The proposed conservation easement would eliminate any future potential to subdivide the property, prohibit conversion to non-farm uses, and reduce the amount of additional infrastructure allowed on the land. This would facilitate, though not guarantee, continued farming or ranching on the property by eliminating the right to conduct most other uses.

- The proposed conservation easement would specifically reserve the right to conduct agricultural activities, which will be further elaborated on in a management plan that will be incorporated into the conservation easement.
- The land itself has been in active production for decades, demonstrating its ability to support viable agricultural activities regardless of the operation's value-added activities. The property has the basic components needed to be viable for agriculture – productive soils, water infrastructure, and access to markets.
- The land's water rights are part of the Three Sisters Water District, which provides water through a pressurized pipe system, significantly reducing water loss due to evaporation and seepage.
- The proposed conservation easement would specifically reserve the right to conduct agricultural activities, facilitating continued use of the property for local food production, which is growing in popularity in the urban environment around Bend, supporting the viability of the farming operation.

Concerns

- If the larger conservation vision described in the application does not come to fruition, the property could become isolated open space within a relatively fragmented area. This could reduce the viability of the property for agricultural use by increasing potential conflicts with increased residential uses nearby.
- Water shortage and drought pose a potential threat to ongoing agricultural viability of this property. There is no direct access to water on the property and it is entirely reliant on irrigation water from the Three Sisters Irrigation District.
- A discussion of decision making, both during the transaction and during the LLC's ownership of the property would have provided more clarity on the commitment from the parties and the specifics of the proposed easement's administration.
- The proposed conservation easement does not empower the land trust to require ongoing agricultural use of the property.

PROTECTING, MAINTAINING, ENHANCING HABITAT, WATER, AND OTHER NATURAL RESOURCE VALUES ON SIGNIFICANT WORKING LAND

Low	*Medium*	*High*

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: (OAR 698-015-0090(3)(a)-(e))

(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.

Strengths

- The proposed conservation easement would reduce conversion and fragmentation of this property, aiding in connectivity between the federal land on the Deschutes River and Whychus Creek, a core migration area for large game, primarily mule deer and elk. The property is not directly adjacent to the federal land but is connected via additional open space – either pasture or rangeland.
- The project supports the goals of the Metolius Winter Range Group – a collaborative group working to improve habitat for wildlife utilizing the winter range that overlays the project area -- by connecting federal lands through conservation easements on private lands.
- The proposed conservation easement and current management practices are aligned with the Upper Deschutes Agricultural Water Quality Management Area Plan.
- Current management includes actions that support soil health and water quality and quantity efforts, and these actions are intended to be included in the management plan accompanying the conservation easement.

- Protecting the property from conversion, would at bare minimum, conserve the soil and have water availability benefits regardless of the management practices.
- The management plan described by the applicant would maintain flexibility for the landowner to respond to changing environments, both economic and natural, and is intended to include goals and objectives for maintaining the important natural resource values identified on the property.

Concerns

- Pitchfork T is a relatively small property surrounded by fragmented farmlands, public lands, and rural housing development. On its own, the property may not provide a great amount of wildlife conservation value to ungulates due to its size.
- The application highlights how large game species would benefit from the proposed easement but does not describe how management practices associated with the proposed easement would impact other wildlife species.
- A large portion of the property is irrigated agriculture, which contributes little to the wildlife habitat of the property beyond open space. It is unclear how the proposed conservation easement or the resulting management plan will address any potential wildlife and livestock conflicts and how monitoring will be used to identify impacts.
- The application lacks detail to support the stated effects of soil health principals and water management techniques intended to be incorporated into the management plan.

PROTECTING, MAINTAINING, ENHANCING SIGNIFICANT AGRICULTURAL OUTCOMES OR REGIONALLY IMPORTANT VALUES

Low	*Medium*	*High*

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: (OAR 698-015-0090(4)(a)-(b))

(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.

Strengths

- The property sits within an area of increasing fragmentation, making it part of a potential stronghold for continued availability of agricultural land within the region. This property could be a catalyst for additional conservation of nearby agricultural land.
- The operation itself is significant in its participation in a local food economy, supporting agricultural education, training new farmers, providing a canvas for research on non-conventional farming practices, and hosting farm-to-table events, along with a farm store. Much of this activity does not take place directly on the property to be conserved, but the property supports these activities by providing adjacent local ground to contribute to the operation.
- The proposed conservation easement would complement an existing, viable farm property owned and managed by the same entity, allowing for expansion of the livestock aspects of the operation. The property provides grazing land for the business's herd that is close to other aspects of the farm business, reducing reliance on leased land.
- The operation is relatively close to the communities of Redmond, Sisters, and Bend, which provide urban areas with a market for locally raised agricultural product.
- The parcel's suitability for pasture and range is supported by its productive soils and flat topography, which also help reduce the possibility of significant erosion that could degrade water quality.

Concerns

- The property is marginally large enough to function on its own as a viable agricultural operation. The conservation easement will only apply to this property, not all land utilized in the operation, and does not bind the two. The nearby property is the core of the operation, and the extent to which this property would be significant without it is not well detailed in the application.
- The conservation of this parcel is intended to be the start of a broader effort, which could make a significant contribution to the agricultural land base if successful, but if not successful would result in a small parcel isolated among rural residential uses.
- There is no direct access to water on the property, rather it is entirely dependent on water supplied by the Three Sisters Irrigation District, which transfers water from Whychus Creek. Although the current landowners have an efficient system and run a water-conscious practice, increased pressure on water resources in the area and drought pose a potential threat to this property's ongoing suitability for agriculture.

ORGANIZATIONAL CAPACITY

Low	*Medium*	*High*

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: OAR 698-015-0090(5)(a)-(e)

(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.

Strengths

- Deschutes Land Trust (DLT) is accredited by the Land Trust Alliance which means they have met the highest national standards for excellence and conservation permanence.
- DLT stewards over 8,000 acres of land in conservation easements, demonstrating a commitment to, and a track record of, following best practices for conservation acquisitions, land and easement stewardship, and organizational and financial governance.
- The applicant has a proven track record of accomplishing conservation transactions and demonstrates a general approach to funding conservation easement stewardship that is typical of land trusts of its size.
- The land trust utilizes Terrafirma Insurance, which provides support for the legal defense of a conservation easement up to $500k for each claim.

Concerns

- The application does not describe whether conservation of agricultural land is in its organizational mission, vision, or other organizational documents.
- The application is inconsistent regarding the expected annual stewardship obligations and associated costs. The narrative describes an annual cost reasonable for an easement of this nature, though the uploaded documentation is possibly for a project other than the subject and would be substantially higher for the project described in the application.
- Clarification and additional detail would be helpful to determine that the land trusts stewardship fund is maintained in a manner that is not outpaced by its stewardship obligations.

CAPITALIZING ON STATE INVESTMENTS

Low	*Medium*	*High*

The extent to which the benefit to the state from the investment may be maximized, based on: OAR 698-015-0090(6)(a)-(f)

(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 OAHP 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.

Strengths

- The project leverages match money from the NRCS ACEP/ALE program for the purchase of the conservation easement.
- The project proposes a perpetual conservation easement.
- As the first working land easement in the area, the proposed project would establish a conservation foothold in the region.
- The property's zoning is for exclusive agricultural use and the application describes how the conservation easement is consistent with the "spirit" of that zoning designation by preserving the land base for agriculture.
- The project area has a grazing permit on the adjacent Crooked River National Grassland which has an Annual Operating Management Plan and identifies the number of head of livestock allowed to run on the public lands. This plan also provides cumulative value to the project area and increases the value of their ag operation beyond just the capacity of the project area.

Concerns

- There are no current plans to develop a Conservation Management Plan as defined by OAHP.

IMPACT TO NEIGHBORING LANDS

Low	*Medium*	*High*

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. (OAR 698-015-0090(7))

Strengths

- The applicant has communicated their intentions to place a proposed easement on the property to the Metolius Winter Range Group and they have expressed their support.
- The applicant states they are unaware of any opposition to the project.

Concerns

- There is no conservation management plan associated with the project, and therefore the applicant does not describe efforts to address impacts. The applicant states that they did not do any community engagement around this proposed project.

THREAT OF CONVERSION OR FRAGMENTATION

Low	*Medium*	*High*

The level of threat of conversion or fragmentation of the working land. (OAR 698-015-0090(8))

Strengths

- The property is in an area experiencing high population growth rates, which puts pressure on agricultural lands by attempted conversions and fragmentation of the landscape leading to conflicting uses across the geography.
- Due to the population growth in central Oregon, this property and area are highly valued in economic and development terms, with encroaching low density residential development putting pressure on the larger landholdings.
- This area, which was once a rural farming/ranching area, has become highly fragmented, impacting winter habitat and habitat connectivity.

- The area is under threat from land division, development of nonfarm dwellings, intensive recreational development and proposed rezoning of land for rural residential and recreational development.
- The applicant describes a pattern of attempted reclassification of farm zoned lands by Deschutes County. The current landowners may not have intentions of capitalizing on any potential for conversion or fragmentation of the land, as demonstrated by their commitment to the conservation easement application; however, the landscape around them suggests that future owners without such commitment may push for a change of use of the property.

Concerns

- Much of the land in this area is no longer valued as contributing to the agricultural land base due to the nature of the reduced size of the fragmented properties, suggesting a trajectory away from agricultural uses in the area that the proposed conservation easement may not be able to alter on its own**.**

SOUNDNESS OF TRANSACTION

Low	*Medium*	*High*

The soundness of the legal and financial terms of the proposed real estate transaction. (OAR 698-015-0090(9)

Strengths

- The transaction mechanics appear to be relatively sound, though specifics of the transaction and the terms of the proposed conservation easement itself were not provided.
- The applicant submitted a copy of the offer presented to the landowner describing the financial terms of the purchase of the conservation easement. The offer does not address any additional terms relating to the transaction.
- The applicant submitted a letter of intent that includes general proposed easement terms as well as a description of the due diligence needs associated with the conservation easement. While the letter of intent is not binding, it describes the parties' intentions surrounding the basics of the conservation easement and funding needs.
- There are no access issues, there is direct access to the property from a public road.
- There are no apparent boundary issues with the property.

Concerns

- Significant follow up is needed related to title and vesting matters. The preliminary title report provided has numerous exceptions without accompanying documentation and vesting needs to be confirmed.

EVALUATION SUMMARY

The significance of the agricultural, natural resource, and social values of the working land are substantially tied to the current management practices and the business associated with the property. The property is an above average sized parcel for the immediate area and surrounded by fragmented farmlands, public lands, and rural housing development. The tract is in the northern part of Deschutes County commonly known as the Lower Bridge area. This part of the county is generally more viable for long-term agricultural operations than areas located to the south and southwest. The level of fragmentation of farmland in Deschutes County is high, and this property could represent a starting point for conservation of adjacent land, resulting in the ultimate conservation of a significant amount of pasture and range. On its own, however, the property may be too small to independently alter the trend of fragmentation and development across the region and does not provide a great amount of wildlife habitat conservation due to its relatively small contribution to open space independent of adjacent lands.

The proposed conservation easement is designed to address the most significant threats to the working lands and natural resource values on the property, eliminating the ability to subdivide and the right to conduct activities inconsistent with agricultural use. These restrictions reduce the likelihood of conversion of the property and reduce fragmentation of use across the neighboring parcels. Ultimately, the proposed conservation easement as described in the application would leave the property at baseline for ongoing agricultural use and natural resource values.

The property provides open space and connectivity between high quality wildlife habitat but doesn't provide high quality habitat itself. The soil health and water quality/quantity management practices, along with the control of invasive plant species resulting from current management practices are intended to be incorporated into the management plan accompanying the easement. The proposed conservation easement will maintain the property as open space and facilitate management that aims to build soil health and biomass for retention of carbon, water resources, and the sustained ability to grow crops.

The applicant is an experienced entity with a significant track-record in implementing conservation land acquisitions in Central Oregon for decades. The applicant is accredited by Land Trust Alliance's Land Trust Accreditation Commission, which means it has met the highest national standards for excellence and conservation permanence. There are no significant concerns regarding the applicant's ability to successfully complete this transaction pursuant to OWEB's requirements and timelines.

Additional detail would be useful to understand the specific path toward fully funding the stewardship need for this conservation easement, as the applicant provided only a general description of its stewardship funding approach. The approach is typical, utilizing a combination of funds from its Stewardship Fund and unrestricted funds for general operation to pay for its stewardship activities, often supplementing these funds with additional grant funding for stewardship management and restoration activities. The Stewardship Fund generates income to support annual stewardship costs. However, the current balance of its Stewardship Fund is not provided in the application, rather a general intention to grow the fund, but additional detail would have provided more confidence that the applicant is positioning itself to ensure its stewardship obligations do not outpace its funding.

STAFF RECOMMENDATION

Staff recommend the Commission recommend the OWEB Board fund in accordance with OWEB's grant agreement for OAHP conservation easement projects, including project-specific conditions specified in the grant agreement.

FALL 2022 OWEB Grant Offering

Oregon Agricultural Heritage Program

Conservation Covenants and Easements

Application No.:	223-7101-22522	**Project Type:**	Conservation Easement
Project Name:	O'Keeffe Ranch		
Applicant:	Oregon Agricultural Trust		
Region:	Central Oregon	**County:**	Lake
OWEB Request:	$277,776	**Total Cost:**	$911,549

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

The O'Keeffe Ranch, LLC project is composed of 6,511 acres in multiple non-contiguous tracts around the town of Adel in Lake County. It is a Phase 1 of a hopefully 2 or 3 phase acquisition process. The properties, though technically not contiguous are connected by the O'Keeffe's grazing allotments and are part and parcel of their summer grazing strategies. The O'Keeffes are seeking a sale of conservation easement to preserve a century-old family ranching operation, and help ensure their economic sustainability for the long term by reinvesting the proceeds into further pasture, economically stabilizing the operation for the future and reducing their reliance on leased pasture.

The property is composed of high-quality native rangeland for grazing, and is significant to the conservation of sage grouse and pronghorn. It is within an area with a significant history of ranching, lying on both sides of the Warner Valley, and the town of Adel and is contiguous with resources of a high conservation concern, being near to the Hart Mountain Antelope Refuge, the Fish Creek Rim and the Warner Mountains, with many other buttes, canyons, and ephemeral wetlands besides.

OAT is seeking match funding for a Natural Resources Conservation Service (NRCS) Agricultural Lands Easement - Grasslands of Special Significance (ALE-GSS) conservation easement, for which those matching funds have already been awarded. Parties and partners limited to the transaction would be the O'Keeffes, Oregon Agricultural Trusts, NRCS and OWEB

REVIEW

The review below is the staff evaluation of the project based on the evaluation criteria described for conservation easement applications in OAR 698-015-0090, feedback from the project technical review teams, and soundness review from OWEB due diligence contractors.

SIGNIFICANCE OF THE WORKING LAND

Summary of staff's assessment of project's responsiveness to application criteria.		
Low	***Medium***	***High***

The significance of the agricultural, natural resource, and related social values of the working land subject to the working land conservation covenant or easement. (OAR 698-015-0090(1))

Strengths

- The property subject to the proposed conservation easement is comprised of large non-contiguous tracts of agriculturally and ecologically productive land that is part of a larger operation that includes federal grazing allotments, and as a unit is nearly three times the size of the average operation in Lake County. The project parcels are part of a large multi-generational operation that has demonstrated sustainable animal husbandry and land stewardship for decades.
- The parcels, especially combined with the allotments currently under the same management, are significant for the species listed, as they are comprised mostly of sagebrush rangeland with native perennial bunchgrasses—providing habitat for wildlife species of concern such as sage-grouse, pronghorn antelope, and mule deer.
- The property supports a leading ranch operation in the region that provides employment and contributes to the local social fabric of the rural community.
- The parcels represented by this project are strategically located in places that, if lost to development or converted to non-agricultural uses, would significantly fragment available rangeland, significantly altering the region's agricultural future.
- The parcels of interest rank highly for resilience to conversion and wildfire, due to the quality of management, according to the Rangeland Analysis Platform. The soil classes across the tracts are appropriate for the ongoing use as rangeland and there is little evidence of conflicting area land uses that could hinder the ability to ranch and the effectiveness of the operation. These parcels have been managed as rangeland for decades (since 1905) and contain valuable forage that support substantial agricultural productivity and wildlife habitat.

Concerns

- On their own, the seven individual tracts that make up the property are likely too small to support a viable operation independently and are dependent on off-site infrastructure.
- The property lacks access to the water needed to support a viable ranching operation independent of the infrastructure and water associated with an off-site established operation.

PROTECTING, MAINTAINING, ENHANCING FARMING OR RANCHING ON SIGNIFICANT WORKING LAND

Low	*Medium*	*High*

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: ((OAR 698-015-0090(2)(a)-(d))

(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.

Strengths

- Limited residential building will be allowed on the tracts (total of 2 across the entire project area), providing an opportunity for onsite residence of an operator or associated farm labor, reducing the likelihood of conversion to non-farm use and facilitating the transfer of ownership to an agricultural operator.
- The proposed conservation easement restricts uses that would allow for the conversion of the property to uses incompatible with the agricultural values.
- The proposed conservation easement utilizes affirmative obligations to maintain agricultural use on the property, triggering intervention if agricultural use ceases on a significant portion of the property for a duration of 3 years. The land trust (OAT) also includes provisions that provide them with a right of first refusal and the option to purchase at agricultural value, as well as the right to lease the land to resume agricultural use. These provisions, if activated by the land trust (the easement provides the right but not the obligation for the land trust to activate these provisions) significantly increase the likelihood that the land will remain in agricultural use regardless of the landowner. It also encourages any future transfer of ownership to be to an agricultural operator.

Concerns

- The amount of subdivision allowed across the property appears to be intended to facilitate the purchase of each tract (there are 7 tracts included in the application and the ALE Minimum Deed Terms allow for the property to be conveyed as 7 separate parcels) at an "obtainable" agricultural scale based on the average operation size (approximately 1,900 acres) in Lake County. It is unclear whether each independent tract could support a viable operation on its own, especially given the remoteness of each tract included in the project, potentially resulting in "orphaned" tracts that are not integral parts of any operation.
- The application lacks detail on the allotments that are associated with the current operation. Additional detail would allow for a more thorough understanding of how the allotments may interact with each individual parcel, since each can be conveyed and managed independently of the main operation under the terms of the easement.
- The property is to be protected as grassland of special significance under the NRCS ALE minimum deed terms, which limits the type of agriculture that is compatible with grassland, pasture, and grazing. This could be challenging if the land trust to chooses to activate its rights to require affirmative agricultural use if the most likely use, livestock grazing, becomes uneconomical.
- The application includes conflicting statements on how the goals of maintaining the property as rangeland (which is the foundation of the applicant's description of the significance of the working land) and the need for flexibility of agricultural practices will be addressed.

PROTECTING, MAINTAINING, ENHANCING HABITAT, WATER, AND OTHER NATURAL RESOURCE VALUES ON SIGNIFICANT WORKING LAND

Low	*Medium*	*High*

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: (OAR 698-015-0090(3)(a)-(e))

(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.

Strengths

- The project is consistent with the ODFW Oregon Conservation Strategy in that it sits within two Conservation Opportunity Areas and conservation easements are a recommended action in those COAs.
- The proposed easement would restrict uses of the various tracts that conflict with sagebrush habitat, which is an Oregon Conservation Strategy habitat.
- The applicant included the minimum deed terms from ACEP/ALE as part of the proposed conservation easement. The minimum deed terms limit the agricultural uses to grassland uses as defined by NRCS, including grazing, production of hay, harvest for hay and non-crop seed production, mowing, construction of fire breaks, conducting fire pre-suppression and rehabilitation activities, and conducting common grazing practices, including cultural practices.
- The project maintains habitat connectivity by limiting conversion to uses that are incompatible with the needs of the two primary species identified as significant to this proposal – sage-grouse and pronghorn. Movement and migration corridors will be more permanently protected by maintaining this land cover. Many of the project parcels are within what is currently one of the most intact and functional large scale migration corridors in the state, and preservation of this open space is critical for continued function.

- The application states the project's proposed management plan will meet the requirements of NRCS ACEP/ALE funding, which will require the grazing and other land uses to be compatible with the habitat needs for sage-grouse, specifically.
- The proposed conservation easement supports several conservation efforts and plans including the SAGECON effort and land management plans for the federal lands surrounding most of these private lands.
- The proposed conservation easement supports the protection and maintenance of the wildlife habitat on and around the property. Keeping these lands in native sagebrush habitats and protecting the mesic and meadow habitats will enhance overall habitat values with the surrounding Federal lands for not only sage-grouse and several other sagebrush obligate species, but for other publicly important wildlife species such as pronghorn and mule deer. The 233 acres of mesic habitats described in the proposals are limited within the existing landscape and are of critical importance to a host of species, but especially as brood rearing habitats for sage-grouse.

Concerns

- There are conflicting details throughout the application and the draft conservation easement regarding the easement project's approach to maintaining a predominantly native grass land cover and maintaining the sagebrush habitat type across the protected property if there are conflicting needs with the agricultural operation. The management plan outline presented does not add clarity.
- The application identifies multiple water resources present on the property, primarily intermittent streams. The application identifies the watersheds incorporated in the project area – Camas Creek and Sagehen Creek watershed, Lower Twelve Mile and Twenty Mile Creek watersheds, Piute, Fish Creel and Guano Creek watersheds. However, it does not discuss the state's Agricultural Water Quality Management Program, and how, or if, the project supports the goals of the program.
- A grazing management plan is required by the federal funder (NRCS) under the grasslands of special environmental significance designation. The application and the attached outline for the management plan do not provide adequate detail to determine the extent that resources are intended to be protected, maintained, or enhanced, beyond relying on what is required by NRCS.

PROTECTING, MAINTAINING, ENHANCING SIGNIGICANT AGRICULTURAL OUTCOMES OR REGIONALLY IMPORTANT VALUES

Low	*Medium*	*High*

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: (OAR 698-015-0090(4)(a)-(b))

(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.

Strengths

- The landowner and their family have been managing these lands for agriculture for over 100 years. There is a strong dedication and commitment to preserving working lands and the existing ranching operation is viable and a leader in the region.
- The proposed conservation easements would solidify the rangeland grazing uses common on adjacent federal lands, increasing the long-term compatibility and viability of both land ownerships to continue as productive rangeland.
- The parcels are strategically located in places that provide access and connectivity to federal grazing lands. If one of more parcels were lost to development or converted to non-agricultural uses, it would fragment available rangeland, inhibiting the ability to move stock across the landscape, significantly altering the region's agricultural future.

Concerns

- If a parcel (or parcels) become severed from a ranching operation with infrastructure and available water, they may not be able to support a viable agricultural operation.
- The property is in a water-limited landscape, given the general climate, persistent drought in eastern Oregon and lack of water rights. Due to ongoing drought in the West, water availability may limit the landscape's potential for sustaining cattle.

ORGANIZATIONAL CAPACITY

Low	*Medium*	*High*

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: OAR 698-015-0090(5)(a)-(e)

(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.

Strengths

- Though not accredited with the Land Trust Accreditation Commission, the land trust implements practices like one that is eligible for accreditation. OAT also describes sound governance principles.
- OAT is the only agricultural land trust working on a statewide basis. They have a staff of seven employees with extensive experience in acquiring and stewarding conservation easements for agricultural purposes. While this property is not in one of OAT's Investment Zone, OAT is committed to stewarding this easement and establishing a significant foothold for agricultural conservation in Lake County through the successful implementation of this large project.
- The land trust's project management staff have considerable experience implementing conservation transactions and stewarding conservation easements.
- The organization shows a commitment to easement stewardship by establishing a stewardship fund of $500,000 prior to the organization holding its first easements. The fund is invested and has a stated target return rate of 6%. The applicant intends to grow the stewardship fund with each easement it acquires.

Concerns

- Oregon Agricultural Trust is a relatively young land trust and does not yet hold any conservation easements.
- The acquisition of this conservation easement will significantly increase the organizations stewardship obligations, going from 0 to thousands of acres to monitor.

CAPITALIZING ON STATE INVESTMENTS

Low	*Medium*	*High*

The extent to which the benefit to the state from the investment may be maximized, based on: OAR 698-015-0090(6)(a)-(f)

(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 OAHP 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.

Strengths

- The project is consistent with the SageCon effort and Oregon Conservation Strategy and would provide an example of the benefits of utilizing long-term conservation tools.
- The project proposes a perpetual conservation easement, solidifying the efforts and many of the management strategies employed by the landowner that have been beneficial for rangeland management and sage-grouse.
- The project includes NRCS ACEP/ALE funds, which will require a grazing plan for this project, and the applicant intends to build the management strategies into the ongoing operation of the landscape.
- The project is consistent with planning goals, specifically Statewide Planning Goals 3, 5, and 6.
- The applicant is leveraging NRCS funding (75% match) and has the potential to set an example in the local area for future conservation easements.

Concerns

- There is no Conservation Management Plan as defined by OAHP currently in place for the property and the applicant states there are no present plans to develop one.

IMPACT TO NEIGHBORING LANDS

Low	*Medium*	*High*

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. (OAR 698-015-0090(7))

Strengths

- The applicant states it is unaware of any opposition to the project.

Concerns

- The long-term benefits of additional investments and any negative impacts along with ways to mitigate them were not described in detail. Due to landowner preference, the applicant did not conduct significant local outreach, resulting in limited knowledge of any potential impacts to neighboring lands. The application does not identify any impacts the easement would have on owners or operators on neighboring lands and the land trust did not discuss any attempts to determine such impacts.
- There is no conservation management plan associated with the project, and therefore the applicant does not describe efforts to address impacts. The application states that they did not do any community engagement around this proposed project.

THREAT OF CONVERSION OR FRAGMENTATION

Low	*Medium*	*High*

The level of threat of conversion or fragmentation of the working land. (OAR 698-015-0090(8))

Strengths

- While significant residential development in this area is unlikely, energy development and mining are potential threats to long-term agricultural use.
- Lake County has seen an increasing trend over the last 15 years with non-agricultural development of isolated parcels, supported by the number of non-farm dwellings approved by the county. This proposal would facilitate these parcels remaining in agricultural use.
- Lake County is second only to Deschutes County in terms of the number of nonfarm dwellings approved on EFU land in Oregon. Lake County is also susceptible to large footprint energy generation development.

Concerns

- Each independent tract is part of the working-whole of the operation, and the property is already fragmented in that it sits as scattered inholdings within Bureau of Land Management ownership. Without the associated grazing allotments, each individual parcel would be isolated from the others, fragmenting the operation.
- The level and urgency of threat is poorly described in the application.
- Urgency is lower here compared to other, more desirable and less isolated locations for both residential and commercial development.

SOUNDNESS OF TRANSACTION

Low	*Medium*	*High*

The soundness of the legal and financial terms of the proposed real estate transaction. (OAR 698-015-0090(9)

Strengths

- The approach to the conservation easement is sound, with the land trust providing for ongoing agricultural use, limiting home construction across the tracts, and limiting subdivision within the tracts. The proposed easement also grants the land trust the right to lease the property for an agricultural purpose if it is unused for agriculture by the current or legal owners.
- There are no apparent boundary issues and most of the tracts are legally described in manner that is consistent with the proposed boundary of the conservation easement. Most of the neighboring properties are owned by the federal government, presenting limited risk of encroachment on the easement area.
- There are no financial encumbrances on the property, eliminating the need for any subordination or payoff negotiations that could slow the project.
- Ownership is simplified through the consolidation into an LLC.

Concerns

- There are several mineral reservations benefitting the federal government and the State of Oregon and the risk of these rights being exercised is unclear. Obtaining a release from the State of Oregon and conducting a mineral remoteness assessment to understand the risk related to the federally held rights may delay the project.
- Access to most of the tracts will require access agreements with Bureau of Land Management (BLM). BLM's willingness to grant NRCS and OWEB with the needed access rights for easement monitoring purposes is unclear.
- The proposed purchase price is based on an appraisal from a California-based appraiser, who used four "After" comparable sales from California and only two from Oregon to determine the hypothetical "after" value. The development restrictions from an agricultural conservation easement in California might have a greater market value than in Oregon, based on our comprehensive land use laws. This issue will need to be addressed by the OWEB appraisal review.
- Based on the age of the appraisal, the OWEB review appraiser might request that it either be updated or replaced.
- The draft conservation easement accompanying the application is confusing and cumbersome, particularly in relation to the required NRCS terms that are attached as an exhibit to the document.

EVALUATION SUMMARY

The 6,511-acre property is part of the landowner's century-old family ranching operation and supports significant agricultural values and significant contributions to habitat for sage-grouse and pronghorn antelope. The extent to which the proposed conservation easement will enhance, protect, maintain those resources lacks clarity throughout the proposal, and the level of threat of conversion or fragmentation is not well described.

The property lies on both sides of the Warner Valley and is near the Hart Mountain Antelope Refuge, and amidst federal grazing lands where the landowners hold grazing allotments. The connectivity for both range uses and wildlife are unique in this part of the state and the contribution to habitat and agricultural values are significant beyond the benefits to Lake County. The property supports the current agricultural operation in providing needed summer range and provides resiliency to the impacts of climate change for both rangeland and habitat needs.

The approach to the proposed conservation easement provides flexibility in the agricultural uses, building potential, and allowable division of the property, helping facilitate ongoing use by an agricultural operator tied to the area. The proposed terms do limit the agricultural uses to those compatible with grassland – which is defined broadly – but could still be financially limiting if in the future the value of running livestock across this landscape is uneconomical. The proposed easement's allowance for the individual tracts to be sold independently of each other has both positive aspects and potential challenges. The easement terms would apply regardless of ownership, facilitating continuation of compatible uses and the ease of moving cattle across the landscape; however, each independent parcel is likely too small and isolated to support an operation on its own, requiring the parcel be tied to a larger operation or risk the piece becoming an "orphaned" parcel that is not operated in conjunction with the surrounding landscape. The agricultural values and outcomes are supported by the proposed easement's grant of rights to the land trust to require ongoing agricultural use and the right to lease the land out irrespective of the owner if agricultural use ceases for a given amount of time. This gives the land trust more certainty around the use of the property, helping facilitate coordinated management, even if under fragmented ownership.

The extent the proposed conservation easement protects and maintains natural resource values is not well described in the application, instead requiring reviewers to piece together the protections required by NRCS through its designation of the property as a grassland of special significance. The project supports implementation of the Oregon Conservation Strategy and the Oregon SageCon effort by facilitating continued connectivity of open grassland in areas important for sage-grouse, pronghorn antelope, and other upland birds and mammals. It appears that the intent of the project is to maintain the rangeland characteristics and encourage the ongoing proliferation of sage-steppe habitat cover, but the application lacks clarity in this regard, instead asking OWEB to rely on the assumption that the NRCS requirements for easements funded through Grassland of Special Significance designation will guarantee this outcome. The management plan outline submitted with the application does not provide sufficient detail for the land trust's approach to the interaction between the natural resource and agricultural values. Without further detail, it is unclear whether the easement, even with the Minimum Deed terms and resulting management plan, will maintain the sagebrush habitat type across the protected property. The application requires reviewers to make assumptions regarding the land trust's approach to maintaining wildlife habitat across the landscape, specifically regarding the potential conflict inherent in the draft easement terms relegating natural resource and habitat values to lower status than current and potential intensified agricultural use.

The project overall is a relatively straight forward conservation easement transaction, though the terms of the transaction were not described in detail. The landowner is an LLC, though it is unclear the level of commitment of all parties and what level of agreement is needed among the parties to complete the transaction. A discussion of decision making, both during the transaction and during the LLC's ownership of the property would have provided more clarity on the commitment from the parties and the specifics of easement administration. OAT's described approach to protecting ongoing agricultural use of the property is strong. In addition to keeping the land in agricultural use, limiting home construction, and limiting subdivision of the property, the easement also grants OAT the right to lease the property for an agricultural purpose if it is unused for agriculture by the current and future owners. The main concern is having OAT prepare a conservation easement that coherently integrates the easement terms required by NRCS with OWEB's requirements for meeting the purposes of the OAHP. The draft conservation easement accompanying the application is not based on the OWEB CE template and is a bit confusing and cumbersome, particularly in relation to the required NRCS terms that are attached as an exhibit to the document.

The title shows multiple severed mineral reservations, held by the United States and the Oregon State Land Board. At the very least a mineral remoteness report is necessary to evaluate the likelihood that marketable minerals are present on the property and any potential risk to the conservation purposes of the project.

STAFF RECOMMENDATION

Staff recommend the Commission recommend the OWEB Board fund in accordance with OWEB's grant agreement for OAHP conservation easement projects, including project-specific conditions specified in the grant agreement.

FALL 2022 OWEB Grant Offering

Oregon Agricultural Heritage Program

Conservation Covenants and Easements

Application No.:	223-7102-22523	**Project Type:**	Conservation Easement
Project Name:	Ferrell, Justin and Jayna		
Applicant:	Oregon Agricultural Trust		
Region:	Central Oregon	**County:**	Lake
OWEB Request:	$223,056	**Total Cost:**	$405,615

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

The Ferrell property is in Valley Falls, Oregon, immediately underneath the Abert Rim. The parcel is the home ranch parcel for the Ferrell's ranching operation and is used as winter pasture and for summer hay production. The Ferrells are interested in selling a conservation easement for multiple reasons: They would like to silence the potential speculative interest in their land created by the existence of a historic subdivision on their property, especially given their scenic location and easy road access; ensure that their land stays in agriculture for the benefit of their family and community, and to gain access to liquid capital to increase their pasturage and pay down debt, increasing the diversity of grazing opportunities and the resiliency of their ranching business in the long term.

The conservation easement is an ACEP-ALE Standard easement, intended to protect the property from conversion to non-agricultural uses or uses which may harm its potential for agriculture in the long term. The property would be used in keeping with any potential utilizable form of agriculture so long as it did not harm the long-term viability of the agricultural resources thereon.

The property has already received a 50% funding agreement from NRCS via their ACEP-ALE easement program. There are no other identified partners

REVIEW

The review below is the staff evaluation of the project based on the evaluation criteria described for conservation easement applications in OAR 698-015-0090, feedback from the project technical review teams, and soundness review from OWEB due diligence contractors.

SIGNIFICANCE OF THE WORKING LAND

Summary of the project's responsiveness to the application criteria.		
Low	***Medium***	***High***

The significance of the agricultural, natural resource, and related social values of the working land subject to the working land conservation covenant or easement. (OAR 698-015-0090(1))

Strengths

- The property subject to the proposed conservation easement is 514 acres of farmland comprised entirely of prime agricultural soils—soils of this quality, at this scale, are not common in Lake County.
- Secure groundwater rights allow the property to be one of the most productive agricultural properties in the region.

- The property can produce high quality hay/alfalfa and livestock, which are major contributors to the local economy of Lake County.
- Groundwater rights exist for irrigation on this and adjacent lands for a place of use encompassing 260 acres with a priority date of 2012 (130 acres of which is used on this property), and a further 70 acres with a date of 2016. This is not a ground water limited aquifer.
- The property is at the base of Abert Rim which is a popular sight on the Oregon Outback Scenic Highway and one of the most identifiable geological features in Lake County.
- The property provides a lower elevation location for calving, an asset to a farm or ranch in this region as it provides flexibility and a safer place for calving operations than reliance on more remote high-country areas with more extreme weather conditions.
- Though smaller than average for an agricultural property in this region, its attributes as a "home ranch" make it valuable to any operation, which could provide opportunities for other operators if the landowners no longer choose to own and manage the land.

Concerns

- The size of the property (514ac.) is smaller than the average farm in the region (1,983 acres). On its own, the acreage in this proposed conservation easement is likely not large enough independently support a viable cattle operation.
- The property on its own does not provide significant, high-quality habitat and is not adjacent to protected, high-quality habitat.
- The water right that facilitates the utilization of the prime soils for significant agricultural outputs is legally secure, but the future of groundwater and surface water availability in Lake County is uncertain given ongoing drought and changes in the water regime due to climate change.

PROTECTING, MAITAINING, ENHANCING FARMING OR RANCHING ON SIGNIFICANT WORKING LAND

Low	*Medium*	*High*

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: ((OAR 698-015-0090(2)(a)-(d))

(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.

Strengths

- The proposed conservation easement would eliminate subdivision rights and reduce the allowable uses to only those consistent with agricultural use of the property. These requirements together eliminate the potential for fragmentation of the working land and the likelihood of conversion to a non-agricultural use on the property itself.
- The proposed conservation easement would support the potential agricultural viability of the property by protecting the ability to farm on these high-quality soils with associated ground water rights for irrigation. Additional infrastructure onsite and within the proposed conservation easement currently supports the type of commodity produced onsite (hay and cattle) – improvements consist of a hay barn and two equipment barns, a residence, and a groundwater fed center pivot irrigation system.
- The proposed conservation easement provides for the development of additional farm infrastructure, including housing infrastructure, supporting the potential for onsite residence of the farm operator and associated farm labor.
- The proposed conservation easement would likely decrease the value of the land, resulting in a reduced tax burden on the estate. While this is highly particular to the individualized finances of the landowner, the potential for conservation easements to reduce the estate tax is generally acknowledged as a benefit of easements in facilitating transfer of ownership to the next generation by reducing the need to divide or sell the property to pay the taxes associated with settling the estate.

- The proposed conservation easement utilizes affirmative obligations to maintain agricultural use on the property, triggering intervention if agricultural use ceases on a significant portion of the property for a duration of 3 years. The land trust (OAT) also includes provisions that provide them with a right of first refusal and the option to purchase at agricultural value, as well as the right to lease the land to resume agricultural use. These provisions, if activated by the land trust (the easement provides the right but not the obligation for the land trust to activate these provisions) significantly increase the likelihood that the land will remain in agricultural use regardless of the landowner. It also encourages any future transfer of ownership to be to an agricultural operator

Concerns

- The property is half the size of average agricultural properties in the region, and the scale of protected working lands resulting from this easement may not be sufficient to alter the direction of land use in surrounding private lands.

PROTECTING, MAINTAINING, ENHANCING HABITAT, WATER, AND OTHER NATURAL RESOURCE VALUES ON SIGNIFICANT WORKING LAND

Low	*Medium*	*High*

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: (OAR 698-015-0090(3)(a)-(e))

(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.

Strengths

- The project meets the objectives of the Oregon Mule Deer Plan by maintaining mule deer winter range and supports the implementation of the ODFW Oregon Conservation Strategy by protecting open space for wildlife to move between nearby Conservation Opportunity Areas. There is considerable use by mule deer year-round, especially during winter months, and some use by bighorn sheep.
- The proposed conservation easement would maintain habitat connectivity by limiting conversion to uses that are incompatible with the needs of migrating wildlife, including the two primary species identified as significant to this proposal – mule deer and bighorn sheep. Movement and migration corridors will be more permanently protected by maintaining this land cover. Though not directly adjacent to other protected areas, the property is within a network of land managed for wildlife, sitting between Bureau of Land Management land and just north of US Forest Service land.
- The property is at the base of the Abert Rim, a prominent feature along the Oregon Outback Scenic Byway and a major part of the natural landscape of Lake County and important to the local community. The limited development allowed in the proposed conservation easement would contribute to the preservation of the view of Abert Rim as a scenic amenity for the people of Lake County and Oregon generally.
- The proposed conservation easement does not require the current agricultural use persist, but maintaining the land as 'open space', guarantees that even if farm practices change to a crop cover that is less beneficial for wildlife than its current use as forage production, the benefit to wildlife generally will be maintained by eliminating irreversible conversion and fragmentation.
- The landowner is currently implementing a conservation plan that is consistent with the goals of the state Agricultural Water Quality Program.

Concerns

- The application provides little detail regarding the approach to utilizing the management plan to support natural resource and agricultural values on the property. The application lists soil resources and big game forage as natural

resource values important to the property, but the draft easement and the nominal outline of the management plan do not provide detail on the approach to managing these values alongside agricultural values.

- The proposed easement aims at maintaining healthy sage-steppe vegetation communities beneficial to native wildlife. The proposed easement terms are flexible on type of agricultural use, which is good for agriculture, but could have impacts on the positive outcomes for mule deer and big horn sheep if the current agricultural use changes. The application is unclear how the project will incorporate wildlife values and the draft easement does not stipulate that managing for wildlife is a purpose or an independent conservation value, suggesting the benefits to these species are potential by-products of the primary purpose, which is to preserve the agricultural use of the property.
- On its own, the property may not provide a great amount of wildlife conservation value to ungulates due to its size.
- The application does not address how the proposed easement would address issues of water quality and/or quantity.

PROTECTING, MAINTAINING, ENHANCING SIGNIFICANT AGRICULTURAL OUTCOMES OR REGIONALLY IMPORTANT VALUES

Low	*Medium*	*High*

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: (OAR 698-015-0090(4)(a)-(b))

(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.

Strengths

- The property subject to the proposed conservation easement is flat, with sufficient access, productive soils, and onsite infrastructure to support the agricultural operation. The proposed easement has flexibility for additional infrastructure and for the type of agricultural use allowed, which supports an onsite operation and the parcel's desirability as an addition to an off-site operation. The maintenance of small-scale residential use, limited in amount and location, adds to the likelihood of owner-operator management and supports potential employee housing for an operation that is primarily based off-site.
- The soils in this area are uniquely productive for agricultural purposes, with productivity potential bolstered by the existing water rights, that will continue to support the property's viability. The property is highly conducive to hay production and the proposed conservation easement would facilitate the ongoing availability of this property to contribute to this regionally significant agricultural commodity.
- Existing water rights for irrigated agriculture amplify the agricultural value of the ranch. The irrigation systems that serve the property have been or will be upgraded, which point to this operation's ability to be profitable and resilient.
- The current agricultural uses align with the agricultural operations in the surrounding area – hay production and ranching support all facets of the rural economy of southern Lake County.

Concerns

- Due to ongoing drought in the West, groundwater availability may present a challenge in the next 30-50 years if annual precipitation continues to be below average**.**
- The degree to which water rights will be incorporated into the proposed easement and associated management plan is not described in the application.
- The property is a relatively small operation by local standards, limiting its contribution to the region's agricultural land base.
- The proposal states that the influx of liquidity resulting from purchase of the proposed conservation easement will facilitate the landowner's ability to increase the operation's pasturage, an important agricultural outcome identified by the applicant; However, the income from this project may not be enough to significantly reduce the

overall debt load to the point of providing liquid capital, potentially reducing the immediate effectiveness in prolonging existing operations.

ORGANIZATIONAL CAPACITY

Low	Medium	High

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: OAR 698-015-0090(5)(a)-(e)

(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.

Strengths

- Though not accredited with the Land Trust Accreditation Commission, the land trust implements practices like one that is eligible for accreditation. OAT also describes sound governance principles.
- OAT is the only agricultural land trust working on a statewide basis. They have staff of seven employees with extensive experience in acquiring and stewarding conservation easements for agricultural purposes. This property is in OAT's Chewaucan River Investment Zone, which means this portion of Lake County is a target area for the organization and presumably will be so for the long-term.
- The land trust's project management staff have considerable experience implementing conservation transactions and stewarding conservation easements.
- The organization shows a commitment to easement stewardship by establishing a stewardship fund of $500,000 prior to the organization holding its first easements. The fund is invested and has a stated target return rate of 6%. The applicant intends to grow the stewardship fund with each easement it acquires.

Concerns

- Oregon Agricultural Trust is a relatively young land trust and does not yet hold any conservation easements and does not have an established track record to demonstrate capacity.
- The acquisition of this conservation easement will significantly increase the organizations stewardship obligations, going from 0 to hundreds of acres to monitor.

CAPITALIZING ON STATE INVESTMENTS

Low	*Medium*	*High*

The extent to which the benefit to the state from the investment may be maximized, based on: OAR 698-015-0090(6)(a)-(f)

(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 OAHP 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.

Strengths

- The project is leveraged with federal NRCS funds in a cost-share approach to funding the purchase of the easement. There are no other funding sources identified for the easement purchase.
- The project proposes a perpetual conservation easement.
- The project is consistent with planning goals, specifically Statewide Planning Goals 3, 5, and 6.
- This easement would set an example for producers in Lake County that conservation and profitable ranching are complementary. This will serve as an example for other landowners to follow.

Concerns

- There are few conservation easements within the local area and the appetite for additional conservation easements within the region is vaguely discussed.
- There is no Conservation Management Plan as defined by the OAHP currently in place for the property and the applicant states there are no present plans to develop one.

IMPACT TO NEIGHBORING LANDS

Low	*Medium*	*High*

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. (OAR 698-015-0090(7))

Strengths

- The applicant states it is unaware of any opposition to the project.

Concerns

- The long-term benefits of additional investments and any negative impacts along with ways to mitigate them were not described. Due to landowner preference, the applicant did not conduct significant local outreach, resulting in limited knowledge of any potential impacts to neighboring lands. The application does not identify any impacts the easement would have on owners or operators on neighboring lands and the land trust did not discuss any attempts to determine impacts.
- There is no conservation management plan associated with the project, and therefore the application does not describe efforts to address impacts. The applicant states that they did not do any community engagement around this proposed project.

THREAT OF CONVERSION OR FRAGMENTATION

Low	*Medium*	*High*

The level of threat of conversion or fragmentation of the working land. (OAR 698-015-0090(8))

Strengths

- The threats are not well discussed beyond the speculative value of the nonconforming townsite plat parcels; however, general development threats have increased greatly within Lake County over the last decade and are likely in this area due to the scenic value of Abert Rim. The threat of development and non-agricultural use is also supported by the number of non-farm dwellings approved by the county and growing interest from energy facility development.
- The current threat of conversion facing this property is primarily toward subdivision into ranchette sized parcels, given the development rights associated with the parcel's zoning, usually for manufactured housing. However, the adjacency of a significant natural feature (the Abert Rim) of scenic quality and easy access off the major transportation routes in the area raises the possibility of its development for "amenity" ranch sales.

Concerns

- The urgency of the identified development threat may be lacking as compared to other, more desirable locations for residential development.
- The extent to which the elevated subdivision threat associated with the historic plat as identified in the application would be approved under current laws is tenuous.

SOUNDNESS OF TRANSACTION

Low	*Medium*	*High*

The soundness of the legal and financial terms of the proposed real estate transaction. (OAR 698-015-0090(9)

Strengths

- The application proposes a typical conservation easement transaction; however, the transaction details are not provided.
- In addition to keeping the land in agricultural use and limiting subdivision of the property, the proposed easement also grants OAT the right to lease the property for an agricultural purpose if is unused for agriculture by the current and future owners.
- There are no access issues. The property has legal access from Abert Rim Road to US Highway 395 and State Highway 31.
- There are no apparent boundary issues with the property.

Concerns

- There are numerous financial liens encumbering the property, which will need to be either subordinated or paid off at, or prior to, closing. The status of these obligations is confusing, to the extent that it is unclear which entities need to consent to the conservation easement beyond the landowners listed in the application. Sorting this out with the multiple lenders may be a daunting and time-consuming task.
- There is a reservation by the county for mineral rights and public rights of way. The risk of these rights being exercised, and what impact they would have on the objectives of the project, is unclear.
- The draft conservation easement accompanying the application is not based on the OWEB CE template and is confusing and cumbersome, particularly in relation to the required NRCS terms that are attached as an exhibit to the document.
- The appraisal is from a California-based appraiser, who used four "After" comparable sales from California and only two from Oregon to determine the hypothetical "after" value. The development restrictions from an agricultural conservation easement in California might have a greater market value than in Oregon, based on our comprehensive land use laws. This issue will need to be addressed by the OWEB appraisal review.
- Based on the age of the appraisal, the OWEB review appraiser might request that it either be updated or replaced.
- The legal status of a mutual well agreement for irrigation is unclear, as it is not discussed in the application but does appear on the Status of Record Title documents provided by the applicant. The nature and effect of this agreement could have impacts on the water situation for the property, but more detail is required to understand the extent of those impacts.

EVALUATION SUMMARY

The 514-acre property lies just east of the junction of US Highway 395 and State Highway 31 near the community of Valley Falls. It is agriculturally significant in Lake County due to uniquely high-quality soils and legally secure groundwater rights. It sits amidst a migration corridor for mule deer and other wildlife species, contributing to a network of open space between two important federal land bases. Sitting at the base of the Abert Rim, an impressive geological feature in southwest Oregon, the property contributes to the scenic view from the Oregon Outback Scenic Byway. Though relatively isolated, and smaller than the average agricultural property of its kind in the area, the protection of the property for agricultural, open space, and scenic values will contribute to the protection of the region's agricultural land base, aid in providing habitat needs for wildlife, and support the economic viability of the current and potential future operations.

Though the property is currently primarily in grass and forgeable crops, the proposed conservation easement is flexible regarding the type of the agricultural use that can be conducted on the property. This could lead to the transition away from forage crops, which would have an impact on the natural resource values identified by the applicant – primarily forage for mule deer and big horn sheep. Maintaining the property as open space, however, provides greater benefit than the alternative of irreversible conversion to energy facilities, industrial, or rural residential use. While the

property's individual contribution of benefits to mule deer and bighorn sheep specifically are relatively minor overall, the maintenance of the property's soil resources are important considerations.

The overall threat of conversion facing the property is not well documented by the applicant. In general, Lake County approves a high number of non-farm dwelling on farm properties; however, it is unclear whether the development threats described in the application are real versus hypothetical in this portion of Lake County.

Overall, the transaction presented appears sound, though there is significant financial leveraging of the property and farm infrastructure, making it challenging to determine the extent to which additional parties and institutions need to subordinate their interests or otherwise consent to the conservation easement. There are also several mineral interests that are severed from the property. The application does not describe whether measures have been taken to address these issues, other than a general statement regarding the presence of a mortgage.

The property lies in OAT's Chewaucan River Investment Zone, an area of focus for its farm and ranchland protection efforts. The zone was identified due to its high-quality soils and irrigated pasture and hay fields, which are core features of the agricultural economy in Lake County. The applicant's ongoing investment in the area supports the organization's capacity to invest in the stewardship of this conservation easement, in directing both financial assets and staff time to the area.

STAFF RECOMMENDATION

Staff recommend the Commission recommend the OWEB Board fund in accordance with OWEB's grant agreement for OAHP conservation easement projects, including project-specific conditions specified in the grant agreement.

FALL 2022 OWEB Grant Offering

Oregon Agricultural Heritage Program

Conservation Covenants and Easements

Application No.:	223-7103-22597	**Project Type:**	Conservation Easement
Project Name:	Hagen Farm Conservation Easement Phase 2		
Applicant:	McKenzie River Trust		
Region:	Willamette Basin	**County:**	Lane
OWEB Request:	$289,233	**Total Cost:**	$469,223

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

The 230 acre Hagen farm is located West of Junction City in Lane County, Oregon. In 2011, McKenzie River Trust completed a 61.7 acre conservation easement covering the riparian area around Ferguson Creek using a North American Wetlands Conservation Act grant. The goal of this project is to place an additional 156 acre easement on the property covering the remaining riparian zone, a timber stand, and four agricultural areas resulting in 217.7 protected acres. The goal of the project is to conserve this property for a combination of agricultural use, sustainable timber production, preservation and restoration of wildlife habitat, and protection against the future fragmentation of this important wildlife anchor. The property contains significant wet prairie habitat that will be enhanced through a restoration project led by the Long Tom Watershed Council with secured OWEB funding once the working lands conservation easement is in place.

McKenzie River Trust and Ducks Unlimited have secured Willamette Valley NAWCA funding to support the purchase price of the easement but need additional funds to support our match requirement and due diligence expenses. Funding would support the purchase price of the easement as well as acquisition costs and staff time. Ducks Unlimited is administering the NAWCA grant funds. McKenzie River Trust is partnered with the Long Tom Watershed Council to implement a wetland habitat restoration project in the conservation zone of the phase 2 Easement.

REVIEW

The review below is the staff evaluation of the project based on the evaluation criteria described for conservation easement applications in OAR 698-015-0090, feedback from the project technical review teams, and soundness review from OWEB due diligence contractors.

SIGNIFICANCE OF THE WORKING LAND; EASEMENT SPECIFICS

Summary of staff's assessment of project's responsiveness to application criteria.		
Low	***Medium***	***High***

The significance of the agricultural, natural resource, and related social values of the working land subject to the working land conservation covenant or easement. (OAR 698-015-0090(1))

Strengths

- The subject property is 156 acres of a larger 230-acre property located in the transition area between the coast range and the mid-Willamette Valley. The property contains a mix of conifer forest, a riparian area along Ferguson Creek, and dispersed agricultural fields currently used to produce hay.
- The property subject to the proposed conservation easement has the foundations for a productive agricultural operation – productive soils, water rights, and access to markets.

- The property provides habitat for several Oregon Conservation Strategy species, including Acorn Woodpecker, Western gray squirrel, Western blue bird, and fish habitat within Ferguson Creek.
- The property provides the foundation for a project that enables habitat conservation and restoration while supporting local, small-scale, family-owned farming.
- The property has senior water rights on Ferguson Creek and holds irrigation rights (OWRD Permit number S 13654) to 40 acres.

Concerns

- The property is relatively small and surrounded by fragmented farmlands, industrial timberland, and rural housing development. Therefore, on its own, the property may be too small to independently have real agricultural significance in the area.
- There is little detail provided in the application about the property's agricultural resources themselves, rather the application characterized agricultural significance in the context of threat of conversion to timber production.

PROTECTING, MAINTAINING, ENHANCING FARMING OR RANCHING ON SIGNIFICANT WORKING LAND

Low	*Medium*	*High*

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: ((OAR 698-015-0090(2)(a)-(d))

(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.

Strengths

- The proposed conservation easement will eliminate the right to divide the property, eliminating the risk of fragmentation.
- The proposed conservation easement will restrict uses on the property, including the right to convert to industrial timberland, limiting allowable uses to those compatible with the farm, forest, and wetland and riparian conservation values.
- The proposed conservation easement facilitates the ongoing use of the property for small-scale agriculture, designating agricultural reserves throughout the property.
- The property has water rights for 40 acres and suitable soils to support a variety of cropping systems—much of the property is considered prime farmland by the NRCS
- The property has the foundations to provide multiple sources of income (timber, crops, livestock) from the land which benefits the resilience of a small farm operation.

Concerns

- The application does not detail the overall acreages for the farm and conservation zones – and does not describe how different provisions for each zone will function together.
- The proposed conservation easement reduces the availability of land suitable for agricultural production and fragments the largest agricultural field. It is not clear that the remaining agricultural lands will be able to produce enough income to maintain the agricultural viability of the operation on their own.
- The application lacks detail regarding e the potential impacts to the use of the property for agriculture resulting from the conversion of the center of the southern farm field to wet prairie habitat.
- The viability of the current agricultural operation is not well described. This creates uncertainty around the property's contribution to a viable farming and/or ranching business and the extent the proposed conservation easement will impact it.
- The application does not describe why the 5 acres currently producing blueberries and figs were not included in the proposed conservation easement. This is likely the most valuable farmland asset on the property because of its superior soils, current cultivation, and its location out of the floodplain and adjacent to existing infrastructure and developed access.

- It's not clear how the Water Right Permit 13654 will be impacted by the proposed conservation easement and whether the identified locations of the agricultural and conservation zones within the proposed easement will be compatible with the existing water rights.
- The infrastructure associated with the farm operation – the primary barn, residence, and irrigation – is not included in the easement area. On-site infrastructure is important for small scale farm operations where the entire operation is contained within a single property.
- It is unclear the extent to which the proposed conservation easement will provide additional protection against conversion and fragmentation of the property because of the uncertainty surrounding the current easement's description of the area encumbered in Phase 1.

PROTECTING, MAINTAINING, ENHANCING HABITAT, WATER, AND OTHER NATURAL RESOURCE VALUES ON SIGNIFICANT WORKING LAND

Low	*Medium*	*High*

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: (OAR 698-015-0090(3)(a)-(e))

(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.

Strengths

- The proposed conservation easement supports the implementation of the ODFW Oregon Conservation Strategy because the property is within the Oregon Conservation Strategy's West Eugene Area Conservation Opportunity Area. The proposed easement is structured to encourage multiple Recommended Actions in this COA, including the continued active management of restored habitats, maintaining and restoring riparian and wetlands habitat and connectivity, and protecting and enhancing oak savanna and grasslands.
- The proposed easement protects and promotes habitat connectivity for Acorn Woodpecker, Western Gray Squirrel, Western Blue Bird, and Oregon white oak, all known to exist on the site.
- The easement supports the expansion of riparian habitat along Fergerson Creek and provides the opportunity to enhance water quality downstream of the property.

Concerns

- The proposed easement may not function to protect the legacy oaks that are located within the Agriculture and Forest Zones as identified on the map included in the application. Agricultural soil disturbance and encroachment from forestry activities are a threat to these trees.
- The application does not discuss the potential impacts that may result from various forms of agriculture (will subsurface ripping be allowed or drain tiles be installed) on water quality beyond the inclusion of additional acreage in the conservation zone focusing on riparian areas.
- About a quarter mile of stream downstream from the homesite is not included in the conservation zone, limiting the connectivity of riparian habitat.
- Much of the property is floodplain. The application lacks detail regarding whether the project supports the implementation of the Ag Water Quality Management Program.

PROTECTING, MAINTAINING, ENHANCING SIGNIFICANT AGRICULTURAL OUTCOMES OR REGIONALLY IMPORTANT VALUES

Low	*Medium*	*High*

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: (OAR 698-015-0090(4)(a)-(b))

(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.

Strengths

- The property has highly fertile floodplain soils across the property, and the soil types located in the agriculture zones are suitable for farming.
- The proposed easement's structure eliminates the potential of conversion of most of the highest value agricultural soils to other uses – including preventing conversion to industrial timberlands.
- The water rights available on this property are an asset for specialty crop production. If water rights and drainage are maintained and the land is not left fallow to be overtaken with invasive species, then the agricultural land has potential to be available for long-term use and contribute to the overall agricultural land base in the immediate region.
- The property supports multiple compatible uses on a single piece of land (ag, timber, conservation) and keeping the land whole allows diversification of income, thereby improving viability.
- The property is situated in an area where industrial scale farming hasn't yet pushed its way up the valley and industrial scale tree farming hasn't worked its way down from the coast range. The proposed conservation easement could be a catalyst for additional conservation of nearby agricultural land.

Concerns

- It is unclear from the application how many acres will remain available for agricultural use, including the extent to which the Phase 1 easement impacts existing farm use, making unclear whether the acres remaining for agricultural production within the proposed easement are enough to support a financially viable operation.
- Ongoing restoration planned on the property reduces the amount of land available for agriculture.
- The application does not provide enough information to determine how the specific agriculture and conservation zones will function together and the resulting impacts of the proposed conservation easement to the use of the property for agriculture.
- It is unclear in the application regarding the type of agricultural commodity that can be grown within the areas set aside for agriculture in the proposed easement and how the dispersed nature of the agricultural zones will impact the efficiency and viability of the farm operation.
- It is unclear how limitations on grazing within the conservation and forestry zones will impact the viability of the property for agriculture.
- The application is unclear as to how the proposed conservation easement impacts the ability to use existing water rights to support agricultural uses within the identified agricultural zones.
- The proposed conservation easement appears to primarily elevate protection of wildlife habitat, wetlands, and riparian values across the property, while allowing limited agricultural use. The application does not describe how this approach will lead to significant agricultural outcomes and the ongoing agricultural viability of the working land.

ORGANIZATIONAL CAPACITY

Low	*Medium*	*High*

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: OAR 698-015-0090(5)(a)-(e)
(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.

Strengths

- McKenzie River Trust is accredited by the Land Trust Alliance which means they have met the highest national standards for excellence and conservation permanence.
- The land trust has over 7000 acres of protected land in its portfolio –in fee title and conservation easements - demonstrating a commitment to, and a track record of, following best practices for conservation acquisitions, land and easement stewardship, and organizational and financial governance. McKenzie River Trust currently has 3 FTE of stewardship staff based in Eugene, OR who are charged with monitoring easements and maintaining relationships with landowners.
- The applicant has a proven track record of accomplishing conservation transactions and demonstrates a general approach to funding conservation easement stewardship that is typical of land trusts of its size.
- The organization includes the protection of working lands in its most recent strategic plan. The applicant has demonstrated commitment to working lands on some of their other easements, which is not an easy process.
- The land trust utilizes Terrafirma Insurance.

Concerns

- The application does not describe whether and the extent to which the conservation of agricultural land is in its organizational mission, vision, or other organizational documents.
- The project includes matching funds from the North American Wetlands Conservation Act, but there is little detail in the application demonstrating the applicant has a solid understanding of the method for integrating NAWCA requirements with the OAHP and OWEB requirements.

CAPITALIZING ON STATE INVESTMENTS

Low	*Medium*	*High*

The extent to which the benefit to the state from the investment may be maximized, based on: OAR 698-015-0090(6)(a)-(f)

(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 OAHP 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.

Strengths

- The applicant leveraged other sources of funds to support the purchase of the proposed conservation easement (38% match is demonstrated), and the proposed easement will complement an easement that is already in place.
- The project proposes a perpetual conservation easement, that is intended to build on the conservation of 62 acres of land protected with a conservation easement in 2011 by the same landowner.
- The property in the Phase 1 conservation easement has historically received funding from both state and federal entities to accomplish important restoration goals and objectives.
- The Willamette Valley is home to many diverse agricultural operations. Due to the diverse set of habitats and management zones in the proposed conservation easement, this project has the potential for setting an example that will encourage additional projects in the region by demonstrating the potential of small-scale agriculture's compatibility with fish and wildlife habitat conservation.
- Though a management plan doesn't a exist for the property, plans for habitat and wetland restoration are ongoing.
- The land trust is partnered with Ducks Unlimited and the Long Tom Watershed Council to implement the project. The easement will allow the Long Tom Watershed Council to move forward with a planned wet prairie and habitat restoration project within the newly established conservation zone.

Concerns

- There are no current plans to develop a Conservation Management Plan as defined by OAHP.
- The management plan outline is does not contain sufficient detail to understand how the agricultural and natural resource values are expected to be managed over time.
- The application does not address how the proposed project interfaces with local comprehensive plans and statewide planning goals.
- The proposed conservation easement results in a sizable amount of agricultural land being removed from production and fragmented across the property rather than guaranteeing the preservation and protection of the continued use of a working land for agricultural purposes. This may perpetuate the perception that conservation easements are not compatible with the ongoing use of land for viable agricultural operations.

IMPACT TO NEIGHBORING LANDS

Low	*Medium*	*High*

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. (OAR 698-015-0090(7))

Strengths

- The proposed easement would protect the water quality and riparian habitats of Ferguson Creek in perpetuity while also contributing to the restoration and enhancement of the natural water system. This would lead to improved water quality in the local area.
- The applicant states they are unaware of any opposition to the project.

Concerns

- The applicant did not conduct significant local outreach, resulting in limited knowledge of any potential impacts to neighboring lands. The application does not identify any impacts the easement would have on owners or operators on neighboring lands and the land trust did not discuss any attempts to determine impacts.
- There is no conservation management plan associated with the project, and therefore the applicant does not describe efforts to address impacts. The applicant states that they did not do any community engagement around this proposed project.

THREAT OF CONVERSION OR FRAGMENTATION

Low	*Medium*	*High*

The level of threat of conversion or fragmentation of the working land. (OAR 698-015-0090(8))

Strengths

- The property is within a landscape that sits within the transition areas between industrial timberland operations and rural residential, positioning it in an avenue of potential conversion to non-agricultural uses.

Concerns

- The applicant identifies the property as within a "location near an area experiencing development growth along with recent trends of rural development [that] increase the risk for future development of the property into non-working land use." However, there is no detailed discussion or supporting documentation of such a threat provided.
- The urgency around the threat of conversion or fragmentation of the working land is not well documented.
- The provisions within the Phase 1 conservation easement and the Notice of Grant Agreement related to that easement cast uncertainty on the level of division practically and legally allowed across the greater property. The description of the land that the easement pertains to within both documents is confusing and the application does not describe the impact these uncertainties have on the overall threat across the property.

SOUNDNESS OF TRANSACTION

Low	Medium	High

The soundness of the legal and financial terms of the proposed real estate transaction. (OAR 698-015-0090(9)

Strengths

- There are no access issues. The property has legal access from Ferguson Creek Road.
- There are no apparent boundary issues. MRT has budgeted to pay for a survey of the proposed conservation easement area, which will identify any boundary discrepancies with neighboring properties.

Concerns

- The current easement was not legally described and references to the location within the recorded document lack clarity. The applicant has contacted a surveyor to legally describe the current easement, though it is unclear whether the applicant intends to amend the current easement to reflect the clarified easement boundary and the impact the process may have on the timing of the proposed Phase 2 easement.
- In the Cascade Title Co. status of record title (SORT) report dated June 29, 2022, exception #14 pertains to a deed of trust for the benefit of U.S. Bank N.A., dated August 31st, 2021. This deed of trust will need to be subordinated to the conservation easement, which presumably the NAWCA funder will require, too.

EVALUATION SUMMARY

The property in this proposal is a varied landscape with forestlands, riparian and prairie habitats, and dispersed agricultural fields. While the property supports habitat resources that represent a contribution to habitat values in the region, the agricultural values on the property are arguably too small and fragmented to represent a significant contribution to the overall agricultural land base. The property itself presents the characteristics of a viable farm property – good soils, good topography, easy access to markets, and reasonable access to water. The existence of a separate income producer – the timber zone – allows for increased economic viability, contributing to the likelihood that farm income can be supplemented if markets change; however, the extent to which the proposed conservation easement would protect, maintain, or enhance farming and contribute to significant agricultural outcomes is not well documented in the application, and the resulting amount of acreage remaining for agriculture and the type of agricultural use allowed is unclear.

The application better demonstrates the property's significance for forestry, riparian and prairie natural resource values. The habitat protected throughout the property within the proposed conservation easement represents a valuable contribution to the conservation of strategy habitats in the Oregon Conservation Strategy, as well as supporting migratory birds and waterfowl. Under the proposed terms of the easement the riparian corridor is heavily restricted, securing valuable habitat as well as contributing to improved water quality. Further, the proposed conservation easement proposes to set aside a large portion of the property's land base for a wet prairie restoration project. The proposed easement will protect the restored habitat and enlarge the riparian buffer along Ferguson Creek and facilitate operations in the forestland that embraces longer rotations and smaller units in harvest. The proposal represents the second phase of conservation on the larger property, building upon a conservation easement purchased by the applicant in 2011 with funds from the North American Wetlands Conservation Act. The same funding is presented as match funding for the OAHP proposal. That conservation easement put 62 acres of the land into permanent habitat reserves.

The applicant is an established land trust with a proven track record of purchasing and stewarding conservation easements. It utilizes Terrafirma insurance and has a general approach to funding and managing stewardship needs of a conservation easement of this nature. There are no concerns about the applicant's capacity to manage the transaction and complete the project within the OWEB required timeline of 18-months.

The application did not include a transaction agreement of any type, so the specifics of the legal and financial terms of the proposed transaction could not be evaluated. Limited work was conducted by the applicant to support the proposed purchase price and it is unclear whether the landowner will accept less than the expected value if the appraisal does not support the anticipated amount. There are no significant soundness issues, other than concerns regarding the proposed

purchase price. Title matters include a need for the subordination of a mortgage and the need to clarify the boundaries of the Phase 1 conservation easement prior to executing the proposed conservation easement.

STAFF RECOMMENDATION

Staff recommend the Commission recommend the OWEB Board fund in accordance with OWEB's grant agreement for OAHP conservation easement projects, including project-specific conditions specified in the grant agreement.

Attachment E

Project Type	Project Name	Applicant	OWEB Request	Application No.	Staff Recommendation	OAHC Funding Recommendation
CE	Wahl Ranch	Wild Rivers Land Trust	$4,008,000	**223-7104-22600**	**Fund**	$2,702,395
CE	Aspen Valley Ranch – Rim Tract	Deschutes Land Trust	$286,280	**223-7106-22616**	**Fund**	*$263,779
CE	Seeley Farm Phase 1	Oregon Agricultural Trust	$276,297	**223-7100-22521**	**Fund**	$276,297
CE	Pitchfork T	Deschutes Land Trust	$129,175	**223-7105-22611**	**Fund**	*$121,134
CE	O'Keefe Ranch	Oregon Agricultural Trust	$277,776	**223-7101-22522**	**Fund**	$277,776
CE	Ferrell, Justin and Jayna	Oregon Agricultural Trust	$223,056	**223-7102-22523**	**Fund**	$223,056
CE	Hagen	McKenzie River Trust	$289,233	**223-7103-22597**	**Fund**	*$269,255
		Total Conservation Easement Staff Recommendation				**$4,133,692**
CMP	Baker & EOARC	High Desert Partnership	$41,366	**223-7201-22602**	**Fund**	$41,366
CMP	Branch Road	Coast Fork Willamette Watershed Council	$24,942	**223-7200-22539**	**Fund**	$24,942
		Total Conservation Easement Staff Recommendation				**$66,308**
Total OAHC Funding Recommendation			**$5,556,125**			**$4,200,000**

* Funding recommendations changed due to ineligible costs included in proposed budget.

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item N

Spending Plan

Board Meeting April 25-26, 2023

Oregon
Tina Kotek, Governor

OREGON WATERSHED ENHANCEMENT BOARD

775 Summer Street NE, Suite 360
Salem OR 97301-1290
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Agenda Item N supports all of OWEB's Strategic Plan priorities

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Lisa Charpilloz-Hanson, Executive Director
Eric Williams, Grant Program Manager

SUBJECT: Agenda Item N – 2023-2025 Spending Plan
April 25-26, 2023 Board Meeting

I. Introduction

This report updates the board on OWEB's 2023-2025 Spending Plan. This item is for discussion only; no board action will be taken at this time. The board will, however, be asked to provide direction to staff for moving forward with final options for the July 2023 meeting.

II. Background

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, salmon license plates, general, and other funds. The bulk of OWEB's funding historically came from two major sources: Measure 76 Lottery funds and the Pacific Coastal Salmon Recovery Fund (PCSRF). In the current biennium, OWEB for the first time in its history, received significant general fund appropriations for drought and wildfire resilience, the Oregon Agricultural Heritage Program, and the Water Acquisitions program

At its July 2021 meeting, the board adopted a 2021-2023 Spending Plan totaling $142.9 million. In January 2022, the board updated the spending plan to include $10.8 million in drought resiliency funds appropriated during the December 2021 special legislative session. Following the short legislative session, the board added $19.1 million in April 2022 for wildfire recovery, the Oregon Agricultural Heritage Program, and water acquisition grants. In July 2022 the board added $14.3 million to the spending plan to include the second year of PCSRF as well as recaptured funds that were not spent from prior grant awards. In October 2022, the board added funds for Klamath post-dam removal watershed restoration to the spending plan by decreasing other line items. The spending plan total for 2021-2023 is $187.06 million. The 2021-2023 Spending Plan, total board awards and proposed awards to date, and funds remaining in each line item as of April 2023 is included on page 9 of this document.

III. 2023-2025 Spending Plan Development

Based on the February 2023 revenue forecast, it is estimated that a total combined approximately $131.7 million will be available for grant distribution through Measure 76 Lottery Funds and PCSRF funding over the course of the biennium for core programs, exclusive of legislatively directed funds and transfers to other agencies. This compares to $123.5 million for core programs in the current spending plan. For Lottery funding, this amount is dependent on revenues received. For PCSRF funding, this amount will be dependent on OWEB's successful receipt of funding through the competitive federal grant process. If Congressional funding is available, PCSRF provides an opportunity for eligible applicants—including OWEB on behalf of the State of Oregon—to submit grants each year. It should be noted that there are limitations on eligible uses of the available PCSRF funds, such that these funds cannot be used for all aspects of OWEB's grant programs.

In January 2023, the board was updated on the process and timeline for approving the 2023-2025 Spending Plan and discussed spending plan categories and estimated allotments to each category. Between January 2023 and April 2023, staff discussed funding options for specific grant types within each category. Based on board feedback and staff discussions, a draft 2023-2025 spending plan is provided as Attachments B (percentages) and C (spending plan detail).

IV. Spending Plan Line Items

The spending plan contains a range of items. Some are frequently discussed (for example, restoration, technical assistance, and monitoring grants; focused investments; and council capacity), while others (for example, weed grants, small grants, district capacity, and CREP) are less frequently on the board's agenda. At the April 2023 board meeting, staff will present on each line item to give the board a better sense of what is funded in each area. Subsequent attachments to the staff report provide summaries of the spending plan line items. Staff will present information to the board at the April meeting to provide additional details about the programs and answer any questions the board may have about those programs. These presentations are in advance of the July 2023 board meeting, at which decisions will be made on spending plan amounts for the 2023-2025 biennium.

V. Recommendation

This is an information item only. Staff will be seeking feedback on spending plan line items for development of a final proposal for board consideration in July 2023. No decisions will occur at the April 2023 meeting.

Attachments

A. 2021-2023 Spending Plan (located at the beginning of the board book)
B. Draft 2023-2025 Spending Plan
C. C-1 through -18 Spending Plan Line Item Summaries

OWEB 2023-2025 DRAFT GRANT FUNDS SPENDING PLAN

(Core Programs)

April 2023 Board Meeting

	GRANTS	Proposed 2023-2025 (July 2023) *for Board approval July 2023	Anticipated additions contingent upon FFY 2024 PCSRF funding	Anticipated 2023-2025 (July 2024) *for Board approval July 2024
1	**Open Solicitation:**			
2	Restoration	31,500,000	3,000,000	34,500,000
3	Technical Assistance			
4	Restoration TA	4,097,000	1,903,000	6,000,000
5	CREP TA	1,200,000	-	1,200,000
6	Stakeholder Engagement	2,000,000	-	2,000,000
7	Monitoring grants	4,500,000	-	4,500,000
8	Land and Water Acquisition	6,500,000	2,000,000	8,500,000
9	Weed Grants	3,250,000	-	3,250,000
10	Small Grants	2,800,000	-	2,800,000
11	Quantifying Outputs and Outcomes	1,000,000	-	1,000,000
12	**TOTAL**	**56,847,000**	**6,903,000**	**63,750,000**
13	**% of Total Core Programs**	**45.54%**		**48.39%**
14	**Focused Investments:**			
15	John Day Partnership	4,000,000	-	4,000,000
16	Baker Sage Grouse	2,348,000	-	2,348,000
17	Warner Aquatic Habitat	1,857,000	-	1,857,000
18	Rogue Forest Rest. Ptnrshp	1,800,000	-	1,800,000
19	Clackamas Partnership	2,309,000	-	2,309,000
20	Klamath Siskiyou Oak	2,715,000	-	2,715,000
21	East Cascades Oak	2,433,000	-	2,433,000
22	Siuslaw Coho	4,000,000	-	4,000,000
23	Coos	3,859,000	-	3,859,000
24	Estuaries	3,922,000	-	3,922,000
25	New FIP Solicitation	8,000,000		8,000,000
26	FI Effectiveness Monitoring	500,000	-	500,000
27	**TOTAL**	**37,743,000**	**-**	**37,743,000**
28	**% of Total Core Programs**	**30.23%**		**28.65%**
29	**Operating Capacity:**			
30	Capacity grants (WC/SWCD)	17,793,843	-	17,793,843
31	Statewide org partnership support	525,000	-	525,000
32	Organizational Collaboration	-	-	-
33	Partnership Technical Assistance	-	-	-
34	**TOTAL**	**18,318,843**	**-**	**18,318,843**
35	**% of Total Core Programs**	**14.67%**		**13.91%**
36	**Other-Prior Committed Funding:**			
37	CREP	750,000	-	750,000
38	Governor's Priorities	1,000,000	-	1,000,000
39	Lower Columbia Estuary Partnership	330,000	-	330,000
40	Strategic Implementation Areas	1,500,000	-	1,500,000
41	Sage Grouse Conservation Partnership	350,000	-	350,000
42	Klamath Post Dam Removal Watershed Restoration/KRRC-Contingency	8,000,000	-	8,000,000
43	**TOTAL**	**11,930,000**	**-**	**11,930,000**
44	**% of Total Core Programs**	**9.56%**		**9.06%**
45	**TOTAL Core Programs**	**124,838,843**	**6,903,000**	**131,741,843**

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Governor's Priorities

Recommended Amount: $1,000,000

I. Summary

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. These types of investments are unique in that they address both technical assistance and restoration needs while focusing on areas of importance to the Governor.

II. Program History

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.

These investments have varied over time and include:

- Support for initial work of forest-health collaboratives, including statewide coordination, technical support for local collaboratives, and planning and implementation support for these groups.

- Partnerships with the National Fish and Wildlife Foundation (NFWF) to support on-the-ground investments in Salmon Stronghold projects. This work led to a multi-organizational partnership to develop a Coastal Coho Business Plan and component action plans through a partnership with NFWF, the Wild Salmon Center, National Oceanic and Atmospheric Administration, and Oregon Department of Fish and Wildlife.

- Support for development of a federal, state, and local agency and organization partnership focused on clean water. The partnership includes a comprehensive framework in support of monitoring and implementation focused on the state's agricultural water quality program, currently focused on Strategic Implementation Areas.

- Support for the development of a working lands easement program concept focused on agricultural lands. This resulted in legislative approval of the Oregon Agricultural Heritage Program.

III. Demand

Investments in this line item are typically approximately $1 million per biennium. Because this program operates as a proactive grant-making item, the demand does not exceed the funding available.

IV. Future Need

The Governor's Office is in the process of identifying future focus areas for the Governor's Priorities funding and will provide updates at future meetings. In addition, as in previous biennia, the Governor's Office may come before the board during the biennium with additional program priorities.

V. Highlights of Accomplishments or Program Developments in the 21-23 Biennium

In the last biennium, the board invested in three initiatives through this spending plan item:

Post-Fire Recovery Immediate Response - $300,000 to provide grants to support immediate post-fire recovery work during the 2021 and 2022 fire seasons. Eligible implementation actions included stabilization efforts and log salvage for future restoration. Funding also could be used for stakeholder engagement to aid landowners in accessing fire-response funding along with technical assistance for fire impact assessments. Grants awarded under this offering included post-fire immediate recovery grants for the Cougar Peak, Bootleg, and Double Creek wildfires.

Climate-Related Initiatives - $350,000 to support work that was mutually agreed upon by OWEB and the Governor's Office. Grants awarded under this offering included a grant to develop a baseline soil carbon map for Oregon, and a technical assistance grant that assesses the current and forecasted need for reforestation, along with the capacity of the reforestation pipeline (e.g., seed, seedling production, site preparation, planting, post-planting maintenance, etc.) following wildfires and other climate-driven events and disturbances.

Tide Gate Partnership - $247,000 to support efforts associated with increased tide gate repair and replacement efforts along the Oregon Coast and lower Columbia River. Grants awarded under this offering included a monitoring grant to develop a common monitoring approach for tide gate replacement projects, and a technical assistance grant to develop an engineering tool that can model tide gate size based on location and other inputs, to be used by landowners and regulatory agencies to assist with complex design and permitting processes.

The remaining $53,000 balance in the 2021-2023 Governor's Priorities line item was allocated to the Klamath River post-dam removal watershed restoration (see Attachment C-18).

Investments by Biennium		
Biennium	Spending Plan (after any additional funds added)	Remaining Spending Plan at end of biennium
2019-2021	$793,000	$0
2021-2023	$1,000,000	$0
2023-2025	$1,000,000	

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Open Solicitation - Restoration

Recommended Amount: $34,500,000

I. Summary

Open solicitation restoration grants are OWEB's primary method of delivering support for watershed projects that restore watershed functions. Open solicitation restoration grants are offered twice per year, spring and fall, through a competitive granting program.

II. Program History

Open solicitation restoration grants aid landowners and landmanagers 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. Initial investments were modest and focused on restoration demonstration projects. The number of projects and level of investment quickly increased as the Oregon Legislature and the public supported OWEB through Ballot Measures 66 and 76. At the same time, organizational capacity within watershed councils, soil and water conservation districts, and other groups to plan and implement projects grew, and landowners became engaged in implementing voluntary projects.

Restoration accomplishments in Oregon, including those funded by OWEB, have been reported through the Oregon Watershed Restoration Inventory (OWRI). From 1999 through 2022, OWEB invested $430 million in 7,146 OWEB restoration projects that have reported their accomplishments to OWRI. Riparian, road, upland, fish passage, and instream restoration activities make up the largest number of projects, respectively. These projects have resulted in:

- 6,563 linear stream miles treated through instream and riparian activities
- 7,048 miles of habitat made accessible for fish
- 1,392,620 acres treated through upland activities
- 61,369 acres of wetland/estuarine habitat restored/created/enhanced.

III. Demand

Should the board award recommended restoration projects at the April 2023 board meeting, the board will have awarded 65% of requested funds, or $34.6 million out of $52.9 million requested.

The board will have awarded 87% of the funds requested in applications recommended for funding by regional review teams.

IV. Future Need

Even with 11 FIPs operating during the biennium, demand for open solicitation restoration funds remained high. The average restoration grant award continues to increase, exceeding $200,000 this biennium. This is up from about $150,000 in 2017.

V. Highlights of Accomplishments or Program Developments in the Biennium

This biennium saw the return to in-person site visits and review team meetings, a welcome change from pandemic-induced virtual meetings. Regional Program Representatives (RPRs) provided facilitation of each other's regional review team meetings as well as peer review of evaluations. This model provided RPRs with opportunities to both broaden exposure to many more reviewers as well as ensure consistency throughout the review process.

Investments by Biennium		
Biennium	Spending Plan (after any additional funds added)	Remaining Spending Plan at end of biennium
2019-2021	$24,565,000	$0
2021-2023	$32,000,000	$*
2023-2025	$34,500,000	

*Full biennium data not available

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Open Solicitation – Technical Assistance

Recommended Amount: $6,000,000

I. Summary

Open solicitation technical assistance (TA) grants are offered twice per year, spring and fall, through a competitive granting program for watershed assessments and designs that lead to eligible restoration projects. TA grants through the open solicitation process are currently capped at $75,000 per grant.

II. Program History

Since 1999, OWEB has been awarding TA grants. 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. There are two types of TA grants offered through the open solicitation program:

- Technical Design and Engineering: Development of technical design for a restoration project.
- Resource Assessment and Planning: Development of an implementation plan for restoration activities.

III. Demand

Should the board award recommended TA projects at the April 2023 board meeting, the board will have awarded 61% of requested funds, or $4.489 million out of $7.2 million requested. The board will have awarded 79% of the funds requested in applications recommended for funding by regional review teams.

We have also seen a positive development in the form of TA requests to fund development of land and water acquisition grants. While these activities have always been eligible for TA grant funding, most funding was awarded to develop restoration projects.

IV. Future Need

Even with 11 FIPs operating during the biennium, demand for open solicitation TA funds remained high. This trend is expected to continue, and increased TA fund requests are expected due to several factors: 1) increased need for cultural resources compliance in OWEB-funded grants; 2) increased permitting costs due to "no net-rise flood certifications"; 3) increased services required to address

local land use permitting; and 4) increased needs to produce fully permitted projects prior to seeking restoration funds. For these reasons, staff will request as part of the spending approval in July 2023, the following policy changes for TA grants:

Removal of the $75,000 cap (the cap currently does not apply to Focused Investment Partnership TA grants).

Since costs are increasing and match funds are more difficult to obtain for TA projects, greatly reducing the match requirement.

V. Highlights of Accomplishments or Program Developments in the Biennium

We have continued to see a trend toward more complete design work in TA grant projects. This reduces uncertainty in permitting and budgeting for restoration projects, which has become more critical with inflationary pressures experienced in the last two years.

Investments by Biennium		
Biennium	Spending Plan (after any additional funds added)	Remaining Spending Plan at end of biennium
2019-2021	$3,270,000	$0
2021-2023	$5,500,000	$*
2023-2025	$6,000,000	

*Full biennium data not available

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Open Solicitation – Stakeholder Engagement

Recommended Amount: $2,000,000

I. Summary

Open solicitation stakeholder engagement projects include outreach efforts that are necessary for carrying out eligible restoration and acquisition projects, or programs that lead to eligible projects.

II. Program History

From 1999 to 2011, OWEB awarded outreach and education grants. Under Measure 66, these activities were funded through non-capital funds, which could be used for a variety of purposes that furthered the goals of improving water quality, recovering fish and wildlife, and enhancing watershed health.

Measure 76 changed the constitutional language regarding education and outreach grant offerings. Due to these changes, beginning with the October 2011 grant cycle, OWEB only offered outreach grants that are necessary for activities to protect or restore native fish and wildlife habitat, water quality, or stream flows. Grants for education only are not eligible under Measure 76. In 2017, the board adopted rules for the new stakeholder engagement offering that provided further guidance for the program.

III. Demand

Should the board award recommended stakeholder engagement projects at the April 2023 board meeting, the board will have awarded 74% of requested funds, or $1.8 million out of $2.4 million requested. The board will have awarded 95% of the funds requested in applications recommended for funding by regional review teams.

IV. Future Need

As projects, permitting, and community engagement become more complex, the need for stakeholder engagement grants will continue to grow. These grants provide a form of capacity funding that is essential for project development. More communication is needed to secure understanding and buy-in for eligible restoration and acquisition projects from landowners, operators, and communities. While the path is still being determined for many organizations, reaching previously underserved communities is emphasized more than in the recent past.

Stakeholder engagement grants are an ideal opportunity to help OWEB achieve its diversity, equity, and inclusion goals.

V. Highlights of Accomplishments or Program Developments in the Biennium

Regional Program Representatives continue to communicate the value of the stakeholder engagement offering to prospective grantees. While community engagement can add length to the project development timeline, it is often essential to achieving successful restoration and acquisition outcomes.

Investments by Biennium (in millions)		
Biennium	Spending Plan (after any additional funds added)	Remaining Spending Plan at end of biennium
2019-2021	$1,014,000	$0
2021-2023	$2,750,000	$*
2023-2025	$2,000,000	

*Full biennium data not available

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Open Solicitation Monitoring Grants

Recommended Amount: $4,500,000

I. Summary

Prior to 2021, open solicitation monitoring grants were solicited once a year during the fall grant cycle. Beginning in 2021, these monitoring grants switched to being solicited during the spring grant cycle, with board awards in the fall.

Eligible monitoring activities include describing current watershed conditions and establishing trends about watershed conditions by gathering and analyzing data. Applicants can also request funding for evaluating the specific effects of a restoration or acquisition project or program by comparing similar watershed components before and after implementation of restoration or acquisition. Effectiveness monitoring is not a requirement of any OWEB grant and is above and beyond compliance monitoring/implementation reporting. Monitoring information can assist restoration practitioners and OWEB in determining the biological and physical changes due to restoration actions and inform future restoration design. Monitoring grant applications must articulate the monitoring question to be answered and provide information about complementary monitoring that is occurring in the watershed, among other monitoring grant application requirements. Monitoring projects must make their monitoring results publicly available.

Open solicitation monitoring grants differ from OWEB's Quantifying Conservation Outcomes and Outputs line item in the spending plan in that the open solicitation monitoring grants are proposed by local partners to OWEB as part of the agency's responsive grant-making process. The monitoring projects funded in the open solicitation grant program are designed and led by grantees, and typically are smaller in scope and effort than effectiveness monitoring projects funded by OWEB in the Quantifying Conservation Outcomes and Outputs.

II. Program History

As a part of the Oregon Plan for Salmon and Watersheds, OWEB and other state natural resources agencies developed an associated monitoring strategy. This strategy described an overall framework for structuring coordinated monitoring and provided direction to help integrate Oregon Plan programs and monitoring with region-wide watershed enhancement and salmon recovery 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 Oregon Plan progress.

III. Demand

The total allocation to open solicitation monitoring grants in the 2021-2023 biennium was increased from previous biennia for a total of $4.750 million, resulting in a total of 35 applications being funded. The board awarded 60% of requested funds, or $4.579 million out of $7.686 million

requested. The board awarded 91% of the funds requested in applications that were recommended for funding by regional review teams. The total allocation to open solicitation monitoring grants in the 2023-2025 biennium is $4.5 million and is $250,000 lower compared to the previous biennium.

IV. Future Need

It is anticipated that a consistent and significant need for monitoring funds will extend into the next biennium, given that 24-35 monitoring applications have been received each year since 2015. Alternate sources of funding for monitoring in Oregon are limited, and in some cases other funding sources have seen reductions in available funds in recent years. For example, Oregon Department of Environmental Quality's Clean Water Act Section 319 grants can only fund a limited number of monitoring projects statewide due to limited funding. In addition, recent budget cuts in Bonneville Power Administration's Research, Monitoring and Evaluation Program have resulted in OWEB receiving more monitoring applications from entities in the Columbia Basin.

V. Highlights of Accomplishments or Program Developments in the Biennium

During the 2021-2023 open solicitation grant cycle, OWEB's effectiveness monitoring coordinator and regional program representatives continued to offer informal pre-application consultations with potential monitoring applicants. These consultations allow the applicant to describe their monitoring interest and provide an opportunity for OWEB staff to advise them on integral components of a successful monitoring project. In addition, OWEB staff convened the Oregon Plan Monitoring Team to discuss the technical merits and potential benefits of monitoring applications received during the 2021-2023 biennium. These reviews were provided to the regional review teams to inform their funding recommendations.

Investments by Biennium		
Biennium	Spending Plan (after any additional funds added)	Remaining Spending Plan at end of biennium
2019-2021	$1,750,000	$0
2021-2023	$4,750,000	$*
2023-2025	$4,500,000	

*Full biennium data not available

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Open Solicitation - Land and Water Acquisition

Recommended Amount: $8,500,000

I. Summary

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 trusts.

OWEB funds several types of land and water acquisitions: the purchase of property in fee simple, conservation easements, permanent water rights, water leases, and contractually protected instream flow.

II. Program History

Land Acquisition: The board began making land acquisition grants in 1998. Several grants were awarded during the first few years of the program. In 2000, interest in the program began growing, and grew significantly over subsequent biennia. To date, the board has awarded approximately $55 million in land acquisition grants, leveraging approximately $97 million in matching funds and protecting approximately 87,000 acres.

Water Acquisition: The board awarded its first water acquisition grant in 2001. Until 2010, only five grants were awarded, with a relatively small award amount for each project (i.e., under $40,000). Beginning in 2010, interest in water acquisition grants began to grow because of increased organizational capacity in select areas of the state to carry out water acquisition projects and programs and increased concern about instream flow issues. Since 2010, the board has awarded over $5.01 million for water acquisition grants, resulting in the short-term transfer of over 103 cubic feet per second (cfs), or 17,987 acre-feet and the permanent transfer of about 33.5 cfs, or 6,477 acre-feet to instream use. To date, funding requests to OWEB have come from three primary locations in the state: the Deschutes, Klamath, and mid-Columbia basins. In addition, OWEB is now seeing more applications from the Rogue Basin. These awards have supported a range of activities from permanent transfers and temporary leases of instream water rights to incentivizing voluntary curtailments by irrigators.

III. Demand

Land Acquisition: Two open solicitation grant cycles were held in the 2021-2023 biennium. Five applicants requested approximately $12 million in funding, with three projects awarded $3 million, and one project requesting $2.9 million recommended for funding at the April 2023 board meeting. In addition, one land acquisition project that is part of a Focused Investment Partnership was awarded $818,550.

Water Acquisition: Due to a pandemic-induced pause in grant offerings, there was only one solicitation in the 2021-2023 biennium resulting in two eligible applications requesting $509,875.

IV. Future Need

Land acquisition: Funding needs in the 2023-2025 biennium are expected to be approximately the same as the 2021-2023 biennium.

Water acquisition: During the 2022 Legislative session, $10 million in general funds was appropriated for water acquisition grants as part of a drought resilience package. The funds were deposited in OWEB's Flexible Incentives Account, which is continuously appropriated. Since nearly all of these funds will be available in 2023-2025, lottery or PCSRF funds are not expected to be needed for water acquisition grants.

V. Highlights of Accomplishments or Program Developments in the Biennium

Land Acquisition: In the first cycle of the biennium, the board awarded grants to projects that protect ecosystem connectivity, increase climate resilience, and restore and protect tidal wetlands. The scope of these projects, and the significance of the habitat they involve, align with the board's established principles for the program. One of the awarded projects was completed, in addition to the completion of five projects awarded funding in prior biennia.

Water Acquisition: To incorporate recent changes to program rules, the grant application was updated for a 2022 solicitation. OWEB is now overseeing a greater portion of the application review process with National Fish and Wildlife Foundation partnering on the review of organizational capacity, transaction soundness, and water rights valuation. New guidance was created reflecting the updated 2020 rules and the 2022 solicitation resulted in four applications. Two of those applications are undergoing technical review in advance of board awards in July.

Investments by Biennium		
Biennium	Spending Plan (after any additional funds added)	Remaining Spending Plan at end of biennium

2019-2021	$4,905,000	$0
2021-2023	$8,500,000	$*
2023-2025	$8,500,000	

*Full biennium data not available

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Open Solicitation – Small Grant Program

Recommended Amount: $2,800,000

I. Summary

OWEB small grant program funds are awarded biennially to cooperative partnerships of watershed councils, soil and water conservation districts, and tribes. These small grant teams (Teams) form to prioritize and implement smaller-scale watershed restoration projects. Teams select from an OWEB rule-defined list of actions when identifying priority watershed concerns for their small grant area. Priority concerns include: fish passage; urban impact reduction; road impact reduction; water quality and quantity/irrigation efficiency; and instream, riparian, wetland, and upland process and function. Teams set application cycles, review submitted proposals, and submit recommended projects to OWEB.

II. Program History

In 1999 OWEB investigated ways to be more responsive to small restoration projects. During this time the Oregon Legislature encouraged the agency to initiate a county-based, local cost-share program through a budget note in OWEB's legislative adopted budget.

In January 2002, the board adopted administrative rules establishing the small grant program with the goal of supporting implementation of the Oregon Plan for Salmon and Watersheds by funding small, straightforward restoration projects designed to improve water quality, water quantity, and fish and wildlife habitat. Such projects are to include, but are not limited to, those developed to address Total Maximum Daily Loads, Agriculture Water Quality Management Plans, urban non-point source pollution management plans, and the Board of Forestry's Forestry Program for Oregon.

The board set boundaries for 28 geographic areas throughout the state. Within each area a Team may form comprised of representatives from local watershed councils, soil and water conservation districts, and tribes. Teams are guided by self-defined operating procedures, along with a list of watershed priorities and eligible project types revisited biennially. Historically the board has awarded $2.8 million ($100,000 per team) per biennium to the program.

In the 2017-2019 biennium, the board approved an incentive for Teams with high demand for funds where unexpended small grant funds from the previous biennium are provided to Teams who allocate 95% of available funds by the midpoint of the biennium. In 2017-2019, $350,000 in

additional funds were allocated to 12 Teams; in 2019-2021, three Teams received $95,000 in additional funds.

III. Demand

In the 2021-2023 biennium, all 28 Teams successfully reorganized and were awarded $100,000 each. As of March 24, 2023, 149 project grants have been awarded allocating more than $1.7 million of the available $2.8 million in small grant program funding this biennium. This is a typical rate of spending as teams work to expend the balance of available funds by June 30, 2023.

IV. Future Need

The biennium spending plan need is expected to remain stable at $2.8 million. The continuation of unspent program funds carryover is requested to allow high-performing Teams access to carried over funding after expending their original funding award at the mid-point of the biennium.

Three Teams have requested adjustment to their Small Grant Area boundaries. Small grant program rules allow Teams to petition the OWEB Board to adjust the boundaries of Small Grant Areas. The administrative rule outlines a process whereby the OWEB Board may choose to consider a boundary-adjustment petitions once a biennium at the time it considers reauthorizing small grant program funds for the next biennium. In keeping with rule, Teams 17, 18, and 19 petition to adjust their boundaries to better align with existing watershed restoration partnerships and ecological similar landscapes. A written request for boundary adjustment, approved by the Teams 17, 18 and 19 along with a map illustrating the boundary change will be provided to the board in July prior to reauthorization of the small grant program for the 2023-2025 biennium

V. Highlights of Accomplishments or Program Developments in the Biennium

Investments by Biennium		
Biennium	Spending Plan (after any additional funds added)	Remaining Spending Plan at end of biennium
2019-2021	$1,500,000	$0
2021-2023	$2,800,000	$*
2023-2025	$2,800,000	

*Full biennium data not available

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Quantifying Conservation Outputs and Outcomes

Recommended Amount: $1,000,000

I. Summary

Quantifying Conservation Outputs and Outcomes (QCOO) includes OWEB-led initiatives that evaluate specific types of restoration actions at a broad geographic and temporal scale, rather than at the project scale. QCOO are targeted investments that are identified and developed collaboratively by staff and local partners. QCOO is different from Open Solicitation Monitoring Grants, which are proposed by local partners and considered through OWEB's responsive grant program. For example, QCOO funds supported the evaluation of restoration approaches that aim to achieve Stage 0 conditions, and to evaluate tide gate restoration effectiveness. QCOO funds have also supported outcomes tracking for OWEB's Focused Investment Partnership grants, and the 'Telling the Restoration Story' grant offering, which helps local partners compile and report existing data to highlight progress towards meeting ecological outcomes and communicate lessons learned. OWEB staff support QCOO efforts by convening cross-agency teams to engage with natural resources agencies to achieve common objectives. For example, OWEB convenes a team to provide guidance for Strategic Implementation Area (SIA) monitoring, including the Oregon Departments of Agriculture, Environmental Quality, and Fish and Wildlife.

II. Program History

In September 2004, the board authorized the initial concept of an Effectiveness Monitoring program and hired the Effectiveness Monitoring Coordinator position. Staff worked closely with the board to identify the appropriate scale for program-level monitoring efforts, such as at the watershed-scale Upper Middle Fork John Day Intensively Monitored Watershed (IMW) that was established in 2008. In September 2016, OWEB filled the Conservation Outcomes Coordinator position, which assists the state of Oregon with quantifying outcomes associated with collective conservation actions. QCOO is the title for the previously named Programmatic Effectiveness Monitoring line item in OWEB's spending plan.

III. Demand

Demand for QCOO has been consistently increasing since 2017. However, due to reductions in Lottery revenue, the funding amount for this line item in OWEB's 2019-21 spending plan was reduced from $1,278,000 to $760,000 and some QCOO staff were shifted to other positions due to budget challenges. In the 2021-23 biennium, OWEB re-adjusted the spending plan and budgeted $1,250,000 in this line item. Should the board award recommended projects at the April 2023 board meeting, the board will have awarded $983,000. Throughout these past two biennia, demand for QCOO has remained high, with several 'Telling the Restoration Story' proposals in progress; and emerging needs to document climate benefits from OWEB investments and continuing to support Stage 0 restoration effectiveness monitoring.

IV. Future Need

Staff continues to work with the board to identify priority QCOO needs. At the January 2023 board meeting, strong support was expressed for 'Telling the Restoration Story'. Following that meeting, staff met with

interested board members to discuss which projects are considered for this offering and how the resulting products could reach broader audiences including non-traditional partners. In addition, staff are exploring whether 'Telling the Restoration Story' could highlight outcomes from a variety of actions such as post-fire recovery grants. Pursuing these concepts may require additional resources for the offering. Staff are planning to utilize funds from this line item in the 2023-2025 biennium to continue to support physical habitat monitoring to track restoration effectiveness monitoring in the Middle Fork John Day River IMW. There are ongoing needs to support stage 0 restoration effectiveness monitoring as OWEB continues to fund these valley-wide restoration actions across Oregon.

To increase efficiency and serve Oregonians, there is an increasing need for coordination among state natural resources agencies. For example, OWEB and other water agencies are exploring how to provide water data through a new, more efficient, and transparent online Water Data Portal. OWEB continues to advise and support inter-agency efforts to provide technical resources to grantees and partners. Moreover, staff are compiling resources to help grantees identify specific monitoring needs related to climate change and develop monitoring plans that consider climate change.

V. Highlights of Accomplishments or Program Developments in the Biennium

'Telling the Restoration Story' - These grants support compilation, analysis, and/or interpretation of existing data from a watershed restoration project to tell data driven stories restoration outcomes. In the 2021-23 biennium, three new projects were funded and are currently working towards product development describing: (1) pollinator habitat in the Zumwalt Prairie acquisition; (2) fish recovery improvements under the collaborative Lostine flow agreement in Wallowa County; (3) and bull trout restoration in Sun Creek, located in the Klamath Basin. Staff has recruited grantees to identify three projects that are in the process of submitting applications in 2023 (Ni-les'tun on the Oregon Coast; Little Butte/Bear creeks in the Rogue watershed; and Sandy River Basin near Portland). In addition, at least three more projects are currently under active exploration. In January 2023, the board approved $150,000 for this initiative, providing an opportunity for several additional proposals (each project award is typically $30,000).

Carbon and Riparian Condition Monitoring of Riparian Reforestation Projects – OWEB is working with The Nature Conservancy to support a statewide monitoring project that will assess the effectiveness of streamside revegetation projects for restoring riparian function and evaluate what project characteristics and management practices lead to restored riparian function and climate benefits. In January 2023, the board approved $100,000 for monitoring carbon and riparian condition of riparian planting restoration projects.

Effectiveness Monitoring of Stage 0 Restoration and Workshop – OWEB awarded funding to the Upper Deschutes Watershed Council and the McKenzie Watershed Alliance to implement the first phase of the effectiveness monitoring of Stage 0 restoration actions in Whychus Creek and South Fork McKenzie River, respectively. In November 2020, practitioners, researchers, regulators and other stakeholders convened at the Stage 0 Monitoring Workshop to discuss current topics and identify data gaps related to implementing and monitoring restoration projects intended to achieve a Stage 0 condition.

Investments by Biennium		
Biennium	Spending Plan (after any additional funds added)	Remaining Spending Plan at end of biennium
2019-2021	$760,000	$0
2021-2023	$1,250,000	$*
2023-2025	$1,000,000	$

*Full biennium data not available

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Focused Investment Partnerships

Recommended Amount: $37,743,000

Components of recommended amount:

Cohort 2 FIP Initiatives	$12,314,000
Cohort 3 FIP Initiatives	$16,929,000
2023-2025 FIP Solicitation	$8,000,000
FIP Effectiveness Monitoring	$500,000

I. Summary

Focused Investment Partnerships (FIP) investments address a board-identified priority of significance to the state; achieve clear and measurable ecological outcomes; use integrated, results-oriented approaches as identified through a strategic action plan; and are implemented by high-performing partnerships. Focused Investment Effectiveness Monitoring (EM) supports efforts to evaluate outcomes from dedicated FIP funding to help board, staff, and stakeholders to adaptively manage partnership investments in the future.

II. Program History

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. At that time, no formal definition, process, or solicitation approach for the FIP program existed. In October 2013, OWEB initiated a nine-month process to develop the definition, criteria, and program structure (including solicitation approach and process) for the FIP category in the Long-Term Investment Strategy. This was followed by initiation of an 18-month process to set board priorities and solicit for investments within the program.

Following an extensive public process, the board selected the following priority areas for focused investments at its April 2015 meeting:

1) Sagebrush/Sage-Steppe Habitat

2) Oregon Closed Lakes 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

To date, OWEB has funded 16 FIP initiatives. Six partnerships were awarded FIP funding for 6-year initiatives in 2016 as Cohort 1, five partnerships were awarded FIP funding in 2019 as Cohort 2, and five more partnerships were awarded FIP funding in 2022 as Cohort 3.

Recognizing the need to understand how FIPs are achieving their intended ecological and programmatic impacts, the board awarded funds to the Bonneville Environmental Foundation (BEF) in April 2016 to help OWEB establish a structure for evaluating progress towards ecological outcomes and program-level impacts, based on theory of change approaches. The resulting progress monitoring framework helps OWEB and local implementers evaluate progress toward outcomes for each of the board-identified ecological priorities.

III. Demand

In August 2021, staff announced the solicitation for FIP initiatives for the 2021-2023 biennium. Eleven applications were submitted, and in July 2022 five partnerships were awarded FIP initiative funding by the board.

In January 2022, the board awarded Focused Investment EM funding to support the ongoing work of the OWEB-BEF partnership toward the continued development and improvement of the FIP program, and grants to fill priority monitoring gaps for the Cohort 2 FIP initiatives. In April 2022, the board awarded additional Focused Investment EM funding to support a post-FIP reporting pilot project with the Ashland Forest All Lands Restoration FIP Initiative.

IV. Future Need

Details on the budgets for the Cohort 2 and 3 FIP initiatives are found in Attachment A. Project work plans for Cohort 2 and 3 FIP initiatives for the 2023-2025 biennium are available upon request.

During the 2023-2025 biennium, the intent of the Focused Investment EM line item is to continue FIP program evaluation and improvements through work with the BEF team, completing Adaptive Management pilot projects, and providing support to Cohort 3 FIPs as they develop metrics and monitoring plans. Other anticipated work includes hosting a FIP Gathering where all cohorts of FIP initiatives across the state would be invited to share with and learn from each other. Depending on progress for the post-FIP pilot project initiated in the 2021-2023 biennium, additional grant opportunities for Cohort 1 FIPs to engage in post-FIP reporting could be offered.

V. Highlights of Accomplishments or Program Developments in the Biennium

An update on progress for Cohort 2and 3 FIP initiatives was provided at the January 2023 meeting, which featured progress tracking reports for the Cohort 2 FIP initiatives.

For Focused Investment EM, OWEB has entered into supplemental monitoring grant agreements with two of the five Cohort 2 FIP initiatives to fill gaps identified in their strategic action plan results chains; one grant agreement is pending; and the remaining two FIPs have approved monitoring concepts in place and anticipate submitting full applications within the coming weeks. BEF is working with OWEB staff to review and update the strategic action plan template which will be made available with the 2023-2025 FIP solicitation. At the time of writing this staff report, BEF is in the process of final formatting of a partnership governance guidance document that will be a reference for FIP program partnership applicants and others interested in strengthening the governance of their partnerships. BEF has engaged two Cohort 2 FIP initiatives in a pilot program in applying an adaptive management framework to their work, which will inform publicly available guidance on the topic.

Investments by Biennium		
Biennium	Spending Plan (after any additional funds added)	Remaining Spending Plan at end of biennium
2019-2021	$22,110,000	$0
2021-2023	**$32,391,000	$*
2023-2025	$37,743,000	

*Full biennium data not available

**Includes 'make whole' funding that was carried forward from 2019-2021.

Attachment

A. FIP Budget Tables

Focused Investment Partnerships (FIP)
2023-202 FIP Budget Tables

Table 1. Baker Sage-grouse LIT

OWEB Grant Category	2021-2023 OWEB Investment	2023-2025 OWEB Investment
Partnership Capacity	$71,380	$56,379
Stakeholder Engagement	$552,386	$552,386
Technical Assistance	$24,200	$0
Restoration	$1,753,821	$886,875
Land Acquisition	$0	$750,000
Water Acquisition	$0	$0
Monitoring	$33,368	$101,979
TOTAL	***$2,435,155**	**$2,347,619**

* Total includes “make whole funds” awarded in this biennium – Covid reduction from the previous biennium.

Table 2. Clackamas Partnership

OWEB Grant Category	2021-2023 OWEB Investment	2023-2025 OWEB Investment
Partnership Capacity	$140,001	$126,000
Stakeholder Engagement	$23,000	$23,000
Technical Assistance	$320,760	$0
Restoration	$2,385,532	$1,950,000
Land Acquisition	$0	$0
Water Acquisition	$0	$0
Monitoring	$212,707	$210,000
TOTAL	***$3,082,000**	**$2,309,000**

* Total includes “make whole funds” awarded in this biennium – Covid reduction from the previous biennium.

Focused Investment Partnerships (FIP)
2023-202 FIP Budget Tables

Table 3. John Day Basin Partnership

OWEB Grant Category	2021-2023 OWEB Investment	2023-2025 OWEB Investment
Partnership Capacity	$350,763	$143,217
Stakeholder Engagement	$0	$0
Technical Assistance	$53,737	$145,000
Restoration	$2,094,806	$3,241,783
Land Acquisition	$818,550	$0
Water Acquisition	$0	$0
Monitoring	$798,293	$470,000
TOTAL*	***$4,116,249**	**$4,000,000**

* Total includes “make whole funds” awarded in this biennium – Covid reduction from the previous biennium.

Table 4. Rogue Forest Partnership

OWEB Grant Category	2021-2023 OWEB Investment	2023-2025 OWEB Investment
Partnership Capacity	$60,000	$90,000
Stakeholder Engagement	$213,000	$170,000
Technical Assistance	$180,000	$133,000
Restoration	$2,067,000	$1,107,000
Land Acquisition	$0	$0
Water Acquisition	$0	$0
Monitoring	$180,000	$300,000
TOTAL	**$2,700,000**	**$1,800,000**

Focused Investment Partnerships (FIP)
2023-202 FIP Budget Tables

Table 5. Warner Basin Aquatic Habitat Partnership

OWEB Grant Category	2021-2023 OWEB Investment	2023-2025 OWEB Investment
Partnership Capacity	$30,990	$45,000
Stakeholder Engagement	$0	$75,000
Technical Assistance	$0	$100,000
Restoration	$2,132,756	$1,537,000
Land Acquisition	$0	$0
Water Acquisition	$0	$0
Monitoring	$129,485	$100,000
TOTAL*	***$2,293,231**	**$1,857,000**

* Total includes “make whole funds” awarded in this biennium – Covid reduction from the previous biennium.

Table 6. Klamath Siskiyou Oak Network

OWEB Grant Category	2021-2023 OWEB Investment	2023-2025 OWEB Investment
Partnership Capacity	$188,934	$189,965
Stakeholder Engagement	$166,219	$162,724
Technical Assistance	$100,058	$137,384
Restoration	$688,876	$2,019,392
Land Acquisition	$0	$0
Water Acquisition	$0	$0
Monitoring	$229,155	$205,270
TOTAL	**$1,373,242**	**$2,714,735**

Focused Investment Partnerships (FIP)
2023-202 FIP Budget Tables

Table 7. East Cascades Oak Partnership

OWEB Grant Category	2021-2023 OWEB Investment	2023-2025 OWEB Investment
Partnership Capacity	$103,000	$252,000
Stakeholder Engagement	$77,000	$0
Technical Assistance	$456,000	$0
Restoration	$1,280,000	$1,858,000
Land Acquisition	$535,000	$323,000
Water Acquisition	$0	$0
Monitoring	$93,000	$0
TOTAL	**$2,544,000**	**$2,433,000**

Table 8. Oregon Coast Estuary Collaborative

OWEB Grant Category	2021-2023 OWEB Investment	2023-2025 OWEB Investment
Partnership Capacity	$35,200	$131,000
Stakeholder Engagement	$55,000	$70,000
Technical Assistance	$322,300	$353,700
Restoration	$225,500	$1,947,000
Land Acquisition	$825,000	$1,300,000
Water Acquisition	$0	$0
Monitoring	$60,000	$120,000
TOTAL	**$1,523,000**	**$3,921,700**

Focused Investment Partnerships (FIP)
2023-202 FIP Budget Tables

Table 9. Siuslaw Coho Partnership

OWEB Grant Category	2021-2023 OWEB Investment	2023-2025 OWEB Investment
Partnership Capacity	$257,235	$115,000
Stakeholder Engagement	$75,000	$23,000
Technical Assistance	$75,000	$150,000
Restoration	$3,374,358	$2,382,383
Land Acquisition	$0	$1,104,617
Water Acquisition	$0	$0
Monitoring	$218,000	$225,000
TOTAL	**$3,999,593**	**$4,000,000**

Table 10. Coos Basin Coho Partnership

OWEB Grant Category	2021-2023 OWEB Investment	2023-2025 OWEB Investment
Partnership Capacity	$112,704	$98,909
Stakeholder Engagement	$183,478	$126,691
Technical Assistance	$200,000	$185,000
Restoration	$2,320,568	$2,542,500
Land Acquisition	$19,550	$176,550
Water Acquisition	$0	$0
Monitoring	$633,314	$729,321
TOTAL	**$3,469,614**	**$3,858,971**

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Statewide Organization Partnership Technical Assistance

Recommended Amount: $525,000

I. Summary

The Oregon 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 more than 150 conservation organizations.

II. Program History

Since 2007, the board has approved grants to support 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, training, webinars, regional and local media assistance, and one-on-one work with local organizations.

In 2012, OWEB, NOWC, and OACD began meeting to discuss ways to further advance collaboration among the organizations. This resulted in NOWC and OACD taking steps to formalize a partnership that included shared office space and staff resources, allowing them to reduce overhead and expand capacity. In recent years, the organizations' work has expanded to include COLT and OCEAN. This expanded effort resulted in a Partnership request to the board for the 2015-2017 biennium that included funding for partnership-focused deliverables in each of the four organizations. This model has continued through the 2021-2023 biennium.

III. Demand

The Partnership has continued to focus on providing educational opportunities for their constituents including the CONNECT conference and webinars. These events continue to be well attended and cover many relevant topics.

IV. Future Need

OWEB staff are proposing a slight increase in funding for the 2023-2025 biennium. The Partnership and OWEB staff have discussed increased opportunities for service delivery to constituents,

including support to track and apply for the increased federal funding opportunities because of recent federal legislation.

V. Highlights of Accomplishments or Program Developments in the Biennium

Examples of accomplishments include:

2022 CONNECT Conference, which was held both in person and virtually;

Monthly webinars covering a diversity of topics;

Site tours; and

At least one earned media article a month.

Investments by Biennium		
Biennium	Spending Plan (after any additional funds added)	Remaining Spending Plan at end of biennium
2019-2021	$425,000	$0
2021-2023	$450,000	$*
2023-2025	$525,000	

*Full biennium data not available

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Council Capacity

Recommended Amount: $9,486,708 (total line item $17,793,843 including Districts)

I. Summary

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 projects to protect or restore native fish or wildlife habitats and natural watershed functions to improve water quality or stream flows of watersheds.

II. Program History

OWEB has provided operating grants to watershed councils for more than 20 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 statutory 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).

Watershed councils use operating capacity funding to engage in local, regional, and state planning processes including providing public comment on OWEB rule advisory committees, board, and committee meetings. Sustained local capacity funding enables councils to engage with local communities to develop complex projects which they submit to OWEB grant programs such as Open Solicitation.

In July 2021 the OWEB Board awarded a total of $15.121 million for Operating Capacity grants, this amount was split evenly between councils and districts. For the 2021-2023 biennium, 55 councils were funded at $131,465 and one council received $328,663 (merger bonus) for a total award of $7.559 million. Staff used the merit criteria and evaluation process adopted by the board in July 2014 to determine funding levels, including full funding, reduced funding, and do not fund.

III. Demand

Council capacity funding supports watershed councils to work with their local communities to help implement local restoration, and conservation goals and implement state and federal plans. The

funds are used to support relationship and partnership building, project development, staff and board training, and operational costs. In recent years additional federal funds, targeted at on-the-ground restoration, have been made available through the passage of the Bipartisan Infrastructure Law and more recently the Inflation Reduction Act. This increase in federal restoration funding is increasing the need for capacity funding to support local organizations in the development of projects to take advantage of these generational funding opportunities.

IV. Future Needs

For the 2023-2025 biennium staff propose to shift the approach from equal distribution of funds between councils and districts to begin narrowing the base funding gap between the two entities. For the 2023-2025 biennium OWEB staff proposes to provide an increase in funding for councils that meet all of OWEB's merit criteria from $131,465 to $166,142, which is 10% less than districts.

The proposed approach narrows the capacity funding gap between individual councils and districts, recognizes the need for both types of organizations to offer competitive wages to recruit and retain qualified staff, while acknowledging districts have an additional workload that includes the legal requirements of local government entities.

V. Highlights of Accomplishments or Program Developments in the Biennium

Councils serve a different niche and play an important role in engaging communities in conservation and restoration activities on private land critical for endangered species recovery. Examples of council accomplishments from the 2021-2023 biennium include:

- 30 councils (60 total staff and board members) participated in a series of DEI trainings hosted by the Network of Oregon Watershed Councils.
- The North Fork John Day WC secured new funding sources, enabling the council to serve new landowners. New funding sources include National Fish and Wildlife Foundation's America the Beautiful Challenge funding, Oregon Conservation and Recreation Fund grants and Bella Vista grants.
- Lower Rogue WC is working with more than 120 unique landowners to address invasive weeds.
- Malheur WC installed more than 73,000 feet of fence to protect riparian areas.
- Luckiamute WC was able to leverage its Operating Capacity grant 13:1 and its budget exceeded $1 million for the first time with funding from state, federal and private sources.
- Long Tom WC formed the Urban Waters and Wildlife Partnership, serving the entire Eugene-Springfield metro area and completed three urban projects treating 108 acres of stormwater.
- The Siuslaw WC distributed over 20,000 native plants at no cost to local riparian residents.
- The Hood River Watershed Group worked completed Phase 2 of Neal Creek Instream Habitat Restoration, which included creation of two new side channels totally 640 feet of new off-

channel habitat, 2 alcoves and 11 log-jams along 1.5 miles of stream and across 5 private land ownerships.

Investments by Biennium		
Biennium	Spending Plan (after any additional funds added)	Remaining Spending Plan at end of biennium
2019-2021	$7,129,000	$0
2021-2023	$8,510,500	$*
2023-2025	$9,486,708	

*Full biennium data not available

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District Capacity

Recommended Amount: $8,307,135 (total line item $17,793,843 including Councils)

I. Summary

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 requirements, conduct business, and aid landowners and partners.

II. Program History

SWCDs have an over 75-year history in Oregon. South Tillamook became the first official Soil Conservation District in 1939. In 1963 the Oregon Legislature added “and Water” to the district title. SWCDs are not state agencies but political subdivisions of state government known as municipal corporations. They are governed by enabling legislation under ORS 568. The five to seven members of SWCD Boards of Directors are elected officials.

Implementation of the Agricultural Water Quality Management Program is guided by legislative direction and budget notes. The annual work plan, commonly known as the Scope of Work , is built on the following principles:

1) ODA is responsible to develop, periodically modify, and implement Agricultural Water Quality Area Plans that are sufficient to meet water quality standards as described in statute.

2) SWCDs are the Local Management Agencies that assist ODA in implementing the Area Plans. SWCDs are to be involved in timely, effective implementation of Area Plans to the fullest extent practical.

3) Legislative budget notes (1997, 2007) provide direction on the use and purpose of funds allocated to SWCDs, as further refined in the Intergovernmental Agreement between ODA and OWEB.

4) Legislative direction is to use these funds to implement the agricultural portion of the Oregon Plan for Salmon and Watersheds as administered by ODA.

III. Demand

In the 2021-2023 biennium, 40 SWCDs received full-capacity grant funding. Four Baker County SWCDs split two full shares of capacity grant funds. In recent years additional federal funds, targeted at on-the-ground restoration, have been made available through the passage of the Bipartisan Infrastructure Law and more recently the Inflation Reduction Act. This increase in federal restoration funding is increasing the need for capacity funding to support local organizations in the development of projects to take advantage of these generational funding opportunities. OWEB funding helps to provide stability for staff funding.

IV. Future Need

For the 2023-2025 biennium OWEB staff are proposing to shift the approach from equal distribution of funds between councils and districts to begin narrowing the base funding gap between the two entities. OWEB staff proposes to provide districts a 5% cost of living increase from the initial 2021-2023 district capacity award which would move individual awards from $175,813 to $184,603 (the four Baker County SWCDs will continue to split two awards). The proposed approach recognizes the need for both types of organizations to offer competitive wages to recruit and retain qualified staff, while acknowledging districts have an additional workload that includes legal requirements of local government entities.

V. Highlights of Accomplishments or Program Developments in the Biennium

SWCDs continue to work directly with ODA, watershed councils, Natural Resources Conservation Service, and other partners in implementing Oregon's 38 Agricultural Water Quality Area Plans and assist landowners in conducting conservation work on agricultural lands. SWCDs are also vital to assisting ODA in implementing the Strategic Implementation Area Initiative. Examples of SWCD accomplishments from the 2021-2023 biennium include:

- Districts all over the state work together to plan and implement a wide variety of conservation projects and engage land managers through outreach events.
- In 2022 districts continued their partnership with NRCS's conservation programs. Two such incentive programs that are widely utilized by districts are the Conservation Reserve Enhancement Program (CREP), used to restore numerous miles of riparian buffers on ag lands, and the Regional Conservation Partnership Program (RCPP). In 2022 districts were awarded over $4.8 million from RCPP. Awarded projects include Tualatin SWCD's, Tualatin Basin Habitat Conservation Partnership which is working to remove barriers that obstruct migration access for native migratory fish in the Gales Creek Watershed; and Harney SWCD's Southeast Harney County Oregon Sage-Grouse Habitat Conservation Strategy Project, whose goal is to reduce primary threats to Greater sage-grouse and improve habitat quality and quantity by accelerating the implementation of conservation actions on private lands.
- Conservation work around the state on ag lands also continues at the Wasco County SWCD. They recently completed an OWEB Stakeholder Engagement grant and feasibility studies to further progress on their Fifteen-mile Managed Underground Storage Project. This engineered subsurface storage facility is designed to catch and store water when flows are abundant, and

release water back into the stream when flows are low, augmenting water quality and quantity to benefit land managers and support wildlife.

- At Fort Rock Silver Lake SWCD, The Buck Creek Diversion Dam Replacement Project, a partnership consisting of the US Fish and Wildlife Service, Ducks Unlimited, and a private landowner continues. This project replaces an existing irrigation diversion dam on Buck Creek, a tributary of the Paulina Marsh in Lake County, Oregon. The existing diversion represents the last fish passage impediment between Highway 31 at Paulina Marsh and the headwaters in the public land's ownership.
- The Coos SWCD continues working to implement a 10-year water quality monitoring project in the Lower Coquille River ODA Strategic Implementation Area (SIA) to collect data on water temperature and bacteria. The water quality monitoring will identify areas where riparian vegetation conditions and livestock activity affect water quality. The data will then be used by the Coos SWCD and partner organizations to prioritize restoration locations and actions to improve water quality within the SIA.
- Gilliam SWCD together with the Gilliam East John Day Watershed Council, ODA, OWEB, and the Oregon Department of Fish and Wildlife, is implementing an ODA SIA Ag Water Quality Support Grant, to assess the most widespread ag water quality concern in the Lower John Day: elevated temperature. Funds will be used to update and perform a ground-based riverscape assessment and data survey of riparian conditions in over 60+ miles of the Thirty-mile Watershed. The assessment will be used to define the most effective places to lower stream temperatures in ag lands.

Investments by Biennium		
Biennium	Spending Plan (after any additional funds added)	Remaining Spending Plan at end of biennium
2019-2021	$7,129,000	$0
2021-2023	$8,510,500	$*
2023-2025	$8,307,135	

*Full biennium data not available

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Weed Grants

Recommended Amount: $3,250,000

I. Summary

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. Under the OSWB Grant program, 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 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.

The prevention and control of State Listed noxious weed species are critical elements of watershed protection and enhancement. To address this issue, ODA and OWEB partner to support the implementation of high-priority noxious weed control statewide. Noxious weed control is a first step in restoring watershed health and is key to protecting the investment in Oregon's restoration work.

II. Program History

The OSWB Grant Program was established in the 1999-2001 biennium after the passage of Measure 66. Until 2010 and the passage of Measure 76, the fiscal responsibilities for OSWB grants were administered through ODA. The passage of Measure 76 in 2010 started the partnership between OWEB and ODA for OSWB grants. The ballot measure changed the language within the constitution, designating OWEB as the single granting agency for State Lottery funds designated for watershed restoration. This change resulted in a move of OSWB grant funding under OWEB's budget, rather than being transferred directly to and administered by ODA.

The 2011-2013 biennium was a transition period for the OSWB grants partnership. A process was completed to identify strengths, challenges, and redundancies in the process, and refinements to the process were made based on the lessons learned.

III. Demand

Funding to the OSWB Grant Program provides cooperators with resources that are important for protecting Oregon's natural resources, treating priority state-listed invasive noxious weeds, and maintaining weed control activities in small communities. In the current biennium, 95 OSWB grants have been awarded, averaging $34,210. Many cooperators around the state depend on OSWB grant funding to pay for priority invasive noxious weed project work, match other federal or private grants, and keep staff funded to do invasive noxious weed work.

IV. Future Need

The demand for weed grants is expected to remain high. OSWB grant funding will focus on:

- Treatments on priority state listed noxious weeds,
- Areas impacted by wildfire,
- Aquatic noxious weeds,
- Funding essential to support local noxious weed staff, for weed surveys, monitoring, or treatments.

V. Highlights of Accomplishments or Program Developments in the Biennium

Highlights in the current biennium include:

- Completed projects reported leveraging 152% match with OSWB/OWEB funding.
- Completed projects treated 19,632 net acres, 10.5 instream miles, and 255 riparian miles, and surveyed 705,066 gross acres.
- Biocontrol activities were included in eight grants, targeting Russian knapweed, Canada thistle, Leafy spurge, and gorse. Crooked River Weed Management Area Grant, Central Oregon Coordinated Biocontrol Project is a great example of collaborative and coordinated grant. The grant worked with five counties: Crook, Jefferson, Wheeler, Deschutes, and Wasco covered 4228 gross acres. Grant included survey, releasing and monitoring, three biocontrol agents in Central Oregon.

Investments by Biennium		
Biennium	Spending Plan (after any additional funds added)	Remaining Spending Plan at end of biennium
2019-2021	$1,631,000	$0
2021-2023	$3,250,000	$0
2023-2025	$3,250,000	

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Strategic Implementation Areas

Recommended Amount: $1,500,000

I. Summary

The Oregon Department of Agriculture (ODA), Agricultural Water Quality Management Program, is leading the "Strategic Implementation Area" (SIA) initiative. Select areas around the state receive focused stakeholder engagement, technical assistance, monitoring, and where necessary, compliance follow-up to address water quality concerns in agriculturally influenced areas. Local partners work with landowners and managers to meet and exceed water quality requirements, and ODA follows up as needed to address compliance concerns.

For each SIA identified by ODA, OWEB Stakeholder Engagement/Technical Assistance (TA) and Monitoring funding is offered. TA funding supports the SIA lead and local partners in developing outreach plans and working with landowners to develop restoration projects. Any restoration projects developed within the SIA may be submitted either through OWEB's grant programs or in partnership with other agencies for implementation.

Monitoring funds support baseline and long-term monitoring within the SIA geography. Each SIA convenes a local monitoring team to provide guidance and feedback on local monitoring objectives and the development of a monitoring proposal. Prior to implementation, all monitoring plans are reviewed by a Statewide Monitoring Advisory Group made up of representatives of OWEB, ODA, Oregon Department of Environmental Quality, and Oregon Department of Fish and Wildlife.

During the 2021-23 biennium, ODA and OWEB resumed SIA grants following the COVID-19 funding pause in 2020. Two SIAs applied for funding in January 2021; five applied in June 2021; and four applied in February 2022. In addition, OWEB convened an application and award process to offer the remaining recaptured funds from the 2017-19 biennium to current SIA grantees in January 2022.

II. Program History

Beginning with the 2017-2019 biennium, the board awarded $100,000 of Stakeholder Engagement/ TA funds for each SIA. These funds are available for up to four years to help SIA partners engage stakeholders, plan, and develop future conservation actions to address impacts on Oregon's water quality standards, and/or to address goals identified in salmonid conservation and recovery plans. The board also awarded an additional $25,000 in monitoring funds for each SIA. These funds are available for monitoring work after an approved monitoring proposal has been developed. The purpose of SIA monitoring is to measure changes in landscape and/or water quality resulting from

the implementation of projects that improve agricultural management practices. Detecting a signal in water quality and landscape conditions takes time, which is why the monitoring funds are available for up to 10 years.

During the 2021-23 biennium, OWEB worked with SIA grantees to provide flexibility in the use of funding between the TA and Monitoring funding categories. Two current SIA grantees requested to shift funding from TA to Monitoring to meet their monitoring needs.

III. Demand

As ODA and local partner staffing recovers from COVID-19 impacts, demand for SIAs is anticipated to continue to increase during the 23-25 biennium. ODA has developed a five-year schedule to identify SIAs geographically distributed throughout the state. For the 23-25 biennium, ODA anticipates identifying nine new SIAs. In each SIA area, ODA and local partners will estimate the OWEB funds needed for local technical assistance and tailor local partners' SIA technical assistance requests to the amount of funding needed. In addition, there is increasing demand for restoration funding for SIAs to be responsive to landowners. OWEB and ODA are considering how to address this need and may bring a proposal to the board in July 2023.

IV. Future Need

It is anticipated that SIAs will continue to be selected using a robust prioritization approach based on data from multiple sources including state and federal agencies. Funding will continue to be needed to assist in providing TA and Monitoring in selected SIAs. Current SIA grantees have consistently identified a need for additional monitoring funding, and agency staff has been working collaboratively to improve the process and identify specific areas of potential future need.

V. Highlights of Accomplishments or Program Developments in the Biennium

Several soil and water conservation districts have developed projects because of the SIA program and OWEB TA funds, and have submitted applications to OWEB's small grant and open solicitation grant programs. In addition, 16 groups have developed monitoring plans and are currently in various stages of data collection.

Investments by Biennium		
Biennium	Spending Plan (after any additional funds added)	Remaining Spending Plan at end of biennium
2019-2021	$1,925,000	$0
2021-2023	$1,500,000	$0
2023-2025	$1,500,000	

*Full biennium data not available

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Conservation Reserve Enhancement Program Cost Share & Technical Assistance

Recommended Amount: $750,000 for CREP Cost Share, $1,200,000 for CREP TA

I. Summary

The Oregon Conservation Reserve Enhancement Program (CREP) is a cooperative venture between the State of Oregon and Farm Services Agency (FSA), with technical support from the Natural Resources Conservation Service (NRCS), state agencies, 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.

II. Program History

In 1998, Oregon CREP was established to support implementation of approved conservation practices aimed at improving riparian function on private lands throughout Oregon. The State of Oregon contributes 25% of the eligible cost-share for establishing approved conservation practices, 75% of eligible cost-share (minus available federal cost-share) for certain water developments, and 100% of costs for heavy-duty tree protectors. FSA contributes federal cost-share, rental payments, incentive bonuses, and administrative oversight. NRCS and the Oregon Department of Forestry provide the majority of the necessary technical assistance, with Oregon Water Resources Department, Oregon Department of Agriculture, and others providing in-kind technical assistance. Since 1998, Oregon CREP has grown from a relatively small, experimental program into a robust statewide program that provides important, unique financial incentives and continues to be a leader in enrollments nationwide.

The board has supported CREP technical assistance with funding since 2001, beginning with SWCDs. In 2011, in consultation with CREP agency partners, funding eligibility expanded to include multi-county, multi-organization proposals. In that same year, OWEB and NRCS joined to invest over $1 million in CREP TA grants independent from the funding for SWCD capacity and OWEB's regular

technical assistance grant program. These two-year grants aimed to address critical technical assistance needs for Oregon CREP.

III. Demand

The agency is on track to expend all CREP funds by the end of the biennium. For the TA portion of the program, nine organizations secured funding through CREP TA grants; however, the funding available was not fully utilized. With funding in federal farm bill programs increasing, we anticipate that demand for technical assistance will increase in order to access the federal funds.

IV. Future Need

The CREP cost-share program is seeking to make available $750,000 in the 2023-2025 biennium. Staff estimate 10 organizations will apply for CREP TA funding in the 2023-2025 biennium. In the past, NRCS has contributed to the CREP TA program, and OWEB staff are in conversations to continue that investment this biennium. If that occurs, the number will be increased in July.

V. Highlights of Accomplishments or Program Developments in the Biennium

The CREP TA funding supported nine programs in the 2021-2023 biennium. These programs provide critical technical assistance for Oregon CREP, covering 12 counties statewide. During the 2022 federal fiscal year, 3,185.4 acres were enrolled into CREP, 758.3 acres newly enrolled while 2,427.2 acres were re-enrolled. Farmers who participated in CREP received a total of $652,492 in payments during the 2022 federal fiscal year. Of that, 37% came from OWEB funding and the remaining 63% was paid by FSA.

Investments by Biennium – CREP Cost Share		
Biennium	Spending Plan (after any additional funds added)	Remaining Spending Plan at end of biennium
2019-2021	$750,000	$0
2021-2023	$750,000	$0
2023-2025	$750,000	
Investments by Biennium– CREP TA		
Biennium	Spending Plan (after any additional funds added)	Remaining Spending Plan at end of biennium
2019-2021	$1,163,000	$0
2021-2023	$1,200,000	$0
2023-2025	$1,200,000	

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Other Prior Committed Funding-SageCon Partnership

Recommended Amount: $350,000

I. Summary

The SageCon Partnership is a collaborative partnership focused on the ecological, social, and economic resilience in Oregon's sagebrush country. The partnership's work spans across science, policy, communication, and on-the-ground restoration, addressing challenges that operate at a landscape scale where no single agency or organization can make a big enough difference alone.

II. Program History

Sagebrush rangelands occupy about one-third of the state of Oregon and vast swaths of the western U.S. and face multiple threats across much of the range. In 2010, with populations of the Greater sage-grouse declining, the U.S. Fish & Wildlife Service proposed a listing under the Endangered Species Act. In response, a diverse range of partners in Oregon came together to build the Oregon Sage-Grouse Action Plan as an "all hands all lands" approach to species and habitat conservation for the sage-grouse.

The SageCon Partnership was charged with coordinating implementation of the plan across the many public and private partners that play a role. Partners increasingly recognize that the issues underlying sage-grouse decline are much broader and more complex than conservation of a single species and that a broad approach to restoring sagebrush ecosystem health is needed. In addition, complex issues like invasive annual grasses, wildfire, juniper encroachment, impacts from energy, mining, and infrastructure require cross-sector, collaborative, science-based approaches. Continuing negative habitat and population trends highlight the need for a strategic, coordinated approach that ensures partners are working effectively on the right things and in the right places to address those issues.

OWEB has a vested interest in sage-grouse, their habitat, and associated rural communities. The habitat area spans three OWEB regions and has been a major focus of watershed restoration investments for the Board. The area comprises large tracts of private, state, and federal lands. Over the years, numerous watershed projects funded by OWEB on private lands have been designed to enhance sage-grouse habitat. Other projects have been conducted in conjunction with federal land managers with the same purpose in mind.

III. Demand

Funding for this line item continues investment in key coordination and collaborative governance to planning and coordination from statewide to local levels, and leverages and coordinates tens of millions of dollars of state and federal investment on the ground. The partnership addresses the health of Oregon's sagebrush ecosystem, rural community vitality, and threats to habitat and wildlife, while advancing economic development within a conservation framework.

IV. Future Need

OWEB staff are proposing the same funding amount as in the 2021-2023 biennium for the SageCon Partnership in the 2023-2025 biennium

V. Highlights of Accomplishments or Program Developments in the Biennium

SageCon Partnership funding from OWEB in the 2021-2023 biennium has supported:

- Ongoing governance, coordination, and facilitation efforts, including budget coordination, a refreshed and updated SageCon vision and purpose document, annual SageCon Summit events in 2022 and 2023, and regular meetings of the executive-level Coordinating Council and program-level Staff Implementation Teams.
- Support for locally-led collaboration, including regular communication and technical support for Local Implementation Team coordinators and the Candidate Conservation Agreements with Assurances Coordinating Committee, and continued work on the SageCon Landscape Planning Tool to assist in developing cross-boundary sagebrush conservation projects.
- The implementation of ongoing coordination efforts to address invasive annual grasses, a key threat in the sagebrush ecosystem.

Investments by Biennium		
Biennium	Spending Plan (after any additional funds added)	Remaining Spending Plan at end of biennium
2019-2021	$300,000	$0
2021-2023	$350,000	$0
2023-2025	$350,000	

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Other Prior Committed Funding-Lower Columbia Estuary Partnership

Recommended Amount: $330,000

I. Summary

In 1995, the lower Columbia River was designated as an 'Estuary of National Significance' by the U.S. Environmental Protection Agency (EPA), recognizing the river's important to the Pacific Northwest and the entire United States. The governors of Oregon and Washington, along with the EPA, needed an organization to further study the lower river and coordinate its restoration. They created the Lower Columbia Estuary Partnership (LCEP) to study and care for the lower river, and in 1999 the organization was incorporated as a non-profit organization. Since 2003, Oregon has provided state matching funds via OWEB in support of LCEP.

II. Program History

Beginning in the 2003-2005 biennium, Oregon has provided state funding at a base support level to LCEP, which is used to leverage EPA National Estuary Program funding for water quality and habitat restoration work throughout the lower Columbia River Watershed.

Beginning in 2013, this base funding for LCEP was shifted by the Oregon Legislature from Measure 76 Operating to 76 Measure Grant funds. Since then, at the beginning of each biennium LCEP has submitted a grant application to OWEB requesting funding for habitat restoration, invasive species removal, and community engagement efforts, which in turn is also utilized as the state matching funds to complement federal funding through the National Estuary Program.

OWEB has an interest in the lower Columbia River Watershed as the area supports a large portion of the population of Oregon, as well critical aquatic and terrestrial species, including 13 salmonid species listed as either threatened or endangered under the Endangered Species Act that use the river and estuary during key points of their life cycle. Habitats that support these species have greatly declined in both quantity and quality after more than a century of land clearing for development and other human actions. Over the years, numerous watershed projects funded through competitive grant programs independent of the base award, by OWEB have been implemented to restore habitat in the Lower Columbia River Watershed.

III. Demand

LCEP needs state matching funds to complement federal funding received through the National Estuary Program. OWEB funds to LCEP will support riparian and habitat restoration in the lower Columbia River Watershed.

IV. Future Need

OWEB staff are proposing the same funding amount as in the 2021-2023 biennium for LCEP in the 2023-2025 biennium

V. Highlights of Accomplishments or Program Developments in the Biennium

Funding provided by OWEB through the base support level grant has supported habitat restoration and stewardship work at three sites in the lower Columbia River Watershed (Fox Creek in Rainier, the floodplain of the Sandy River Delta in Troutdale, and South Scappoose Creek in Scappoose). Project activities include enhancement of riparian and floodplain habitats through native tree and shrub planting, controlling invasive species, and engaging a diversity of community volunteers in these restoration and stewardship efforts.

Investments by Biennium		
Biennium	Spending Plan (after any additional funds added)	Remaining Spending Plan at end of biennium
2019-2021	$321,000	$0.00
2021-2023	$330,000	$0.00
2023-2025	$330,000	

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KLAMATH RIVER POST-DAM REMOVAL WATERSHED RESTORATION

Recommended Amount:

$8 million for 2023-25 biennium (in addition to $4.053 million from 2021-23 holding account based on October 2022 board award); remaining $2.947 to be allocated during 2025-2027.

I. Summary

On October 26, 2022, the OWEB Board committed $15 million over a period of 3-5 years for Klamath River post-dam removal restoration watershed restoration contingency costs incurred by Klamath River Renewal Corporation (KRRC). The funding is consistent with OWEB's constitutional and statutory authority to fund projects that address habitat needs for native fish and wildlife, along with water quality.

II. Program History

The KRRC is a private, independent nonprofit organization formed by signatories of the Amended Klamath Hydroelectric Settlement Agreement (AKHSA), including the States of Oregon and California, local governments, Tribal nations, PacifiCorp, irrigators, and several conservation and fishing groups, to take ownership and oversee the removal of the four Klamath River dams and restore the river to a free-flowing condition. As part of the AKHSA, PacifiCorp agreed to transfer ownership of the dams to KRRC, and funding in the amount of $450 million for removal and watershed restoration was committed through a California bond and by PacifiCorp ratepayers.

As KRRC implements the dam removal, former reservoir areas will become exposed and require restoration and stabilization of bare sediment deposits for long-term water quality, long-term ecological benefits, and restoration of natural river functions and processes. KRRC submitted a Reservoir Area Management Plan (RAMP) to the Federal Energy Regulatory Commission (FERC), the principal responsible entity for the regulatory review of the project. The RAMP describes measures for restoration, monitoring, and adaptive management of the former reservoir areas and high-priority tributaries, including actions specifically planned for the former reservoir area upstream of J.C. Boyle dam, the section of the project located in Oregon. During the FERC review, a question was raised about whether existing contingencies and risk tools provide a high enough level of certainty that the work will be completed on time and within budget. In response to this concern, the states and PacifiCorp agreed to provide additional financial support for the project, divided equally among the three partners. On August 26, 2022, FERC released a Final Environmental Impact Statement and

recommended approval of the proposed license surrender, decommissioning, and removal of the four Klamath River dams.

In October 2022, staff from former Governor Brown's Natural Resources Office requested that the OWEB Board commit funding to support Klamath River post-dam removal watershed restoration. On October 26, 2022, the OWEB Board committed $15 million over a period of 3-5 years for Klamath River post-dam removal restoration watershed restoration contingency costs incurred by KRRC. The funding is consistent with OWEB's authority to fund projects that address habitat needs for native fish and wildlife, along with water quality. Multiple funding sources administered by OWEB will be utilized for this commitment. The initial grant award made by the board is $4.053 million, which was delegated to the OWEB Executive Director for distribution. The remaining $10.947 million will be included in the OWEB Board's spending plans for future biennia, beginning in 2023-2025.

III. Demand

The contingency costs are to be split equally in three ways among the State of Oregon, the State of California, and PacifiCorp, as described in a Memorandum of Agreement regarding Supplemental Contingency Funding Implementation that was executed by these three entities and KRRC in late 2022. OWEB and KRRC finalized a partnership agreement that affirms the intent of OWEB's investment in Klamath River post-dam removal watershed restoration and describes the framework, scope, tasks, and timeline for the overarching $15 million in funding. KRRC expects to submit a grant application for OWEB funding in September of 2023. Actions that are likely to be proposed to OWEB for funding include but are not limited to tributary restoration, floodplain reconnection, fish-passage barrier removal, instream large-wood placement, revegetation, and treatment of invasive species.

IV. Future Need

KRRC expects expenditures for restoration work associated with the removal of J.C. Boyle dam to occur over several years through payments to the main restoration contractor, RES. As a result, it is expected that not all the entire remaining commitments of $10.947 million will have to be allocated in the 2023-25 spending plan. At least $3 million (and possibly up to $5 million) could be allocated in the 2025-27 biennium. Oregon's commitment to contingency funding will be met when the entire $15 million is authorized and released.

V. Highlights of Accomplishments or Program Developments in the Biennium

The final License Surrender Order from FERC approving the decommissioning and removal of the dams was issued on November 17, 2022. Ownership of the four dams on the mainstem Klamath River previously owned by PacifiCorp was transferred to KRRC effective December 1, 2022. OWEB and KRRC finalized a partnership agreement that affirms the intent of OWEB's investment in Klamath River post-dam removal watershed restoration and describes the framework, scope, tasks, and timeline for the overarching $15 million in funding. The States of Oregon and California, PacifiCorp, and KRRC finalized a Memorandum of Agreement regarding the Supplemental Contingency Funding Implementation. In February of 2023, OWEB opened a grant cycle for this KRRC-specific grant offering that includes a project-level grant application and associated guidance

documents for use by KRRC to propose specific activities that would utilize the OWEB's post-dam removal watershed restoration funding.

Investments by Biennium		
Biennium	Spending Plan (after any additional funds added)	Remaining Spending Plan at end of biennium
2019-2021	$0	$0
2021-2023	$4,053,000	$ 0
2023-2025	$8,000,000	
2025-2027	$2,947,000	
Total Commitment over 3 biennia	$15,000,000	

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NEWS – FOR IMMEDIATE RELEASE

May, 2023

Oregon Watershed Enhancement Board Awards More Than $21 Million in Grants

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The Oregon Watershed Enhancement Board **(OWEB) awarded 89 grants totaling $21,212,270** to local organizations statewide to support fish and wildlife habitat and water quality projects at their April 25-26, 2023 board meeting in Keizer.

"These investments support healthy watersheds, fish and wildlife habitats, and working lands," says Lisa Charpilloz Hanson, OWEB's Executive Director. *"They will help landscapes recover from wildfire and be more resilient in the future. They will provide cool water for salmon, steelhead, and trout and improve habitat for sage-grouse and other species. They will help maintain the long-term viability of agricultural working lands. These investments showcase Oregon's commitment to healthy and sustainable landscapes."*

Funding for these projects includes Oregon Lottery, Oregon Agricultural Heritage Fund, and Federal Pacific Coastal Salmon Recovery funds provided by the National Ocean and Atmospheric Administration. A listing of all awarded grants is available at: https://www.oregon.gov/oweb/Documents/2023-April-Board-Awards.pdf

Since 1999, the Oregon Lottery has provided over $600 million to OWEB's grant program that helps restore, maintain and enhance Oregon's watersheds. For more information about the Oregon Lottery visit www.oregonlottery.org

For additional information about OWEB's grant programs, contact Eric Hartstein at eric.hartstein@oweb.oregon.gov.

Grant Type	Number of Grants Awarded	Amount Invested
Open Solicitation	72	$13,027,997
Oregon Agricultural Heritage Program	9	$4,200,000
Partnership Technical Assistance	5	$639,273
Effectiveness Monitoring	2	$470,000
Land Acquisition	1	$2,875,000
TOTAL	**89**	**$21,212,270**

###

Region 1 - North Coast Restoration

Region 1 - Restoration Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-1004	MidCoast WC	Lower Drift Creek (Siletz) Tidal Restoration	Tidal wetlands will be restored within the Siletz Bay estuary. Dikes will be removed and tidal channels constructed to restore the site's natural hydrology. Large wood will be placed in the wetlands to improve habitat diversity. Native marsh plant species will be planted and invasive species controlled.	573,724	Columbia
223-1002	Lower Nehalem WC	Little North Fork Large Wood Enhancement	Large wood structures will be placed along a stream reach on the Little Nork Fork Nehalem River to improve habitat complexity for salmon and steelhead. The project location is a priority for Oregon coast coho salmon.	73,706	Clatsop
223-1005	CREST	Nicolai-Wickiup Watershed Connectivity and Tidal Restoration	Two new fish passage crossings will be constructed under the railroad on the Lower Columbia River. These crossings will restore fish passage and habitat quality. Several existing openings will be expanded and new openings created to provide critical access for salmon and steelhead to the lower river.	629,650	Clatsop
223-1000	Scappoose Bay WC	Upper Raymond Creek Large Wood Enhancement	Large wood structures will be placed and streamside habitat restored along Raymond Creek, a tributary to South Scappoose Creek. This project will improve habitat for Lower Columbia River salmon.	244,610	Columbia
Total Restoration Projects Recommended for Funding by RRT and OWEB Staff				1,521,690	

Region 1 - Technical Assistance Projects Recommended for Funding in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-1007	Lower Nehalem WC	Coal Creek Riparian and Tidal Wetland Enhancement	Tidal wetland habitat will be restored on Coal Creek, a tributary of the Nehalem River. Technical assistance work will explore alternatives and produce designs to restore streamside vegetation, improve tidal connections, and address a failing tide gate.	73,625	Tillamook
223-1009	Lower Nehalem Community Trust	McCoy Dike Breach Technical Assistance Project	TIdal wetland habitat will be restored on a property within the Nehalem estuary. Restoration in the wetland will provide new rearing habitat for fish in Nehalem Bay. Technical assistance will aid in a site assessment, alternatives, and preliminary designs to reconnect the site to the estuary.	74,888	Tillamook
223-1010	Tillamook Estuaries Partnership	Mill Creek Trib B Culvert Replacements & Habitat Enhancement	Undersized road crossings will be replaced at two locations on an unnamed tributary in the Mill Creek basin, in the Tillamook Bay watershed. Technical assistance will aid to finalize designs for the new crossings. The crossings will restore passage to nearly two miles of habitat for salmon and steelhead.	67,650	Tillamook
223-1008	Columbia SWCD	Conyers Creek Habitat Diversification and Enhancement	Habitat for Columbia River salmon will be restored on Conyers Creek, a major tributary to the Clatskanie River. Technical assistance will help complete site assessments and develop permit ready designs. The restoration project will improve habitat complexity and restore native vegetation along a priority stream.	63,769	Columbia
Total Technical Assistance Projects Recommended for Funding by RRT and OWEB Staff				279,932	

Region 1 - Stakeholder Engagement Projects Recommended for Funding in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-1012	North Coast Land Conservancy	Conservation Planning Outreach	Stakeholder engagement activities will aid to complete a conservation plan to identify priority conservation areas on the north coast.	27,431	Clatsop
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				27,431	
Region 1 Total OWEB Staff Recommended Board Award				**1,829,053**	

Region 2 - Southwest Oregon Restoration

Region 2 - Restoration Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-2001	Rogue River WC	South Fork Little Butte Creek River Mile (RM) 4.5, RM 5.5, and RM 6.2 Riparian Rehabilitation	Streamside habitat will be improved in a stream near Lake Creek. Restoration includes reconnecting a historic side-channel, removing invasive weeds, and encouraging native plant establishment.	221,225	Jackson
223-2009	Curry SWCD	Elk River Coho SAP Riparian Restoration	Trees will be planted and invasive weeds removed in the lower watershed, from the head of the tide, upstream on the Elk River.	483,184	Curry
223-2002	WaterWatch of Oregon	Lovelace Dam Removal and Restoration Project	Lovelace Dam on Slate Creek near Grants Pass will be removed. The restoration project will improve access for salmon to over twenty-five miles of spawning and rearing habitat.	159,180	Josephine
223-2007	Coos SWCD	North Bank Working Landscape & Tidal Channel Restoration: Phase II	The installation of a new culvert and Muted Tidal Regulator tide gate will improve salom access to tidal habitat. Muted Tidal Regulated tide gates stay open on default instead of closed, which allows more time for fish passage.	497,129	Coos
223-2008	Partnership for the Umpqua Rivers	Rock Creek Tributaries Instream Enhancement	Rock Creek, located in the North Fork Umpqua River watershed, will have whole trees and logs placed across one and a half miles of streams. The instream trees and logs will improve fish habitat and trap sediment runoff from the recent Archie Fire.	275,878	Douglas
223-2000	Cascade Pacific RC&D	Benson Creek Wetland Restoration	Land near Lakeside will be restored to a functioning wetland. The project will improve habitat for native salmon, trout, and wildlife species along with stream and lake water quality.	521,943	Coos
223-2005	National Forest Foundation	Copeland Creek Priority Watershed Protection	A section of road along the North Umpqua River in the Copeland Creek Watershed will be hydrologically closed off to remove sediment inputs into the stream.	167,641	Douglas
Total Restoration Projects Recommended for Funding by RRT and OWEB Staff				2,326,180	

Region 2 - Technical Assistance Projects Recommended for Funding in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-2010	Curry Watersheds Nonprofit	Greene Creek Habitat Restoration Design	Conceptual design alternatives will be developed for channel restoration, floodplain restoration, and livestock management around Greene Creek, a tributary to the lower Sixes River.	74,525	Curry
223-2011	Coos SWCD	Cunningham Creek Fish Passage and Riparian Improvement Technical Assistance	Designs to address fish passage concerns and improve streamside health will be developed for sites along one mile of Cunningham Creek, a tributary of the Coquille River.	74,924	Coos
223-2012	Willamette Partnership	Needs & Gaps Assessment to Update Tenmile Lakes Restoration Plan	Project Partners will create an assessment of Tenmile Lakes to guide future restoration plans.	39,382	Coos
Total Technical Assistance Projects Recommended for Funding by RRT and OWEB Staff				188,831	

Region 2 - Stakeholder Engagement Projects Recommended for Funding in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
None					
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff					
Region 2 Total OWEB Staff Recommended Board Award				**2,515,011**	

Region 3 - Willamette Basin Restoration

Region 3 - Restoration Projects Recommended for Funding in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-3007	Greenbelt Land Trust	Kingston Prairie & Santiam Kingston Hills Restoration Phase 1	Oak woodland, upland prairie, and wet prairie habitats will be restored. The habitats will support native bird and wildlife populations in the North Santiam Watershed.	314,133	Linn
223-3001	Institute for Applied Ecology	Restoring Taylor's checkerspot butterfly in Oregon	Upland priarie habitat will be restored for the endangered Taylor's checkerspot butterfly. There are only two remaining populations of Taylor's checkerspots in Benton County, Oregon.	510,622	Benton

223-3000	The Freshwater Trust	Upper Sandy-Zigzag River Tributaries Restoration Project	A fish passage barrier will be replaced in a tributary to the Zig-Zag River to allow salmon and steelhead access to an additional three miles of stream habitat and floodplain habtat. The restoration project will increase the abundance and productivity of Sandy basin fish populations.	393,967	Clackamas
223-3004	Marys River WC	Recovering System Process in Reese Creek	The health and function of Reese Creek will be improved by restoring instream conditions and habitat for native aquatic species. Streamside native vegetation will be established to create diversity of wildlife habitat.	196,710	Benton
223-3005	Molalla River Watch Inc	Molalla Side Channel Restoration	Side-channel habitat important to winter steelhead and spring Chinook, coho, and cutthroat trout will be enhanced and protected by installing large wood instream structures in the Molalla River watershed.	156,382	Clackamas
223-3006	Greenbelt Land Trust	Building Resilience of Mid-Willamette Valley Habitats	Oak woodland, wetlands, grasslands, and mixed deciduous forest will be restored across two sites in the Willamette Valley that will provide habitat for native species such as acorn woodpecker, white-breasted nuthatch, Nelson's checkermallow and Willamette daisy, along with other rare plants, birds, and wildlife.	229,872	Benton
223-3011	Metro	Prairie in Portland - St. Johns Prairie Phase 4	Upland prairie habitat will be restored on a former landfill in North Portland. The site will provide habitat to grassland birds, insects and pollinators, nesting turtles, and other wildlife.	141,150	Multnomah
223-3002	Institute for Applied Ecology	Oak prairie restoration at Live Oak Drive	Oak woodland, streamside forest, and upland prairie habitat will be restored north of Corvallis. The project will reduce nonnative and invasive plants, and reintroduce native plants and First Foods plants that are important to Tribes. Restoration will also help prevent old-growth Oregon white oaks from being overtopped by Douglas fir trees, and increase fire resiliency of the woodland.	109,036	Benton
223-3012	Long Tom WC	Lower Upper Long Tom Oak-Prairie Ecocultural Restoration	A fish passage barrier will be replaced to allow fish access to two miles of headwater stream habitat on a private property along the Long Tom River just upstream of Fern Ridge Reservoir. Oak, prairie, and streamside plant communities will also be restored on the property.	238,257	Lane
223-3003	Cerro Gordo Land Conservancy	Cerro Gordo Prairie and Oak Restoration Phase 1	A diverse native habitat will be restored and maintained on a threatened remnant of Willamette Valley prairie, oak savanna, and oak woodlands in the Row River watershed. The project will reverse conifer tree encroachment and inhibit the spread of non-native plant species.	260,312	Lane
Total Restoration Projects Recommended for Funding by RRT and OWEB Staff				2,550,441	

Region 3 - Technical Assistance Projects Recommended for Funding in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-3018	Middle Fork Willamette WC	Finalizing Floodplain Restoration Designs & Permitting for Elijah Bristow State Park - Phase 1	Final designs will be completed for a floodplain restoration project on the Middle Fork Willamette River that will result in habitat for native species such as Oregon chub, western pond turtle, spring Chinook salmon, and beaver. The designs will be process-based–they will focus on restoring the natural, physical processes that occur to create healthy river habitat over time.	75,000	Lane
223-3015	Long Tom WC	Long Tom River and Wilson Creek Floodplain Restoration Design	Designs will be completed to restore, create, and maintain habitat for important native fish and wildlife species in Wilson Creek, a tributary to the Long Tom River.	73,330	Lane
223-3014	Pudding River WC	Aamodt Dam Alternatives Analysis and Preliminary Design	Designs will be developed to remove a splash dam that spans a stream channel. Dam removal will restore natural streamflow, improve water quality, and provide summer migratory fish access to cold-water habitat in the Pudding River Watershed.	59,479	Clackamas
Total Technical Assistance Projects Recommended for Funding by RRT and OWEB Staff				207,809	

Region 3 - Stakeholder Engagement Projects Recommended for Funding in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-3021	Oregon Agricultural Trust	Protecting Habitat and Water Resources on Willamette Valley Farmland	The Oregon Agricultural Trust will build landowner interest to implement conservation easements that will preserve the Willamette Valley's unique mix of agriculture, native oak, forest, and streamside habitats.	63,552	Polk
223-3020	Pudding River WC	Scotts Mills Dam Removal Stakeholder Engagement	The Pudding River Watershed Council will engage local residents in the City of Scotts Mills to build support for the removal of Scotts Mills Daml Dam removal will open thirteen miles of spawning and rearing habitat to Endangered Species Act-listed steelhead and Chinook salmon.	41,457	Marion
223-3019	Middle Fork Willamette WC	Island Park Slough Stakeholder Engagement	Springfield community members around Island Park Slough will be engaged to raise awareness about water quality concerns and generate support for stormwater infrastructure improvements and streamside restoration. These enhancements will improve the communities' social, economic, and environmental health.	61,188	Lane
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				166,197	
Region 3 Total OWEB Staff Recommended Board Award				**2,924,447**	

Region 4 - Central Oregon Restoration

Region 4 - Restoration Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-4006	Deschutes Land Trust	Ochoco Preserve Restoration - Phase 2	Stream and floodplain restoration will continue along private property on the Crooked River downstream of Prineville. Restoration will enhance fish and wildlife habitat.	689,365	Crook
223-4007	Trout Unlimited Inc	Annie Creek Non-Native Fish Barrier and Screening	A dam on Annie Creek will be installed keep invasive brook trout from moving upstream and support future bull trout reintroduction.	245,718	Klamath
223-4000	Lakeview SWCD	North Warner Rangeland Health Project	Rangeland conservation will be implemented across a large landscape to restore core sage steppe habitat for sage-grouse.	496,571	Lake
223-4002	Lake County Umbrella Watershed Council	Lake County All Lands Restoration Initiative Mini FIP Phase II	Private forests adjacent to public lands will be thinned, and thinning debris piles burned to restore wildlife habitat and connectivity in the North Warner and Thomas Creek project areas.	397,432	Lake
Total Restoration Projects Recommended for Funding by RRT and OWEB Staff				1,829,086	

Region 4 - Technical Assistance Projects Recommended for Funding in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-4010	Oregon Wildlife Heritage Foundation	Restoring Ecological Connectivity via Wildlife Overcrossings in Southwest Oregon	Project designs will be developed for two Interstate 5 overpasses south of Ashland that will provide safe wildlife passage.	74,813	Jackson
223-4012	Crook SWCD	Crooked River Watershed Sage-Grouse Conservation IV	Private landowners will be engaged to develop Site Specific Plans (SSP) for blueprints to restore high-priority sage-grouse habitat.	74,987	Crook
Total Technical Assistance Projects Recommended for Funding by RRT and OWEB Staff				149,800	

Region 4 - Stakeholder Engagement Projects Recommended for Funding in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-4014	Deschutes River Conservancy	Trout Creek Stakeholder Engagement Project	Landowners in the Trout Creek watershed will be engaged to facilitate future land and water acquisitions and on-the-ground restoration.	81,318	Jefferson
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				81,318	
Region 4 Total OWEB Staff Recommended Board Award				**2,504,992**	

Region 5 - Eastern Oregon Restoration

Region 5 - Restoration Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-5017	Nez Perce Tribe	Lostine River Mile 5.7 Floodplain and Side Channel Enhancement Project	Instream, floodplain, and streamside vegetation on the Lostine River, near Lostine, will be restored to improve water quality and habitat conditions for native fish.	396,381	Wallowa
223-5007	Union SWCD	Elmer Dam Fish Passage and Flow Improvement Construction	An irrigation diversion, fish ladder, and irrigation infrastructure on Catherine Creek, near La Grande, will be replaced to improve water quality, fish passage, and habitat conditions for native fish.	521,001	Union
223-5006	Keating SWCD	Restoring The Powder Phase II	Native tree planting, streambank stabilization, and streamside fencing will be installed along the Powder River, near Keating, to improve water quality and stream habitat.	100,400	Baker
223-5000	Malheur WC	So Many Juniper, So Little Time	Juniper will be removed on a privately owned property, near Brogan. The project will build on prior sage-grouse conservation, improve water quality, and enhance wet meadow function.	61,322	Malheur
223-5008	Tri-County CWMA	Upper Grande Ronde Invasive Weed Control Phase VII	A variety of non-native weeds will be contained and controlled in the Upper Grande Ronde River Watershed, west of La Grande. Several local, state, and federal partners, as well as private landowners, will collaborate to build upon achievements realized since 2016.	37,102	Union
223-5010	Malheur WC	Fiercely Fighting for Fopian Crk and the NF Malheur with Off-stream Water II	Forest and rangeland health, wildlife habitat, and water quality will be improved in the Fopian Creek watershed, a tributary to the north fork of the Malheur River. Habitat for redband and bull trout will be improved by fencing livestock away from Fopian Creek and developing off-stream livestock watering systems.	96,038	Baker
223-5015	Wallowa Resources	Defend & Grow Core Grassland Vegetation in Wallowa County	Improvement for rangeland and native perennial vegetation on Wallowa County's Zumwalt Prairie will include stakeholder engagement and the development of ranch management plans with private landowners. Plans will include treating invasive annual grasses.	167,537	Wallowa
223-5016	Malheur WC	Improving Wildlife & Riparian Habitat Along the Malheur River	Instream, floodplain, and streamside vegetation on the Malheur River near Vale will be restored to improve water quality and habitat conditions for native fish and wildlife.	199,989	Malheur

223-5012	Malheur WC	Mockingbird 3	Located near Harper, flood-irrigated land will be converted to sprinkler irrigation. The conversion will reduce irrigation wastewater, sediment, nutrients, and bacteria contribution to the nearby Malheur River.	115,280	Malheur
223-5003	Malheur SWCD	KWV LITE FM	Located near Ontario in the Morgan Bench area, flood-irrigated land will be converted to sprinkler irrigation. The conversion will reduce irrigation wastewater, sediment, nutrients, and bacteria contribution to the nearby Malheur River.	53,145	Malheur
223-5002	Owyhee WC	Oliver Phase I - South	Located near Jordan Valley, flood-irrigated land will be converted to corrugate irrigation. The conversion will improve flood irrigation management, and reduce irrigation wastewater, sediment, nutrients, and bacteria contribution to the nearby Owyhee River.	139,159	Malheur
223-5013	Owyhee WC	Small But Mighty Water Quality Improvement	Located near Adrian in the Big Bend Area, nine flood-irrigated acres will be converted to sprinkler irrigation. The conversion will reduce irrigation wastewater, sediment, nutrients, and bacteria contribution to the nearby Snake River.	56,384	Malheur
223-5001	High Desert Partnership	Cote In-stream Irrigation Diversion Structure Replacement - Fish Passage and Wet Meadow Restoration	An irrigation diversion and fish ladder on Silver Creek near Burns will be replaced to improve water quality, fish passage, and wet meadow habitat for Pacific Flyway migratory birds.	393,100	Harney
Total Restoration Projects Recommended for Funding by RRT and OWEB Staff				2,336,838	

Region 5 - Technical Assistance Projects Recommended for Funding in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-5018	Powder Basin WC	Uplifting Anthony Creek for Sensitive Trout and Beaver: Alternatives Assessment and Design	Designs will be created to improve instream habitat, streamside vegetation, and water quality. Improvements will benefit bull trout, redband trout, and beaver in Anthony Creek near Baker City.	74,666	Baker
223-5022	Harney County Watershed Council	Five Mile Dam Replacement Design	Designs will be created to improve fish passage and flood irrigation practices at the Five Mile Irrigation Dam. Improvements will benefit redband trout and Pacific Flyway migratory birds on the Silvies River near Burns.	64,550	Harney
223-5020	Tri-State Steelheaders	Mottet Creek Valley Restoration	Designs that address fish passage at a road crossing will be created to increase bull trout and Snake River steelhead productivity in Mottet Creek in the Grande Ronde Basin.	49,738	Union
223-5023	High Desert Partnership	Relationship of Flood Meadow Vegetation to Habitat Value in the Face of Climate Change	Bird species diversity and use of wet meadows will be evaluated to determine the effects of varying water flow and irrigation. This work will inform improved management practices that will benefit habitat for migratory waterfowl in the face of climate change.	74,996	Harney
223-5019	Harney SWCD	Trout Creek Diversion	Designs will be created to improve fish passage and flood irrigation practices at the Trout Creek irrigation diversion near Fields. Improvements will benefit water quality and habitat for fish and Pacific Flyway migratory birds.	75,000	Harney
223-5021	High Desert Partnership	Watershed Synthesis Model	Stream flow, irrigation diversion rates, and water quality data will be combined with existing data to develop a model that improves water management decisions for aquatic habitat on the Malheur National Wildlife Refuge.	54,868	Harney
Total Technical Assistance Projects Recommended for Funding by RRT and OWEB Staff				393,818	

Region 5 - Stakeholder Engagement Projects Recommended for Funding in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-5025	Wallowa Resources	Creating Healthy and Resilient Forest in NE Oregon Through Local Engagement	Forest land managers and the public will be engaged to develop tools and resources needed to create healthy forests in northeast Oregon that are resilient to fire, insects, disease, and climate change.	116,143	Union
223-5024	High Desert Partnership	Harney Basin Wetlands Collaborative Stakeholder Engagement	Agricultural landowners and public land managers will be engaged to develop restoration methods to control invasive plants and non-native carp in the Harney Basin. The project is necessary to restore migratory bird habitat in the Pacific Flyway.	139,808	Harney
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				255,951	
Region 5 Total OWEB Staff Recommended Board Award				**3,200,906**	

Region 6 - Mid-Columbia Basin Restoration

Region 6 - Restoration Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-6003	Gilliam SWCD	Wet Fork Hat Creek Low-Tech Process-Based Restoration	Low-tech log structures and beaver dam analogs (man-made) will be installed along six miles of the Wet Fork of Hay Creek. The structures will help sustain streamflow, expand the floodplain, and encourage streamside vegetation to create better living conditions for fish and wildlife in the area.	78,344	Gilliam
223-6000	Confederated Tribes Umatilla Indian Reservation	South Fork Walla Walla River RM5 Post Flood Adaptive Management	Banks eroded from a 100-year flood event in 2020, that nearly took out a county road, will be fixed to improve stream conditions for fish and wildlife in the South Fork Walla Walla River corridor.	60,000	Umatilla
223-6001	South Fork John Day WC	Lewis Creek Headwaters Restoration	Rangeland health and conditions for wildlife, including redband trout, will be improved in the Lewis Creek watershed, a tributary of the South Fork John Day River. An upland water source will be developed for both wildlife and livestock in this semi-arid landscape. To help struggling aspen communities, buck and pole fencing will be added and encroaching juniper removed.	67,187	Grant
223-6002	Wheeler SWCD	Headwaters of Keyes Creek	Wildlife living conditions will be improved in the headwater area of Keyes Creek. Improvements include encroaching juniper removed, clean water sources at two sites provided, and one aspen grove protected.	80,886	Wheeler
223-6006	Bridge Creek WC	Mac Creek Watershed Improvement	Forest and rangeland health will be improved by removing acres of encroaching juniper and thinning crowded and diseased timber along Mac Creek in southeast Wheeler County.	223,284	Wheeler
223-6008	North Fork John Day WC	Hughes Water Development	Installing three solar-powered units to fill off-channel livestock watering troughs will reduce the carbon footprint by removing the need to use generators to power pumps. This project will aid to improve grazing management and increase the protection of streamside vegetation along Pine Creek, a tributary of Camas Creek, home to native steelhead.	108,717	Umatilla
Total Restoration Projects Recommended for Funding by RRT and OWEB Staff				618,418	

Region 6 - Technical Assistance Projects Recommended for Funding in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-6009	Monument SWCD	Vardanega Conservation Assessment	Multiple inventory tools will contribute to a whole-ranch conservation assessment, and prioritize restoration in the uplands, wet meadows, and on multiple streams located in the Lower Fox Creek & Upper Cottonwood Creek watersheds.	17,833	Grant
223-6010	Oregon Natural Desert Association	Pine Creek Conservation Area Robinson Creek Riparian Restoration Plan	An assessment will result in a restoration plan and conceptual designs to help increase year-round stream flows, improve streamside vegetation, and benefit living conditions for both fish and wildlife along Robinson Creek in Wheeler County.	30,243	Wheeler
223-6012	Walla Walla Basin Watershed Foundation	Cup Gulch Assessment and Action Plan	Assessing the Cup Gulch watershed will help identify and prioritize future restoration opportunities, including strategies to remove a fish passage barrier where Cup Gulch enters the North Fork Walla Walla River.	46,181	Umatilla
Total Technical Assistance Projects Recommended for Funding by RRT and OWEB Staff				94,257	

Region 6 - Stakeholder Engagement Projects Recommended for Funding in Priority Order					
Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
None					
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				0	
Region 6 Total OWEB Staff Recommended Board Award				**712,675**	

Partnership TA Grants

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-8303	Grande Ronde Model WS Foundation	Grande Ronde Restoration Partnership Capacity	Funding will help the Partnership to expand, improve and maintain communication to the restoration partners, researchers, and landowners in high-priority areas in the Grande Ronde River subbasin.	149,810	Union
223-8302	Cascade Pacific RC&D	Update Tenmile Lakes Restoration Plan	Funding will help the Willamette Partnership to update the current Tenmile Lakes Native Fisheries and Water Quality Restoration Plan, develop governance documents, and build local capacity of the Partnership to implement it.	149,758	Coos
223-8308	Ducks Unlimited	Umpqua Oak Partnership Strategic Action Plan Development	Funding will help the Partnership continue to collaborate with partners, finalize governance documents, complete our strategic action plan, develop a monitoring plan that aligns with the Klamath-Siskiyou Oak Network's plan, and create oak distribution and prioritization maps to guide conservation initiatives.	95,614	Douglas
223-8304	Curry SWCD	Siskiyou Coast Estuaries Partnership Capacity Resubmit	Funding will assist with capacity needs to implement a Strategic Action Plan in the Sixes River watershed, engage in outreach with potential additional partners, and enhance monitoring plans.	96,875	Curry
223-8307	High Desert Partnership	Harney Basin Wetlands Collaborative - Partnership Capacity	This grant project will support staff salary for the Coordinator, whose work includes coordinating Strategic Action Plan implementation, conducting meetings with facilitation, grant tracking and management, and supporting partners.	147,216	Harney
Total OWEB Staff Recommended Board Award				**639,273**	

Land Acquisition Grants

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-9900	Oregon Desert Land Trust	Trout Creek Meadows	Property at Trout Creek Ranch will be permanently protected under a conservation easement and managagement plan that includes the use of grazing to help obtain wildlife habitat goals.	2,875,000	Harney
Total OWEB Staff Recommended Board Award				**2,875,000**	

Oregon Agricultural Heritage Program

Conservation Easement Grants

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-7104	Wild Rivers Land Trust	Wahl Ranch	A large family ranch and an ecologically critical landscape along the coast north of Port Orford will be protected for generations.	2,702,395	Curry
223-7106	Deschutes Land Trust	Aspen Valley Ranch – Rim Tract	Important habitat for greater sage-grouse, pronghorn antelope, Rocky Mountain elk, and mule deer will be conserved in the Aspen Valley Ranch Rim Tract--a second phase in a four phase project.	263,779	Crook
223-7100	Oregon Agricultural Trust	Seely Farm Phase 1	High-value farmland will be permanently preserved in Catskanie. The farmland is also home to federally-threatened Columbia white-tailed deer and numerous birds who use the land for migration along the Pacific Flyway.	276,297	Columbia
223-7105	Deschutes Land Trust	Pitchfork T	The Property is within a core wildlife migration area for elk and a mule deer and will help to connect migrating wildlife with larger, undeveloped landscapes.	121,134	Deschutes
223-7101	Oregon Agricultural Trust	O'Keefe Ranch	A century-old family ranching operation will be preserved for agricultural use and the conservation of sage grouse and pronghorn habitat on both sides of the Warner Valley, near the Hart Mountain Antelope Refuge.	277,776	Lake
223-7102	Oregon Agricultural Trust	Ferrell, Justin and Jayna	The Ferrell property in Valley Falls will be protected from conversion to non-agricultural uses or uses which may harm its potential for agriculture in the long term. Funding will ensure that the land stays in agriculture for the benefit of their family and community.	223,056	Lake
223-7103	McKenzie River Trust	Hagen	Property west of Junction City will be preserved for a combination of agricultural use, sustainable timber production, preservation and restoration of wildlife habitat, and protection against the future fragmentation.	269,255	Lane

Oregon Agricultural Heritage Program

Conservation Management Plan Grants

Project #	Grantee	Project Title	Brief Description	Amount Recommended	County
223-7201	High Desert Partnership	Baker & EOARC	Plans will be developed for vegetation and water management to enhance flood-irrigated wet meadow habitat. Improved habitat aims to increase bird use, and optimize agricultural production with changing climate and water patterns in mind.	41,366	Harney
223-7200	Coast Fork Willamette Watershed Council	Branch Road	A Conservation Management Plan will be created to address water resource concerns, soil conservation priorities, and natural habitat maintenance and restoration in the coming decades.	24,942	Lane
Total OWEB Staff Recommended Board Award				**4,200,000**	

OREGON
WATERSHED
ENHANCEMENT BOARD

Hybrid Board Meeting

Sisters, Oregon

July 24-25, 2023

Oregon Watershed Enhancement Board Meeting Agenda July 24-26, 2023

Monday, July 24, 2023

Tour – 2:00 pm

The board and OWEB staff will conduct a field tour of restoration on Whychus Creek. The tour will be leaving from the Sisters Park & Recreation District (located at 1750 W. McKinney Butte Rd. in Sisters). Anyone is welcome to join the tour, but please be prepared to provide your own transportation and be prepared for hot and/or inclement weather.

Tuesday, July 25, 2023

FivePine Lodge
1021 Desperado Trail
Sisters, OR 97759

Business Meeting – 8:00 am

The public is welcome to listen to the virtual meeting through the following methods:

- **YouTube Streaming**: https://www.youtube.com/channel/UC0dl-TOwLt4Sp--i1KEa_OA. Please note that there may be a slight delay when streaming the meeting content.
- **Phone**:
  - **July 25:** Dial 1 669 900 6833, when prompted, enter ID number: 838 5357 5247 and passcode: 522235
  - **July 26:** Dial 1 669 900 6833, when prompted, enter ID number: 895 1378 2473 and passcode: 154768

The board materials are available at: https://www.oregon.gov/oweb/about-us/Pages/board/2023-Jul.aspx

For each agenda item, the time listed is approximate. Anyone interested in a particular agenda item is encouraged to give ample time and listen in to the meeting at least 30 minutes before the approximate agenda item time.

Public comment
OWEB encourages written or verbal public comment on any agenda item that is not marked with an asterisk. Agenda items with an asterisk (*) are not open for public comment because they were the subject of a formal public hearing that included a comment period.

All written comments and requests to make verbal comments to the board can be submitted on our website at Oregon Watershed Enhancement Board : Public Comment or can be emailed to

Nicole Bettinardi at Nicole.BETTINARDI@OWEB.oregon.gov. The deadline for submitting written comments and requests to make verbal comments is 12:00 p.m. Friday, **July 21, 2023**.

Written comments will be provided to the board before the meeting.

Verbal comments:

- Are limited to three minutes
- Will be heard in the public comment periods (**Agenda Items F, G, H, J, and K**).
- Please provide the following information:
  - Your first and last name
  - The topic/item letter of your comment
  - Whether you plan on coming to the meeting in person or virtually
  - If calling in, the phone number you will use when calling the meeting. Also, note if the phone is a landline and you prefer to be scheduled for public comment early to avoid long distance phone call charges.

A. Board Member Comments (8:05 am)
Board representatives from state and federal agencies will provide updates on issues related to the natural resource agency they represent. This is also an opportunity for public and tribal board members to report on their recent activities and share information and comments on a variety of watershed enhancement and community conservation-related topics. *Information item*.

B. Review and Approval of Minutes (9:35 am)
The minutes of the April 2023 meeting will be presented for board approval. *Action item*.

C. Co-Chair Election (9:40 am)
The current term of OWEB Board Co-Chair Barbara Boyer ends in July 2023. Board members will vote to re-elect Barbara Boyer to continue as Co-Chair for a new two-year term. *Action item.*

D. Directors Updates (9:45 am)
Executive Director Lisa Charpilloz Hanson and staff will update the board on agency business. *Information item.*

E. Committee Updates (10:45 am)
Representatives from board committees will provide written updates on committee topics to the full board. *Information item*.

F. General Public Comment (11:00 am)
This time is reserved for the board to hear general public comments and review the written public comment submitted for the meeting. *Information item*.

G. Adopt 2023-2025 Spending Plan (11:15 am)
NOTE: Verbal public comment specific to this agenda item will be heard at approximately 11:30 am

Executive Director Lisa Charpilloz Hanson and Grant Program Manager Eric Williams will provide the 2023-2025 Spending Plan for board review and approval, based on both feedback from the April board meeting and the May revenue forecast for the Oregon Lottery. *Action item.*

H. Council Capacity Grants Awards (1:25 pm)
NOTE: Verbal public comment specific to this agenda item will be heard at approximately 1:45 pm.

Monitoring and Reporting Manager Courtney Shaff and Water Acquisitions Coordinator, Council and District Capacity Coordinator Brian Wolcott will provide an overview of the 2023-2025 Council Capacity grant offering and outline staff recommendations for the grant awards. *Action item.*

I. Climate-Related Evaluation Criteria Rulemaking (2:55 pm) *
Board and Legislative Policy Coordinator Eric Hartstein and Water and Climate Programs Coordinator Jessi Kershner will present the climate criteria rulemaking evaluation criteria for approval by the board. *Action item.*

Informal Reception – 5:00-7:00 pm

The public is invited to join the OWEB Board and staff at a reception.

FivePine Lodge
1021 Desperado Trail
Sisters, OR 97759

Wednesday, July 26, 2023

Business Meeting – 8:00 am

J. General Public Comment (8:05 am)
This time is reserved for the board to hear general public comments and review the written public comment submitted for the meeting. *Information item*.

K. Water Acquisitions Grant Awards (8:20 am)
NOTE: Verbal public comment specific to this agenda item will be heard at approximately 8:35 am

Grant Program Manager Eric Williams and Water Acquisitions Coordinator, Council and District Capacity Coordinator Brian Wolcott will provide an overview of the November 2022 Water Acquisitions Grant Offering process and outline staff recommendations for grant awards. *Action item.*

L. OWEB Small Grants 101 (9:35 am)
Grant Program Manager Eric Williams and Small Grants Coordinator Kathy Leopold will provide an 'OWEB 101' presentation highlighting the Small Grants program. *Information Item.*

M. Drought & Fire Grant Program Presentation (10:20 am)
Drought & Fire Program Manager Renee Davis and representatives from local organizations that are grantees in the post-wildfire recovery and drought relief grant programs will join the board for a panel discussion on the work they are implementing, and how this work addresses post-wildfire recovery and drought relief efforts. *Information item.*

N. Council and District Operating Capacity Retrospective Analysis (11:35 am)
Monitoring and Reporting Manager Courtney Shaff and guest presenter Oregon State University Extension Service Interim Fire Program Director Emily Jane Davis will present to the board the results of a retrospective evaluation of OWEB's operating grants. Information item.

O. Initiate Rulemaking -Division 35 (12:20 pm)
Board and Legislative Policy Coordinator Eric Hartstein will request board authorization to initiate rulemaking for the OWEB Small Grant Program and a legislatively directed new grant program related to protecting source drinking water. *Action item.*

P. Other Business (12:35 pm)
This item is reserved for other matters that may come before the board. *Information item.*

Meeting Rules and Procedures

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

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

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

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

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

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

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

More Information
If you have any questions about this agenda or the Board's procedures, please call Nicole Bettinardi, OWEB Board Assistant, at 503-428-1804 or send an e-mail Nicole.BETTINARDI@OWEB.oregon.gov. If special physical, language, or other accommodations are needed for this meeting, please advise Nicole Bettinardi as soon as possible, and at least 48 hours in advance of the meeting.

Oregon Watershed Enhancement Board Membership

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

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

Contact Information
Oregon Watershed Enhancement Board

775 Summer Street NE, Suite 360
Salem, Oregon 97301-1290
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Fax: 503-986-0199
www.oregon.gov/OWEB

OWEB Executive Director – Lisa Charpilloz Hanson
Lisa.CHARPILLOZ.HANSON@OWEB.oregon.gov
OWEB Assistant to Executive Director and Board – Nicole Bettinardi
Nicole.BETTINARDI@OWEB.oregon.gov

2023 Board Meeting Schedule
October 24-25 – Klamath Falls/Hybrid
2024 Board Meeting Schedule
January 23-24 – Virtual

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

OREGON
WATERSHED
ENHANCEMENT BOARD

Agenda Item B

Board Meeting Minutes

Board Meeting July 25-26, 2023

MINUTES ARE NOT FINAL UNTIL APPROVED BY THE BOARD

Oregon Watershed Enhancement Board (OWEB)
April 25 & 26, 2023, Board Meeting

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

OWEB MEMBERS PRESENT
Agpaoa, Elizabeth (4/25 only)
Allen, Chris
Boyer, Barbara
Brandt, Stephen
Brown, Dan
Buckmaster, Bruce
Coates, Kelly
Curtis, Aaron
Kile, Molly
Labhart, Mark
Marshall, Gary
McClary, Lindsay
McLeod-Skinner, Jamie
Owens, Cory
Reeves, Meg
Shively, Dan

OWEB STAFF PRESENT
Bettinardi, Nicole
Charette, Amy
Charpilloz Hanson, Lisa
Ciannella, Greg
Davis, Renee
DeBardelaben, Theresa
Duzik, Katie
Fetcho, Ken
Forney, Miriam
Greer, Sue
Grenbemer, Mark
Hartman, Heidi
Hartstein, Eric
Hatch, Audrey
Hoffert, Denise
Kershner, Jessi
Larson, Taylor
Leopold, Kathy
Meacher, Robin
Menton, Coby
McCarthy, Jillian
Page, Stephanie
Redon, Liz
Repplinger, Linda
Scharer, Miriam
Shaff, Courtney
Williams, Eric
Wolcott, Brian

OTHER
Abercrombie, Troy
Beamer, Kelley
Berg, Tristen
Berning, Kurt
Bierly, Ken
Cook, Maya
Creutzburg, Megan
Dye Purpura, Holly
Green, Vanessa
Henderson, Lauren
Huntington, Geoff
Larson, Kristen
Lee, Jan
Mork, Lauren
Nye, Brad
Placido, Elaine
Power, Karin
Rice, Alex
Richardson, Shannon
Rook, Erik
Schmide, Emily
Thieman, Cindy
Walz, Kristen
Weybright, Jared
Winters, Herb

Tuesday, April 25, 2023

The meeting was called to order at 8:02 a.m. by Barbara Boyer: Video

A. Board Member Comments (Timestamp = 0:4:17)

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

B. Review and Approval of Minutes (Timestamp = 1:21:57)

The minutes of the January 24 & 25, 2023 meeting was presented for board approval. *Action item*.

Jamie McLeod-Skinner moved the board to approve the minutes from the January 24 & 25, 2023 virtual meeting. Lindsay McClary seconded. The motion passed unanimously.

C. Directors Updates (Timestamp = 1:22:42)

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

D. Committee Updates (written report)

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

E. General Public Comment (Timestamp = 2:35:21)

This time was reserved for the board to hear general public comments and review the written public comment submitted for the meeting. *Information item*.

- Network of Oregon Watershed Councils, Vanessa Green
- Hood River Watershed Group, Cindy Thieman
- McKenzie Watershed Council, Jared Weybright
- Upper Deschutes Watershed Council, Kris Knight
- Written public comments available on the OWEB public comments page

F. Land Acquisition Grant Awards (Timestamp = 2:51:49)

Grant Program Manager Eric Williams and Land Acquisitions Coordinator Miriam Forney presented on the September 2022 land acquisition offering. *Action item.*

Item F public comment

- Oregon Desert Land Trust, Brad Nye

Motion #1: Mark Labhart moved the board award funding for the land acquisition grant as specified in Attachment A to the Land Acquisition Grant Awards staff report, with the project-specific conditions detailed in Attachment B to the staff report.

Motion #2: Mark Labhart moved the board extend the closing deadline to April 27, 2024, for the Siuslaw land acquisition project (Grant No. 221-9903-19500) with all other conditions of the project remaining unchanged.

Jamie McLeod-Skinner seconded both motions. The motions passed unanimously.

G. Climate-Related Evaluation Criteria Rulemaking Update (Timestamp = 3:39:05)

Board and Legislative Policy Coordinator Eric Hartstein and Water and Climate Programs Coordinator Jessi Kershner provided an update on the climate criteria rulemaking process and an overview of draft climate evaluation criteria, definitions, and guidance. *Information item.*

H. Fall Open Solicitation Grant Offering Board Awards (Timestamp = 5:00:05)

Grant Program Manager Eric Williams, North Coast Program Representative Katie Duzik, Southwest Oregon Program Representative Mark Grenbemer, Willamette Valley Program Representative Liz Redon, Central Oregon Program Representative Greg Ciannella, Eastern Oregon Program Representative Coby Menton, and Mid-Columbia Program Representative Sue Greer presented on the Fall Open Solicitation grant offering, including highlighting projects from each region. *Action Item.*

Item H public comment

- Long Tom Watershed Council, Rob Hoshaw

Meg Reeves moved the board adjust the 2021-2023 spending plan as described in Table 1, Recommended Spending Plan Adjustment column in the Fall 2022 Open Solicitation Grant Offering staff report. Jamie McLeod-Skinner seconded. The board approved unanimously.

Meg Reeves then moved the board approve the staff funding recommendations as described in Attachment D to the Fall 2022 Open Solicitation Grant Offering staff report. Mark Labhart seconded. The board approved unanimously.

I. Stage 0 Effectiveness Monitoring Funding Request (Timestamp = 7:00:26)

Monitoring and Reporting Manager Courtney Shaff, Effectiveness Monitoring Coordinator Ken Fetcho, Executive Director of the McKenzie Watershed Council Jared Weybright, and Monitoring Program Manager of the Upper Deschutes Watershed Council Lauren Mork provided a progress update on Stage 0 restoration efforts and requested funding for effectiveness monitoring . *Action Item.*

Jamie McLeod-Skinner moved the board award up to $470,000 for effectiveness monitoring of large-scale restoration projects in Whychus Creek and the South Fork McKenzie River with funds from the Quantifying Conservation Outputs and Outcomes line item of the OWEB spending plan, and delegate to the Executive Director the authority to distribute the funds through appropriate agreements with an award date of April 25, 2023. Gary Marshall seconded. The board approved unanimously.

J. **Partnership Technical Assistance Grants Awards (Timestamp = 8:14:21)**

Monitoring and Reporting Manager Courtney Shaff and Drought Program Specialist Theresa DeBardelaben presented the staff evaluations and recommendations for Partnership Technical Assistance grants. *Action Item.*

Mark Labhart moved the board award Partnership Technical Assistance grants as shown in Attachment C to the Partnership Technical Assistance Grant Awards staff report. Lindsay McClary seconded. The board approved unanimously.

The meeting was adjourned at 4:51pm by co-chair Barbara Boyer.

Wednesday, April 26, 2023

The meeting was called to order at 8:00 by Barbara Boyer: Video

K. General Public Comment (Timestamp = 0:01:15)

This time was reserved for the board to hear general public comments. *Information item*.

- South Santiam Watershed Council, Shannon Richardson
- Lower Rogue Watershed Council, Kelly Timchak

L. Approval of Focused Investment Partnerships Carry Forward Funding (Timestamp = 0:8:32)

Grant Program Manager Eric Williams requested carry-forward for the funding of six Focused Investment Partnership holding accounts. *Action item*.

Jamie McLeod-Skinner moved the board approve carry forward of funding in the six Focused Investment Partnership holding accounts to the 2023-2025 biennium as identified in the Approval of Focused Investment Partnerships Carry Forward staff report. Kelly Coates seconded. The board approved unanimously.

M. Oregon Agricultural Heritage Program Grant Awards (Timestamp = 0:19:23)

Grant Program Manager Eric Williams, Oregon Agricultural Heritage Program Coordinator Taylor Larson, and Oregon Agricultural Heritage Program Conservation Easements Specialist Robin Meacher presented the Oregon Agricultural Heritage Commission's funding recommendations for the conservation easements and conservation management plan grant offerings. *Action Item.*

Item M public comment

- Coalition of Oregon Land Trusts, Kelley Beamer

Mark Labhart moved the board award Oregon Agricultural Heritage Program grants as shown in Attachment E to the Oregon Agricultural Heritage Program staff report as recommended by the

Oregon Agricultural Heritage Commission with project-specific conditions detailed in Attachment F to the staff report. Bruce Buckmaster seconded. The board approved unanimously.

N. Spending Plan (Timestamp = 1:46:02)

Executive Director Lisa Charpilloz Hanson and a team of staff, external presenters and partner agencies provided updates to the board on each line of OWEB's 2023-2025 Spending Plan. The board was asked to provide direction for staff moving forward with final options for the July 2023 meeting. *Information Item.*

Item N public comment

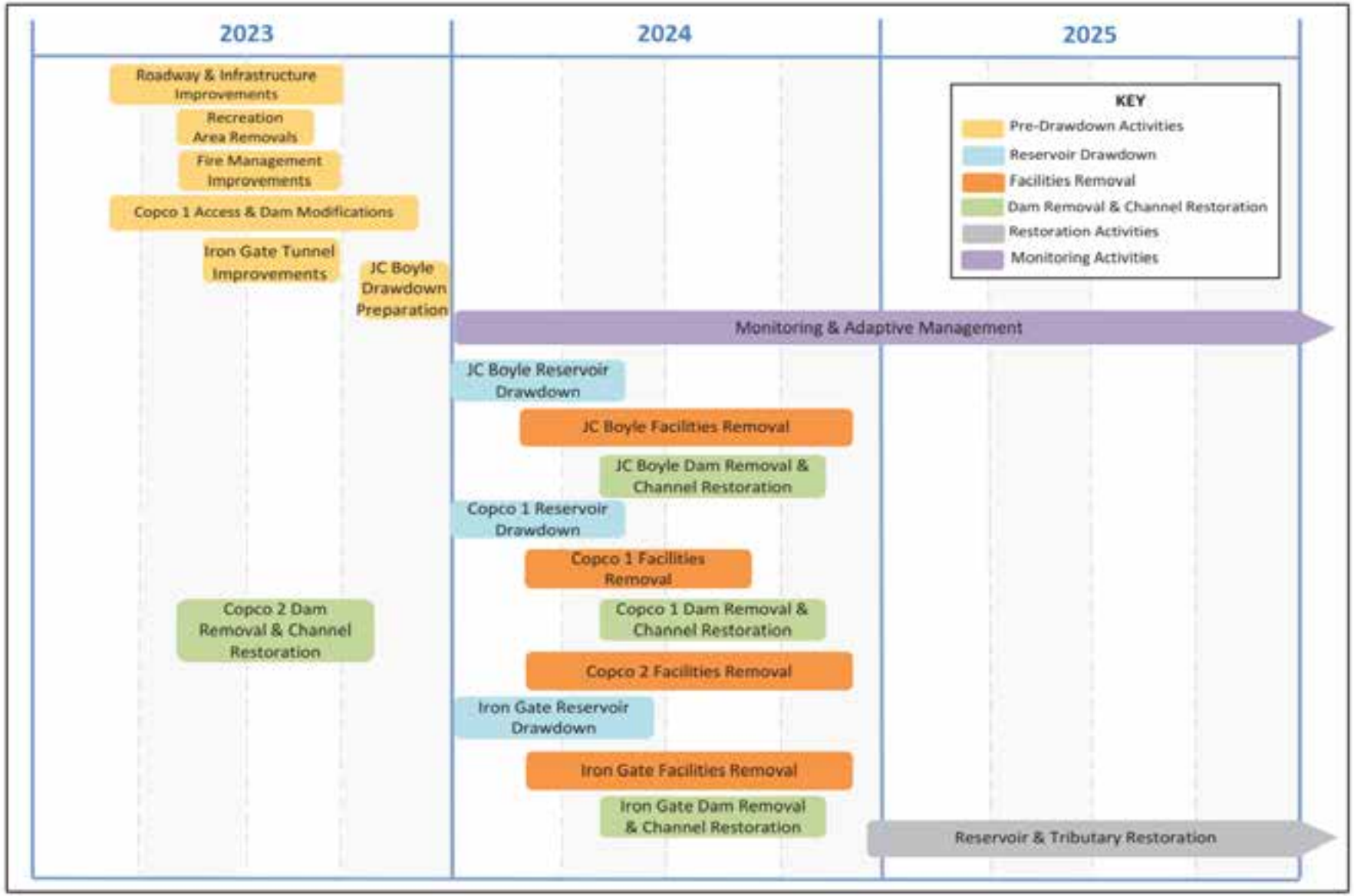
- Baker County Weed District, Jeffrey Pettingill
- Lake County Stockgrowers, Jason Jaeger
- Wild Salmon Center, Caylin Barter
- Oregon Conservation Partnership, Kelley Beamer, Jan Lee, Vanessa Green
- Pudding River Watershed Council, Kurt Berning
- Luckiamute Watershed Council, Kristen Larson,
- N Fork John Day Watershed Council, Kristen Walz
- Coalition of Oregon Land Trusts, Kelley Beamer
- Oregon Association of Conservation Districts, Jan Lee
- Marys River Watershed Council, Holly Dye Purpura

O. Other Business – Coastal Wetland Grant (Timestamp = 1:23:33)

Partnerships Coordinator Jillian McCarthy requested the board approve submittal of a U.S. Fish and Wildlife Service National Coastal Wetlands grant application on behalf of the Columbia Rivers Estuary Study Taskforce. *Action Item.*

Bruce Buckmaster moved the board approve, pending legislative approval, submission of an application for the Nicolai-Wickiup Watershed Connectivity and Tidal Restoration Project – Phase II to the U.S. Fish and Wildlife Service's 2024 National Coastal Wetlands Conservation Grant Program. Gary Marshall seconded. The board approved unanimously.

The meeting was adjourned at 4:21 by co-chair Barbara Boyer.



KLAMATH RIVER RENEWAL CORPORATION

Anticipated Construction Timeline

Klamath River Renewal Project

As of: March 2023

OREGON
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Public Comment

Board Meeting July 25-26, 2023

OREGON
WATERSHED
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Agenda Items F and J

General Public Comment

Board Meeting July 25-26, 2023

Bierly and Associates, LLC
Natural Resource Consulting
2308 Ptarmigan St. NW
Salem, OR 97304
(503) 362-6860

Bierly & Associates LLC

July 14, 2023

Oregon Watershed Enhancement Board
775 Summer St. NE #360
Salem, OR 97301

RE: Agenda Item N Operating Capacity Retrospective

Dear Board Members:

The 20-year retrospective is an excellent summary of the history and value of operating capacity for watershed councils (councils) and soil and water conservation districts (districts). The analysis could be strengthened by comparing the different origins of councils and districts. The time of organization, the concepts behind their formation, the difference in relationships with state agencies (particularly ODA's legal responsibility to provide services to districts), and relationships they have had historically have consequences on their current structure and approach. While the need for operational capacity is similar, the operational environment for each group is quite different. I believe that the results of the survey and findings are somewhat reflective of these inherent differences between councils and districts.

The finding on page 44 that "...governance is fluid because relationships are fluid. Councils and districts have often heavily depended on a single individual..." is particularly cogent. The funding model for councils should be looked at in this manner. For example, those councils that are struggling are often given a list of improvements needed for full funding and awarded a reduced funding amount. I argue that, while it goes against the "merit" system of funding, it is a method to ensure further decline asking for improvement with less resources. While I do not have a solution to this problem, I would encourage the Board to consider it. I notice that you have three councils that will face this dilemma for the biennium as proposed in Agenda Item H.

The critical nature of stable and predictable funding for capacity of conservation organizations was highlighted by the Meyer Memorial Trust funding of council capacity over a 10-year period for their Willamette Initiative[1]. Other large scale restoration efforts also provide assured long-term funding for capacity such as the Lower Columbia River Partnership for restoration efforts in the Columbia River estuary. The assurance of such funding provides the opportunity to offer both longer-term employment and the potential for benefits. While OWEB cannot guarantee funding beyond a biennium, the competitive nature of funding for councils creates a measure of uncertainty of future capacity support not felt by districts where a more allocative model is used. A discussion of the effects of the funding approach used for council capacity could be productive. This concern is reflected in the

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

recommendation of the authors of the review as: Coordinating with and Educating External Funders on the Significance of Longer-Term Funding (Executive Summary page O, page 47).

The 20-year review identifies strategic planning as an important organizing framework for effective council/district work. There is a suggestion that OWEB develop guidance for such a document. If the experience from the FIP program is of any use where the guidance has been radically changed at least three times, I would suggest that guidance be generic, allowing each council/district to format and address their unique issues in the manner that fits their organization. A common template is easy to use in a comparative evaluation, however, is just as likely to become a "requirement" that is not valued locally.

One aspect of the history of the Governor's Watershed Enhancement Board and subsequently the Oregon Watershed Enhancement Board that was not mentioned was the sponsorship of a "biennial conference". This effort by GWEB/OWEB to provide a biennial gathering to allow councils and districts staff and boards to meet OWEB staff and other agency partners in a forum where sessions associated with issues such as "Strategic Planning", "Board Management", "Coordination with NGO's", "Staff Retention", as well as project specific topics could be discussed in an open and active forum. While organizing such a gathering is a workload issue it could be of immeasurable help in addressing some of the critical suggestions from the 20-year review.

A creative relationship between OWEB, ODA, NOWC, and OCEAN or others could reestablish a biennial conference that focuses on the needs of councils and districts and engages public agency staff with council and district staff and boards.

I commend your review of the importance of capacity in local communities. The hope that was created in the 1980's and 1990's of building and honoring local community voices to address difficult natural resource issues has grown and matured over the last two decades. Your deliberations on the future and the value of local community capacity to focus on ecosystem restoration is greatly appreciated.

Sincerely

Kenneth F. Bierly

Oregon Watershed Enhancement
Board of Directors
775 Summer St NE #360
Salem OR 97301

July 21, 2023

Dear Oregon Watershed Enhancement Board of Directors,

Thanks to the support of OWEB and other funders we have the opportunity to invest millions of dollars each year in working with our communities to improve watershed health, our local economies and increase community resilience. One of those most pressing issues for our coastal communities is failing tide gates. Tide gates are critical pieces of infrastructure that, when designed appropriately, allow the tide to move in and out of the lowland area in a controlled manner that provides critical habitat to salmonids and other aquatic species. These structures are also critical for protecting agricultural lands, homes, roads and other local and state infrastructure from catastrophic flooding. An inventory conducted by The Nature Conservancy shows that there are over 444 primary tide gates in the state of Oregon (not counting the hundreds of internal gates found on properties). Many of these gates were installed in a similar timeframe utilizing outdated technologies and will need to be replaced over the next decade.

Administrative rules 695-005-0050 and 695-005-0060 require that all "necessary permits and licenses have been ***granted***" prior to OWEB reimbursing the grantee for expenses related to project elements that require permits. OWEB is revered as a funder who understands what it takes to put restoration projects on the ground, but this administrative rule is making it really challenging to put OWEB dollars on the ground, particularly in the realm of tide gate replacement projects.

The purchase of the tide gates themselves are considered a project element that require a permit and thus unable to be ordered until all permits are granted. There is one primary tide gate manufacturer servicing the state of Oregon (also sells in Washington and California) and they require a purchase order with a 50% down payment at least 3-4 months prior to project implementation, ideally more. Project supplies are constrained by resource shortages and Build in America Buy in America requirements paired with minimal American manufacturers. An average tide gate replacement project requires ten permits from eight different agencies which takes a minimum of 6 months to process, but usually takes around 9 months and up to a year. The issue of permit processing is truncated by agency capacity constraints and an influx of projects due to the increase in infrastructure funding. Funding and completing design so that permits can be drafted is generally a 3-4 year process, this rule adds an entire additional year to the process. This year-long delay is another year of inflation, flooding, and landowner frustration.

We certainly respect the necessity for OWEB as an agency to decrease risk but would appreciate the opportunity to work with the OWEB board and staff to explore alternative approaches to see if there is a better compromise for this challenging situation that better supports landowners and restoration practitioners in implementing these time sensitive projects.

Thank you for your consideration.

BETTINARDI Nicole * OWEB

From: CRAIG M PATTERSON <craigmpatterson@msn.com>
Sent: Wednesday, May 31, 2023 9:28 AM
To: BETTINARDI Nicole * OWEB
Subject: Comments for board consideration for upcoming meeting.

Follow Up Flag: Follow up
Flag Status: Flagged

Hello Nicole Bettinardi,

I have a couple of comments that need vetting in open and transparent ways. In all of my previous attempts to bring these issues to OWEB, I have never felt they got adequate vetting or consideration. I hope that can change.

First, what is called restoration today (putting logs in streams) isn't really supported by local (Pacific northwest scientists) Science which is a MAJOR problem. I have contacted many local (Oregon and Washington) scientists about why they don't get more directly involved in this controversy/discussion and I have yet to hear a good reason. The whole notion of what is "restoration" is woefully inadequate as millions of dollars are spent on very questionable practices. Not to mention there is NO overarching assessment of what are the BIGGEST threats to river and aquatic ecosystems, so that the most egress threats are addressed first.

When I discussed this with Jim Furnish (who was supervisor at the Siuslaw National forest and deputy chief under Dombeck) how he justifies the practice of putting logs in streams. His response was to say they are emulating debris flows and landslides. My follow up was how is that a positive to emulate, when the soil and trees are wasted in the process. He never answered.

However the other glaring problem with OWEB's efforts is the elephant in the watershed – jobs in rural forested communities. When I've asked OWEB how many local jobs have been created with OWEB's (1/2 a billion dollars spent over the last 2 decades) verses monies spent of big equipment, technology and all, NO ONE can answer. They don't tract that.

Why not, when today there are NO thriving rural forested communities anywhere. When our McKenzie school district has been reduced under 180 students in 13 grades, because there aren't jobs to support families anymore. I've lived here mostly for 49 years. In the 70's and 80's the McKenzie schools had over 1000 students, I've been told. This is a direct function of very limited employment which OWEB seems to have a blind eye toward. Can't you do better?

If OWEB wants to open this discussion and vet it properly, let me know. I will gladly participate.

Regards,
Craig Patterson

Sent from Mail for Windows

BETTINARDI Nicole * OWEB

From: Gary Young <gyoung@bluemtnranch.com>
Sent: Tuesday, May 30, 2023 7:54 PM
To: BETTINARDI Nicole * OWEB
Subject: Oregon Watershed Enhancement

Follow Up Flag: Follow up
Flag Status: Flagged

Our government and legislators should support practices for the slowing and spreading of our spring runoff, which does seem to be happening earlier every year. Recharge should be high priority as the need inevitably grows and must be increasingly acknowledged. Always remaining cognizant that the higher the elevation, the more subsequent opportunities, the more storage, the more overall saving and enhancement. If we can't expand our ability to recharge upper-level aquifers, over time we'll witness sagebrush, parched soil and dried up springs…a desert… creeping up into the mountains.

Gary Young

Sent from my iPad

BETTINARDI Nicole * OWEB

From: Gary Young <gyoung@bluemtnranch.com>
Sent: Tuesday, July 18, 2023 5:55 PM
To: BETTINARDI Nicole * OWEB
Subject: Re: Water Concerns — Blue Mountain Ranch

Another perspective on the necessity of recharging our groundwater aquifers.

What is concerning, however, is groundwater's contribution to sea level rise.

https://www.businessinsider.com/groundwater-pumping-causes-earth-rotational-pole-to-shift-study-finds-2023-7

Sent from my iPad

> On Jun 13, 2023, at 9:12 AM, Gary Young <gyoung@bluemtnranch.com> wrote:
>
> Hi Nicole,
> I think you should pass this along to all your contacts interested in fixing our climate crises.
> Rehydrate the Earth!
> I would also recommend a book by Charles Massey:
> The Call of the Reed Warbler
> This is the best I've read on creating healthy functioning watersheds/landscapes.
> Thanks,
>
> Gary
>
> Sent from my iPhone
>
> > On Jun 13, 2023, at 8:20 AM, BETTINARDI Nicole * OWEB <Nicole.BETTINARDI@oweb.oregon.gov> wrote:
> >
> > Gary,
> >
> > Thank you for your comments. I'll pass this along to the Climate and Water Committee.
> > If there is anyone else you'd like me to pass this along to, please let me know.
> >
> > Have a great day.
> >
> > Nicole Bettinardi | she/her/hers (why is this important?)
> >
> > Phone: 503-428-1804
> >
> > Nicole.BETTINARDI@OWEB.oregon.gov

-----Original Message-----

From: Gary Young <gyoung@bluemtnranch.com>

Sent: Monday, June 12, 2023 4:36 PM

To: BETTINARDI Nicole * OWEB <nicole.bettinardi@oweb.oregon.gov>

Subject: Water Concerns — Blue Mountain Ranch

[You don't often get email from gyoung@bluemtnranch.com. Learn why this is important at https://aka.ms/LearnAboutSenderIdentification]

https://www.bluemtnranch.com/water-concerns

Sent from my iPad

Hi Nicole,

This is a link to our website for the ranch. The lack of healthy functioning floodplains to recharge our aquifers is like a bank account with expenses and no source of income…not sustainable, let alone regenerative.

Forbs: Missing Link in Sage-Grouse Recovery

Comments to the OWEB Board of Directors
25 July 2023

Josh Collins, PhD
East Cascades Audubon Society

Good morning. Thank you for providing me time to speak.

My name is Josh Collins. I chair the Sage Science Team of ECAS and I represent environmental NGOs on the SageCon Coordinating Council. I have submitted my comments in writing.

I would like to add my scientific perspective on what more OWEB can do to save the sage-grouse.

Here is a fundamental aspect of sage-grouse natural history: every year adult hens move from shared places of mate selection, called leks, to breeding habitat, and then brood-rearing habitat, and then wintering habitat. The seasonal movements of sage-grouse delineate Sage-Grouse Landscapes. They differ in size from hundreds to a few thousand acres.

Every part of a Sage-Grouse Landscape is critically important, but the breeding habitat is most important. Without good breeding habitat, the number of surviving chicks is inadequate to sustain the population.

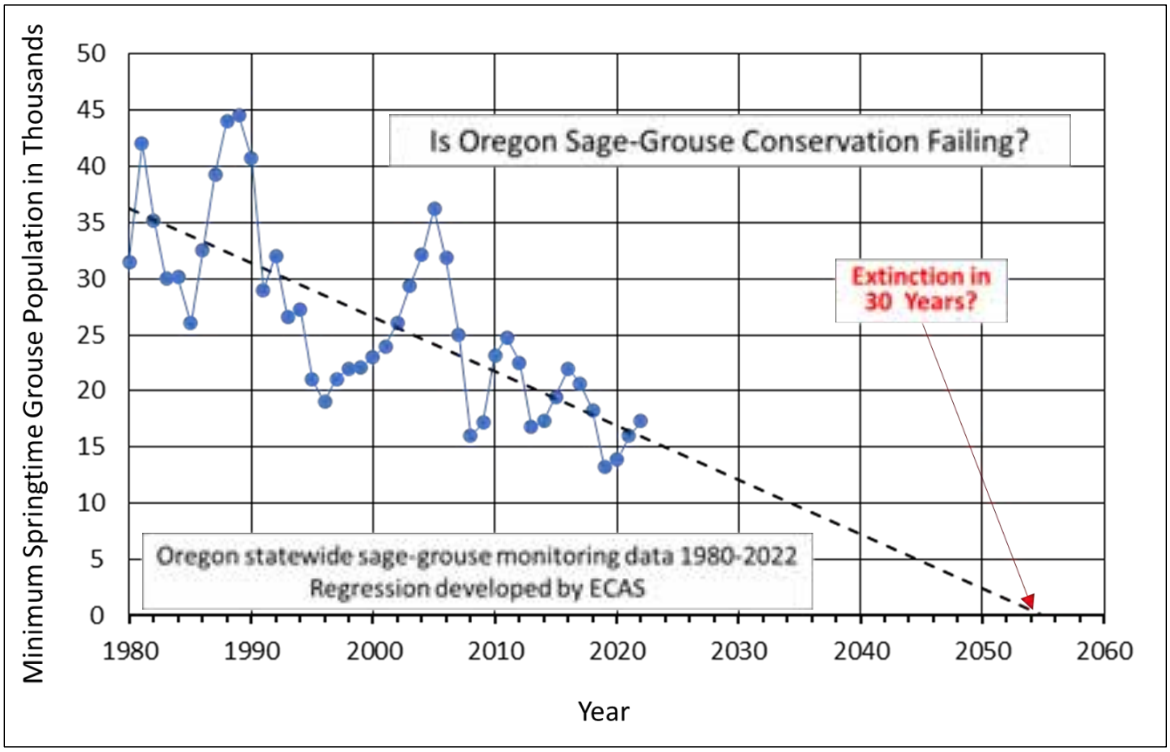
For decades, ODFW has expertly monitored the status and trends of Oregon sage-grouse populations. For the state as a whole, the population trend points to zero in less than 30 years. Some regional populations are doing a little better, and some are doing worse. But, we are running out of time to save the sage-grouse, and what we have done so far hasn't worked.

There are many reasons for the chronic decline in Sage-Grouse populations. The lack of adequate food for brood hens and chicks is a very serious factor. Sage is not their main food during the breeding season. Without the protein provided by springtime forbs, or wildflowers, and associated insects, hens lay fewer eggs, and fewer chicks survive. In fact, chicks cannot digest sage until they are about six weeks old. Until then they absolutely depend on forbs and insects. Forbs are the missing link in Sage-grouse recovery. We must address this fact.

You might be asking, why are the forbs missing? There are two main reasons. First, historical overgrazing by sheep and cattle depleted the Sage-Grouse Landscapes of forb seeds. Second, modern range management has kept most forbs from coming back. Efforts to repair the range after wildfire and invasive plant control do not involve forb restoration. By the time those projects yield good breeding habitat, if they ever do, most sage-grouse are likely to be gone, due to poor hen fitness and low rates of chick survival.

Here is a big part of the solution: bring back the wildflowers, asap. Add dietary forbs to existing breeding habitat to boost its productivity, and integrate forb restoration into wildfire and invasive vegetation management. We encourage OWEB to prioritize forb restoration in sage-grouse landscapes.

We would welcome further dialogue with OWEB, perhaps with relevant field visits, to further examine these concerns. Thank you for your attention.



Springtime sage-grouse habitat with and without forbs as food for brood hens and chicks.



All photos curtesy of Stuart Garrett

Conserving and restoring habitat for Greater Sage-Grouse and other sagebrush-obligate wildlife: the crucial link of forbs and sagebrush diversity

R Kasten Dumroese, Tara Luna, Bryce A Richardson, Francis F Kilkenny, and Justin B Runyon

ABSTRACT

In the western US, Greater Sage-Grouse (*Centrocercus urophasianus* Bonaparte [Phasianidae]) have become an indicator species of the overall health of the sagebrush (*Artemisia* L. [Asteraceae]) dominated communities that support a rich diversity of flora and fauna. This species has an integral association with sagebrush, its understory forbs and grasses, and the invertebrate community dependent on that flora. Adult birds and their growing chicks consume a wide variety of understory species, and the invertebrates that develop on this flora are an important source of protein, especially for developing broods. Restoration plans for degraded sagebrush communities must consider outplanting the correct species and seed source of sagebrush and its diverse array of native forbs. Changes in climate and the problem with invasive species, especially annual grasses that spawn large-scale fires, will need to be addressed so that restoration efforts can succeed.

Dumroese RK, Luna T, Richardson BA, Kilkenny FF, Runyon JB. 2015. Conserving and restoring habitat for Greater Sage-Grouse and other sagebrush-obligate wildlife: the crucial link of forbs and sagebrush diversity. Native Plants Journal 16(3):277–299.

KEY WORDS

Centrocercus urophasianus, Artemisia, habitat, restoration, forbs, invasive species

NOMENCLATURE

Plants: USDA NRCS (2015)
Fungi: Farr and Rossman (2015)
Animals: ITIS (2015)
Birds: AOU (2015)

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Once covering 69 million ha (170 million ac) in 16 states and 3 provinces, quality sagebrush (*Artemisia* L. [Asteraceae]) habitat is now an imperiled ecosystem in the US (Noss and others 1995). Native floras of the sagebrush biome are remarkably diverse and species rich, with numerous endemic genera and species (Figure 1). Collectively, these areas contain more than 5000 plant taxa (Cronquist and others 1972–2012; Hitchcock and others 1987; Baldwin and others 2002, 2012). They are centers of diversity for a significant number of monotypic and species-rich genera (Table 1), many of which are narrow or regional endemics, and new species are still being discovered, such as *Lomatium ochocense* Helliwell & Constance (Apiaceae) from central Oregon (Helliwell 2010).

This diverse flora in turn supports a diverse invertebrate community including herbivores, predators, detritivores, important pollinators of regional flora, and the western population of the monarch butterfly (*Danaus plexippus* L. [Lepidoptera: Nymphalidae]). Together, the diverse flora and invertebrate community support numerous obligate wildlife species such as the pygmy rabbit (*Brachylagus idahoensis* Merriam [Leporidae]), sagebrush vole (*Lemmiscus curtatus* Cope

TABLE 1

Forb genera with high species diversity within the sagebrush biome of western North America.

Genus and authority	Family
Allium L.	Liliaceae
Astragalus L.	Fabaceae
Calochortus Pursh	Liliaceae
Castilleja Mutis ex L.f.	Scrophulariaceae[z]
Eriogonum Michx.	Polygonaceae
Lomatium Raf.	Apiaceae
Lupinus L.	Fabaceae
Penstemon Schmidel	Scrophulariaceae[z]
Phlox L.	Polemoniaceae
Trifolium L.	Fabaceae
Multiple genera	Asteraceae

[z] ITIS (2015) places *Castilleja* in the Orobanchaceae and *Penstemon* in the Plantaginaceae.



Figure 1. Greater Sage-Grouse habitat in the Virginia Mountains of Nevada. Photo by Steven Schwarzbach, US Geological Survey

[Cricetidae]), pronghorn (*Antilocapra americana* Ord [Antilocapridae]), Sagebrush Sparrow (*Artemisiospiza nevadensis* Bruant des armoises), Sage Thrasher (*Oreoscoptes montanus* JK Townsend [Mimidae]), and more than 200 species of other resident and migratory birds.

Of the birds of the sagebrush biome, the Greater Sage-Grouse (*Centrocercus urophasianus* Bonaparte [Phasianidae]) and Gunnison Sage-Grouse (*Centrocercus minimus* Young and others) have become "canaries in the coal mine" as indicators for the health of the North American sagebrush landscape. These 2 species of sage-grouse have a remarkable life history entwined with sagebrush. Males assemble in areas called "leks" during the breeding season (late winter through spring) to court females with their spectacular mating displays (Figure 2). Nesting hens, brooding females, and chicks rely directly on a high diversity of annual and perennial forbs; sage-grouse diet of those forbs and the biodiverse, high-protein invertebrates associated with the plants is critical for the species survival.

In 1805, near the confluence of the Marias and Missouri Rivers, Meriwether Lewis remarked, *I saw a large flock of the mountain cock, or a large species of heath hen with a long pointed tail that the Indians informed us were common to the Rocky Mountains*, and later that winter, *the Cock of the Plains is found in the Plains of the Columbia and are in great abundance from the s.e. fork of the Columbia to that of Clark's River* [Clark Fork River].

Today, the Gunnison Sage-Grouse roams the Colorado Plateau, whereas the Greater Sage-Grouse (GRSG) occurs in just half of its original range in the Great Basin, Columbia River Basin, and Wyoming Basin and some areas of the northern and western Great Plains. Gunnison Sage-Grouse was listed as threatened under the Endangered Species Act (ESA) in 2014 (Federal Register 2014). Although listing GRSG under the ESA was recently deemed not warranted, its status will be re-evaluated in 5 y (USDI 2015). Today, most remaining GRSG populations are associated with habitats at more northern latitudes or higher elevations, and (or) within more mesic or colder sagebrush environments (Connelly and Braun 1997).



Figure 2. A displaying male Greater Sage-Grouse on a lek in Butte County, South Dakota. Photo by Steve Fairbairn, US Fish & Wildlife Service

Because Gunnison Sage-Grouse and GRSG are believed to have similar life histories and habitat requirements and because most literature concentrates on GRSG, the focus of this paper will be on GRSG, recognizing that key points are most likely applicable to Gunnison Sage-Grouse, too. Our objectives are to demonstrate to nursery managers, seed producers, and land managers the importance of floral diversity to sustainable populations of both sage-grouse species (Gunnison and Greater) and to encourage those professionals to produce and deploy more native plants, especially forbs, in habitat restoration efforts.

THREATS TO SAGE-GROUSE

A suite of threats are affecting sage-grouse; these threats are often broadly lumped together as the loss, fragmentation, and degradation of sagebrush ecosystems, which are primarily driven by human activities (Connelly and others 2011). These anthropogenic activities are now interacting in complex ways (see Finch and others 2015 for a concise review), and important drivers include invasive annual grasses, encroachment by trees, altered fire cycles, grazing, and climate change (Davies and others 2011). The decades of chronic loss, fragmentation, and degradation within the sagebrush ecosystem has led to the acute potential problem of several sagebrush obligate wildlife species being considered for threatened or endangered status at the state and federal levels, which would have a large implication on the management and use of western rangelands. Two other drivers in the current discussion are pesticides and energy development.

By the 1970s, more than 2 million ha (nearly 5 million ac) of sagebrush had been mechanically treated, sprayed with herbicides, or burned to improve grazing (Hull and others 1952; Schneegas 1967; Vale 1974), often during spring and early summer at the height of GRSG nesting and brood rearing, resulting in declines in sage-grouse populations and habitat quality (Connelly and others 2000; Beck and others 2003, 2012; Crawford and others 2004). These treatments also negatively affected populations of understory native floras, health of biological soil crusts, and persistence of native seedbanks (Belnap and Eldridge 2003; Thacker and others 2012).

Herbicide use is a factor for GRSG survival. 2,4-D is a very commonly used phenoxy herbicide used for control of broadleaf plants in rangelands. Perennial forbs important to the dietary requirements of pre-laying hens, chicks, and juveniles, such as those in the species-rich Asteraceae, Liliaceae, Rosaceae,

Plantaginaceae, Orobanchaceae, and Fabaceae that support entire communities including a web of regional pollinators, are severely damaged or killed by 2,4-D. In addition, modern formulations of 2,4-D are highly toxic to bees (Hymenoptera) (Dow Chemical Company 2015), which may have long-term implications for forb reproduction if pollination services are hindered. It may take several years for annual plant recovery or recruitment following 2,4-D application (Thacker and others 2012). Broadleaf herbicides can also have long-term effects on remaining native perennials. Picloram, for example, reduced flowering of established arrowleaf balsamroot (*Balsamorhiza sagittata* (Pursh) Nutt. [Asteraceae]) plants and occurrence of new seedlings for at least 4 y after application (Crone and others 2009). Sites with herbicide-reduced cover of native vegetation are vulnerable to infestation by invasive annual grasses, such as cheatgrass (*Bromus tectorum* L. [Poaceae]).

Insecticides, such as those used to control grasshoppers (Orthoptera: Acrididae) (Johnson and Boyce 1990) and Mormon crickets (*Anabrus simplex* Haldeman [Orthoptera: Tettigoniidae]), can be toxic to adult birds (Blus and others 1989), and low rates of annual GRSG recruitment, especially in areas where sagebrush habitat interfaces agricultural fields, may be attributable to insecticides. Juveniles are attracted to agricultural fields during late summer months (Peterson 1970) after many preferred native forbs have senesced for the season.

In addition, oil, gas, coal, and wind energy development in sagebrush-dominated habitats during the past 20 y has negatively affected GRSG. Holloran (2005) noted that the number of producing wells has more than doubled, and this development in sagebrush habitat far exceeds GRSG tolerance thresholds. Unfortunately, current energy expansion is occurring in some of the best remaining sagebrush communities and within areas having the highest density populations of GRSG and other sagebrush-obligate species (Knick and others 2003; Crawford and others 2004; Kaiser 2006; Bergquist and others 2007). Threats to GRSG associated with energy development include a number of detrimental effects: increased fragmentation leading to disrupted habitat use patterns (Lyon and Anderson 2003; Ingelfinger and Anderson 2004; Aldridge and Boyce 2007; Walker and others 2007; Doherty and others 2008: Blickley and others 2012; LeBeau 2012), increased chick mortality proximate to oil and gas projects (Aldridge and Boyce 2007), increased invasive plant establishment along roads (Gelbard and Belnap 2003), and problems associated with wastewater holding ponds, such as potential facilitation of the spread of West Nile virus (Schrag and others 2011).

SAGEBRUSH COMMUNITIES

At first glance, sagebrush may appear to be homogenous (Figure 3); closer inspection has, however, revealed an intricate, species-rich mosaic of sagebrush taxa that are largely defined by climate and soil properties (Barker and McKell 1983; Mahalovich and McArthur 2004; Miglia and others 2007; Still and



Figure 3. Artemisia tridentata ssp. *tridentata* in the Centennial Valley of southwestern Montana. Photo by Bebe Crouse, The Nature Conservancy

Richardson 2015). Moreover, ecotones between these mosaics often harbor sagebrush derived from hybridization (McArthur and others 1988), some of which have been recognized by researchers as subspecies (Garrison and others 2013). These mosaics in turn foster various assemblages of flora and fauna referred to as communities that are critical to sustaining sage-grouse.

Classifying these taxa and characterizing the environments where they occur is a key activity and essential to successful restoration. The most predominant sagebrush species across the Great Basin, Wyoming Basin, and Colorado Plateau is *A. tridentata* (full nomenclature for most species discussed in this article is found in Tables 1–4). This species has, however, clearly diverged into subspecies that occupy specific niches (Mahalovich and McArthur 2004; Shultz 2006). Two subspecies, *A. tridentata* spp. *tridentata* (basin big sagebrush) and *A. tridentata* spp. *wyomingensis* (Wyoming big sagebrush), co-occur in basin habitats but are differentiated based primarily on soil depth (Barker and McKell 1983; McArthur and Sanderson 1999). With increasing elevation and precipitation these subspecies transition into subspecies *A. tridentata* spp. *vaseyana* (mountain big sagebrush). Genetic markers (Richardson and others 2012), growth rates (McArthur and Welch 1982), and phytochemicals (Stevens and McArthur 1974; Welch and McArthur 1981; Kelsey and others 1983; Wilt and others 1992) can be used to differentiate these 3 subspecies. In addition to these 3 widespread subspecies, 4 range-restricted subspecies (Table 2) occur across the Great Basin, Colorado Plateau, and southwestern US (Goodrich 2005). These subspecies have likely formed through hybridization with other subspecies or species similar to that proposed by Garrison and others (2013).

Dwarf sagebrush, *A. arbuscula* (includes 3 subspecies) and *A. nova*, are an important component to sagebrush communities (Goodrich 2005; Shultz 2006). These species are typically found in areas where soil and (or) climatic characteristics do not support *A. tridentata* (Rosentreter 2005). For example, *A. nova* can occupy ridgetops or rocky soils and form boundaries with *A. tridentata* ssp. *wyomingensis*. *Artemisia nova* can also form more continuous distributions, apparently driven by warmer and drier climates at lower elevations (Kitchen and McArthur 2007). Similarly, some subspecies of *A. arbuscula* occupy poorly drained claypan soils. Other sagebrush species have regional importance to mosaics and sage-grouse habitat. These include *A. tripartita* ssp. *tripartita* distributed across higher elevations that co-occur primarily with *A. vaseyana*, *A. rigida* distributed across basalt scablands in the Columbia Basin and Oregon, and *A. cana* ssp. *cana* found principally along the front range of the Rocky Mountains (Mahalovich and McArthur 2004; Rosentreter 2005). This robust mosaic of taxa is the foundation for sagebrush community floral diversity necessary for supporting sage-grouse. Biologists can use a pocket *Artemisia* field guide (Shultz 2012) to help distinguish taxa and communities. While ample information and understanding of sagebrush taxonomy and niche specialization exists, developing the guidelines and methodologies to support a successful habitat restoration framework remains a major challenge.

SAGEBRUSH HABITAT USE

In general, GRSG use sagebrush habitat for courting, cover, and food based on sagebrush species composition and density. GRSG populations can remain resident in some areas, while other populations migrate between winter and breeding habitat or exhibit more complicated movements (Eng and Schladweiler 1972). Juvenile birds can use a wide range of habitats during autumn dispersal (Dunn and Braun 1986; Hannon and Martin 2006). Home range size varies from 125 km^2 to 2764 km^2 (30,888 ac to 683,000 ac) (Connelly and others 1988; Leonard and others 2000; Smith 2013). Leks occur where sagebrush cover is minimal (< 10%), such as open meadows, sparsely vegetated ridges, and even agricultural fields (Ellis and others 1989; Connelly and others 2004). Females can travel great distances from breeding leks to suitable nesting habitat (Braun and others 2005).

Although pre-laying hens use dwarf sagebrush communities for feeding (Figure 4), nesting occurs primarily in denser, tall sagebrush with tall native grass cover and proximity to abundant forbs (Connelly and others 2000; Thompson and others 2006; Hagen and others 2007; Ersch 2009). These sagebrush communities generally have canopy cover values that range from 12 to 43% (Connelly and others 2000). Throughout the Wyoming Basin and Great Basin, GRSG tend to utilize sagebrush communities that include *A. tridentata* ssp. *tridentata* and *A. cana* in valleys, floodplains, and lower elevations and *A. tridentata* ssp. *wyomingensis* and *A. tridentata* ssp. *vaseyana* at mid to higher elevations. *Artemisia rigida* is also used for cover and nesting in central Washington. In the northern Great Basin, nesting success is associated with dense sagebrush cover with 10 to 50% tall bunchgrass cover (Gregg and others 1994; Crawford and others 2004). While dwarf and tall sagebrush communities are most commonly used for nesting, other shrub communities in association with sagebrush can support nests, including those inhabited by *Purshia tridentata* Pursh DC (Rosaceae) and members of the Asteraceae (*Ericameria*, *Chrysothamnus*, *Tetradymia canescens* DC).

During late spring to early summer following hatch, broods move to more open sagebrush canopy cover to feed on insects and forbs. Not surprising, as canopy cover of big sagebrush decreases, the abundance of grasses and forbs increases (Olson and Whitson 2002) as does the abundance of invertebrates hosted by the herbaceous plants. Moreover, as discussed earlier, dwarf sagebrush (for example, *A. arbuscula*, *A. nova*, *A. tripartita*) inhabits soils less conducive to big sagebrush.

TABLE 2

Artemisia *conservation status, range, and community types.*

Species •*According to Garcia and others (2011)*	Global status	Range	Soils	Community ranks and types
Artemisia arbuscula Nutt. ssp. *arbuscula*	G5	CA, ID, MT, NV, OR, UT, WA, WY	Rocky, calcareous clays or silt loams	G2–G5 sage-steppe and grasslands
A. arbuscula ssp. *longicaulis* Winwood & McArthur	G4	CA, NV, OR	Alluvial silts and sands	Sage-steppe communities on alluvial fans
A. arbuscula ssp. *longiloba* (Osterh.) L.M. Shultz •*A. longiloba* (Osterh.) Beetle	G4	MT, WY	Fine textured, shallow clay or silt loams	G3–G4 sage-steppe and stream terraces
A. arbuscula ssp. *thermopola* Beetle	G5T3Q	CA, ID, OR, UT, WY	Well-drained to poorly drained clay soils above igneous or volcanic rock	G2 grasslands ID, WY
A. bigelovii A. Gray	G5	AZ, CA, CO, NV, NM, TX, UT	Shallow sandy to clay loams	G3 warm and cool woodlands, grasslands, desert rock vegetation, rock outcrops
A. cana Pursh ssp. *cana*	G4	*Canada:* AB, BC, MB, SK; *US:* CO, NE, ND, MN, MT, SD, WY	Sandy loams	G3–G4 sage-steppe, grasslands
A. cana ssp. *bolanderi* (A. Gray) G.H. Ward	G3G4?	CA, NV, OR	Gravelly loams	G1–G3 streams and sage-steppes mountain meadow
A. cana ssp. *viscidula* (Osterh.) Beetle	G3G4?	*Canada:* AB, MB; *US:* AZ, CO, ID, MT, NV, NM, UT, WY	Alluvial sandy loams to loams	G1–G5 wet meadows, streambanks, floodplains, snow beds
A. filifolia Torr.	G5	AZ, CO, KS, NE, NV, NM, OK, SD, UT, WY	Sandy or gravelly or clay loams with clay or caliche layers; biological crusts in Colorado Plateau	G1–G3 communities in western Great Plains G4–G5 communities dry sandy uplands washes and river floodplain terraces
A. frigida Willd.	G5	Throughout North America	Rocky, sands, sandy loams to clay loams	G3–G5 grasslands, woodlands, and sage-steppe
A. longifolia Nutt.	G5	*Canada:* AB, BC, MB, SK; *US:* ID, MT, NE, ND, SD, WA, WY	Shale derived sandy to clay loams	G3–G5 grasslands and open forests
A. ludoviciana Nutt.	G5	Throughout North America	Stony, sands, sandy to clay loams	G3–G5 communities, grasslands, sage-steppe, streams, river terraces, woodlands, talus slopes
A. nova A. Nelson	G5	CA, CO, ID, MT, NV, NM, OR, UT, WY	Shallow, gravelly, lithic, calcic	G1–G3 dry, rocky hills, open sage-steppe G4–G5 southern Great Basin and southwest US
A. papposa S.F. Blake & Cronquist	G4	ID, (NV), OR	Sands, sandy loams, sandy clays or poorly drained clays	G3/G4 sage-steppe and grasslands, 1 G2/G3 riparian community
A. pedatifida Nutt.	G4	ID, CO, southwest MT, WY	Sands, sandy loams, sandy clays derived from shales or sandstones or clays from alluvium	G2–G3 communities sage-steppe grasslands
A. porteri Cronquist	G2	WY	Barren, gravelly clays to clay loams	G2 barren slopes
A. pygmaea A. Gray	G3G4	AZ, CO, NV, NM, UT	Calcic, shale clays with gravel content, gypsum outcrops	G2 communities in some states; G3–G4 sage-steppe

continued

TABLE 2 *continued*

Artemisia *conservation status, range, and community types.*

Species •*According to Garcia and others (2011)*	Global status	Range	Soils	Community ranks and types
A. rigida (Nutt.) A. Gray	G5	ID, MT, OR, WA	Stony, shallow rarely with clay subsoils	G2–G4 sage communities in dry rocky scablands, volcanic plains
A. rothrockii A. Gray	G3	CA	Clays to gravelly silt loams to loamy sands; often carbonate rich	G3 mountain meadows
A. tridentata Nutt. ssp. *parishii* (A. Gray) H.M. Hall & Clem.	G5T2T4	Central and southern CA	Dry, sandy	Desert, mountain, and coastal grasslands and shrub communities in valleys and foothills
A. tridentata Nutt. ssp. *spiciformis* (Osterh.) Kartesz & Gandhi •*A. spiciformis* Osterh.	G5T3T4	CA, CO, ID, MT, NV, WA, WY	Shallow loams, rocky	Subalpine, mountain sage-steppe and grasslands
A. tridentata Nutt. ssp. *tridentata* •*A. tridentata* ssp. *tridentata* (Osterh.) Beetle	G5	*Canada:* AB, BC; *US:* AZ, CA, CO, ID, MT, NE, NM, ND, OR, SD, WA, WY	Sandy to sandy loams, loess soils	G1–G5 warm to cool sage-steppe and grasslands
A. tridentata Nutt. ssp. *vaseyana* (Rydb.) Beetle	G4/G5	*Canada:* AB, BC; *US:* CA, CO, ID, MT, NE, NV, ND, OR, SD, UT, WA, WY	Loamy soils	G2–G4 cool sage-steppe, grasslands, forests and woodlands
A. tridentata Nutt. ssp. *wyomingensis* Beetle & A.M. Young	G5	CA, CO, ID, MT, NE, NV, ND, OR, SD, UT, WY	Loamy to clay soils	G1–G5 (WY) cool dry, sage-steppe, grasslands, forests and woodlands, rock vegetation
A. tridentata Nutt. ssp. *xericensis* Winward ex R. Rosentreter & R. Kelsey	G5T1T3	ID	Deep alluvial soils	G1 sage-steppe
A. tridentata Nutt. ssp. *xbonnevillensis* H. Garrison, L. Schultz, & E.D. McArthur	No rank	ID, UT	Sandy alluvial loams	Sage-steppe on lakeshore sediments
A. tripartita Rydb. ssp. *rupicola* Beetle	G5T3	MT, WY	Coarse-textured soils	G3 grassland and sage-steppe
A. tripartita Rydb. ssp. *tripartita*	G5T3T5	*Canada:* BC; *US:* CA, ID, MT, NV, OR, UT, WA, WY	Sandy to gravelly soils, loams, or loess over bedrock	G1–G3 grassland and sage-steppe
A. tridentata Nutt. ssp. *spiciformis* (Osterh.) Kartesz & Gandhi •*A. spiciformis* Osterh.	G5T3T4	CA, CO, ID, MT, NV, WA, WY	Shallow loams, rocky	Subalpine, mountain sage-steppe and grasslands
A. tridentata Nutt. ssp. *tridentata* •*A. tridentata* ssp. *tridentata* (Osterh.) Beetle	G5	*Canada:* AB, BC; *US:* AZ, CA, CO, ID, MT, NE, NM, ND, OR, SD, WA, WY	Sandy to sandy loams, loess soils	G1–G5 warm to cool sage-steppe and grasslands
A. tridentata Nutt. ssp. *vaseyana* (Rydb.) Beetle	G4/G5	*Canada:* AB, BC; *US:* CA, CO, ID, MT, NE, NV, ND, OR, SD, UT, WA, WY	Loamy soils	G2–G4 cool sage-steppe, grasslands, forests and woodlands
A. tridentata Nutt. ssp. *wyomingensis* Beetle & A.M. Young	G5	CA, CO, ID, MT, NE, NV, ND, OR, SD, UT, WY	Loamy to clay soils	G1–G5 (WY) cool dry, sage-steppe, grasslands, forests and woodlands, rock vegetation

continued

TABLE 2 *continued*

Artemisia *conservation status, range, and community types.*

Species •*According to Garcia and others (2011)*	Global status	Range	Soils	Community ranks and types
A. tridentata Nutt. ssp. *xericensis* Winward ex R. Rosentreter & R. Kelsey	G5T1T3	ID	Deep alluvial soils	G1 sage-steppe
A. tridentata Nutt. ssp. *xbonnevillensis* H. Garrison, L. Schultz, & E.D. McArthur	No rank	ID, UT	Sandy alluvial loams	Sage-steppe on lakeshore sediments
A. tripartita Rydb. ssp. *rupicola* Beetle	G5T3	MT, WY	Coarse textured soils	G3 grassland and sage-steppe
A. tripartita Rydb. ssp. *tripartita*	G5T3T5	*Canada:* BC; *US:* CA, ID, MT, NV,OR, UT, WA, WY	Sandy to gravelly soils, loams, or loess over bedrock	G1–G3 grassland and sage-steppe
Bud Sage and Chicken Sage				
Picrothamnus desertorum Nutt. •*Artemisia spinescens* DC. Eaton	G5	AZ, CA, CO, MT, NV, NM, OR, UT, WY	Sands, sandy loams, sandy clays eolian or alluvium derived or poorly drained clays from alluvium	G2/G3 (MT, WY) sage-steppe and G3–G5 (NV, OR, UT, WY)
Sphaeromeria argentea Nutt. •*A. argentea* S. Garcia and others	G3G4	CO, ID, MT, NV, WY	Sands, silts, clays loams, gravelly loams, often calcareous, with cobble or gravel	G2 grassland communities in WY, ID
S. cana (D.C. Eaton) A. Heller •*A. albicans* S. Garcia and others	G3/G4	CA, NV, OR	Rocky crevices and talus slopes	Sparsely vegetated cliffs, talus slopes
S. capitata Nutt. •*A. capitata* (Nutt.) S. Garcia and others	G3	CO, MT, UT, WY	Shallow, rocky sometimes calcareous soils	G3 dry, rocky hills, sage-steppe
S. compacta (H.M. Hall) A.H. Holmgren, L.M. Shultz & Lowrey •*Artemisia constricta* S. Garcia and others	G2	NV	Gravelly, limestone	G2 coniferous woodlands, alpine and rock, talus and scree
S. diversifolia (D.C. Eaton) Rydb. •*A. inaequifolia* S. Garcia and others	G3/G4	NV, UT	Shallow to moderately deep, rocky soils, rock crevices on limestone or quartzite	Sparsely vegetated cliffs, rocky slopes
S. potentilloides (A. Gray) A. Heller var. *nitrophila* (Cronquist) A.H. Holmgren, L.M. Shultz & Lowrey	G5T4	Snake River ID, NV	Alkaline fine-textured soils subjected to seasonal flooding	Wet meadows, springs
S. potentilloides (A. Gray) Rydb. var. *potentilloides*	G5TNR	CA, ID, NV, OR	Non-alkaline fine-textured soils	G2 mountain wet meadows, hot springs, seeps
S. ruthiae A.H. Holmgren, L.M. Shultz & Lowrey •*A. ruthiae* (A.H. Holmgren, L.M. Shultz & Lowrey) S. Garcia and others	G2	UT	Sandstone, cliffs, boulder talus and scree	G2 woodlands, chaparral, rock, talus scree sandstone crevice woodland communities
S. simplex (A. Nelson) A. Heller •*A. simplex* (A. Nelson) S. Garcia and others	G2	WY	Rocky limestone soils	G2 cushion communities

Notes: Conservation rankings: G1 = highly imperiled; G2 = imperiled; G3 = vulnerable; G4 = apparently secure; G5 = secure (NatureServe 2014).



Figure 4. Female Greater Sage-Grouse on the Seeskadee National Wildlife Refuge, Sweetwater County, Wyoming. Photo by Tom Koerner, US Fish & Wildlife Service

As summarized by Arkle and others (2014), in the Great Basin, GRSG occur more frequently on sites where big and dwarf sagebrush intergrade, perhaps because of the cover advantages of the tall shrubs and because the dwarf sagebrush species provide a more metabolically efficient forage for GRSG. Low elevation sagebrush communities are used for brood rearing and are preferred for forage (Connelly and others 2013). Subshrub sagebrush species, such as *A. frigida* and *A. pedatifida,* and herbaceous species, such as *A. ludoviciana* and related genera such as *Tanacetum nuttallii* Torr. & A. Gray (Asteraceae), are consumed by juvenile and adult GRSG. Other woody *Artemisia*, such as *A. filifolia*, of the west-central Great Plains and Southwest historically provided habitat, and *A. cana* of the northern Great Plains and Great Basin, provides habitat in association with major rivers.

During winter, the diet of GRSG is exclusively sagebrush (Wallestad and others 1975) and winter habitat may be the most limited because, in addition to the forage quality of different sagebrush species, topographical and stand structure features are critical (Eng and Schladweiler 1972; Remington and Braun 1985). When winter precipitation is high, birds may travel greater distances to find sagebrush blown free of snow. Low elevation sagebrush communities are often used as winter habitat (Connelly and others 2013).

GREATER SAGE-GROUSE DIET

Life history and diet of GRSG are closely tied to the phenological development of sagebrush habitats. Brood rearing and chick productivity are highly dependent on sagebrush communities that contain a diversity and abundance of forbs and insects necessary for early GRSG development. Physiological condition of pre-laying hens may also contribute to juvenile survival and is highly dependent on understory flora from early spring to midsummer, as well as during the first few weeks post-hatch for young broods.

Barnett and Crawford (1994) found that forbs comprised 18 to 50% (by weight) of the diet of pre-nesting hens; consumption of forbs containing high calcium, crude protein, and phosphorus content can improve reproductive success. Hens are known to feed on a variety of early spring annuals and perennials including the flower buds of *Ranunculus* and *Lomatium*. Chicks have been documented to consume 41 families of invertebrates and 34 genera of forbs (Drut and others 1994b);

however, some plant taxa are preferred. Gregg and Crawford (2009) found that Lepidoptera availability and the annual *Microsteris gracilis* frequency were the only habitat variables related to brood survival, decreasing risk of total brood loss by nearly 12% and 3%, respectively (Figure 5).

Chicks less than 3 wk old need adequate quantities of insects for survival and development, whereas chicks greater than 3 wk old require insects for optimum growth (Johnson and Boyce 1990). Klebenow and Gray (1968) and Peterson (1970) found that invertebrates comprised 52 to 60% of the diet of chicks less than 7 d old, whereas forbs were the major component of chick diets 2 to 10 wk post-hatch. Greater forb and insect consumption has been positively correlated to chick survival (Barnett and Crawford 1994; Drut and others 1994a,b; Thompson and others 2006).

In Oregon, during the first week post-hatch (May to June), chicks consume ants (Hymenoptera: Formicidae), darkling beetles (Coleoptera: Tenebrionidae), scarab beetles (Coleoptera: Scarabaeidae), and various caterpillars (Lepidoptera) (Ersch 2009). Noteworthy, *Ericameria* and *Chrysothamnus* (rabbitbrush) communities contained more caterpillars throughout May and June than did *A. tridentata* ssp. *vaseyana* communities (Ersch 2009), providing optimal food sources during early brood rearing. Many other invertebrate taxa are consumed by chicks in other regions of the Great Basin and Wyoming Basin and Great Plains (Wallestad and others 1975; Thompson and others 2006).

Early spring emerging forbs are especially important for pre-laying hens and chicks during their first 3 wk of development. Research revealed that forbs comprised 50% or more of the juvenile and adult summer diets in Utah, Idaho, Montana, and Oregon (Trueblood 1954; Klebenow and Gray 1968; Wallestad and others 1975; Barnett 1992; Barnett and Crawford 1994; Connelly and others 2000; Gregg and others 2008; Ersch 2009). In particular, *Lomatium* species (Figure 6) are preferred forage by pre-laying hens and chicks in the Columbia Basin and Great Basin, comprising a significant portion of their diet (Barnett 1992; Barnett and Crawford 1994; Ersch 2009). Important forbs, including annuals, consumed by adults and chicks (for their first 10 wk) are listed in Table 3.

The suite of plants consumed reflects species availability as summer progresses and includes native species in natural communities, forage crops in agricultural fields, and weeds in disturbed sagebrush communities (Klebenow and Gray 1968). Where sagebrush has been removed, grazed, or burned, crops and weeds commonly occur (Prevéy and others 2010a,b) and have been found to be major dietary components (Wallestad and others 1975; Barnett 1992; Barnett and Crawford 1994). Throughout the late summer and fall, juveniles continue feeding on available forbs, such as *Eriogonum* (Braun and others 2005) in a variety of upland habitats, succulent forbs in riparian areas, as well as leaves and flower buds of sagebrush. GRSG



Figure 5. Microsteris gracilis is an important annual in chick survival of Greater Sage-Grouse. Photo by Jim Morefield



Figure 6. The lomatiums, including *Lomatium cous* (S. Watson) J.M. Coult. & Rose, are a valuable contributor to the diet of Greater Sage-Grouse. Photo by Tara Luna

TABLE 3

Native forb species documented to be in the diet of Greater Sage-Grouse.[z]

Species	Source[y]	Species	Source[y]
Achillea L. Asteraceae	2	*Eriogonum* Michx. Polygonaceae	6,8
A. millefolium L.	1,3,4,5,8	*Fritillaria* atropurpurea Nutt. Lilliacea	5
Agoseris Raf. Asteraceae	1,6,7,8	***Gayophytum*** A. Juss. Onagraceae	5,8
A. glauca (Pursh) Raf.	5	*Geum* L. Rosaceae	2
A. grandiflora (Nutt.) Greene	5	***Grindelia*** squarrosa (Pursh) Dunal Asteraceae	3,4
A. heterophylla (Nutt.) Greene	5	*Lactuca* tatarica (L.) C.A. Mey. var. *pulchella* (Pursh)	
Antennaria Gaertn. Asteraceae	2,6	Breitung[w] Asteraceae	3
A. dimorpha (Nutt.) Torr. & A. Gray	8	*Lepidium* densiflorum Schrad.	3
A. microphylla Rydb.	5	***Leptosiphon*** harknessii[v] (Curran) J.M. Porter &	1
Arabis L. Brassicaceae	6	L.A. Johnson Polemoniaceae	
Arenaria L. Caryophyllaceae	5,7	*Lomatium* Raf. Apiaceae	6,7,8
Astragalus L. Fabaceae	2,7	*L. nevadense* (S. Watson) J.M. Coult. & Rose	5
A. convallarius Greene	1	*L. triternatum* (Pursh) J.M. Coult. & Rose	5
A. curvicarpus (A. Heller) J.F. Macbr.	5	*Lupinus* L. Fabaceae	7
A. filipes Torr. ex A. Gray	5	*Machaeranthera* canescens (Pursh) A. Gray Asteraceae	5
A. lentiginosus Douglas ex Hook.	5	*Mertensia* Roth Boraginaceae	6
A. obscurus S. Watson	5,6,8	*Microseris* D. Don Asteraceae	8
A. purshii Douglas ex Hook.	5,6,8	***Microsteris*** gracilis (Hook) Greene Polemoniaceae	5,7,8
Balsamorhiza Nutt. Asteraceae	8	*M. gracilis* (Hook.) Greene var. *gracilis*[u]	8
Blepharipappus *scaber* Hook. Asteraceae	7	*Mimulus* L. Scrophulariaceae	8
Calochortus macrocarpus Douglas	1	*M. nanus* Hook. & Arn.	5
Castilleja angustifolia (Nutt.) G. Don Scrophulariaceae[x]	1	*Monolepis* nuttalliana (Schult.) Greene Chenopodiaceae	1
Cleome platycarpa Torr. Capparaceae	5	*Orobanche* L. Orobanchaceae	7,8
Collinsia Nutt. Scrophulariaceae[x]	6	*Phlox* L. Polemoniaceae	6,7
C. parviflora Lindl.	5	*P. longifolia* Nutt.	1,5,6,8
Crepis L. Asteraceae	6,7	*Ranunculus* L. Ranunculaceae	1,6
C. acuminata Nutt.	1,5,8	*R. glaberrimus* Hook.	8
C. modocensis Greene	5	*Symphyotrichum*[t] Nees Asteraceae	4,8
Delphinium L. Ranunculaceae	6	*S. spathulatum* (Lindl.) G.L. Nesom var. *spathulatum*[s]	5
D. nuttallianum Pritz. ex Walp.	8	*Trifolium* L. Fabaceae	2,6,7,8
Epilobium L. Onagraceae	5	*T. cyathiferum* Lindl.	5
Erigeron L. Asteraceae	2,7,8	*T. gymnocarpon* Nutt.	5
E. corymbosus Nutt.	5	*T. macrocephalum* (Pursh) Poir.	8
E. lonchophyllus Hook.	5	*Vicia americana* Muhl. ex Willd. Fabaceae	3

Notes: Underlined *genera* are consumed by chicks during their first 14 wk of development. Bold **genera** include annual plants.

[z] Determined from analysis of GRSG crops; most likely this is partial list. For example, in their results, Drut and others (1994) stated that they observed GRSG consuming 34 genera of forbs, yet named only 11. In addition, most authors referenced here identified plants only to the genus. Note this list does not account for GRSG preference; some of these species are consumed in large amounts, others rarely. Consult the original sources for more information on GRSG feeding preferences. Chick diet information from sources 1, 3, 5, 7, and fide 8.

[y] Sources: 1 = Klebenow and Gray (1968); 2 = Martin (1970); 3 = Peterson (1970); 4 = Wallestad and others (1975); 5 = Pyle (1992); 6 = Barnett and Crawford (1994); 7 = Drut and others (1994b); 8 = Gregg (2006).

[x] ITIS (2015) places *Castilleja* in the Orobanchaceae and *Collinsia* in the Plantaginaceae.

[w] Formerly *Lactuca pulchella.*

[v] Formerly *Linanthus harknessii.*

[u] Formerly *Phlox gracilis.*

[t] Formerly *Aster.*

[s] Formerly *Aster occidentalis.*

feed exclusively on sagebrush during winter months (Wallestad and others 1975).

RESTORATION TO SUPPORT GREATER SAGE-GROUSE

Given the limited resources of management agencies, it is imperative to develop restoration strategies that yield the best success for establishing and retaining resilient sagebrush communities to support GRSG and other sagebrush-obligate species. The Great Basin Native Plant Project (GBNPP), a joint project of the USDI Bureau of Land Management (BLM) and the USDA Forest Service (USFS), is one of the primary research and development projects promoting the development of diverse native plant materials for restoration of the GRSG (Shaw and others 2012). GBNPP currently has more than 30 cooperating partners made up of universities, state and federal land management and research agencies, NGOs, private landowners, and seed producers. GBNPP continues to work with managers and botanists at BLM, USFS, and US Fish & Wildlife Service to strategically develop plant materials that are known to be important components of GRSG habitat. Past research results, information to assist land managers, and current work can be viewed at the GBNPP website (http://www.GreatBasinNPP.org). In addition, ongoing research by the USFS Rocky Mountain Research Station (RMRS) focuses on sagebrush genetics, seed transfer guidelines, native plant development, restoration methods, habitat loss, modeling, and monitoring (see Finch and others 2015 for a concise review). While the scientific literature concerning sagebrush restoration is rich (for example, Arkle and others 2014; Chambers and others 2014), sources of a more applied nature, such as the Sagebrush Steppe Treatment Evaluation Project (SageSTEP; http://www.sagestep.org) and the Sage-grouse Habitat Assessment Framework (Stiver and others 2015) provide a wealth of pragmatic restoration information. Within the scope of this paper, we will narrow the discussion to 1) using proper sagebrush seed sources now and in the future, 2) developing and outplanting forbs, and 3) control of invasive grasses and forbs to ensure restoration success.

Outplanting the Correct Sagebrush in the Correct Location

Given that sagebrush is the foundation species in GRSG habitat, and that its absence from the landscape allows the populations of invasive plants to increase and native forbs and grasses to decrease (Prevéy and others 2010a,b), returning sagebrush to the landscape is imperative. Unfortunately, for sagebrush restoration, we may be failing to meet the mantra: the right seed in the right place at the right time. In the sagebrush steppe, disturbances and invasion by weeds are most prevalent in the driest and warmest areas (Chambers and others 2007). Therefore, *A. tridentata* ssp. *wyomingensis* (hereafter *wyomingensis*) is appropriate for many sagebrush restoration projects, and populations more local to the restoration site have higher first-year survival than more distant sources (Brabec and others 2015).

To obtain the sagebrush seed needed for restoration, land management agencies rely on private seed collectors and vendors. In high fire years, land management agencies may request in excess of 226,800 kg (500,000 lb) of sagebrush seeds (Krabacher 2015). Despite *wyomingensis* and *A. tridentata* ssp. *tridentata* (hereafter *tridentata*) growing in close proximity, these subspecies have vastly different moisture requirements and growth rates: *tridentata* prefers deeper soils or areas that retain winter moisture longer into the summer along dry washes and roadside ditches (Barker and McKell 1983; McArthur and others 1988) whereas *wyomingensis* favors shallower, drier soils in uplands and plateaus. The implication is clear: seeding misidentified *tridentata* on the wrong (that is, *wyomingensis*) site has the potential to reduce restoration success. In a recent study, Richardson and others (2015) found that *wyomingensis* had significantly greater seed weight than *tridentata* regardless of environment. Using this data, they determined that 83% of the certified seedlots labeled as *wyomingensis* collected in 2013 and 2014 and purchased by the BLM were largely composed of *tridentata*. Thus, we encourage seed collectors and land managers to use seed weight as a screening technique to ensure "the right seed for the right place."

In the future, sagebrush restoration planning will have to account for the impacts of climate change to maximize successful outcomes. It is clear from research that plant communities, taxa, and populations are in flux (Menzel and others 2006; Hackett and others 2008). Overall, the desert biomes of western North America are expected to expand 25% by mid-century. This expansion is, however, largely gained by warm deserts (that is, Mojave and Chihuahuan) at the expense of the sagebrush steppe (Rehfeldt and others 2012). Bioclimatic niche modeling of *wyomingensis* supports these findings. The climate niche of *wyomingensis* predicts a reduction of 39% by mid-century (Still and Richardson 2015) (Figure 7). Losses mainly occur in the trailing edge of subspecies distribution, which are associated with aridity; recent ecohydrological models for decade 2070 found that winter and spring precipitation will not support big sagebrush at its trailing edge (Schlaepfer and others 2015). The contracting areas of *wyomingensis* (Figure 7) are in the same areas where Mojave Desert climates are predicted to expand (Rehfeldt and others 2012). Moreover, contracting areas should not be viewed as hopeless for *wyomingensis* restoration, but they are more likely to be less resilient over the next few decades.

Developing and Outplanting Forbs and Grasses

The recovery of healthy GRSG populations will require the restoration of diverse sagebrush-associated native plant

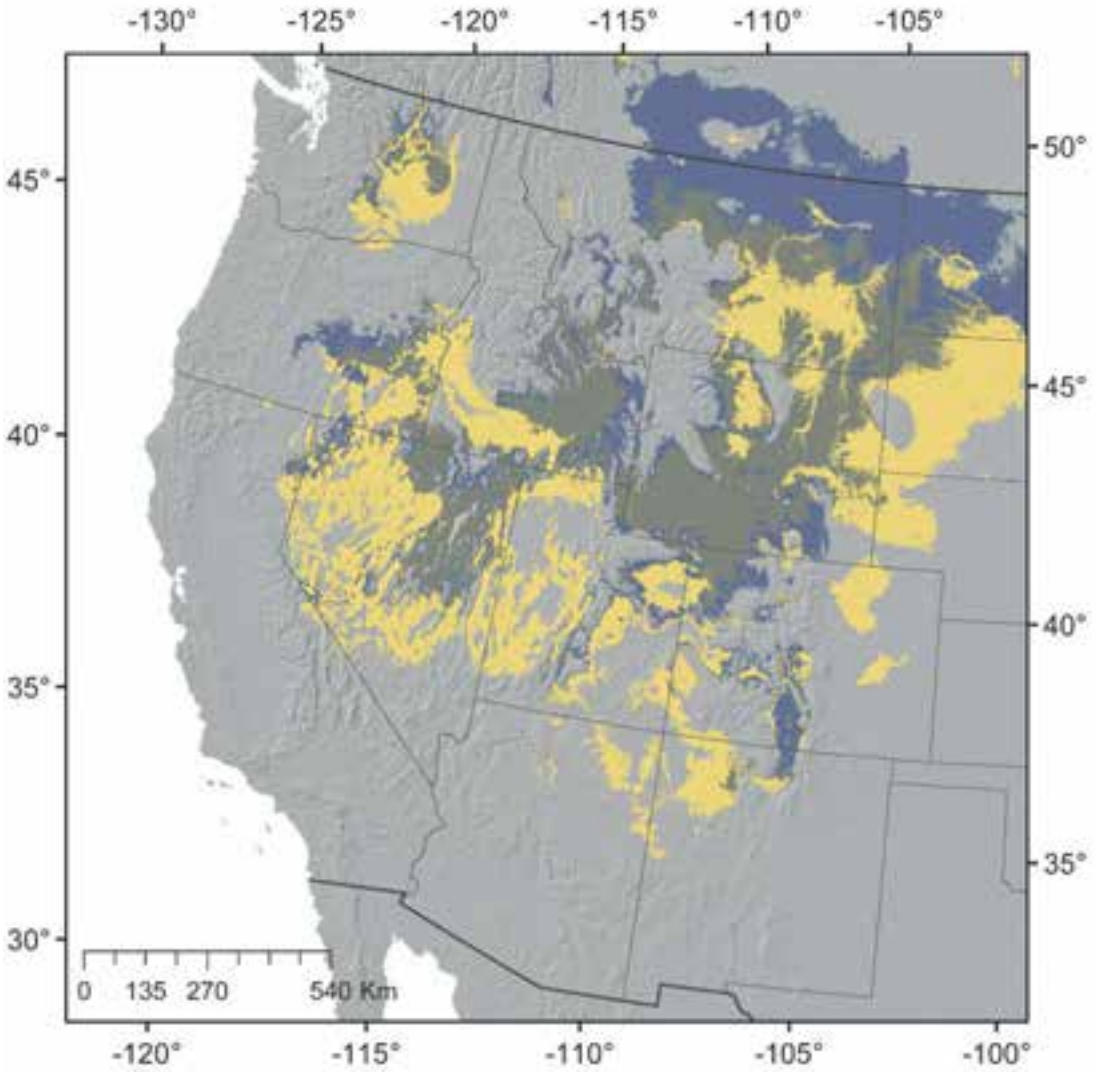


Figure 7. Artemisia tridentata ssp. *wyomingensis* climatic niche from present to decade 2050 (adapted from Still and Richardson 2015). Contracting niche space = yellow, stable = dark gray, and expanding = blue. Projections for 2050 are based on representative concentration pathway 6.0 of the IPCC 5th assessment report.

communities. Restoration success can hinge on selecting plant materials that "match" conditions at degraded sites (Lesica and Allendorf 1999; Hufford and Mazer 2003), and the National Seed Strategy calls for using the "right seed in the right place at the right time" (PCA 2015). Plant species exhibit intraspecific, or ecotypic, adaptive variation across multiple spatial scales, from local to regional (Linhart and Grant 1996), which needs to be taken into account in seed source selection and plant material development (McKay and others 2005). The strength, spatial scale, and trait by environment correlations that define intraspecific adaptive variation can vary substantially by species and ecosystem (Linhart and Grant 1996; McKay and others 2005). Seed zones and seed transfer guidelines are management tools, developed originally in forestry, that are currently being used to define acceptable distances to transplant germplasm that preserve ecological and evolutionary relationships (Campbell 1991; Ying and Yanchuk 2006; Kilkenny 2015). Species-specific seed zones, also called empirical seed zones, are constructed by modeling the relationship between plant phenotypic traits, determined through common-garden studies, and climatic variables (St Clair and others 2013; Kilkenny 2015).

The 2 primary forms of common-garden studies include genecological studies, where many populations (often > 100) are tested in one or a few common gardens, and reciprocal transplant studies, which test populations across multiple environments and usually use only a few populations (but see Wang and others 2010). Genecological studies are best suited to characterize adaptive genetic variation across a large proportion of a species' range and are therefore most often used for cost-effective seed zone construction, while reciprocal transplant studies are best suited for fully characterizing the adaptivity

and plasticity of specific plant materials across a range of environments (Kilkenny 2015). Data from all common-garden studies can be leveraged for use in more traditional agronomic methods of plant material selection, as well as to predict the effects of changing climates on plant populations of conservation concern (Kilkenny 2015). Plant material selection may include breeding or selection for specific traits, such as enhanced ability to establish under harsh conditions (for example, Jones and others 2009; Leger and Baughman 2015) or to compete with invasive species (for example, Leger 2008) or to just simply increase wild collections (Johnson and others 2010).

These studies are robust in the information they provide, but they require appreciable funding and time to accomplish. Despite this disadvantage, many species important to the sagebrush biome, and therefore, GRSG, have been evaluated and seed zones are now available, including grasses (for example, *Pseudoroegneria spicata*; St Clair and others 2013) and forbs (for example, *Allium acuminatum* Hool.; Johnson and others 2013). Until empirical seed zones can be developed for the full suite of grasses and forbs used by GRSG, provisional seed zones can be used to guide germplasm movement (Bower and others 2014).

With knowledge about where the plant species occurs and where seed sources can be moved, plant material production can proceed. Given that GRSG use a variety of forb species throughout the year, and their use also varies by season, it is important that species mixtures used in restoration activities be robust in their compliment of forb species—mixtures that include only a few forb species will not support the dietary needs of GRSG. Currently available materials, however, are unlikely to be adequate (in quantity and diversity) to restore sufficient sagebrush habitats for GRSG. Indeed, habitat models indicate that sage-grouse need highly diverse plant communities to thrive, and current seeding practices have fallen well short of that goal (Arkle and others 2014). Failure to meet the goal is in part because some forbs are just difficult to produce economically in quantities that allow for abundant use in projects. Notable problems include seed dormancy, indeterminate seed ripening, low stature that makes mechanical harvesting difficult, long durations between initial seed sowing and first seed harvest, and other factors (Shaw and others 2005; Meyer 2006; Boyer 2008). Thus, typical seed mixtures for sage-grouse restoration work often have limited numbers of species despite, for example, data from Wyoming documenting at least 10 genera of native forbs growing on quality GRSG habitat (Jacobs and others 2013). For example, Lambert (2005), discussing restoration of big sagebrush habitat (not specifically sage-grouse restoration), provides "generic" mixtures; these averaged 2, 6, and 4 species of shrubs (one being sagebrush), forbs, and grasses, respectively. A recommendation from North Dakota specifies 1 sagebrush species and 5 species each of forbs and grasses (USDA NRCS 2007). And, recommendations from Wyoming call for a minimum of 4, 2, 1, and 2 species of forbs, bunchgrasses, rhizomatous grass, and shrubs, respectively (UGRB 2015). Thus, it is important that more economical methods for producing forbs are developed for commercial seed and nursery production. Not surprisingly, the recently released National Seed Strategy specifically discusses the need for additional research to develop species-specific methods for improved production (seeds and plants) of native species for restoration (PCA 2015).

A good starting point for working with native forbs is their life histories. Many native forbs important to GRSG initiate germination at temperatures at or barely above freezing, coinciding with cold to cool spring soil temperatures. Many early cold to cool temperature-requiring forbs adapted to soil moisture limitations possess thickened taproots or vertical fleshy root systems that can potentially reach greater root depth and efficiently utilize available soil moisture earlier and deeper in the soil profile and effectively compete for space and soil moisture with invasive annual grasses. For example, Parkinson and others (2013) found that early emerging and senescing forbs with vertical taproots, such as *Lomatium macrocarpum* (Nutt. ex Torr. & A. Gray) J.M. Coult. & Rose, and rapidly growing species, such as *Sphaeralcea munroana* (Douglas ex Lindl.) Spach ex Gray, showed no reduction in relative growth rate when grown with native grasses and exhibited the least reduction in relative growth rate when grown with cheatgrass.

Lomatium species, as a group, are early spring emergers, germinate at cold temperatures, and possess deep, storage taproots. Common and endemic Great Basin and Colorado Plateau spring and summer flowering Fabaceae (*Astragalus, Lupinus, Trifolium*), *Eriogonum*, and many Asteraceae provide important forage during later stages of juvenile development. Many of these same plants also possess deep taproots and occur in a wide range of Basin and Plateau sagebrush communities. *Penstemon* species (Figure 8) frequently found in sagebrush communities often possess woody caudexes surmounting fleshy branched roots, and these species may be more successfully established on moderately invaded sites. In addition to GRSG, they are important for supporting bees and migratory hummingbirds (Trochilidae). *Balsamorhiza sagittata* with its large caudex provides tall cover in association with sagebrush.

Propagation and native seed production protocols are available for many Great Basin, Wyoming Basin, and Colorado Plateau perennial forb species (Dunne and Dunne 2002; Archibald 2006; NPN 2015) and native bunchgrasses (Archibald and others 2000; Smith and Whalley 2002; NPN 2015). Researchers are gaining an understanding of critical seed germination temperatures for these forbs; *Lomatium, Phlox*, and some *Eriogonum*, adapted to late winter germination, germinate at cold temperatures of 3 to 6 °C (37 to 42 °F), while many basin *Castilleja, Penstemon,* and *Trifolium* species germinate at cool temperatures (15 °C [60 °F] or below). Asteraceae species, such as *Agoseris*, *Antennaria, Erigeron*, and



Figure 8. Penstemon radicosus A. Nelson growing with *Artemisia tridentata* ssp. *tridentata* in southwest Montana. Photo by Tara Luna

Crepis (Figure 9), as well as *Astragalus*, *Lupinus,* and some *Castilleja* and *Penstemon* species germinate at 20 °C (68 °F) (Baskin and Baskin 1998; Luna 2005). Some species have specific germination-enhancing requirements; *Balsamorhiza sagittata,* for example, germinates better when exposed to ethylene before stratification (Chambers and others 2006). And some genera, such as *Eriogonum* have species that germinate under a wide range of temperatures and during an extended period of several weeks (Meyer and Paulsen 2000).

Protocols for growing native forbs in seed production fields continue to improve (for example, Shock and others 2015). The same can be said for other shrub species important to the biome (for example, *Ericameria nauseosa* (Pall. ex Purch) G.L. Neson & Baird; Love and others 2014a,b). Techniques for long-term storage of sagebrush seeds have been developed (Karrfalt and Shaw 2013), and techniques for growing (Long and Trimmer 2004; Fleege 2010), storing (Overton and others 2013), and outplanting (Davis and others forthcoming) sagebrush nursery stock are helping ensure successful restoration. For producing seedlings of strongly tap-rooted species (for example, *Lomatium*, *Balsamorhiza*) for which it is difficult to grow a "firm plug" for outplanting, rhizomes grown in bareroot beds (Landis 2008) or "soft-walled" container seedlings grown using Jiffy pellets or stabilized media that maintain a root plug regardless of root architecture (Woodruff and others 2014; Landis and Dumroese 2015) are worthy options to consider.

From 2001 through 2014, the GBNPP program evaluated 92 genera and 225 taxa of native plants (Table 4), of which about 80% are forbs. The number of annual forbs studied by GBNPP is only about 15% of all taxa (Table 4). More use of annual native forbs may have benefit. In addition to annual forbs being an important part (up to 45%) of the diet of GRSG chicks less



Figure 9. Crepis acuminata flowers (*left*) and growing within *Artemisia tridentata* ssp. *wyomingensis* (*right*) in Bingham County, Idaho. Photos by Matt Lavin

TABLE 4

*Genera of native shrubs (S), forbs (F; genera with annuals in **bold**), and perennial grasses (G) and the number of taxa (species and subspecies) under evaluation through the Great Basin Native Plant Project from 2001 through 2014.*

Genus	Taxa	Type	Genus	Taxa	Type
Achillea L. Asteraceae	2	F	*Heterotheca* Cass. Asteraceae	1	F
Achnatherum P. Beauv. Poaceae	4	G	*Iliamna* Greene Malvaceae	1	F
Agastache Clayton ex Gronov. Lamiaceae	1	F	*Ipomopsis* Michx. Polemoniaceae	2	F
Agoseris Raf. Asteraceae	4	F	*Koeleria* Pers. Poaceae	1	G
Allium L. Liliaceae	1	F	*Krascheninnikovia* Guldenstaedt Chenopodiaceae	1	S
***Amsinckia* Lehm. Boraginaceae**	3	F	***Lappula* Moench Boraginaceae**	1	F
Aquilegia L. Ranunculaceae	1	F	*Lathyrus* L. Fabaceae	1	F
Arenaria L. Caryophyllaceae	1	F	*Lepidium* L. Brassicaceae	1	F
***Argemone* L. Papaveraceae**	1	F	*Leymus* Hochst. Poaceae	3	G
Aristida L. Poaceae	1	G	*Ligusticum* L. Apiaceae	2	F
Artemisia L. Asteraceae	13	S	*Linum* L. Linaceae	5	F
Astragalus L. Fabaceae	5	F	*Lomatium* Raf. Apiaceae	12	F
Atriplex L. Chenopodiaceae	3	S	*Lotus* L. Fabaceae	1	F
Balsamorhiza Nutt. Asteraceae	3	F	***Lupinus* L. Fabaceae**	8	F
***Blepharipappus* Hook. Asteraceae**	1	F	*Machaeranthera* Nees Asteraceae	1	F
Bromus L. Poaceae	2	G	***Mentzelia* L. Loasaceae**	3	F
Castilleja Mutis ex L.f. Scrophulariaceae[z]	1	F	***Microsteris gracilis* (Hook) Greene Polemoniaceae**	1	F
Chaenactis D.C. Asteraceae	3	F	*Muhlenbergia* Schreb. Poaceae	1	G
Chamerion Raf. ex Holub Onagraceae	1	F	***Nemophila* Nutt. Hydrophyllaceae**	1	F
Chenopodium L. Chenopodiaceae	1	F	***Nicotiana* L. Solanaceae**	1	F
Chrysothamnus Nutt. Asteraceae	3	S	*Oenothera* L. Onagraceae	1	F
***Clarkia* Pursh Onagraceae**	1	F	*Packera* Á. Löve & D. Löve Asteraceae	1	F
Cleome L. Capparaceae	2	F	*Pascopyrum* Á. Löve Poaceae	1	G
***Collinsia* Nutt. Scrophulariaceae**	2	F	*Penstemon* Schmidel Scrophulariaceae[z]	26	F
Crepis L. Asteraceae	3	F	*Perideridia* Rchb. Apiaceae	1	F
***Cryptantha* Lehm. ex G. Don Boraginaceae**	2	F	***Phacelia* Juss. Hydrophyllaceae**	7	F
Cymopterus Raf. Apiaceae	2	F	*Phlox* L. Polemoniaceae	1	F
Dalea L. Fabaceae	3	F	***Plagiobothrys* Fisch. & C.A. Mey. Boraginaceae**	1	F
Delphinium L. Ranunculaceae	2	F	*Poa* L. Poaceae	2	G
Descurainia Webb & Bethel. Brassicaceae	1	F	*Potentilla* L. Rosaceae	2	F
Elymus L. Poaceae	8	G	*Pseudoroegneria* (Nevski) Á. Löve Poaceae	1	G
Enceliopsis (A. Gray) A. Nelson Asteraceae	1	F	*Psoralidium* Rydb. Fabaceae	1	F
Epilobium L. Onagraceae	1	F	*Purshia* DC. ex Poir. Rosaceae	4	S
***Eriastrum* Wooton & Standl. Polemoniaceae**	1	F	*Rudbeckia* L. Asteraceae	1	F
Ericameria Nutt. Asteraceae	1	F	*Scrophularia* L. Scrophulariaceae[z]	1	F
Erigeron L. Asteraceae	3	F	*Shepherdia* Nutt. Elaeagnaceae	2	S
***Eriogonum* Michx. Polygonaceae**	9	F	*Sphaeralcea* A. St.-Hil. Malvaceae	5	F
***Eriophyllum* Lag. Asteraceae**	1	F	*Sporobolus* R. Br. Poaceae	1	G
Festuca L. Poaceae	1	G	*Stanleya* Nutt. Brassicaceae	2	F
Frasera Walter Gentianaceae	1	F	*Stenotus* Nutt. Asteraceae	1	F
Gaillardia Foug. Asteraceae	1	F	*Thelypodium* Endl. Brassicaceae	1	F
***Gilia* Ruiz & Pav. Polemoniaceae**	2	F	***Townsendia* Hook. Asteraceae**	1	F
Grayia Hook. & Arn. Chenopodiaceae	1	F	*Veratrum* L. Liliaceae	1	F
Hedysarum L. Fabaceae	2	F	*Vicia* L. Fabaceae	1	F
Heliomeris Nutt. Asteraceae	3	F	*Vulpia* C.C. Gmel. Poaceae	1	G
Hesperostipa (Elias) Barkworth Poaceae	1	G	*Wyethia* Nutt. Asteraceae	1	F

[z] ITIS (2015) places *Castilleja* in the Orobanchaceae and *Penstemon* in the Plantaginaceae.

than 6 wk old (see Table 3), they may also be an underutilized aspect to restoring degraded sites. In a California Mediterranean climate, annual native forbs seeded on sites dominated by invasive species remained abundant for several years (Seabloom and others 2003). In Oregon, a prairie restoration strategy that included multi-year sowing of natives, including annual forbs, resulted in exceptional cover of native species after 5 y; the annual forbs were thought to reduce weed establishment (Wold and others 2011). Thus, annual native forbs could be important in re-establishing sagebrush habitat and their inclusion in restoration plans deserves more attention.

Controlling Invasive Grasses and Forbs

Our best efforts to produce native plants for restoration are honorable, but successful conservation and restoration of sagegrouse habitat will, in many cases, require controlling invasive plant species (Ielmini and others 2015). One of the most important threats to the sagebrush biome and restoration of sagegrouse habitat is invasion by cheatgrass; this exotic annual grass displaces native forbs, increases fire frequency, and readily re-establishes after fire creating a self-perpetuating cheatgrass-fire loop (D'Antonio and Vitousek 1992). Unfortunately, cheatgrass is not the only invasive plant causing problems. Many invasive forb species can also degrade sagebrush habitat by outcompeting and displacing desirable native plants (Ielmini and others 2015). Nonnative forbs known to invade sagebrush habitats include several members of the Asteraceae (rush skeletonweed, *Chondrilla juncea* L. [Figure 10]; spotted knapweed, *Centaurea stoebe* L.; diffuse knapweed, *C. diffusa* Lam.; Russian knapweed, *Acroptilon repens* (L.) DC.; Canada thistle, *Cirsium arvense* (L.) Scop.; yellow starthistle, *Centaurea solstitialis* L.), 2 members of the Brassicaceae (whitetop, *Cardaria* Desv. spp.; Dyer's woad, *Isatis tinctoria* L.), and leafy spurge (*Euphorbia esula* L. [Euphorbiaceae]) (Miller and others 2011; Ielmini and others 2015).

Chemical herbicides are commonly used to suppress exotic weeds, but effectiveness is usually short-term; herbicides must be re-applied to maintain control and it is often economically unfeasible to apply on a landscape scale. Moreover, herbicides can, as discussed earlier, have long-lasting non-target effects on



Figure 10. Nonnative rush skeletonweed (green with small, yellow flowers), invading and overrunning sagebrush habitat in Craters of the Moon National Preserve in southern Idaho. Photo by Justin B Runyon

native plants (Crone and others 2009), including those important to sage-grouse (Baker and others 2009; Rinella and others 2009). This underscores the need to develop other weed control tactics to minimize use of herbicides and lower non-target impacts.

Biological control, the deliberate use of a weed's natural enemies to suppress its abundance, is a crucial management tool because it is one of the few methods that can provide cost-effective, host-specific, long-term control of widespread invasive plants. Ongoing biological control research at the USFS RMRS is targeting the invasive plants most threatening to sage-grouse habitat. For example, evaluation of seed pathogens, including "black fingers of death" (*Pyrenophora semeniperda* (Brittleb. & D.B. Adam) Shoemaker), to control cheatgrass continues (Meyer and others 2008; Masi and others 2014; Soliai and others 2014), as does the search for, and testing of, new potential biocontrol herbivores of several invasive forb species, including rush skeletonweed (Littlefield and others 2013). RMRS scientists are also evaluating how climate change will affect invasive species and the use of biological control to manage them (Runyon and others 2012). Biological control holds great potential to safely and effectively manage invasive plants in sagebrush habitats and to serve a critical role in sage-grouse conservation.

SUMMARY

The sagebrush-dominated landscape of the western US is a rich mosaic of *Artemisia* species, subspecies, and hybrids foundational to a robust understory of grasses and forbs. This floral understory in turn supports diverse invertebrate communities. Together, these invertebrates and understory species are critical to the diet of GRSG; indeed, GRSG are known to consume nearly 40 genera. Thus, when an objective of restoration in the western US is to provide suitable GRSG habitat, land management protocols that incorporate a broad diversity of forb and grass species will provide more resources for GRSG and other sagebrush-steppe-dependent wildlife than management strategies that do not. To ensure restoration success, control of invasive plants is required, and biological control offers opportunity to accomplish this in a sustainable way.

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Part II

Department of the Interior

Fish and Wildlife Service

50 CFR Part 17

Endangered and Threatened Wildlife and Plants; 12-Month Finding on a Petition To List Greater Sage-Grouse (Centrocercus urophasianus) as an Endangered or Threatened Species; Proposed Rule

DEPARTMENT OF THE INTERIOR

Fish and Wildlife Service

50 CFR Part 17

[Docket No. FWS–R6–ES–2015–0146]; [4500030113]

Endangered and Threatened Wildlife and Plants; 12-Month Finding on a Petition To List Greater Sage-Grouse (Centrocercus urophasianus) as an Endangered or Threatened Species

AGENCY: Fish and Wildlife Service, Interior.

ACTION: Notice of 12-month petition finding.

SUMMARY: We, the U.S. Fish and Wildlife Service (Service), announce a 12-month finding on petitions to list the greater sage-grouse (*Centrocercus urophasianus*), both rangewide and the Columbia Basin population, as an endangered or threatened species under the Endangered Species Act of 1973, as amended (Act). After review of the best available scientific and commercial information, we find that the Columbia Basin population does not qualify as a distinct population segment. In addition, we find that listing the greater sage-grouse is not warranted at this time. However, we ask the public to submit to us any new information that becomes available concerning the threats to the greater sage-grouse or its habitat at any time.

DATES: The finding announced in this document was made on October 2, 2015.

ADDRESSES: This finding is available on the Internet at *http://www.regulations.gov* at Docket Number FWS–R6–ES–2015–0146. Supporting documentation we used in preparing this finding is available for public inspection, by appointment, during normal business hours at the U.S. Fish and Wildlife Service, Mountain-Prairie Regional Office, 134 Union Blvd., Lakewood, CO 80228. Please submit any new information, materials, or questions concerning this finding to the U.S. Fish and Wildlife Service, Mountain-Prairie Regional Office, P.O. Box 25486, DFC, Mailstop 60120, Denver, CO 80225.

FOR FURTHER INFORMATION CONTACT: Michael Thabault, 303–236–9779.

SUPPLEMENTARY INFORMATION:

Executive Summary

Why we need to publish this document. Under the Endangered Species Act (*hereafter,* Act), a species may warrant protection through listing if it is endangered or threatened throughout all or a significant portion of its range. We issued a 12-month finding that greater sage-grouse was warranted for listing in 2010 (75 FR 13910, March 23, 2010). However, since that time, new information about the status of the species, potential threats, regulatory mechanisms, and conservation efforts indicates that listing is not warranted.

The basis for our action. Under the Act, we can determine that a species is an endangered or threatened species based on any of five factors: (A) The present or threatened destruction, modification, or curtailment of its habitat or range; (B) overutilization for commercial, recreational, scientific, or educational purposes; (C) disease or predation; (D) the inadequacy of existing regulatory mechanisms; or (E) other natural or manmade factors affecting its continued existence. Based on new information about these factors and the adequacy of regulatory mechanisms and conservation efforts in managing them, we have determined that the greater sage-grouse is not in danger of extinction now or in the foreseeable future throughout all or a significant portion of its range and that listing the species is no longer warranted.

Based on the best available scientific and commercial information, we have determined that the primary threats to greater sage-grouse have been ameliorated by conservation efforts implemented by Federal, State, and private landowners. In 2010, we identified habitat loss, fragmentation, and inadequacy of existing regulatory mechanisms as factors leading to a warranted determination. Since that time, regulatory mechanisms through Federal and three State plans that incorporate conservation principles identified by the scientific experts have substantially reduced these risks in approximately 90 percent of the breeding habitat through avoidance and minimization measures. Advancements in oil and gas technologies have reduced the anticipated footprint of future development; the future conversion of sagebrush habitats to agriculture is unlikely to impact greater sage-grouse because high densities of breeding sage-grouse do not occur in habitats that are suitable for agriculture; and renewable energy development, although still a potential, is unlikely to occur in areas where greater sage-grouse occur in the highest densities. Fire and invasive species continue to occur in greater sage-grouse habitats, especially in the Great Basin, but existing management and commitments for suppression, restoration, and noxious weed treatments are reducing that impact.

Rangewide, a number of relatively large greater sage-grouse populations continue to be distributed across the landscape and are supported by undisturbed expanses of habitat. Some habitat loss associated with energy development, infrastructure, wildfire, and invasive plants will continue into the future. However, regulatory mechanisms provided by Federal and three State plans reduce threats on approximately 90 percent of the breeding habitat across the species' range.

Acronyms Used in This Document

We use many acronyms throughout this document. To assist the reader, we provide a list of the most frequently used acronyms here for easy reference:

AML Appropriate Management Level
AUM Animal Unit Months
BLM Bureau of Land Management
BSU Biologically Significant Unit
CCA Candidate Conservation Agreement
CCAA Candidate Conservation Agreement with Assurances
CED Conservation Efforts Database
CFR Code of Federal Regulations
CNRMP Cultural and Natural Resource Management Plan
COT Conservation Objectives Team
CRP Conservation Reserve Program
DoD U.S. Department of Defense
DOE Department of Energy
DOI U.S. Department of the Interior
DPS Distinct Population Segment
EIS Environmental Impact Statement
FIAT Fire and Invasives Assessment Tool
FLPMA Federal Land Policy and Management Act of 1976
FR Federal Register
GHMA General Habitat Management Area
GIS Geographic Information System
HMA Herd Management Areas
HMAP Herd Management Area Plan
INRMP Integrated Natural Resources Management Plan
LHS Land Health Standards
MZ Management Zone
NEPA National Environmental Policy Act
NFMA National Forest Management Act
NRCS Natural Resources Conservation Service
NSO No Surface Occupancy
NWR National Wildlife Refuge
PACs Priority Areas for Conservation
PHMA Priority Habitat Management Areas
RDF Required Design Features
ROW Right-of-Way
RFPA Rangeland Fire Protection Associations
SARA Canada's Species at Risk Act
SFA Sagebrush Focal Areas
SGI Sage Grouse Initiative
SGMAs Sage-grouse Management Areas
SGPA Sage-grouse Protection Area
SPR Significant portion of the range
USDA U.S. Department of Agriculture
USFS U.S. Forest Service
USGS U.S. Geological Survey
WAFWA Western Association of Fish and Wildlife Agencies
WNv West Nile virus

YTC Joint Base Lewis-McChord Yakima Training Center

Overview of Sections

The following is an outline of the major sections included in this document:

- Background
  - Previous Federal Actions
- Species Information
  - Bi-State Distinct Population Segment
  - Columbia Basin Population
  - Greater Sage-grouse Listable Entity Summary
- Distribution
- Habitat
- Life-History Characteristics and Seasonal Habitat Selection
- Sage-grouse Connectivity and Landscape Genetics
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  - Habitat Fragmentation
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  - Predation
  - Disease
  - Recreational Hunting
  - Scientific and Educational Use
  - Contaminants
  - Military Activity
  - Small Populations
  - Regulatory Mechanisms
- Finding
  - Significant Portion of the Range
- Conclusion

Background

Section 4(b)(3)(B) of the Act (16 U.S.C. 1531 *et seq.*), requires that, for any petition to revise the Federal Lists of Endangered and Threatened Wildlife and Plants that contains substantial scientific or commercial information that listing the species may be warranted, we make a finding within 12 months of the date of receipt of the petition. In general we must determine whether a petitioned action is: (1) Not warranted, (2) warranted, or (3) warranted, but the immediate proposal of a regulation implementing the petitioned action is precluded by other pending proposals to determine whether species are endangered or threatened, and expeditious progress is being made to add or remove qualified species from the Federal Lists of Endangered and Threatened Wildlife and Plants. Section 4(b)(3)(C) of the Act requires that we treat a petition for which the requested action is found to be warranted but precluded as though resubmitted on the date of such finding, that is, requiring a subsequent finding to be made within 12 months. We must publish these 12-month findings in the **Federal Register**. See below for further discussion of the limitations imposed through various means on this determination.

Previous Federal Actions

From 1999 to 2005, we received eight petitions to list the greater sage-grouse throughout its range or within specific populations (Table 1). Among those, two were petitions to list the bi-State Distinct Population Segment (DPS) of the greater sage-grouse (2002 and 2005), which we have addressed separately and, hence, are not included in this status assessment (see Bi-State Distinct Population Segment, below). The responses to the other six petitions and the outcomes of ensuing lawsuits and court settlements are detailed in the 2010 finding (75 FR 13910, March 23, 2010), and are summarized in Table 1.

TABLE 1—SUMMARY OF PREVIOUS FEDERAL ACTIONS FOR GREATER SAGE-GROUSE, INCLUDING THE EASTERN AND WESTERN SUBSPECIES AND COLUMBIA BASIN POPULATION

Petitioner	Date	Request of petition	90-day petition finding	Status review finding	Legal challenges	Determination upheld
Craig Dremann	Jul. 2, 2002	List rangewide ..	These three petitions were combined in one substantial finding: Apr. 21, 2004 (69 FR 21484).	Not warranted; Jan. 12, 2005 (70 FR 2244).	Western Watersheds Project challenged in 2006.	Finding remanded in 2007; warranted finding published March 23, 2010 (75 FR 13910).
(Institute for Wildlife Protection.	Mar. 24, 2003	List rangewide ..				
American Lands Alliance [lead] + 20 other organizations).	Dec. 29, 2003	List rangewide ..				
Institute for Wildlife Protection.	Jan. 24, 2002	List the western subspecies.	Non-substantial; Feb. 7, 2003 (68 FR 6500).	N/A	Institute for Wildlife Protection challenged.	Positive 90-day finding April 29, 2008 (73 FR 23170); part of March 23, 2010, finding, but determined it was not a recognized subspecies (75 FR 13910).
Institute for Wildlife Protection.	Jul. 3, 2002	List the eastern subspecies.	Non-substantial; Jan. 7, 2004 (69 FR 933).	N/A	Institute for Wildlife Protection challenged.	Judge ruled in favor of the Service on Sept. 28, 2004, and dismissed plaintiff case.
NW Ecosystem Alliance and Biodiversity Legal Foundation.	May 28, 1999	List the Columbian Basin population as a DPS.	Substantial; Aug. 24, 2000 (65 FR 51578).	Warranted but precluded; May 7, 2001 (66 FR 22984).	N/A	Committed to resolve the DPS status in the rangewide status review.

In 2010, we found that listing the greater sage-grouse rangewide was warranted, but precluded by other higher priority actions. That finding was based on continuing population declines, with some areas of local

extirpations, resulting from habitat fragmentation. At that time, habitat fragmentation was caused by a number of land use activities, but energy development, agricultural conversion, conifer encroachment, wildfire, and invasive species were of particular concern. Significant habitat fragmentation was expected to continue into the foreseeable future, and regulatory mechanisms were ineffective in addressing this threat. As a result of these findings, the greater sage-grouse was made a candidate for listing rangewide with a listing priority number of 8, indicating that threats were of moderate magnitude and imminent (75 FR 13910, March 23, 2010).

On May 10, 2011, we filed a multiyear workplan as part of a proposed settlement agreement with Wild Earth Guardians and others in a consolidated case in the U.S. District Court for the District of Columbia. On September 9, 2011, the Court accepted our agreement with the plaintiffs in *Endangered Species Act Section 4 Deadline Litig.,* Misc. Action No. 10–377 (EGS), MDL Docket No. 2165 (D. D.C.) (known as the ''Multi-District Litigation case''), on a schedule to publish proposed rules or not-warranted findings for the 251 species designated as candidates as of 2010 no later than September 30, 2016. The workplan included a deadline to submit a proposed rule or not-warranted finding to the **Federal Register** for greater sage-grouse, including any DPSs (but excluding the bi-State DPS), by September 30, 2015. Further, Congress prohibited the expenditure of funds to publish a proposed rule for the greater sage-grouse or the Columbian Basin population (Pub. L. Number 113–235). The publication of this finding complies with the workplan and is consistent with Congressional direction.

Species Information

Greater sage-grouse are birds in the Phasianidae family, which is a diverse taxonomic group consisting of over 50 genera including turkeys (*Meleagris* spp.), pheasants (*Phasianus* spp.), and partridges (*Perdix* spp.). Adult male greater sage-grouse range in length from 66 to 76 centimeters (cm) (26 to 30 inches (in)) and weigh between 2 and 3 kilograms (kg) (4.4 and 6.6 pounds (lb)). Adult females are smaller, ranging in length from 48 to 58 cm (19 to 23 in) and weigh between 1 and 2 kg (2.2 and 4.4 lb). Males and females have dark grayish brown body plumage with many small gray and white spots, fleshy yellow combs over the eyes, long pointed tails, fully feathered legs and feet, and dark green toes. Males also have blackish chin and throat feathers, conspicuous phylloplumes (specialized erectile feathers) at the back of the head and neck, and white feathers forming a ruff around the neck and upper belly. During breeding displays, males exhibit olive-green apteria (fleshy bare patches of skin) on their breasts (Schroeder *et al.* 1999, p. 2).

Bi-State Distinct Population Segment

In 2010, we found the bi-State population to be a DPS because it is genetically unique and markedly separate from the rest of the greater sage-grouse range (75 FR 13910, March 23, 2010). This DPS has been addressed in a separate status review and was determined to be not warranted for listing (80 FR 22828, April 23, 2015). Therefore, the bi-State population of greater sage-grouse will not be addressed in this status review.

Columbia Basin Population

In 2001, we concluded in a 12-month finding that the Columbia Basin population of the western sage-grouse, a subspecies of the greater sage-grouse, was a valid DPS that warranted listing under the Act (66 FR 22984, May 7, 2001). The subspecies was previously described as being found in southern British Columbia, central Washington, and parts of Oregon, Nevada, and California. Since that 12-month finding, new information emerged that led us to conclude in 2010 that the best scientific and commercial information does not support the recognition of and the taxonomic validity of the western subspecies (75 FR 13910, March 23, 2010). In that finding, we also reported that we would reevaluate the status of the Columbia Basin population as it relates to the greater sage-grouse in the future. Therefore, in the following section we reevaluate the validity (*i.e.,* discreteness and significance) of the Columbia Basin population as a possible DPS with respect to the correct taxon to which it belongs: The greater sage-grouse (*Centrocercus urophasianus*).

Within our *Policy Regarding the Recognition of Distinct Vertebrate Population Segments Under the Endangered Species Act* (61 FR 4722, February 7, 1996), three elements are considered in the decision concerning the establishment and classification of a possible DPS. These elements include:

(1) The discreteness of a population in relation to the remainder of the species to which it belongs;

(2) The significance of the population segment to the species to which it belongs; and

(3) The population segment's conservation status in relation to the Act's standards for listing, delisting, or reclassification (is the population segment endangered or threatened).

Discreteness

Under the DPS policy, a population segment of a vertebrate taxon may be considered discrete if it satisfies either one of the following conditions:

(1) It is markedly separated from other populations of the same taxon as a consequence of physical, physiological, ecological, or behavioral factors. Quantitative measures of genetic or morphological discontinuity may provide evidence of this separation.

(2) It is delimited by international governmental boundaries within which differences in control of exploitation, management of habitat, conservation status, or regulatory mechanisms exist that are significant in light of section 4(a)(1)(D) of the Act.

In our 2001 12-month finding on the Columbia Basin DPS (66 FR 22984, May 7, 2001), we found that the population, which is located in Washington, was physically discrete from other populations of what we then considered the western subspecies of greater sage-grouse in central and southern Oregon. Below, we reevaluate that finding giving consideration to new information and conducting our analysis with respect to the entire range of greater sage-grouse.

Markedly Separate—Greater sage-grouse in the Columbia Basin occur in four relatively small, disconnected areas. Two of these areas (the Army's Joint Base Lewis-McChord–Yakima Training Center (YTC) and Douglas County) have endemic populations, and two areas (Yakama Indian Nation and Lincoln County) are in the process of being repopulated by translocations of individuals from outside the Columbia Basin (WWHCWG 2010, p. 55; WWHCWG 2012, pp. A.2–3). Translocations began in 2004 with augmentation efforts on the YTC (Schroeder *et al.* 2014, p. 8; Stinson and Schroeder 2014, p. 15). Translocations to reestablish populations on Yakama Nation lands and in Lincoln County were initiated in 2006 and 2008, respectively (Schroeder *et al.* 2014, pp. 8–15).

The pre-European settlement distribution of greater sage-grouse is generally described as being continuous from central Oregon, north to the Columbia Basin (Schroeder *et al.* 2004, p. 368). However, this continuity was lost between the pre- and post-settlement period, mostly due to habitat fragmentation (Schroeder *et al.* 2000, pp. 105, 110; 2004, pp. 369–370). Breeding populations of greater sage-grouse in the Columbia Basin are now separated by approximately 250

kilometers (km) (155 miles (mi)) of fragmented and unsuitable habitat from the next nearest breeding population, the Baker population in Oregon (Johnson *et al.* 2011, p. 409, Knick *et al.* 2013, p. 1544). The second closest breeding population, in central Oregon, is approximately 260 km (162 mi) from the nearest breeding population in the Columbia Basin (Johnson *et al.* 2011, p. 409, Knick *et al.* 2013, p. 1544). The area between these populations consists of relatively small patches of fragmented *Artemisia* spp. (sagebrush) within a matrix of croplands (Knick *et al.* 2003, pp. 615–618). At the narrowest point, sagebrush habitats on either side of this forested mountain range are approximately 25 km (15 mi) apart, and no historical greater sage-grouse records exist for this area (Knick *et al.* 2013, p. 1544).

No documented instances exist of greater sage-grouse moving between the Columbia Basin and any other greater sage-grouse populations without the aid of translocations. Seasonal migration in sage-grouse over 100 km (62 mi) has been observed (Hagen 1999, p. 39; Tack *et al.* 2012, p. 65), but in Washington, seasonal movements tend to be less than 30 km (19 mi) between breeding and wintering areas (Schroeder and Vander Haegen 2006, entire; WWHCWG 2010, pp. 54–55). Despite documentation of extensive seasonal movements in this species (Fedy *et al.* 2012, p. 1066; Tack *et al.* 2012, p. 65; Davis *et al.* 2014, pp. 715–716), the natal dispersal abilities of sage-grouse have been shown to be low (Dunn and Braun 1985, p. 622; Thompson 2012, p. 193). Based on data from radio-marked greater sage-grouse, the maximum distance translocated birds in the Columbia Basin moved from the point of release was 85 km (53 mi). The average maximum distance removed from the release site for all birds with two or more locations was only 14 km (9 mi) (Schroeder *et al.* 2014, p. 17).

The ability of greater sage-grouse to move through the landscape is affected by many factors, including the presence of suitable habitats or topographic features that impede movement (Schulwitz *et al.* 2014, p. 568; Row *et al.* 2015, pp. 1965–1966). An assessment of habitat linkages between greater sage-grouse in Washington and Oregon showed relatively high landscape resistance to greater sage-grouse movements and no modeled linkages between the Columbia Basin and other greater sage-grouse populations (WWHCWG 2010, pp. 57–59). A separate modeling effort evaluating contemporary connectivity among leks (communal breeding centers where males perform courtship displays) spanning the Great Basin and Columbia Basin also showed little to no movement potential between the Columbia Basin and other greater sage-grouse populations (Knick *et al.* 2013, p. 1548).

Analysis of genetic variation across the range of greater sage-grouse is consistent with relatively short-distance dispersal, with gene flow (the transfer of genetic material from one population to another) decreasing as the distance between populations increases (*i.e.,* isolation by distance) (Oyler-McCance *et al.* 2005, p. 1306). Landscape resistance can also influence patterns of gene flow in greater sage-grouse, with broad-scale distribution of low-quality nesting and wintering habitats identified as the most important factors driving patterns of effective dispersal (Row *et al.* 2015, pp. 1963–1964). Landscape-scale analyses of genetic variation show low levels of gene flow between the Columbia Basin and other populations of greater sage-grouse (Oyler-McCance *et al.* 2005, p. 1306). Analysis of allele frequencies in greater sage-grouse on the YTC prior to augmentation efforts showed that these individuals had low genetic diversity and were distinguishable from individuals translocated from Oregon and Nevada (Blankenship *et al.* 2011, pp. 7, 10); a result that is consistent with little to no contemporary gene flow.

Greater sage-grouse have been translocated to the Columbia Basin from Idaho, Oregon, Nevada, and Wyoming (Livingston *et al.* 2006, pp. 2–3; Schroeder *et al.* 2014, pp. 8, 14–15). Moving greater sage-grouse from other areas into the Columbia Basin population means that, while this population is physically discrete from other populations, it has been connected through human intervention. Genetic data collected post-augmentation on the YTC confirms that breeding between endemic individuals and translocated individuals has occurred (Blankenship *et al.* 2011, p. 10). It is unknown if translocated greater sage-grouse released on the Yakama Nation or in Lincoln County are interbreeding with endemic populations of greater sage-grouse. However, at least one bird translocated to Lincoln County is known to have dispersed to the Douglas County population (Schroeder *et al.* 2014, p. 17). In addition, two males released in Lincoln County moved to the Douglas County population for a few days early in the 2015 breeding season, but returned to Lincoln County and were observed strutting on the Lincoln County lek (McPherron, USFWS, pers. comm. 2015).

International Boundaries—Greater sage-grouse occurrences were documented in British Columbia from 1864 to 1918 (Campbell and Ryder 2010, p. 7), in the Okanogan Valley, an area considered part of the Columbia Basin ecosystem. From 1918 to the 1950s, no occurrence records were reported (Campbell and Ryder 2010, entire). Translocations were conducted to reintroduce greater sage-grouse in the late 1950s, but given the lack of occurrence records since the 1960s, the species is considered extirpated from the province (Campbell and Ryder 2010, pp. 7–10). Therefore, greater sage-grouse in the Columbia Basin are not delimited by international governmental boundaries.

Summary for Discreteness—Greater sage-grouse in the Columbia Basin are physically separated from the nearest populations by approximately 250 to 260 km (155 to 162 mi). Information on movement and dispersal ecology, telemetry data, habitat and connectivity modeling, and genetic analyses, when viewed together, suggest that greater sage-grouse are unlikely to move between the Columbia Basin population and other greater sage-grouse populations. Based on this information alone, we could conclude that the Columbia Basin population is discrete based on marked separation from other populations as a consequence of physical and ecological factors. However, ongoing translocation efforts provide a connection that artificially links the Columbia Basin population to other populations of greater sage-grouse. The connectivity provided by human-intervention complicates any conclusions about the Columbia Basin population's discreteness. Therefore, we will assume that the population could be discrete and move on to assess the significance of the population to the taxon.

Significance

If a population segment is considered discrete under one or more of the conditions described in our DPS policy, its biological and ecological significance will be considered in light of Congressional guidance that the authority to list DPSs be used ''sparingly'' (see Senate Report 151, 96th Congress, 1st Session) while encouraging the conservation of genetic diversity. In making this determination, we consider available scientific evidence of the DPS's importance to the taxon to which it belongs. Since precise circumstances are likely to vary considerably from case to case, the DPS policy does not describe all the classes of information that might be used in

determining the biological and ecological importance of a discrete population. However, the DPS policy describes four possible classes of information that provide evidence of a population segment's biological and ecological importance to the taxon to which it belongs. As specified in the DPS policy (61 FR 4722, February 7, 1996), this consideration of the population segment's significance may include, but is not limited to, the following:

(1) Persistence of the population segment in an ecological setting unusual or unique to the taxon;

(2) Evidence that loss of the population segment would result in a significant gap in the range of a taxon;

(3) Evidence that the population segment represents the only surviving natural occurrence of a taxon that may be more abundant elsewhere as an introduced population outside its historical range; or

(4) Evidence that the population segment differs markedly from other populations of the species in its genetic characteristics.

A population segment needs to satisfy only one of these conditions to be considered significant. Furthermore, other information may be used as appropriate to provide evidence for significance.

In our 2001, 12-month finding on the Columbia Basin DPS, we found that the population was significant to the western subspecies because it occurred in a unique ecological setting to the subspecies and because loss of the Columbia Basin would have resulted in a significant gap in the range of the western subspecies (66 FR 22984, May 7, 2001, p. 22992). Below we reevaluate these findings giving consideration to new information and conducting our analysis on the significance of the population segment to the greater sage-grouse species, rather than to the no-longer-recognized western subspecies.

Unusual or Unique Ecological Setting – In our 12-month finding published in 2001, relative to unusual or unique ecological setting, we found that:

(1) The Columbia Basin is a unique ecosystem, whose characteristics were the result of a unique combination of elevation, soil, influences of historical geologic processes, and climatic conditions; as a result, sagebrush habitats in the Columbia Basin could be differentiated from sagebrush habitats outside of the Columbia Basin by a number of floristic characteristics, including the presence of *Juniperus* spp. (juniper) woodlands, salt-desert shrub habitats, and the type and distribution of sagebrush taxa and forb species;

(2) Sage-grouse occupying the Columbia Basin were, ''necessarily,'' differentially exploiting the resources that are available, as compared with sage-grouse in central and southern Oregon; and that these differences in exploitation of resources had bearing on their food and cover preferences, distribution, movements, reproductive fitness, and ultimately, their survival; and

(3) The unique elements of the Columbia Basin held different management implications for western sage-grouse within this ecosystem (66 FR 22984, May 7, 2001).

Below, we reevaluate these findings giving consideration to new information and conducting our analysis on the entire greater sage-grouse range, rather than the no-longer-recognized western subspecies range.

As stated in the DPS Policy, occurrence in an unusual ecological setting may indicate that a population segment represents a significant resource warranting conservation under the Act (61 FR 4722, February 7, 1996). In considering whether the population occupies an ecological setting that is unusual or unique for the taxon, we evaluate whether the habitat includes unique features not used by the taxon elsewhere and whether the habitat shares many features common to the habitats of other populations. We further evaluate whether any of these differences could play an important biological role with respect to the remainder of the taxon, such as by contributing to the taxon's prospects for survival, to a degree that the population warrants conservation under the Act.

The Columbia Basin represents a separate floristic province within the range of the greater sage-grouse and is unique in that none of the ecosystems within the range of the greater sage-grouse are exactly the same with respect to elevation, soil, influences of historical geologic processes, and climatic conditions. As we found in 2001, these differences have resulted in some differences to the types of sagebrush and other vegetative components present in the ecosystem (66 FR 22984, May 7, 2001, pp. 22989–22991). However, simply the occurrence of a species within a definable ecosystem does not, by itself, make it significant to the taxon under the DPS Policy. Sagebrush-dominated plant communities vary considerably across the range of greater sage-grouse (West and Young 2000, pp. 259–267), and specific habitat components used by greater sage-grouse can vary due to biotic and abiotic factors (Connelly *et al.* 2011a, p. 70). Yet, common to all greater sage-grouse is the use of sagebrush and their dependence on this habitat for food and cover during all periods of the year (Connelly *et al.* 2004, pp. 4–1—4–19).

The greater sage-grouse appears to be fairly adaptable to a variety of conditions as it: (1) Occurs throughout a wide variety of sagebrush habitats in western North America; (2) occurs and breeds from less than 610 m (2,000 ft) to more than 3,000 m (9,842 ft) above sea level; (3) spans a variety of climatic conditions from relatively wet montane sagebrush communities to dry sagebrush types; and (4) uses a wide range of understory vegetation during the breeding and brood-rearing periods (Aldridge and Brigham 2002, pp. 440–442; Connelly *et al.* 2004, pp. 4–1—4–19; Schroeder *et al.* 2004, pp. 366–368; Guttery 2011, pp. 20, 50–51). Stated more simply, the species is able to occupy a broad range of sagebrush communities throughout western North America. Therefore, the ability of the Columbia Basin population of greater sage-grouse to exist within a particular amalgamation of habitat features does not necessarily contribute to the survival of the greater sage-grouse species, or otherwise serve an important biological role with respect to the taxon.

The degree to which regional differences in habitat components affect greater sage-grouse distribution, reproductive fitness, and survival is complex (Connelly *et al.* 2011a, pp. 71–83). Greater sage-grouse in the Columbia Basin are comparable to other populations of greater sage-grouse in their date of nest initiation, variation in the date of nest initiation, length of incubation, nest success, lek visitation by females, and fidelity of males to leks (Schroeder 1997, pp. 937–939; Schroeder and Robb 2003, pp. 295–296). Differences reported for the Douglas County population include higher reproductive effort than greater sage-grouse in other regions and lower fidelity to nest sites (Schroeder 1997, p. 939; Schroeder and Robb 2003, p. 296). The degree to which these differences are the result of habitat fragmentation in north-central Washington or other factors is unknown (Schroeder and Robb 2003, p. 297). Nevertheless, greater sage-grouse in the Columbia Basin appear to have reproductive output and survival estimates that are within the range of values observed elsewhere across the range of the species (Stinson *et al.* 2004, p. 6, Connelly *et al.* 2011b, pp. 56–58).

Under the DPS Policy, a determination of significance can be made if a population segment persists in a unique or unusual ecological setting that is significant to the taxon to which it belongs. Although the Columbia Basin differs in some ways from other habitats that the greater sage-grouse inhabits, this is not unusual for the greater sage-grouse rangewide given the diversity of

sagebrush habitats the species utilizes across its range. Further, nothing about the Columbia Basin population's life history or habitat use is unique when compared to other populations across the range. Given that Columbia Basin habitat and birds fall within the natural range of variability for greater sage-grouse across its range, we conclude that the best information available indicates that the Columbia Basin population is not significant to the species as a whole because of persistence in an unusual or unique ecological setting.

Significant Gap in the Range of the Taxon – In our 12-month finding published in 2001, relative to gap in the range, we found that:

(1) Columbia Basin greater sage-grouse represent the extreme northwestern extent of greater sage-grouse range and the northernmost extent of the historical distribution of the western sage-grouse;

(2) The Columbia Basin historically encompassed roughly 55 percent of the entire range of western sage-grouse; and

(3) Due to its potential isolation, greater sage-grouse in the Columbia Basin are likely experiencing increased directional selection due to marginal and varied habitats at the taxon's range periphery, exhibiting genetic consequences of reduced gene flow from other population segments, and responding (and will continue to respond) to the different anthropogenic (human caused) influences in the region (66 FR 22984, May 7, 2001).

Below, we reevaluate these findings giving consideration to new information and conducting our analysis on the entire greater sage-grouse range, rather than the previously designated western subspecies' range.

Greater sage-grouse in the Columbia Basin are the northwestern extent of the sage-grouse range, but greater sage-grouse in Alberta and Saskatchewan and northern Montana make up the northernmost extent of the range. To assess the degree to which being the northwestern extent of the range makes the population significant, we must consider the proportion of individuals in this extent of the range and the amount of habitat available there for greater sage-grouse; being a peripheral population, by itself, does not connote significance to the taxon. Relative to the rest of the range of greater sage-grouse (excluding the bi-State DPS), the Columbia Basin is estimated to contain only 0.6 percent of the rangewide population estimate (Doherty *et al.* 2015, entire), 2.7 percent of the rangewide distribution of sagebrush habitats (Knick 2011, p. 25), and 4 percent of the total occupied range (Knick 2011, p. 25).

In addition, given new information since 2001, we must reevaluate our conclusion relative to the likelihood of directional selection due to the isolation of this peripheral population. The best available population and genetic data suggest that greater sage-grouse in the Columbia Basin have undergone a severe reduction in population size, and are now isolated from other populations (Schroeder *et al.* 2000, pp. 106–109; Oyler-McCance *et al.* 2005, p. 1307). This has resulted in the loss of genetic diversity, and the population now has the lowest levels of genetic diversity, as measured in mitochondrial and nuclear markers, reported for any greater sage-grouse population (Oyler-McCance *et al.* 2005, p. 1307). However, the extent to which this isolation is causing ''selection'' or has resulted in the development of traits in greater sage-grouse that are adapted to the Columbia Basin is not definitive.

Morphological or behavioral differences in greater sage-grouse may be indicators of adaptive traits not revealed through analysis of neutral genetic markers. Comparisons of greater sage-grouse in the Columbia Basin with other greater sage-grouse populations suggest they are heavier than birds in Idaho, Nevada, Oregon, and California, but are similar in mass to greater sage-grouse in northern Colorado to Alberta (Schroeder 2008, pp. 5–9). Although some wing and tail measurements differed between greater sage-grouse from the Columbia Basin and elsewhere, the comparison included only a small number of other populations, measurement bias was unknown, and the conclusion of the author was that the available morphometric data did not illustrate any unique morphological characteristics in the Columbia Basin birds (Schroeder 2008, p. 10). Similarly, an assessment of the available behavioral data did not reveal any substantial differences in greater sage-grouse behavior in the Columbia Basin (Schroeder 2008, pp. 9–10).

In summary, loss of the Columbia Basin population would not result in a significant gap in the range of greater sage-grouse. This area represents less than 1 percent of the rangewide population estimates and less than 3 percent of sagebrush habitat. While loss of this population would reduce the occupied range of the species, it would not remove a habitat type found nowhere else in the range nor would it create a barrier to the movement of birds from other populations. Although the Columbia Basin population is peripheral and isolated, there is no evidence that it has been isolated for long periods of evolutionary time, resulting in significant adaptive traits that might indicate its loss would be significant to the taxon.

Marked Genetic Differences – In our 12-month finding published in 2001, we found that the results from rangewide genetic studies were ''suggestive'' and demonstrated a marked difference between the population segment of greater sage-grouse within the Columbia Basin and the population segment in central and southern Oregon. However, we concluded that these results did not necessarily indicate that genetic differentiation of this population segment is significant to the remainder of the taxon, as we were unsure to what extent the forces of isolation, adaptive change, genetic drift, and/or inbreeding may have influenced the regional profiles of greater sage-grouse (66 FR 22984, May 7, 2001). Below, we reevaluate these findings giving consideration to new information and conducting our analysis on the entire greater sage-grouse range, rather than the previously recognized western subspecies range.

Additional rangewide studies of neutral genetic variation since 2001 support the conclusion that greater sage-grouse in the Columbia Basin segregate from the other populations when evaluated using quantitative measures of genetic diversity (Benedict *et al.* 2003, pp. 308–309; Oyler-McCance *et al.* 2005, pp. 1304–1305). The reason that genetic diversity can be significant to a species is that the presence of novel haplotypes (set of genes inherited from one parent) or alleles (a variant form of a gene) could provide the species with adaptive capacity if faced with deteriorating environmental conditions. However, the quantitative differences in genetics between this population and the species as a whole were largely the result of greater sage-grouse in the Columbia Basin having extremely low levels of genetic diversity (Oyler-McCance *et al.* 2005, p. 1307), rather than a being a function of having a large proportion of novel haplotypes or alleles.

Evaluation of mitochondrial DNA (mtDNA) revealed that approximately 90 percent of the sampled greater sage-grouse in the Columbia Basin had a single mitochondrial DNA haplotype, while only one novel haplotype was present (Oyler-McCance *et al.* 2005, pp. 1298–1300). This novel haplotype (Haplotype DS) was in the same grouping as one of the most common haplotypes observed in greater sage-grouse (Haplotype X) with only a single base-pair difference from this common haplotype (Oyler-McCance *et al.* 2005, pp. 1299, 1301). This indicates that only

a single mutational event was necessary to produce this novel haplotype, which could have occurred over a relatively short amount of evolutionary time. Thus, the available genetic evidence from studies of mtDNA does not lead us to conclude that the populations in Washington are markedly genetically different from other populations of greater sage-grouse found throughout the Great Basin.

Nuclear genetic data evaluated using microsatellite markers showed that populations in the Columbia Basin had the lowest genetic diversity of the 46 populations of greater sage-grouse studied (Oyler-McCance *et al.* 2005, p. 1307). Although genetic distance comparisons showed that the Columbia Basin populations were some of the most differentiated of all greater sage-grouse populations, this finding is largely a reflection of the small number of alleles found there (Oyler-McCance *et al.* 2005, p. 1307). Therefore, while statistically different, these differences cannot be attributed to greater sage-grouse being isolated for a long period of evolutionary time, which might have indicated that they had developed some adaptive traits not found elsewhere in the range of greater sage-grouse.

Summary for Significance – We have considered significance of the Columbia Basin population by evaluating the uniqueness of the ecological setting; the potential for a significant gap in the range of greater sage-grouse if the population was lost; and genetic distinctness from other greater sage-grouse populations. We conclude that the Columbia Basin greater sage-grouse do not occur in a unique ecological setting, and their loss would not result in a significant gap in the range of the greater sage-grouse. While genetic diversity is low, the population is not markedly genetically different from other populations of greater sage-grouse. Based on this information, we find that this population does not meet the definition of significance as defined in our 1996 DPS policy.

Greater Sage-Grouse Listable Entity Summary

In 2010, we determined that the bi-State population qualified as a DPS under the Act. At that time, we deferred any other decisions about potential DPSs, including an assessment of the Columbia Basin population, until this status review. After consideration of the distinctness and significance of the Columbia Basin population, giving consideration to new information, and conducting our analysis on the significance of the population to the greater sage-grouse rangewide instead of to the previously recognized western subspecies, we have determined that it does not meet the criteria for a DPS. Therefore, the Columbia Basin population will be considered together with the other populations in the greater sage-grouse range (hereafter referred to as sage-grouse). Specifically, when we discuss sage-grouse in the Great Basin, we are including Columbia Basin in those discussions. The remainder of this status review will consider all populations and habitat across the range of the species, with the exception of the bi-State DPS.

Distribution

Prior to European settlement of western North America in the 19th century, sage-grouse occurred in an area that today would cover 13 States and 3 Canadian provinces—Arizona, California, Colorado, Idaho, Montana, Nebraska, Nevada, North Dakota, Oregon, South Dakota, Utah, Washington, Wyoming, British Columbia, Alberta, and Saskatchewan (Schroeder *et al.* 2004, p. 369; Figure 1). Sagebrush habitats that potentially supported sage-grouse occurred over approximately 1.2 million square kilometer (km^2) (460,000 square miles (mi^2)) before 1800 (Schroeder *et al.* 2004, p. 366). Currently, sage-grouse occur in 11 States (California, Colorado, Idaho, Montana, Nevada, North Dakota, Oregon, South Dakota, Utah, Washington, Wyoming), and 2 Canadian provinces (Alberta and Saskatchewan), occupying approximately 56 percent of their historical range (Schroeder *et al.* 2004, p. 369; Figure 1). Approximately 2 percent of the total range of sage-grouse occurs in Canada, with the remainder in the United States (Knick 2011, p. 24).

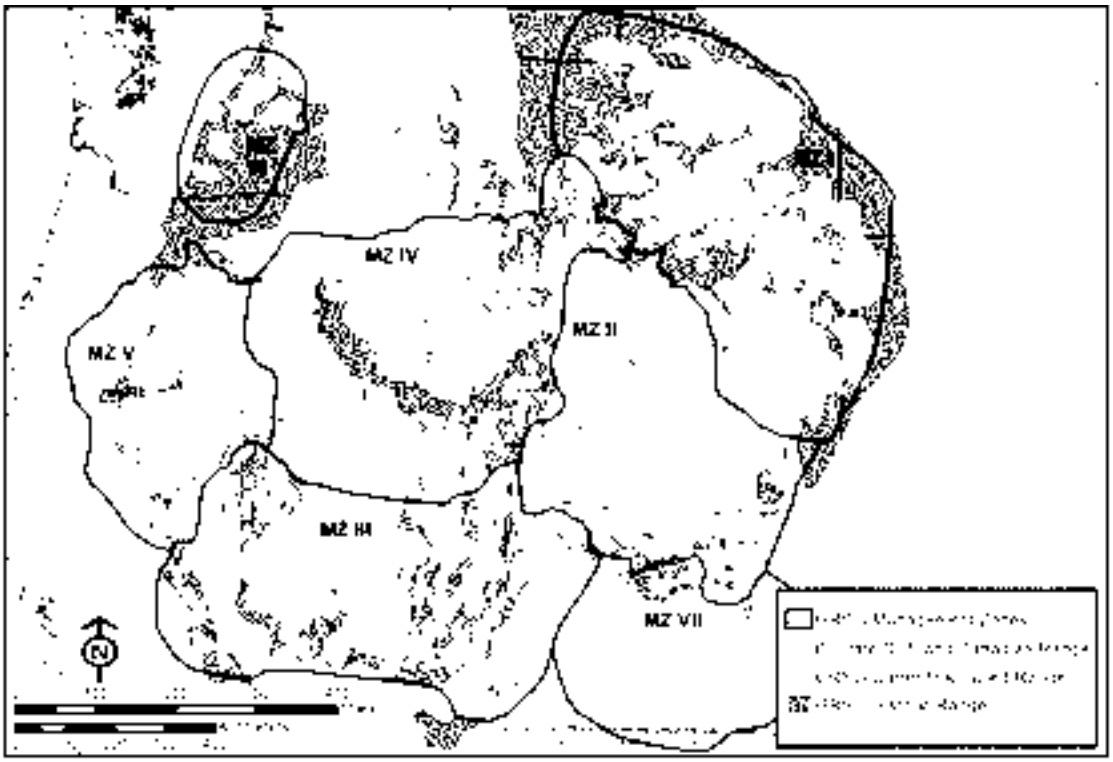


Figure 1 Current occupied and historical range of sage-grouse (derived from Schroeder *et al.* 2004 and updated by the Services) and the WAFWA Sage-Grouse Management Zones (Stiver *et al.* 2006, p. 1–6)

The Western Association of Fish and Wildlife Agencies (WAFWA) Conservation Strategy for Greater Sage-grouse (Stiver *et al.* 2006, p. 1–6) delineated seven sage-grouse Management Zones (MZ; Figure 1) to guide conservation and management. The boundaries of these MZs were delineated based on their ecological and biological attributes (floristic provinces) rather than on political boundaries (Stiver *et al.* 2006, p. 1–6); therefore, vegetation is similar within each MZ, and sage-grouse are likely to respond similarly to environmental factors and management actions. For this reason, we conducted analyses for some potential threats at the MZ-scale. While the Conservation Objectives Team (COT) Report (see *Conservation Objectives Team Report* below for further description) identifies Priority Areas for Conservation (PACs) as the areas needed for the species persistence, not all data used in our potential analyses was available at the PAC scale and the data did not provide a consistent rangewide data set, so PACs were not used as the unit of analysis for the impact analysis.

Sagebrush occurs in two natural vegetation types that are influenced by elevation, temperature, and patterns of precipitation (Miller *et al.* 2011, pp. 147–148). In general, the Great Basin portion of the range, which encompasses MZs III, IV, V, and VI, is lower in elevation and experiences less precipitation. The Rocky Mountain portion of the range, which encompasses MZs I, II, and VII, generally is higher in elevation and has greater precipitation. Due to the variance in the ecological conditions, the regions have differential susceptibility to potential threats (see Summary of Information Pertaining to the Five Factors, below).

Sage-grouse currently occupy a portion of their historical range and are more concentrated in certain Core Areas. Sage-grouse have been extirpated from Nebraska, British Columbia, and Arizona (Schroeder *et al.* 1999, p. 2; Young *et al.* 2000 p. 445; Schroeder *et al.* 2004, p. 369). Changes from the estimated historical distribution are the result of sagebrush alteration and degradation (Schroeder *et al.* 2004, p. 363; Knick and Connelly 2011, p. 6). The current distribution of sage-grouse is estimated at 703,453 km^2 (271,604 mi^2; USFWS 2015a). Approximately half of the sage-grouse occur in the Rocky Mountain portion of the range and half in the Great Basin portion of the range. Management Zones with the highest relative amounts of birds are MZ II (37.5 percent of the rangewide population estimate) and MZ IV (30.7 percent of the rangewide population estimate). As a result, impacts in these MZs may have greater impact to the species rangewide (see Summary of Information Pertaining to the Five Factors, below).

Habitat

Sage-grouse depend on a variety of shrub-steppe habitats throughout their life cycle and are considered a sagebrush obligate (Patterson 1952, p. 48). Sage-grouse use a variety of sagebrush species such as *Artemisia tridentata wyomingensis* (Wyoming big sagebrush), *A. t. vaseyana* (mountain big sagebrush), *A. t. tridentata* (basin big sagebrush), *A. nova* (black sagebrush),

A. frigida (fringed sagebrush), *A. cana* (silver sagebrush), and *A. arbuscula* (little sagebrush) (Miller *et al.* 2011, pp. 145–151). Sage-grouse distribution is strongly correlated with the distribution of sagebrush vegetation (Schroeder *et al.* 2004, p. 364).

Sagebrush is the most widespread vegetation in the intermountain lowlands in the western United States (West and Young 2000, p. 259). Sagebrush occurs in two natural vegetation types that are delineated by temperature and patterns of precipitation (Miller *et al.* 2011, pp. 147–148). The first, sagebrush-steppe, ranges across the northern portion of sage-grouse occupied range, from British Columbia and the Columbia Basin, through the northern Great Basin, Snake River Plain, and Montana, and into the Wyoming Basin and northern Colorado. Sagebrush is a co-dominant plant, along with perennial bunchgrasses, in sagebrush-steppe. The second vegetation type, Great Basin sagebrush, occurs south of sagebrush-steppe, and extends from the Colorado Plateau westward into Nevada, Utah, and California (Miller *et al.* 2011, pp. 147–148). In the Great Basin sagebrush zone, sagebrush is usually the dominant plant layer accompanied by sparse understories. Other sagebrush types within the sage-grouse occupied range include mixed-desert shrubland in the Bighorn Basin of Wyoming, and grasslands in eastern Montana and Wyoming that also support silver sagebrush and *A. filifolia* (sand sagebrush) (Miller *et al.* 2011 p. 148).

Sagebrush is long-lived, with plants of some species surviving up to 150 years (West 1983, p. 340). Sagebrush is resistant to environmental extremes, with the exception of fire and occasionally defoliating insects (West 1983, p. 341). Natural sagebrush re-colonization depends on the presence of adjacent live plants for a seed source or on the seed bank, if present (Miller and Eddleman 2000, p. 17). Although seed viability and germination are high, seed dispersal is limited (West and Young 2000, p. 260). Additionally, sagebrush seeds typically do not remain viable for more than one growing season, and evidence suggests that seeds do not persist in the soil more than 1 year; however, seeds have higher odds of persisting in the seed bank if they are buried (Wijayratne and Pyke 2012, p. 438). Productivity of plants associated with the sagebrush understory varies widely and is influenced by moisture availability, soil characteristics, climate, and topographic position (Miller *et al.* 2011, pp. 151–154). Forb abundance can be highly variable from year to year and is largely affected by the amount and timing of precipitation.

Sage-grouse depend on large areas of contiguous sagebrush to meet all seasonal habitat requirements (Connelly *et al.* 2011a, pp. 82–83; Wisdom *et al.* 2011, p. 465). Sage-grouse exhibit strong site fidelity (loyalty to a particular area, even when the area no longer provides habitat) to seasonal habitats used for breeding, nesting, brood-rearing, and wintering (Connelly *et al.* 2004, p. 3–1; Connelly *et al.* 2011b, p. 60). Little information is available regarding minimum sagebrush patch sizes required to support populations of sage-grouse. Home range calculations range from 4 to 615 km^2 (1.5 to 237.5 mi^2; Connelly *et al.* 2011b, p. 60), and migratory populations (which are discussed in more detail below) may use areas exceeding 2,700 km^2 (1,042 mi^2, 667,185 acres; Leonard *et al.* 2000, p. 269, Davis *et al.* 2014, p. 713). Large seasonal and annual movements emphasize the landscape nature of the species (Knick *et al.* 2003, p. 624; Connelly *et al.* 2011b, p. 60).

Federal lands encompass the majority of the sage-grouse occupied range, with MZs III, IV, and V being more than 60 percent federally owned (Table 2). Primary Federal land managers within the sage-grouse occupied range include Bureau of Land Management (BLM) and the U.S. Forest Service (USFS), which together manage 51 percent of the sage-grouse occupied range. Other Federal owners include the National Park Service, Department of Defense (DoD), the Service, and Department of Energy (DOE). Private lands comprise approximately 39 percent of the species' occupied range, with the largest proportion of private lands occurring in MZs I and VI. Tribal lands cover approximately 3 percent, and State lands cover approximately 5 percent of the current sage-grouse occupied range.

TABLE 2.—PERCENT OF THE CURRENTLY OCCUPIED SAGE-GROUSE RANGE WITHIN MANAGEMENT ZONES, BY SURFACE MANAGING AGENCY

Management zone	BLM	USFS	Other Federal	Tribal	State	Private
I Great Plains	16	2	1	5	8	69
II Wyoming Basin	49	2	2	3	6	38
III Southern Great Basin	69	14	1	1	2	13
IV Snake River Plain	52	8	3	1	5	30
V Northern Great Basin	62	7	6	1	2	23
VI Columbia Basin	5	0	13	11	7	63
VII Colorado Plateau	39	0	0	25	11	25
Rangewide Totals	45	6	2	3	5	39

Life-History Characteristics and Seasonal Habitat Selection

During the breeding season, male sage-grouse gather together to perform courtship displays on areas called leks. These areas are often characterized by having bare soil, shortgrass-steppe, windswept ridges, exposed knolls, or other relatively open sites (Connelly *et al.* 2004, pp. 3–7). Leks are often surrounded by denser shrub-steppe cover used for shelter and to escape predators. Leks can be formed opportunistically at any appropriate site within or adjacent to nesting habitat (Connelly *et al.* 2000a, p. 970), and, therefore, lek habitat availability is not considered to be a limiting factor for sage-grouse (Schroeder *et al.* 1999, p. 4).

After mating, females travel to nesting areas characterized by sagebrush with an understory of native grasses and forbs that provides cover, an insect prey base, and herbaceous forage for pre-laying and nesting females (Connelly *et al.* 2000a, p. 971; Connelly *et al.* 2004, pp. 4–18). Females typically move 1.3 to 5.1 km (0.8 to 3.2 mi) from leks to nest (Connelly *et al.* 2011b, p. 62), although the juxtaposition of habitats, disturbance, and the extent of habitat fragmentation may influence nest location distance from leks (Connelly *et al.* 2011b, p. 62 and references therein).

Sage-grouse clutch size ranges from six to nine eggs with an average of seven eggs (Connelly *et al.* 2011b, p. 62). Males do not participate in incubation of eggs or rearing chicks.

The likelihood of a female nesting in a given year averages 82 percent in the eastern portion of the range and 78 percent in the western portion of the range (Connelly *et al.* 2011b, p. 63). Nest success varies widely, and the average nest success for sage-grouse is 51 percent in non-altered habitats and 37 percent in altered habitats (Connelly *et al.* 2011b, p. 58). Re-nesting occurs only if the original nest is lost (Schroeder *et al.* 1999, p. 11) with an average re-nesting rate of 28.9 percent (Connelly *et al.* 2004, pp. 3–11). Approximately 2.25 chicks per female may be necessary to maintain stable to increasing populations (Connelly *et al.* 2000a, p. 970). Due to low chick survival and limited re-nesting, there is little evidence that populations of sage-grouse produce large annual surpluses (Connelly *et al.* 2011b, p. 67).

Females rear their broods near the nest site for the first 2 to 3 weeks following hatching (Connelly *et al.* 2004, p. 4–8). Forbs and insects are essential nutritional components for chicks (Connelly *et al.* 2004, p. 4–9). Therefore, early brood-rearing habitat must provide adequate cover adjacent to areas rich in forbs and insects to ensure chick survival during this period (Connelly *et al.* 2004, p. 4–9).

Approximately 12 weeks after hatching, sage-grouse gradually move from sagebrush uplands to more mesic (wet) areas during the late brood-rearing period (Peterson 1970, p. 149) as herbaceous vegetation dries during the hot summer (Connelly *et al.* 2000a, p. 971). Summer use areas can include sagebrush habitats as well as riparian areas, wet meadows, and *Medicago* spp. (alfalfa) fields (Schroeder *et al.* 1999, p. 4). These areas provide an abundance of forbs and insects for both females and chicks (Schroeder *et al.* 1999, p. 4; Connelly *et al.* 2000a, p. 971). Males and broodless females will also use more mesic areas in close proximity to sagebrush cover during the late summer, often arriving before females with broods (Connelly *et al.* 2004, p. 4–10).

During the winter, sage-grouse depend almost exclusively on sagebrush for both food and cover (Thacker *et al.* 2012, p. 588). Winter areas are characterized by large expanses of big sagebrush and tall shrubs, predominantly located on relatively gentle south- or west-facing slopes that provide more favorable thermal conditions and above snow forage (Doherty *et al.* 2008, p. 192; Hagen *et al.* 2011, p. 536; Dzialak *et al.* 2013, p. 16). The timing of movement to winter ranges varies considerably, but peaks around mid-October through late November (Schroeder *et al.* 1999, p. 10). Sage-grouse exhibit fidelity to winter sites (Berry and Eng 1985, p. 239); however, some birds shift winter habitat use in response to severe conditions (Smith 2010, p. 8).

The availability of winter habitat is important to sage-grouse persistence. Across the range of sage-grouse, winter habitat comprised from 6.8 to 18 percent of the total landscape used by different populations (Dzialak *et al.* 2013, p. 10; Smith *et al.* 2014, p. 12). Winter habitat availability is reduced during severe winters when heavy snowfall and increasing snow depths further decrease or even eliminate access to sagebrush. During harsh winters, birds become even more concentrated in the few remaining areas of exposed sagebrush (Hupp and Braun 1989, p. 828). As a result, the loss of winter habitats used in harsh winter conditions can have impacts disproportionate to their makeup on the landscape (Swenson *et al.* 1987, p. 128). During the average winter, sage-grouse typically experience low over-winter mortality, estimated at 2 to 4 percent, but could be as high as 15 percent (Connelly *et al.* 2000b, p. 229; Wik 2002, p. 40; Sika 2006, p. 90; Bruce *et al.* 2011, p. 421). During notably severe winters, however, higher mortality rates have been documented (Moynahan *et al.* 2006, p. 1,536; Anthony and Willis 2008, p. 544). In some cases, the locations of these wintering habitats are known, but there is not a consistent data set of this information across the range of the species.

The distances sage-grouse move between seasonal habitats are highly variable across the occupied range (Connelly *et al.* 1988, pp. 119–121). Sage-grouse may migrate between two or three distinct seasonal ranges, or not migrate at all. Non-migratory sage-grouse have seasonal movements of less than 10 km (6.2 mi; Connelly *et al.* 2000a, pp. 968–969), while birds in migratory populations (which are discussed in detail below) may travel well over 100 km (62 mi) (Tack *et al.* 2012, p. 65).

Despite the documentation of extensive seasonal movements in this species (Fedy *et al.* 2012, p. 1066; Tack *et al.* 2012, p. 65; Davis *et al.* 2014, p. 716), the dispersal abilities of sage-grouse are assumed to be low. One study estimated median natal dispersal distances of 8.8 km (5.5 mi) for females and 7.4 km (4.6 mi) for males (Dunn and Braun 1985, p. 622); another study estimated natal dispersal distances of 3.8 km (2.4 mi) for males and 2.7 km (1.7 mi) for females (Thompson 2012, p. 193). Small-scale differences in habitat are not likely to influence sage-grouse dispersal at landscape scales. Rather, the arrangement of habitat quality was more influential on sage-grouse dispersal (Row *et al.* 2015, pp. 1964–1965) than the presence of unsuitable habitats.

Sage-Grouse Connectivity and Landscape Genetics

Habitat-based measures show that maintaining population connectivity is essential for sage-grouse population persistence. Connectivity between sage-grouse populations declined from 1965 to 2007 due to the loss of leks that historically provided connectivity and lower numbers of birds left to disperse (Knick and Hanser 2011, p. 395). As connectivity declined, isolated leks, those leks with low connectivity, were lost first (Knick and Hanser 2011, p. 395), with small decreases in lek connectivity resulting in large increases in probability of lek abandonment (Knick and Hanser 2011, p. 403). This suggests that as connectivity between leks at the edge of the range is lost, the probability these leks will persist is likely to decline (Knick and Hanser 2011, p. 396).

Maintaining sagebrush distribution is the most important factor in maintaining sage-grouse population connectivity (Knick and Hanser 2011, p. 404). Habitat loss decreases the connectivity between seasonal habitats, increasing the potential that a population may be lost (Doherty *et al.* 2008, p. 194). Loss of connectivity can increase population isolation (Knick and Hanser 2011, p. 402 and references therein) and, therefore, lead to a higher probability of loss of genetic diversity and extirpation due to stochastic events. Habitat fragmentation, habitat loss, and altered habitat disturbance regimes (*e.g.,* fire frequency), rather than stochastic events, were identified as the likely primary influences on sage-grouse population trend (Knick and Hanser 2011, p. 403). Large areas of unsuitable habitat, such as mountain ranges, have been found to segregate sage-grouse and restrict genetic mixing (Row *et al.* 2015, p. 1965; Crist *et al.* 2015, p. 16).

Studies of genetic information among populations have revealed patterns of sage-grouse movement and isolation across the landscape. A genetic analysis revealed that the movement of individuals tends to be among neighboring populations and is unlikely to occur over great distances (Oyler-McCance *et al.* 2005, entire; Oyler-

McCance and Quinn 2011, p. 91). Genetic analysis further indicated that sage-grouse in fragmented areas on the periphery of the range in Colorado, Utah, and Washington were not extensively moving between or breeding with other nearby populations (Oyler-McCance and Quinn 2011, p. 92).

A recent analysis shows that core population centers and the habitat between those centers are important for maintaining connectivity (Crist *et al.* 2015, p. 18). This study examined the connectivity of populations across the range of sage-grouse and found that 20 of 188 priority areas contributed the most to range-wide connectivity (Crist et al. 2015, p. 11). These results affirm the conclusion by Knick and Hanser (2011) that relatively large populations in southwestern Wyoming, and straddling the borders between Idaho, Nevada, Oregon, and Utah, were the most highly connected areas within the range of sage-grouse (Crist *et al.* 2015, p. 11) and, therefore, essential to species persistence. However, other priority areas likely contribute to maintaining connections by serving as habitat pathways between and within priority areas, or by maintaining local connectivity in an area (Crist *et al.* 2015, p. 11). Active management will be essential to maintain connectivity between priority areas and to ensure long-term species persistence (Crist *et al.* 2015, p. 16).

Population Abundance and Trends

Estimating population sizes and trends of sage-grouse is difficult due to the large, 11-State range of the species, incomplete sampling, and challenges counting females (Garton *et al.* 2011, pp. 295–296). As a result, sage-grouse population sizes are estimated from counts of male sage-grouse on leks during the breeding season (Garton *et al.* 2011, p. 296). While lek surveys do not provide an accurate estimate of total population, the annual counts of males on leks provide the best indicator of sage-grouse trends (Stiver *et al.* 2006, p. 3–2; WAFWA 2015, p. 2). The relationship of lek survey data to actual population size is unknown (WAFWA 2008, p. 3). When counts are done according to a standardized protocol, these counts can be a useful metric of long-term population trends (Connelly *et al.* 2004, p. 6–6; Johnson and Rowland 2007, p. 20; WAFWA 2008, p. 3, Blomberg *et al.* 2013a, p. 1590, Gregory and Beck 2015, p. 7).

Recent work by MacKenzie and Evans (2015) has indicated the current sampling framework across the range of sage grouse which makes interpreting trend and population data difficult. However, their analysis has indicated that there has been a long-term decline in the number of males per lek which is consistent with other recent trend analyses (Garton *et al.* 2015 and WAFWA 2015). The analysis goes on to indicate that over time and in virtually all management zones the probability of extinction of leks has been relatively stable. Additionally, the probability of recolonization of leks had been decreasing until the mid-1990s but that probability has stabilized to the current point in time. The conclusion of this work indicates that over the last 15 years the rate of extinction of leks and the probability of recolonization of leks has been remarkably stable.

Sage-grouse populations increase and decrease over time, making assessments of population size and short-term trends difficult. The length of these population cycles appears to vary across the range, but most populations have an 8- to 10-year population cycle (Rich 1985, pp. 5–8; Fedy and Doherty 2011, pp. 919–922). The drivers of the cycle are unknown, but may be caused by the amount and timing of precipitation (Rich 1985, p. 14; Fedy and Doherty 2011, p. 921).

In the 2010 finding, we concluded that rangewide, sage-grouse were experiencing a long-term decline in abundance (75 FR 13910, March 23, 2010, pp. 13920–13923). We noted the difficulty in determining the actual rate and magnitude of the declines, but noted that three independent studies had concluded that declines were occurring (Connelly *et al.* 2004, p. 6–71; WAFWA 2008, p. 12; Garton *et al.* 2011, pp. 307–359). In particular, the 2008 WAFWA analysis of lek-count data collected from 1965 to 2007 estimated a long-term decline of 3.1 percent per year during 1965 to 2007 (WAFWA 2008, p. 12). That assessment also found the rate of decline slowed from 1985 to 2007 to an average annual decline of 1.4 percent (Connelly *et al.* 2004, p. 6–71; WAFWA 2008, p. 58). A 2011 study (Garton *et al.* 2011, entire) assessed declining trends similar to the Connelly *et al.* (2004) and WAFWA (2008) analyses. Garton *et al.* (2011, p. 374) also predicted future population declines.

Both Garton *et al.* (2011) and WAFWA (2008) have updated their lek trend analyses to include additional data from 2013 through 2015 (Garton *et al.,* 2015; WAFWA 2015). Garton *et al.* (2015) examined the trend in the years 1965–2013 and reported that the rate of decline has decreased for MZs I, II, and VI when compared to their previous analyses (1965–2007). There was insufficient data from the other MZs to do a similar comparison, but the updated analyses suggest that MZs I–VI have all experienced a long-term abundance decline (Garton *et al.* 2015). Insufficient data in MZ VII prevented a trend analysis in both Garton *et al.* 2011 and Garton *et al.* 2015. The updated WAFWA analyses reported declines in all MZs since 1965, with the exception of MZ III, where a slight increase was noted. In MZ III, the increasing trend was not uniform across the management zone, as peripheral populations are continuing to decline. The rates of decline have increased in MZs I and V in recent years (WAFWA 2015, pp. 17, 26), while the overall rate of decline across the species' range has slowed in recent years. In five MZs, most of the population estimates are primarily trending down at the periphery of the species' range (WAFWA 2015, p. 1), indicating that the denser, interior population areas are more insulated from declining trends. The number of males counted on leks range-wide in 2015 has increased 63 percent since the most recent population trough in 2013 (WAFWA 2015, p. 1).

Analysis of trend data is sensitive to the start and stop dates of the period analyzed due to the cyclic nature of sage-grouse populations. Garton *et al.* (2015) examined data only through 2013, at which time most populations were experiencing a cyclic decline. Lek counts increased in nearly all locations in 2014 and 2015 (WAFWA 2015, p. 1). However, both updated trend analyses are consistent with previous studies showing a long-term rangewide decline of sage-grouse has occurred since 1965 (75 FR 13910, March 23, 2010, p. 13922). The rate of decline lessened during 1985 to 2007, with an average annual decrease of 1.4 percent (Connelly *et al.* 2004, p. 6–71; WAFWA 2008, p. 58). The updated WAFWA analysis reported that, rangewide, rates of declines were less for the past 10 years (2005–2015) than the long-term decline rates (1965–2015) (WAFWA 2015, pp. 10–11).

Abundance and Distribution Models

We developed two models for use in this status assessment: (1) Population Index Model and (2) Occupied Breeding Habitat Distribution Model. These models were developed to evaluate risk to sage-grouse populations and benefits of conservation actions designed to ameliorate those risks. Our models, built with collaboration from WAFWA, are used as metrics for risk analyses and general Geographic Information System (GIS) queries. Full discussions of how the models were created and used are below.

In the 2010 finding, we assessed impacts to sage-grouse and their habitat based on the portion of occupied range where a disturbance occurred. This approach was based on the best available GIS data at that time, but may have overestimated some impacts, because all lands within the occupied range were assumed to provide habitat. We used this analysis in 2010 because current information available to us about the occupied sage-grouse range was developed at a very broad scale and included large areas of non-habitat. The Occupied Breeding Habitat Distribution Model was developed to more accurately portray the breeding areas that are important to sage-grouse. The Occupied Breeding Habitat Distribution Model uses sage-grouse lek data as a proxy for landscapes important to breeding sage-grouse, because leks are central to the breeding ecology of sage-grouse. We developed a model that statistically links habitat characteristics around known lek locations to habitat features such as the amount of sagebrush or tree cover within a 6.4-km (4-mi) radius. The output of the model is a prediction of the probability that each 120-m^2 (393-ft^2) area within a sage-grouse management zone provides habitat to support a breeding population of sage-grouse (Figure 2). These spatial predictions of occupied breeding habitat are then able to be linked with spatially explicit risk models to better understand how potential impacts to sage-grouse overlap with breeding habitat. A consistent data set for other important seasonal habitat is not available, so while the model may not specifically include other seasonal habitats, it is the best available information for predicting impacts to the species consistently across the range. This model was the primary tool used to assess how the location and scope of potential threats may impact the species currently and into the future (see Summary of Information Pertaining to the Five Factors, below).

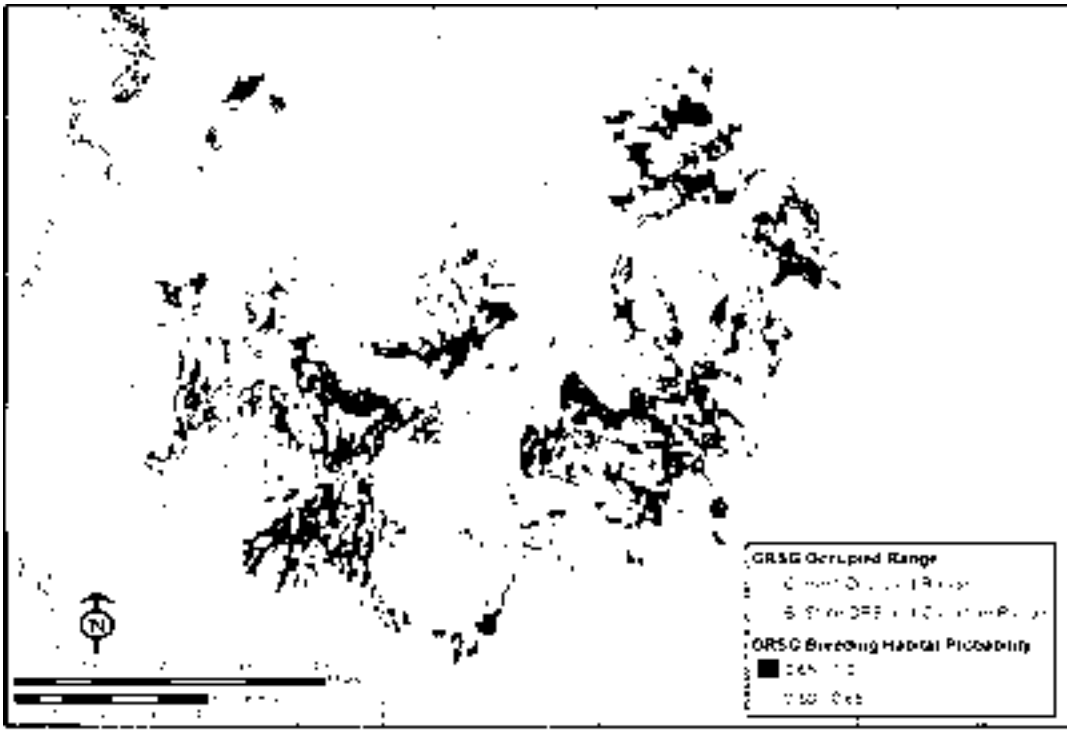


Figure 2 Modeled distribution of occupied sage-grouse breeding habitat

We developed the Population Index Model to spatially identify Core Areas on the landscape that contain population centers of sage-grouse (Figure 3). We did this because sage-grouse populations are highly clumped, and relatively small areas can contain a disproportionate amount of sage-grouse. To create our Population Index Model, we used lek data to identify hotspots using standard statistical methods. We used the Occupied Breeding Habitat Distribution Model to develop our final Population Index Model. The model results are grids that represent an index to the relative amount of breeding birds for each 120 m^2 (393 ft^2) within management zones. Similar to our Occupied Breeding Habitat Distribution Model, our Population Index Model can be linked with other spatially explicit risk models or conservation actions to understand spatial overlap with sage-grouse populations. We would expect high levels of future impacts to occur if current sage-grouse population centers overlap areas with high probabilities of future land use activities. Conversely, we would expect future impacts to be low, if current sage-grouse population centers do not overlap areas with high probabilities of future land use activities. The Population Index Model was used to assess potential impacts from Nonrenewable Energy and Agricultural Conversion (see Summary of Information Pertaining to the Five Factors, below).

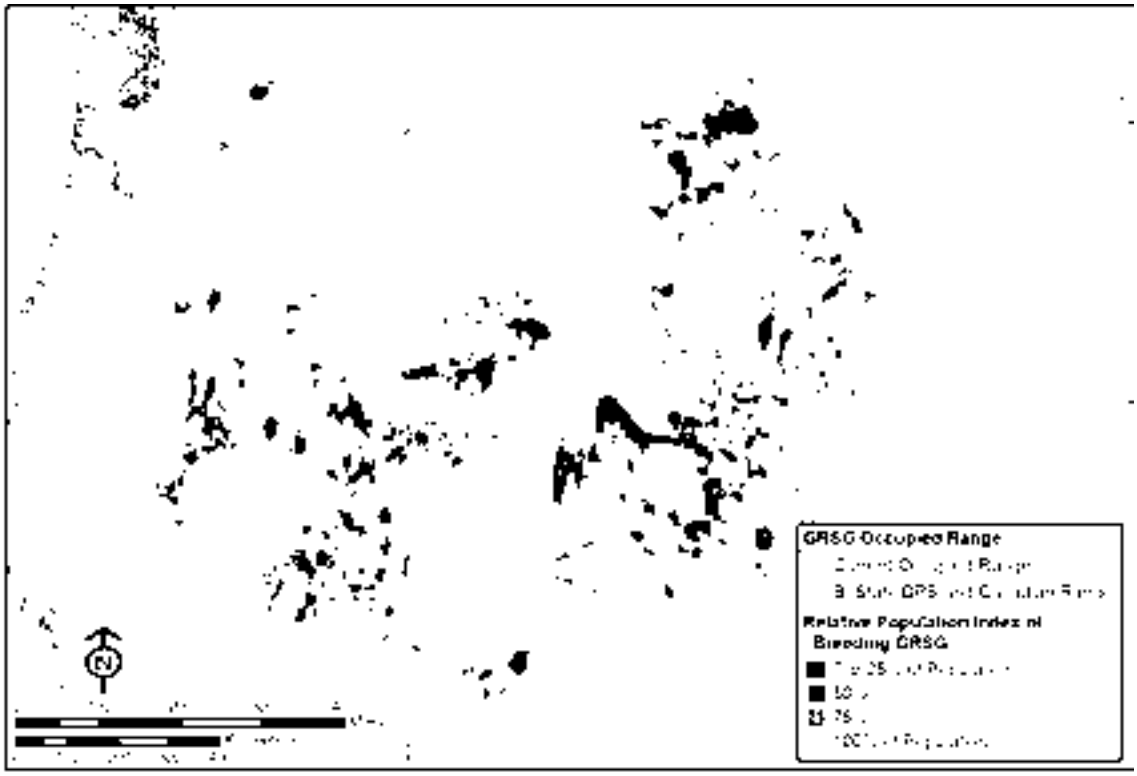


Figure 3 Population Index of breeding sage-grouse Darker areas illustrate the highest densities of breeding sage-grouse

Unfortunately we did not receive population or habitat data from the two Canadian provinces within the species range and, therefore, could not include these areas in our modeling efforts. The abundance of sage-grouse is low in both Canadian provinces (Alberta Environment and Sustainable Resource Development 2013, p. 8). Due to the low number of birds remaining in Canada, coupled with the limited amount of existing habitat in Canada, we do not anticipate that the exclusion of these areas affects the outcome of this range-wide model.

Population Abundance and Trends Summary

Estimating sage-grouse abundance is difficult due to changes in seasonal distributions, the cryptic coloration, and behavior of females and their offspring, and the lack of a systematic survey protocol and sampling scheme across the range of the species (WAFWA 2015, pp. 44–46). Lek counts do not provide a precise estimate of population size; however, these counts provide a useful index to the population size that detects population changes over time (Johnson and Rowland 2007, p. 20). Although an imperfect measure, peak counts of males on leks are the best available information about the number of sage-grouse in an area (Johnson and Rowland 2007, p. 20) and are the accepted method to assess sage-grouse abundance trends (WAFWA 2015, p. 2; Garton *et al.* 2015, entire).

Information reviewed for the 2010 finding indicated a long-term decline of sage-grouse abundance since lek count surveys were initiated in the 1960s. New information since 2010 confirms that long-term declines have occurred from 1965 to 2014 across all MZs where sufficient data exist to make inferences (Garton *et al.* 2011, 2015, entire; WAFWA 2008, 2015, entire). While models agree about downward abundance trends since the 1960s, the actual rates of decline differ among MZs and studies. Our confidence in these rates of decline is limited due to a variety of statistical sampling issues associated with counting peak males on leks (see Johnson and Rowland 2007, pp. 17–20), as well as the cyclic nature of sage-grouse populations. Regardless, the best information available indicates that the rangewide population of sage-grouse is declining.

Changes Since the 2010 Finding

The landscape of the western United States has undergone significant changes since the onset of European settlement, including the dramatic alteration of key sage-grouse habitats. Despite human population growth and accompanying development, sagebrush habitats persist on millions of acres across 11 States in the west. Sage-grouse numbers have declined since pre-European settlement, but sage-grouse distribution (Figure 3) has remained relatively unchanged since our first status review in 2005 (70 FR 2244, January 12, 2005). In other words, despite historical and current population declines, sage-grouse are still distributed throughout their range.

The 2005 status review found that, despite a growing number of serious threats, large numbers of birds continued to be distributed across the range (70 FR 2244, January 12, 2005, p. 2279). At that time, 92 percent of the known active leks occurred in 8 of 41 populations; 5 of those populations were so large and expansive that they were subdivided into 24 subpopulations to facilitate analysis (Connelly *et al.* 2004, p. 13–4). We subsequently

determined that the species did not warrant listing, but emphasized the need for ongoing sage-grouse and sagebrush conservation efforts to moderate the rate and extent of habitat loss for the species in the future (70 FR 2244, January 12, 2005, p. 2279). Following the 2005 finding, the Western Association of Fish and Wildlife Agencies (WAFWA) released a rangewide conservation strategy for sage-grouse, which established an overarching goal of maintaining and enhancing populations and distribution of sage-grouse ''by protecting and improving sagebrush habitats and ecosystems that sustain these populations'' (Stiver *et al.* 2006, p. i). The WAFWA conservation strategy included actions such as increasing capabilities in habitat restoration, habitat conservation, research, and improving regulatory mechanisms. The WAFWA conservation strategy also identified quantifiable conservation goals (Stiver *et al.* 2006, pp. 1–8).

In 2010, we conducted a second status review for sage-grouse (75 FR 13910, March 23, 2010, entire). Although the species remained widely distributed across the landscape, we found it warranted for listing under the Act due to continued loss and fragmentation of habitat exacerbated by a lack of adequate regulatory mechanisms to address habitat loss. The primary drivers of habitat fragmentation identified were renewable and nonrenewable energy development in prime sage-grouse habitats, continued expansion of supporting infrastructure, the spread of invasive annual grasses and associated changes in wildfire regimes, and the lack of adequate regulatory structures to address these impacts. In addition, trend data showed a continuation of population declines identified in 2005. Without regulatory mechanisms in place to control continued habitat loss and fragmentation, we determined the sage-grouse was at risk of extinction in the foreseeable future and, therefore, warranted protection under the Act. However, due to the workload of managing higher priority species, we designated the sage-grouse a ''candidate'' species, assigning it a listing priority number of 8 to indicate the moderate magnitude of imminent threats. Species with lower listing priority numbers are addressed before those with higher priority numbers.

We also concluded that the extinction risk was not imminent. As noted in the 2010 finding when determining its listing priority status: ''We consider the threats that the sage-grouse faces to be moderate in magnitude because the threats do not occur everywhere across the range . . . and where they are occurring they are not of uniform intensity or of such magnitude that the species requires listing immediately to ensure its continued existence. While sage-grouse habitat has been lost or altered in many portions of the species' range, substantial habitat still remains to support the species in many areas of its range. We believe the ability of these population centers to maintain high densities in the presence of several threat factors is an indication that the magnitude of threats is moderate overall'' (75 FR 13910, March 23, 2010, pp. 14008–14009). The 2010 finding has galvanized a rangewide conservation effort that includes new management plans developed by Federal and State agencies to establish regulatory mechanisms adequate to address identified threats.

New Scientific Information

Since 2010, the already voluminous scientific literature on sage-grouse has been augmented by extensive, newly published research on sage-grouse biology, sagebrush habitat, and impacts to both. We collected this information for our status review through a direct request to our conservation partners and through general literature reviews. We have used this data to inform our understanding of the current status of sage-grouse and how its status has changed since 2010. All relevant published resources, as well as unpublished data, were considered in our status review. Not all of this new information is cited in this document, as it either did not provide additional information on impacts to the species or response to conservation, or was repetitive of other studies already cited in our assessment. In addition, we considered all new scientific information presented to us in response to our data call for this status review, information received during our previous annual Candidate Notice of Review data calls, data entered into the Conservation Efforts Database (CED), and recently published articles. Several articles providing new information since 2010 are summarized below.

New population trend analyses incorporating up to 7 years of additional data have been completed (Garton *et al.* 2015, WAFWA 2015) and provide greater insight into population cycling and species status. We recognize the difficulty in detecting short-term trends for a species with decadal cycles; longer term trends show a small, but detectable decline since the 1960s. For more information, see Population Abundance and Trends section, above.

An evolving appreciation of mechanisms that affect sage-grouse and sagebrush habitats assisted in the development of new applied science for conservation efforts, including wildfire and invasive management (Chambers *et al.* 2014a, entire), conifer removal (Miller *et al.* 2014, entire), and energy development (Patricelli *et al.* 2013, entire; Drouin 2014). These important, applied conservation tools have been essential in assessing species and habitat persistence and aiding the minimization of impacts to the species and its habitat. Specifically, the resilience and resistance matrix developed by WAFWA and published in 2014 provided a new applied science framework to better understand the likelihood of habitats to ability to resist *Bromus tectorum* (cheatgrass) invasion and recover following wildfire (Chambers *et al.* 2014a, entire). Conservation actions designed to minimize risk have also been furthered by application of new scientific information and tools. For example, the Natural Resources Conservation Service (NRCS) Sage Grouse Initiative (SGI) has incorporated new scientific research on impacts to guide the development of grazing plans, conifer removal, fence marking, and other conservation actions on private lands to benefit sage-grouse and its habitat (NRCS 2015a, entire).

The U.S. Geological Survey (USGS) compiled the findings of published scientific literature evaluating the influence of human activities and infrastructure on sage-grouse (Manier *et al.* 2013, entire). An additional report (Manier *et al.* 2014, entire) provided information on biologically relevant buffer distances around sage-grouse habitats to help reduce habitat avoidance caused by human disturbance and infrastructure. The revised and amended BLM and USFS Federal Plans adopted and incorporated the recommendations in the Manier *et al.* report (2014), as discussed below in the *Sagebrush Landscape Conservation Planning* section. These new analyses and tools, plus all the other information we considered, are addressed throughout this document and our administrative record.

Many partners across the range of the sage-grouse are working to conserve sage-grouse habitat. In 2014, we developed the CED, a spatially explicit, online platform for efficiently collecting data from conservation partners about their sage-grouse conservation efforts. More than 100 partners across the range of the species entered information about 6,200 projects into the CED. Of these projects, 44 percent (2,700 projects) cover more than 1.2 million ha (3

million ac) and were deemed complete and effective at addressing the primary threats identified in the Conservation Objectives Team (COT) Report (See *Sagebrush Landscape Conservation Planning* section below for a description of this report) (USFWS 2013, entire). Examples of these projects include conservation easements, conifer removal, and treatments to remove or reduce invasive weeds and annual grasses. The other 3,500 projects (56 percent), as reported in the CED, were of more limited scope and scale; and some did not contain enough information for us to reliably assess their effectiveness or implementation even on a local scale. Thus, while these efforts will continue to be helpful in conserving sage-grouse and its habitat now and into the future, we took a conservative approach and did not rely on these efforts in this finding.

Sagebrush Landscape Conservation Planning

The expansive range of sagebrush habitat has compelled managers to take a landscape approach to conservation efforts, with sage-grouse assuming the focus of these efforts for the past decade. In 2006, WAFWA developed a comprehensive strategy for conserving habitat for the benefit of this species. The strategy outlined the need to develop partnerships among local, State, Provincial, Tribal, and Federal agencies, non-governmental organizations, and private landowners to design and implement cooperative actions to support robust populations of sage-grouse and the landscapes and habitats upon which they depend (Stiver *et al.* 2006, p. i). This was the first of several documents to outline the conservation needs of the species and its habitat.

In 2011, the BLM assembled a National Technical Team (NTT) of sage-grouse and sagebrush habitat experts to identify the best available science-based information to guide the development of Federal land management plans for the greater sage-grouse (BLM 2011a, entire). The NTT Report proposed conservation measures based on habitat requirements and other life-history aspects of the species. The NTT Report also described the scientific basis for some of the conservation measures proposed within each of the Federal land planning program areas. These conservation measures included actions such as development of sage-grouse specific habitat objectives relative to domestic livestock management, criteria to inform leasing decisions in sage-grouse habitats, and monitoring of sage-grouse and their habitats (BLM 2011a, entire).

Conservation Objectives Team Report

In 2013, we, together with the States, chartered a team of sage-grouse and habitat experts to identify the conservation goals for the species. The Conservation Objectives Team (COT) Report was a ground-breaking, collaborative approach to develop rangewide conservation objectives for the sage-grouse, both to inform this finding and to inform the collective conservation efforts of the many partners working to conserve the species (USFWS 2013, entire). The highest level objective identified in the COT Report is minimization of habitat threats to the species so as to meet the objective of the 2006 WAFWA Greater Sage-grouse Comprehensive Conservation Strategy: Reversing negative population trends and achieving a neutral or positive population trend.

The conservation principles of redundancy, representation, and resilience guided the development of the conservation goals, priority areas for conservation, conservation objectives, and measures included in the COT Report (USFWS 2013, p. 12). The COT Report found that satisfying these conservation principles for sage-grouse meant having multiple, geographically distributed populations across the species' range (USFWS 2013, p. 12). The COT Report further stated, ''By conserving well distributed sage-grouse populations across geographic and ecological gradients, species adaptive traits can be preserved, and populations can be maintained at levels that make sage-grouse more resilient in the face of catastrophes or environmental change'' (USFWS 2013, pp. 12–13).

In particular, the COT Report, using State information, identified the habitats most critical for the conservation of the species, which were described as Priority Areas for Conservation (PAC, Figure 4) (USFWS 2013, entire). Priority Areas for Conservation are ''. . . the most important areas needed for maintaining sage-grouse representation, redundancy and resilience across the landscape'' (USFWS 2013, p. 13). Identifying PACs ensured that conservation partners direct their efforts to the highest priority habitats. Since the completion of the COT Report, improved habitat mapping and further discussions with the States has resulted in changes to the PAC map in Nevada, Montana, and Utah. For the purposes of this document, we refer to those areas that were added as Important Priority Areas.

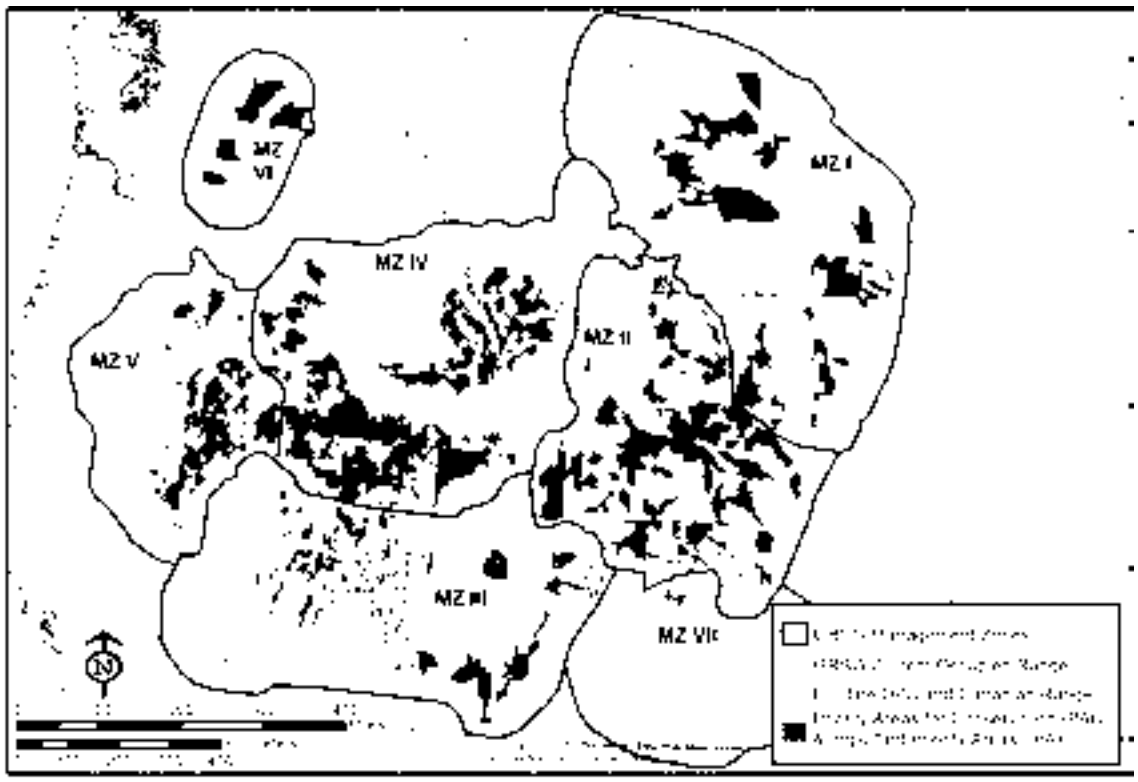


Figure 4 Sage-grouse Priority Areas for Conservation (PACs) including modifications to incorporate Important Priority Areas

Federal and State Planning Efforts

As discussed above, in 2010 we concluded that sage-grouse populations were well-distributed across the occupied range, but without the habitat protections provided by adequate regulatory mechanisms, populations were likely to become smaller, fewer, and separated by fragmentation, placing the species at risk of extinction in the future (75 FR 13910, March 23, 2010, p. 13986). Because the 2010 finding indicated that adequate regulatory protections could prevent the need to list sage-grouse, numerous Federal and State agencies undertook planning efforts to improve regulatory mechanisms and conserve sage-grouse into the future. A centerpiece of all of the conservation efforts is the protection of the most important habitats for sage-grouse that are necessary to maintain redundant, representative, and resilient populations (*i.e.,* PACs). These important habitats for conservation were identified in conservation planning efforts (Figure 4) as the places where large, undisturbed expanses of sagebrush habitat were supporting leks and the highest density of breeding birds (USFWS 2013, p. 15). These important habitats for conservation also correspond with the population centers referred to in the 2010 finding. The maintenance of these areas and the birds that use them would provide a network of resilient and connected populations across the landscape that would provide for long-term species viability.

Using the recommendations provided in the COT Report (USFWS 2013, entire) and the NTT Report (BLM 2011a, entire), the Federal agencies developed conservation strategies to protect the important habitats for conservation. These strategies focus not only on the most important habitats for conservation, but also on conservation objectives to address the greatest threats to the species, as identified in the COT Report (USFWS 2013, pp. 31–52).

While 10 of the 11 States in the range of the sage-grouse updated their State plans to conserve the species by incorporating new information, which is a testimony to their concern and commitment to protect the grouse and its habitats, not all of these plans have been implemented or are regulatory in scope. We will specifically highlight the regulatory conservation actions mandated by the State plans in Wyoming, Montana, and Oregon because they provide the greatest degree of regulatory certainty in addressing potential threats on State and private lands not under the jurisdiction of Federal plans. We appreciate the work that each State has completed, but not all planning efforts met a level of certainty for implementation and effectiveness. We acknowledge that sage-grouse conservation plans have been developed for Colorado, Idaho, Nevada, North Dakota, South Dakota, and Utah that could provide long-term benefits to sage-grouse. For example, the Idaho Plan includes the following measures: Technical and monetary assistance for fire rehabilitation and restoration efforts in areas where wildfire has impacted both State and Federal lands; assistance with implementation of Federal landscape fuels management projects on lands adjacent to Federal lands (such as the extension of fuel break projects onto State lands); development, coordination, and training for Rangeland Fire Protection Associations (RFPAs); and adoption of a general strategy to reduce Idaho Plan ownership of key habitat within Core Habitat Areas through land exchanges with BLM. We encourage all of the States to fully implement their

sage-grouse plans as they will further contribute to the long-term conservation of the sage-grouse.

In this section, we provide a summary of the various conservation programs and efforts put in place at the Federal, State, and local levels that are most important to our analysis of regulatory mechanisms in addressing potential threats to sage-grouse: The Federal plans, State plans in Wyoming, Montana, and Oregon; and the voluntary conservation efforts on private lands provided by SGI and Candidate Conservation Agreements with Assurances (CCAAs). The Wyoming Plan is analyzed based on its 7-year track record of implementation, and SGI is also analyzed based on its accomplishments to date.

The sections below provide an analysis of the implementation and effectiveness of the Federal plans, Montana program, Oregon efforts, and Secretarial Order 3336 pursuant to our Policy for Evaluation of Conservation Efforts (PECE) (68 FR 15100, March 28, 2003). The purpose of PECE is to ensure consistent and adequate evaluation of recently formalized conservation efforts when making listing decisions. The policy provides guidance on how to evaluate conservation efforts that have not yet been implemented or have not yet demonstrated effectiveness. The evaluation focuses on the certainty that the conservation efforts will be implemented and the effectiveness of the conservation efforts to contribute to make listing a species unnecessary. In this finding, we evaluated the certainty that the Federal Plans, and the Montana and Oregon Plans will be implemented into the future and the certainty that they will be effective in addressing threats, based on the best available science and professional recommendations provided in the COT and other scientific literature and reports. We also evaluated the Secretarial Order using PECE, which is discussed below in the *Wildfire and Invasive Plants* section.

The Federal plans and three State Plans provide protective, regulatory mechanisms for the majority of the most important habitat for sage-grouse. The Federal Plans divide habitat into two habitat management area categories—Priority Habitat Management Areas (PHMAs) and General Habitat Management Areas (GHMAs). Priority Habitat Management Areas largely correspond to PACs (USFWS 2013, p. 13) and State-identified Core Areas (BLM and USFS 2015, entire). The PHMAs are the highest priority for conservation because they contain large, undisturbed expanses of breeding habitat and the highest densities of sage-grouse. The most restrictive conservation measures, such as excluding certain activities and requiring avoidance and minimization measures, apply to 64 percent of the species' breeding habitat designated as PHMAs (USFWS 2015a). The Federal and three State plans protect an additional 26 percent of breeding habitat in GHMAs (USFWS 2015a) that contain fewer leks and sage-grouse than PHMAs, but provide habitat and connectivity between populations. As discussed above in Sage-Grouse Connectivity and Landscape Genetics, connectivity between core population areas has been identified as an important strategy to ensure long-term sage-grouse persistence (Crist *et al.* 2015, p. 17). The required conservation measures in GHMAs are less restrictive than in PHMAs and provide greater land-use flexibility, but still deliver measures that minimize potential impacts. To assess the effectiveness of the Federal Plan, we completed a geospatial analysis of how much the areas designated as PHMAs and GHMAs overlapped with areas modeled as breeding habitat. Collectively, the regulatory mechanisms provided by the Federal plans and three State plans reduce potential impacts to approximately 90 percent of the sage-grouse breeding habitat rangewide (USFWS 2015a). Later in this document, we will discuss how all of these conservation efforts are expected to address adverse effects from potential threats, and lastly, we will assess the adequacy of these efforts as regulatory mechanisms (See *Regulatory Mechanisms,* below).

Federal Plans

The BLM and USFS sage-grouse planning effort was unprecedented in scope and scale, and represents a significant shift from management focused within administrative boundaries to managing at a landscape scale. This effort also represented a concerted effort by the agencies to balance their multiple-use mandates with conservation objectives. The BLM and USFS completed this effort by issuing amendments or revisions to 98 land management plans governing over half of the occupied range. These land management plans are the principal regulatory documents for the activities allowed on BLM and USFS lands, are grounded in the agencies' organic statutes (*e.g.,* Federal Land Management and Policy Act, National Forest Management Act), and are at the core of the agencies' National Sage-Grouse Conservation Strategy outlined in their plan revisions and amendments. We were a key partner working closely with BLM and USFS throughout the process to develop and complete the Federal Plans. In this section, we will discuss the Federal plans across the 11-State range of sage-grouse, except for the plans in Wyoming. For Wyoming, because the Federal and State plans work together to conserve sage-grouse on all lands, they will be discussed together in a separate section below.

The BLM and USFS have broad authorities to manage the lands and resources within their jurisdiction. The Federal Land Policy and Management Act of 1976 (FLPMA) (43 U.S.C. 1701 *et seq.*) is the primary Federal law governing most land uses on BLM-administered lands and directs development and implementation of Resource Management Plans, which direct management at a local level. Resource Management Plans are the basis for all actions and authorizations involving BLM-administered lands and resources. Management of activities on National Forest System lands is guided principally by the National Forest Management Act (NFMA) (16 U.S.C. 1600–1614, August 17, 1974, as amended). The NFMA specifies that the USFS must have a Land and Resource Management Plan (16 U.S.C. 1600) to guide and set standards for all natural resource management activities on each National Forest or National Grassland. For the purposes of this document, Resource Management Plans and Land and Resource Management Plans are collectively referred to as Federal Plans.

Under FLPMA, the BLM is required to establish Resource Management Plans for the management and use of public lands in accordance with the principles of multiple-use and sustained-yield. Similarly, pursuant to the NFMA, the USFS is required to establish plans for the management and use of National Forest System lands in accordance with the principles of multiple-use and sustained-yield. The Federal Plans are the basis for on-the-ground actions that the BLM and USFS undertake and authorize. Decisions in Federal Plans guide future land management actions and subsequent site-specific implementation decisions. Land use plan decisions establish goals and objectives for resource management (desired outcomes) and the measures needed to achieve these goals and objectives (land use allocations for the BLM; Standards and Guidelines for the USFS).

These Federal Plans are regulatory mechanisms. The Federal Plans establish goals and objectives and measures to address the potential

threats to sage-grouse and sage-grouse habitat. The Federal Plans establish mandatory constraints and were established after notice and comment and review under the National Environmental Policy Act (NEPA). Therefore, changes to the Federal Plans would require additional notice and comment and further analysis under NEPA. All future management authorizations and actions undertaken within the planning area must conform to the Federal Plans, thereby providing reasonable certainty that the plans will be implemented. The BLM has already made substantial financial commitments to ensure success of actions identified in their Plans, including allocating more than 10 million dollars to support fire management (DOI 2015a, entire). In 2015, BLM directed resources to fund monitoring crews, and funded activities, like data management, to ensure successful implementation of the monitoring commitments; and BLM's fiscal year 2016 budget request included an additional 8 million dollars to directly support monitoring the implementation and effectiveness of the land use plans (Lueders, BLM, 2015, pers. comm.). The Department of the Interior identified additional high-priority actions that the BLM will complete in the next 5 years including prioritizing control of invasive plants and removal of free-roaming equids from high-priority sage-grouse habitat (DOI 2015a, entire). Based upon past Federal land planning efforts, we expect these plans to be implemented for the next 20–30 years. The BLM and USFS have committed to full funding and implementation of these plans, and have included monitoring and adaptive management to ensure their long-term effectiveness.

The Federal Plans represent a paradigm shift in western Federal lands management in their focus on maintaining large expanses of the sagebrush ecosystem for the benefit of sage-grouse and many other species. Federal Plans are structured around a layered management approach that aims to preclude or minimize additional surface disturbance in priority conservation habitats, while providing some management flexibility in sage-grouse habitat areas that are less critical for conservation. In addition to these land use allocations and associated conservation actions, the Federal Plans include direction for wildfire and invasive species management, minimization measures, mitigation strategies, monitoring, and adaptive management that provide further conservation benefits for sage-grouse, as discussed below. There are differences across 98 plans as necessary to address differing ecological conditions; however, the general regulatory framework is consistent amongst all the plans. Because of the commitments from the Federal Government to implement these plans and because of the Plans' consistency with the COT Report recommendation for measures to reduce threats, these Federal Plans provide substantial conservation benefits to sage-grouse, now and in the future

Land Management – The Federal Plans adopt a tiered land use allocation regime that provides the greatest level of protection for the most important habitats. We, together with State agencies, helped the BLM and USFS designate priority habitat areas using the best available scientific data to identify the location of the highest quality habitat with the greatest number of breeding sage-grouse. These areas largely coincide with the PACs identified in the COT Report (USFWS 2013, p. 14) and were designated by BLM and USFS in the Federal Plans as Priority Habitat Management Areas (PHMAs) (BLM and USFS 2015, entire). Based on our recommendation to further protect sage-grouse population centers that have been identified in the scientific literature as critically important for the species and areas identified through our analysis as important for conservation, BLM and USFS designated areas as Sagebrush Focal Areas (SFA) and added protections that would further limit new, human-caused surface disturbance in SFAs. Lastly, BLM and USFS designated General Habitat Management Areas (GHMAs) that represent areas with fewer leks and lower densities of breeding birds where disturbance is limited, while providing greater flexibility for land use activities.

Federal Plans mapped approximately 27 million ha (67 million ac) of sage-grouse habitat, of which 14 million ha (35 million ac) were designated as PHMAs, 4.5 million ha (11 million ac) were designated as SFAs (and overlap generally with PHMAs), and 13 million ha (32 million ac) were designated as GHMAs (no habitat was mapped in Washington, as minimal habitat occurs on BLM and USFS land in that State). The Federal Plans authorize and establish allowable resource uses for each of these Management Area designations. The Federal Plans also establish stipulations for certain authorizations to protect resources. Land use allocations of specific activities are generally categorized as:

- Exclusion/Closed: Areas that are not available for development or use of particular resources; or
- Avoidance: Areas to be avoided but may be available for development or use of particular resources with special stipulations; or
- Open: Areas open to development or use of particular resources, although use may be restricted by stipulations.

Using this targeted and tiered approach to habitat conservation, the Federal Plans have a number of components for conserving sage-grouse and their habitats. The primary components of the Federal Plans are a combination of: (1) Land use allocations; (2) human-caused disturbance caps and density limitations; (3) lek buffers; (4) monitoring; (5) adaptive management; (6) mitigation; and (7) a landscape-scale strategy for addressing the threat of fire and invasive grasses.

The BLM, USFS, and other partners recognize the variability in habitat value across sage-grouse habitat, both in terms of habitat characteristics and habitat quality. Priority sage-grouse habitats are areas that have the highest conservation value to maintaining or increasing sage-grouse populations. These areas include breeding, late brood-rearing, winter concentration areas, and where known, migration or connectivity corridors (BLM 2011a, p. 7). The BLM developed a rangewide Breeding Bird Density Map to highlight locations where the highest densities of breeding males were found on leks (Doherty *et al.* 2010a). Using this information and additional State agency expertise, BLM highlighted seasonal habitats needed for the sage-grouse (BLM 2011a, p. 7). In those instances where the BLM State offices did not complete this delineation, BLM relied upon the Breeding Bird Density maps (Doherty *et al.* 2010a, entire; BLM 2011b, entire). An Instructional Memorandum (IM; IM 2012–043) established two habitat categories. Preliminary Priority Habitat forms the basis for PHMA in the final plans and represents the habitat designated to maintain distribution and sustainable sage-grouse populations (BLM 2011b, entire). The second category was Preliminary General Habitat, the precursor to GHMA, which represents areas with fewer leks and lower densities of breeding birds where disturbance is limited, while providing greater flexibility for land use activities. Many of these areas were already impacted by human activities or wildfire. General sage-grouse habitat is described as occupied (seasonal or year-round) habitat outside of priority habitat (BLM 2011a, p. 9).

The Federal Plans focus on land use management within these two management areas (Figure 5). The discussion below analyzes PHMA and GHMA separately to distinguish the different management considerations in the most important habitats (PHMA) and the measures provided in other occupied habitats (GHMA).

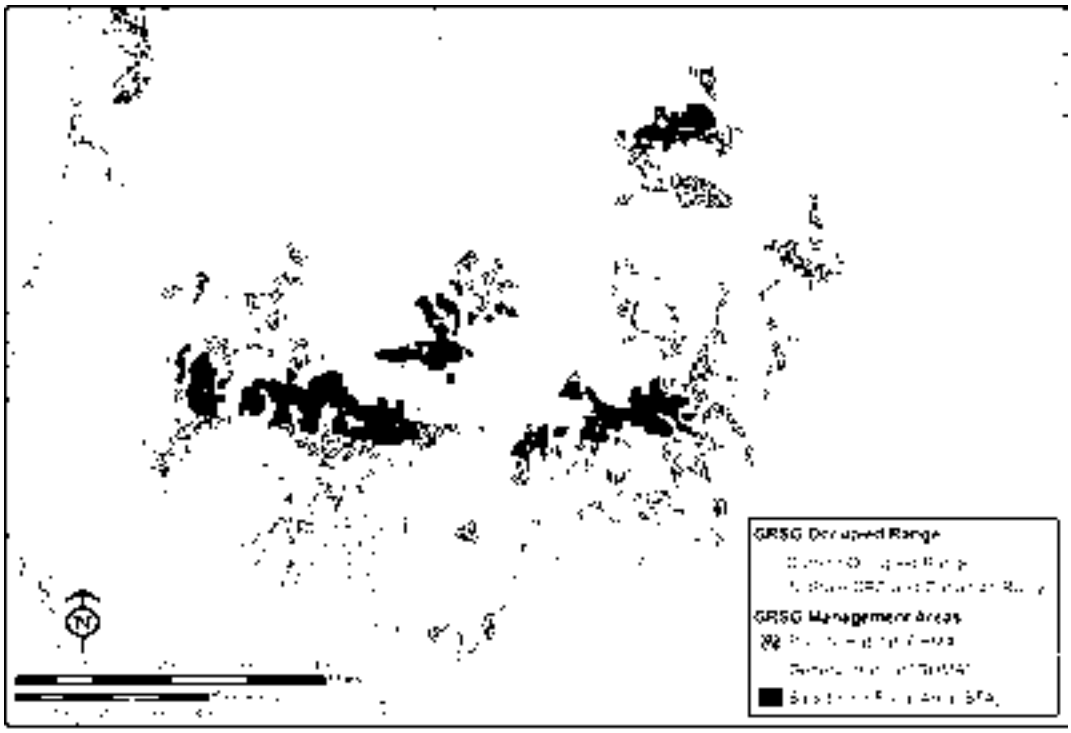


Figure 5 Federal Plan management areas and focal areas

Priority Habitat Management Areas—The BLM and USFS evaluated the occupied habitat within their jurisdiction and designated the areas with the best habitat and the majority of the leks as PHMAs. Approximately 14 million ha (35 million ac) were designated as PHMA (Figure 5), corresponding with approximately 64 percent of breeding habitat. The PHMA consists of the most important habitat on Federal lands occupied by the species. Because this is the most important habitat on Federal lands within the range of the species, the land use allocations and other measures are more restrictive in these habitats. Below we analyze the land use allocations and other measures in the revised and amended Federal Plans to conserve and maintain these important habitat areas on Federal lands. The Federal Plans in Wyoming are discussed separately below with the Wyoming State strategy as they collectively address all lands in Wyoming in a coordinated effort.

Fluid Minerals (Including Oil, Gas, and Geothermal): Under the revised or amended Federal Plans, PHMAs are closed to new leasing or subject to leasing with No Surface Occupancy (NSO). No surface occupancy areas are open to leasing, but human-caused surface-disturbing activities, such as development of well pads, cannot be conducted on the surface of the land. Access to oil and gas deposits would require directional drilling from outside the boundaries of the NSO areas. There will be no waivers, exceptions, or modifications, unless the following condition is met: ''A lease exception may be considered where a portion of the proposed lease is determined to be in non-habitat, the area is not used by sage-grouse, nor would it have direct, indirect or cumulative effects to sage-grouse or its habitat. The determination would be made by a team of agency sage-grouse experts, including an expert from the state wildlife agency, the Service, and BLM/USFS. All exceptions must be approved by the State Director.'' Further, priority will be given to leasing and development of fluid mineral resources, including geothermal, outside of sage-grouse habitat. The implementation of these priorities will be subject to valid existing rights and any applicable law or regulation, including, but not limited to, 30 U.S.C. 226(p) and 43 CFR 3162.3–1(h).''

On existing leases, the BLM will work with the lessees, operators, or other project proponents to avoid, reduce and mitigate adverse impacts to the extent compatible with lessees' rights to drill and produce fluid mineral resources. The BLM will work with the lessee, operator, or project proponent in developing for the lease an application for a permit to drill to avoid and minimize impacts to sage-grouse or its habitat and will ensure that the best information about the sage-grouse and its habitat informs and helps to guide development of such Federal leases. See the *Nonrenewable Energy* section below for a further discussion of valid existing rights.

Fluid minerals land use allocation decisions are more complex than the typical open, avoidance, and closed/exclusion decisions. Allocative decisions within the Federal Plans for fluid minerals can be one of the following:

- Open: These areas are open to leasing with minor to no constraints, subject to existing laws and regulations, and formal orders, as well as any standard terms and conditions.

- Open with moderate constraints: These are areas where it has been determined that moderately restrictive lease stipulations may be required to mitigate impacts. These stipulations include timing limitations and controlled surface uses.
- Open with major constraints: These are areas where it has been determined that highly restrictive lease stipulations are required to mitigate impacts.
- No Surface Occupancy (NSO): These areas are open to leasing, but surface-disturbing activities are precluded. Access to oil and gas deposits would require directional drilling from outside the boundaries of the NSO areas. The NSO areas are also avoidance areas for Rights-of-Way (ROWs); no ROWs would be granted in NSO areas unless there are no feasible alternatives.
- Closed: These are areas where it has been determined that other land uses or resource values cannot be adequately protected with even the most restrictive lease stipulations and appropriate protection can be ensured only by closing the lands to leasing.

In 2010, there were few habitat restrictions specific for sage-grouse for fluid mineral leasing on Federal lands within the range of the species. The new land use allocations in the Federal Plans designating PHMAs as either closed or open with NSO restrictions represent an unprecedented change in the management of areas important for sage-grouse (PHMAs) with fluid mineral potential. These land use allocations are consistent with the COT Report (USFWS 2013, p. 43) recommendations to reduce and eliminate disturbance in PACs. Closing areas to development and requiring NSO with only very limited exceptions, substantially reduces the potential for future disturbance in PHMAs. Considered together, these measures avoid or minimize impacts to fluid mineral development in priority habitat for conservation; this signifies a substantial improvement in the effectiveness of regulatory mechanisms since the 2010 finding.

Non-Energy Leasable Minerals: Under the Federal Plans, PHMAs are closed to new permits for non-energy leasable minerals (*e.g.,* phosphate, sodium, potassium), but expansion of existing operations could be considered, subject to specific conditions outlined in the plans. This provision reduces the potential impacts from non-energy leasable mineral development. The BLM leases certain solid minerals on public and other Federal lands. When mineral rights owned by the Federal Government underlie privately owned surface lands, the BLM can also lease these minerals. The restrictions in PHMAs reduce the likelihood that future development to non-energy leasable minerals will occur in these areas. Closing areas is an effective measure to reduce disturbance.

Mineral Materials: Since July 23, 1955, common varieties of sand, gravel, stone, pumice, pumicite, and cinders were removed from the General Mining Law and placed under the Materials Act of 1947, as amended. Use of salable minerals requires either a sales contract or a free-use permit (free permit for personal, noncommercial use). Under the Federal Plans, PHMAs are closed to new mineral material sale with limited exceptions for free use permits (described below) and the expansion of existing active pits, subject to compensatory mitigation and disturbance caps. Required design features (RDF) will be applied to all free use permits to minimize any potential impacts. As with other mineral development, disturbance in important habitat areas will be minimized through disturbance caps, lek buffers, and other measures. The closure of PHMAs to the sale of mineral materials effectively eliminates new impacts from this activity in PHMAs providing effective conservation in the most important habitats for the species.

Solar/Wind: The Federal Plans generally exclude new utility scale and commercial solar and wind developments from PHMAs. Limited exceptions must be based on an explicit rationale that biological impacts to sage-grouse will be avoided. Rights-of-way are required for wind testing, associated development structures, or solar energy development projects implemented on public lands. In Nevada, California, Utah, and Colorado, the Solar Energy Development Programmatic EIS (BLM 2012, entire) excludes development of utility-scale solar facilities outside the Solar Energy Zones and variance areas (variance areas are potentially available for utility-scale solar energy development, subject to additional environmental review), protecting a majority of the sage-grouse habitat in these States. Exclusion is an effective tool to reduce disturbance and minimize impacts in the most important habitats for conservation on federally managed lands because the activity will not be allowed in important habitats.

Rights-of-way: Under the Federal Plans, PHMAs are either avoidance or exclusion areas for both major and minor rights of way with limited exceptions, which must be based on an explicit rationale that biological impacts to sage-grouse are being avoided. Existing designated corridors for major transmission lines and pipelines will remain open. Federal Plans designate existing and potential ROW corridors to minimize adverse environmental impacts and the proliferation of separate ROWs (43 CFR part 2806). Any new disturbance within these corridors would count towards the disturbance cap. All new, modified, or deleted corridors will require a land use plan amendment (including NEPA analysis and notice and comment), thereby limiting new or expanded corridors in priority habitats for conservation in the future.

Livestock Grazing: The Federal Plans have not substantively changed livestock land use allocations; however, the BLM and USFS have committed to implementation of vegetative standards and habitat objectives specifically for sage-grouse based on local ecological conditions and prioritization of monitoring in PHMAs to determine if they are meeting sage-grouse habitat objectives consistent with site-specific guidelines or ecological site descriptions. The Federal Plans call for grazing to benefit or be neutral to sage-grouse, including in times of drought. Specifically, the BLM and USFS have committed to implementing the following measures in the Federal Plans:

- The habitat assessment framework (Stiver *et al.* 2010, entire) will be used to monitor progress at achieving rangeland health objectives at multiple spatial scales.
- The BLM and USFS will prioritize the following first in SFAs followed by PHMAs outside of the SFAs: (1) The review of grazing permits/leases, in particular to determine if modification is necessary prior to renewal, and (2) the processing of grazing permits/leases. In setting workload priorities, precedence will be given to existing permits/leases in these areas not meeting Land Health Standards, with focus on those containing riparian areas, including wet meadows. The BLM may use other criteria for prioritization to respond to urgent natural resource concerns (*e.g.,* fire) and legal obligations.
- The NEPA analysis for renewals and modifications of livestock grazing permits/leases that include lands within PHMAs will include specific management thresholds based on sage-grouse Habitat Objectives Table and Land Health Standards (43 CFR 4180.2) and defined responses that will allow the authorizing officer to make adjustments to livestock grazing without conducting additional NEPA analysis.
- Allotments within SFAs, followed by those within PHMAs, and focusing on those containing riparian areas, including wet meadows, will be prioritized for field checks to help ensure compliance with the terms and conditions of the grazing permits. Field checks could include monitoring for actual use, utilization, and use supervision.
- At the time a permittee or lessee voluntarily relinquishes a permit or lease, the BLM and USFS will consider whether the public lands where that permitted use was authorized should remain available for livestock grazing or be used for other resource management objectives.
- Structural range improvements will be managed to benefit or not adversely affect sage-grouse by restricting locations of ranch

facilities (*e.g.,* fences, windmills, and corrals) around leks, marking or removing fences, and controlling invasive plants.

Prioritizing the onsite monitoring to the most important areas for sage-grouse consistent with the rangewide monitoring plan, the certainty of implementation is improved because monitoring and management changes will occur in the most important areas for sage-grouse first. The vegetative objectives in the Federal Plans were developed using the best available scientific information, taking into consideration ecological differences across the range of the species. The Federal Plans specifically cite to the literature relied upon to develop these objectives. The Federal Plans commit to implementation of any habitat enhancement projects and other activities to meet these objectives. The monitoring framework is designed to add consistency to this effort and will, with adaptive management, provide additional certainty that measures will be implemented to meet habitat objectives. These changes represent a significant change from having virtually no or only general land health standards for sage-grouse to a system that establishes specific standards for sage-grouse, prioritizes the most important habitats, and targets monitoring to ensure compliance. This framework represents an effective suite of measures that reduces the impacts from improper grazing.

Sagebrush Focal Areas—Sagebrush Focal Areas (SFAs) are the areas that the Federal Plans manage as the highest priority lands in PHMAs for sage-grouse conservation (Figure 5). The BLM requested input from us about additional conservation opportunities, and we provided a memo that identified ''strongholds'' for sage-grouse (USFWS 2014a, entire). These ''strongholds'' represented areas identified in the scientific literature as essential for the persistence of the species. Some of the important characteristics of these areas include large, contiguous blocks of Federal lands; high population connectivity; and high densities of breeding birds (USFWS 2014a, entire). Our recommendations directly informed the BLM and USFS development of SFAs, important conservation units within which land managers will apply the most conservative strategies to protect sage-grouse and habitat. Sagebrush Focal Areas encompass 4.5 million ha (11 million ac) of federally administered lands in PHMAs (BLM and USFS 2015, entire). All of the measures listed above in PHMAs also apply in SFAs; in addition, the following more restrictive measures also apply in SFAs.

Locatable Minerals: The General Mining Law of 1872, as amended, opened the public lands of the U.S. to mineral acquisition by the location and maintenance of mining claims. Mineral deposits subject to acquisition in this manner are generally referred to as locatable minerals. Locatable minerals include metallic minerals (*e.g.,* gold, silver, lead, copper, zinc, and nickel), nonmetallic minerals (*e.g.,* fluorspar, mica, gypsum, tantalum, heavy minerals in placer form, and gemstones), and certain uncommon variety minerals. Under the Federal Plans, the BLM and FS have recommended that lands in SFAs be withdrawn from location and entry under the Mining Law, subject to valid existing rights. (BLM and USFS 2015). Under FLPMA, the first step of the withdrawal process implementing that recommendation is for the Secretary (or Deputy or Assistant Secretary) to ''propose'' a withdrawal. 43 U.S.C. 1714(b). Upon publication of such a proposal in the **Federal Register**, the lands are immediately segregated from location and entry under the Mining Law as specified in the notice for a period of two years. That segregation temporarily has essentially the same effect as a withdrawal; that is, it closes the lands to location and entry under the Mining Law, subject to valid existing rights. Although the Secretary is free to make a final decision prior to or after its expiration, the segregation is intended to allow time for public input and allow time for her to make a final decision as to whether to withdraw the lands. The Assistant Secretary took this first step and proposed withdrawal of the SFAs on September 16, 2015. The BLM will publish notice of the proposal concurrent with the announcement of the BLM Records of Decision, which will segregate the lands. After public involvement and preparation of various reports, including a NEPA analysis, the Secretary will make a final decision as to whether to withdraw the lands. 43 CFR 2310.3–2, 3. A withdrawal aggregating more than 5,000 acres is limited by law to a term of 20 years (subject to renewals) and is subject to Congressional notification. 43 U.S.C. 1714(c).

Fluid Minerals (Including Oil, Gas, and Geothermal): The Federal Plans manage SFAs as NSO, without waiver, exception, or modification, for fluid mineral leasing (with the exception of plans in Wyoming, as discussed below). No Surface Occupancy is where areas are open to leasing but surface-disturbing activities associated with development of the lease cannot be conducted on the surface of the land. Access to oil and gas deposits would require horizontal/directional drilling from outside the boundaries of the NSO areas. This is the most restrictive designation that allows for development of resources and protects habitat.

Habitat Management: BLM and USFS will prioritize management and conservation actions in SFAs, including, but not limited to, review of livestock grazing permits/leases, free-roaming equid gathers, fire management projects, and sagebrush restoration projects. Ensuring these areas are analyzed first provides certainty that, if degraded habitat conditions occur in the most important areas for the species, management actions will be taken and possible restoration will occur.

The actions identified for implementation in the SFAs are more restrictive versions of the measures described above for PHMAs. As such, the measures implemented within SFAs are more effective at reducing threats within these important areas. These measures have been determined to be effective because they eliminate or reduce the impacts from new development or improper grazing on Federal lands in SFAs.

General Habitat Management Areas—The Federal Plans designate approximately 12.5 million ha (31 million ac) as GHMA (Figure 5), which corresponds with approximately 27 percent of breeding habitat rangewide. The GHMAs represent habitats that contain fewer leks and sage-grouse than PHMAs. The designation as GHMAs provide sage-grouse conservation by protecting habitat and connectivity between populations and potential refugia in the event of catastrophic events such as wildfire. While the amelioration of threats in GHMAs will likely be less than in PHMAs due to less stringent required conservation measures, GHMAs do have restrictions that benefit sage-grouse conservation.

Specifically, the Federal Plans contain the following measures that apply in GHMAs:

Fluid minerals (Including Oil, Gas, and Geothermal): General Habitat Management Areas are open with constraints. Areas with standard constraints may be open to mineral leasing with no specific management decisions defined in the Federal Plans; however, these areas are subject to lease terms and conditions. Terms and conditions may include but not be limited to concentrating development, moving or supporting infrastructure, or reducing project footprints, thereby reducing habitat impacts. Moderate constraints include controlled surface

use, which can reduce habitat impacts and timing limitations which reduce human activities during the times sage-grouse are most sensitive to their presence.

Non-Energy Leasable Minerals: General Habitat Management Areas are open to non-energy leasable mineral development, subject to stipulations. In GHMA, development, including mineral exploration, is subject to lek buffers to protect breeding birds, timing restrictions to reduce human activities in important seasonal habitats while sage-grouse are present, mitigation requirements, and other protective measures discussed throughout this section, thereby reducing and minimizing the impacts to the species and its habitat.

Rights-of-Way: For major transmission lines and pipelines, GHMAs are either avoidance or exclusion areas, and may be available for installation of pipeline and transmission lines/ROWs within existing infrastructure corridors. Protective stipulations such as limiting road use (to minimize disturbance to birds) or eliminating perching areas (to reduce predation) will be incorporated into the ROW grants to protect sage-grouse and its habitat. For minor ROWs (*e.g.,* roads), GHMAs are open and subject to stipulations that will protect sage-grouse and its habitat, such as lek buffers and seasonal restrictions (BLM and USFS 2015, entire). For solar and wind energy rights of way, GHMAs are either designated avoidance or exclusion areas with limited exceptions and available for location of new utility scale and/or commercial development ROWs only with special stipulations that minimize the impact to sage-grouse.

Mineral Materials: General Habitat Management Areas can be open to new mineral material sales and free use permits subject to mitigation requirements and application of RDFs that will protect sage-grouse and its habitat.

Livestock Grazing: Federal Plans call for grazing to benefit or be neutral to sage-grouse in GHMAs and PHMAs. However, GHMAs will be the lower priority for monitoring as they comprise habitat with fewer leks and sage-grouse.

Measures Applicable in Both PHMA and GHMA—In addition to specific land use allocations described above, the new Federal Plans include other protective measures that will further limit disturbance and impacts to sage-grouse and their habitats. Additionally the plans include monitoring and adaptive management to help ensure that implementation of the allocative decisions and limitations on disturbance are effective at conserving sage-grouse and their habitats, and mitigation provisions where disturbance cannot be avoided. These measures apply regardless of the habitat designation (PHMA, SFA, or GHMA).

Land Tenure: The land tenure land use allocation refers to whether the BLM or USFS intend to dispose of, or retain, Federal lands. A land use allocation of retain means that the agencies will seek to retain the land in Federal ownership, with limited exceptions. An allocation of dispose means that the agencies may transfer the land out of Federal ownership. Under the Federal Plans, PHMAs and GHMAs will be retained in Federal management, with limited exceptions. Those limited exceptions may occur when: (1) The agency can demonstrate that disposal of lands will provide a net conservation gain to the sage-grouse; or (2) the agency can demonstrate that the disposal of lands will have no direct or indirect adverse impact on conservation of sage-grouse. The land tenure allocation ensures that BLM and USFS lands within PHMAs and GHMAs will be managed for sage-grouse into the future.

Trails and Travel Management: Travel management regulations require BLM and USFS to establish lands as open, limited, or closed to off-road vehicle use. In open areas all types of vehicle use is permitted at all times, anywhere in the area. Limited areas are restricted at certain times, in certain areas, and/or to certain vehicular use. Closed areas are those that are closed to all types of vehicle use and include units of the National Wilderness Preservation System. Areas that have not been designated in one of these categories are undesignated and have no restrictions on motorized access.

In PHMA and GHMA, temporary closures will be considered in accordance with several regulations, including Closures and Restrictions (43 CFR subpart 8364); Designated National Area (43 CFR subpart 8351); Use of Wilderness Areas, Prohibited Acts, and Penalties (43 CFR subpart 6302); and Conditions of Use (43 CFR subpart 8341). These regulations help control access to sensitive areas and have been employed strategically in the past to minimize access and disturbance during critical time periods such as spring breeding. These measures ensure that travel management decisions in PHMA and GHMA are made with consideration of sage-grouse conservation needs. These measures help to address concerns with potential disturbance due to travel on Federal lands and will continue to be used by the agencies as needed.

Disturbance Caps and Density Limitations – Each Federal Plan includes a disturbance cap that will serve as an upper limit (the maximum disturbance permitted). Anthropogenic disturbance has been identified as a key impact to sage-grouse. To limit new anthropogenic disturbance within sage-grouse habitats, the Federal Plans establish disturbance caps, above which no new development is permitted (subject to applicable laws and regulations; *e.g.,* General Mining Law of 1872, and valid existing rights). This cap acts as a backstop to ensure that any implementation decisions made under the Federal Plans will not permit substantial amounts of new disturbance within the distribution of sage-grouse on BLM and USFS lands.

For all States, except Wyoming and Montana, the BLM and USFS have established a 3 percent disturbance cap at two spatial scales – the Biologically Significant Unit (BSU) and at the project scale within PHMAs (BLM and USFS 2015, entire). The BSU is a geographical/spatial area, defined in conjunction with the States, within sage-grouse habitat that contains habitats supporting several interconnected populations. The disturbance cap calculation includes all anthropogenic disturbances in PHMAs at the project scale regardless of land ownership. If 3 percent disturbance is reached at the project level scale, no further anthropogenic disturbances will be permitted by BLM or USFS within PHMAs in the analysis area until the disturbance has been reduced to less than the cap. For BSUs the disturbance calculations will include anthropogenic disturbances in all habitat designations. Those disturbance calculations will be completed on an annual basis by the BLM's National Operation Center. If 3 percent disturbance is reached, the Federal land management agencies will examine all activities under their authority to determine if adaptive management is necessary (depending on the spatial scale at which the 3 percent cap is hit). In Montana, the same disturbance cap approach is used, but disturbance is limited to 5 percent, due to more detailed mapping and disturbance calculations. Wyoming uses a different approach to limiting disturbance in Core Areas, as discussed in Wyoming State and Federal Plans, below. As previously stated, sage-grouse are sensitive to disturbance, and small amounts of development within sage-grouse habitats can negatively affect sage-grouse population viability (Knick and Connelly 2011, p. 1). Thus, limiting future disturbances in sage-grouse

habitats is an essential component of reducing or eliminating effects related to disturbance, as recommended in the COT Report (USFWS 2013, p. 13).

In addition to the percent disturbance cap at the BSU and project scales, the BLM and USFS will use a density cap related to the density of energy and mining facilities during project-scale authorizations. If the disturbance density is greater than an average of 1/259 ha (1/640 ac) in PHMA, the project will either be deferred or co-located in an existing disturbed area (subject to applicable laws and regulations, such as the General Mining Law of 1872, valid existing rights, etc.).

Lek Buffers – Sage-grouse leks are communal breeding centers that are representative of the breeding and nesting habitats. Conservation of these areas is crucial to maintaining sage-grouse populations. Protective buffers around leks conserve these important habitats (Manier *et al.* 2014, pp. 1–2).

To develop ''biologically relevant and socioeconomically practical'' lek buffer distances for use in the Federal Plans, the DOI commissioned the USGS to review the scientific information on conservation buffer distances for sage-grouse. The result was the publication of a USGS Open-File Report, entitled *Conservation Buffer Distance Estimates for Greater Sage-Grouse – A Review,* in 2014 (Manier *et al.* 2014, entire). In addition to the land use allocations described in this section, the BLM and USFS will apply the lek buffer distances specified as the lower end of the interpreted range in PHMAs as described in the report unless justifiable departures are determined to be appropriate (see below). The lower end of the interpreted range of the lek buffer distances are presented in Table 3. Note that for many potential activities in PHMAs, the Federal Plans land use allocations result in no or few activities allowed in these important areas (*e.g.,* no surface occupancy restrictions). Thus, for those types of projects, buffers are unnecessary in PHMAs because the activity is already restricted.

TABLE 3—LEK BUFFER DISTANCES IN FEDERAL PLANS

Disturbance	Lek buffer
Linear Features (*e.g.*, roads).	5 km (3.1 mi).
Infrastructure related to energy development.	5 km (3.1 mi).
Tall structures (communication or transmission towers, transmission lines).	2 km (1.2 mi).
Low structures (*e.g.*, fences, rangeland structures).	2 km (1.2 mi).
Surface disturbance (human activities that alter or remove natural vegetation).	5 km (3.1 mi).
Noise and related disruptive activities.	0.4 km (0.25 mi).

The BLM and USFS may approve actions in PHMAs that are within the applicable lek buffer distance identified above only if the BLM or USFS determine that a buffer distance other than the distance identified above offers the same or greater level of protection to sage-grouse and its habitat. The BLM or USFS will make this determination based on best available science, landscape features, and other existing protections, with input from the local State fish and wildlife agency. The BLM or USFS will explain its justification for determining that the approved buffer distances meet these conditions in its project decision.

For actions in GHMAs, the BLM and USFS will apply the lek buffer distances in Table 3 as required conservation measures to fully address any impacts to sage-grouse identified during the project-specific NEPA analysis. However, if it is not possible to locate or relocate the project outside of the applicable lek buffer distance(s) identified above, the BLM or USFS may approve the project only if: (1) Based on best available science, landscape features, and other existing protections, (*e.g.,* land use allocations, State regulations), the BLM or USFS determine that a lek buffer distance other than the applicable distance identified above offers the same or a greater level of protection to sage-grouse and its habitat, including conservation of seasonal habitat outside of the analyzed buffer area; or (2) the BLM or USFS determines that impacts to sage-grouse and its habitat are minimized such that the project will cause minor or no new disturbance (*e.g.,* co-location with existing authorizations); and (3) any residual impacts within the lek buffer distances are addressed through compensatory mitigation measures sufficient to ensure a net conservation gain, as outlined in the Mitigation Strategy (see below). By applying lek buffers in addition to other measures, the Federal Plans provide an additional layer of protection to the habitat in closest proximity to leks and the areas documented in the literature to be the most important for breeding and nest success (Manier *et al.* 2014, entire).

Required Design Features – Required Design Features (RDFs) are best management practices to reduce potential effects to sage-grouse for certain project-level features. The RDFs establish the minimum specifications for certain activities to help mitigate adverse impacts. Because of site-specific circumstances, some RDFs may not apply to some projects (*e.g.,* a resource is not present on a given site) and/or may require slight variations (*e.g.,* a larger or smaller protective area). The need to apply RDFs to a project or to modify RDFs to address any concerns unique to a project is determined during the project-specific planning and environmental assessment. All variations in RDFs would require that at least one of the following be demonstrated in the NEPA analysis associated with the project/activity:

- A specific RDF is documented to be not applicable to the site-specific conditions of the project/activity (*e.g.,* due to site limitations or engineering considerations). Economic considerations, such as increased costs, do not necessarily require that an RDF be varied or rendered inapplicable;
- An alternative RDF is determined to provide equal or better protection for greater sage-grouse or its habitat;
- A specific RDF will provide no additional protection to sage-grouse or its habitat.

While the applicability and overall effectiveness of each RDF cannot be fully assessed until the project level when the project location and design are known, the Federal Plans include the requirement to implement appropriate RDFs and these RDFs are expected to further minimize impact to the species and its habitat. These RDFs were developed based on the COT and NTT conservation objectives and the best professional judgment of BLM and USFS wildlife biologists. For example, any project that includes the development of a pond or similar water feature would require RDFs that direct the design, construction, and maintenance of the pond so that it would not provide habitat for mosquitos that could carry West Nile virus (WNv).

Monitoring—While monitoring does not in and of itself reduce impacts, it is an integral component of any conservation program's long-term success. We take into consideration monitoring when evaluating the overall adequacy and effectiveness of a conservation strategy. The regulations for the BLM (43 CFR 1610.4–9) and the USFS (36 CFR part 209, published July

1, 2010) require that Federal Plans establish intervals and standards, as appropriate, for monitoring and evaluations based on the sensitivity of the resource to the decisions involved. Pursuant to these regulations, an interagency team developed *The Greater Sage-grouse Monitoring Framework* that describes the methods to be used to collect monitoring data and to evaluate implementation and effectiveness of the sage-grouse planning strategy and the conservation measures contained in the Federal Plans (BLM and USFS 2014, entire).

To ensure that the BLM and the USFS are able to make consistent assessments about sage-grouse habitats across the range of the species, this framework lays out the methodology—at multiple scales (broad, mid, fine, and site scales)—for monitoring of implementation and disturbance and for evaluating the effectiveness of the BLM and USFS actions to conserve the species and its habitat. Monitoring efforts will include data for measurable quantitative indicators of sagebrush availability, anthropogenic disturbance levels, and habitat conditions. Implementation monitoring results will allow the BLM and the USFS to evaluate the extent that decisions from their Federal Plans to conserve sage-grouse and their habitat have been implemented. State fish and wildlife agencies will continue to collect population monitoring information, which will be incorporated into effectiveness monitoring as it is made available.

Managing and monitoring sage-grouse habitats are complicated by the differences in habitat selection across the range and habitat use by individual birds within a given season. Therefore, the monitoring framework evaluates multiple habitat suitability indicators to evaluate plan effectiveness. Descriptions of these habitat suitability indicators for each scale are provided in the ''*Sage-Grouse Habitat Assessment Framework: Multiscale Habitat Assessment Tool''* (Stiver *et al.* 2010, entire).

Results from monitoring data will define when habitat objectives are not being achieved, disturbance caps have been breached, and adaptive management triggers have been met (see below). Having a consistent framework for all management units will allow the agencies to track information and trends across management units, which has not been possible in the past. The BLM and USFS have and committed to increased monitoring, and we expect the results to give the agencies valuable data to assist and improve implementation and improve the overall effectiveness of the BLM and USFS plans.

Adaptive Management – Like monitoring, adaptive management is a key element of complex long-term conservation strategies, particularly where there is uncertainty. Adaptive management is a decision process that promotes flexible resource management decision-making that can be adjusted in the face of uncertainties as outcomes from management actions and other events become better understood. This flexibility is critical for ensuring long-term conservation of sage-grouse into the future, as it will allow the Federal Plans to adjust to changed conditions or new science that cannot be foreseen at this time. Careful monitoring of these outcomes both advances scientific understanding and helps with adjusting resource management directions as part of an iterative learning process. Adaptive management also recognizes the importance of natural variability in contributing to ecological resilience and productivity. An effective adaptive management program will ultimately improve the overall effectiveness of the conservation program through time.

Adaptive management will help ensure that sage-grouse conservation measures in the Federal Plans are effective, and if they are not effective, that corrective actions will be implemented. Each planning area (with the exception of the Lander and North Dakota Plans) has identified adaptive management soft and hard triggers and responses. Soft triggers represent an intermediate threshold indicating that management changes are needed at the project/implementation level to address habitat and population losses. If a soft trigger is met, the BLM will apply more conservative or restrictive implementation conservation measures to mitigate for the specific causal factor in the decline of populations and/or habitats, with consideration of local knowledge and conditions. These types of adjustments will be made to preclude meeting a hard trigger (which signals more severe habitat loss or population declines). Hard triggers represent a threshold indicating that immediate action is necessary to stop a deviation from sage-grouse conservation objectives as set forth in the Federal Plans. Tripping a hard trigger will result in BLM or USFS switching to a more restrictive alternative from the Final Environmental Impact Statement either in whole or in part to address the causal factors (*e.g.,* immediate cessation of authorizing land use authorizations within the area). After the hard-trigger is tripped, the BLM or USFS will determine the causal factor and develop and implement a corrective strategy. While adaptive management is not a land use allocation decision, the Federal Plans have developed species and habitat triggers and tied them to appropriate management actions in the Federal Plans, providing an additional certainty that action will be taken if the species or habitat objectives are not being met.

Mitigation – All of the Federal Plans require that impacts to sage-grouse habitats are mitigated and that compensatory mitigation provides a net conservation gain to the species. All mitigation will be achieved by avoiding, minimizing, and compensating for impacts following the regulations from the White House Council on Environmental Quality (CEQ) (40 CFR 1508.20; *e.g.,* avoid, minimize, and compensate), hereafter referred to as the mitigation hierarchy. If impacts from BLM/USFS management actions and authorized third party actions that result in habitat loss and degradation remain after applying avoidance and minimization measures (*i.e.,* residual impacts), then compensatory mitigation projects will be used to provide a net conservation gain to the species. Any compensatory mitigation will be durable, timely, and in addition to that which would have resulted without the compensatory mitigation.

The Federal Plans will establish a Management Zone Greater Sage-Grouse Conservation Team (hereafter, Team) to help guide the conservation of sage-grouse, within 90 days of the issuance of the Record of Decision. This Team will develop a Management Zone Regional Mitigation Strategy using the BLM's Regional Mitigation Manual as a framework. The Team will also compile and report on monitoring data (including data on habitat condition, population trends, and mitigation effectiveness) from States across the MZs and will use these data to either modify the appropriate Regional Mitigation Strategy or recommend adaptive management actions. Requiring mitigation for residual impacts provides additional certainty that, while impacts will continue at reduced levels on Federal lands, those impacts will be offset to a net conservation gain standard.

Fire and Invasives Assessment Tool (FIAT) – The Federal Plans recognize that fire and invasive plants are the primary impact to sage-grouse habitat in the Great Basin. The BLM and USFS convened an interagency team to develop a rangewide assessment and step-down approach to address these impacts (*i.e.,* FIAT). The result was the ''*Greater Sage-Grouse Wildfire, Invasive Annual Grasses and Conifer Expansion*

Assessment'' report (BLM 2014, entire). The FIAT assessments are incorporated in the Federal Plans. The assessments identify the habitats most resistant and resilient to wildfire and invasive plants to target fire management and ecosystem restoration activities (BLM and USFS 2015, entire). The FIAT Assessments ensure that wildfire and invasive plant management and restoration resources are deployed in the landscapes where they will be most effective in reducing this potential threat.

As part of the assessment process, Instructional Memorandum (IM) 2014–134 was released August 28, 2014. This IM, in part, provided guidance for the BLM field offices to cooperate with interagency partners to complete FIAT assessments at local scales for five priority landscapes in sage-grouse habitat, which roughly corresponded to PACs in the Great Basin as identified in the COT Report (USFWS 2013, p. 14) (*i.e.,* Central Oregon, Northern Great Basin, Snake/Salmon/Beaverhead, Southern Great Basin, Western Great Basin/Warm Springs Valley). For each priority landscape, regional findings were stepped down to describe local conditions by Project Planning Area (PPA) and associated treatment needs and management priorities. Each PPA contained emphasis areas, *i.e.,* portions of a PAC with important habitat characteristics and sage-grouse populations that are impacted by wildfire, invasives, and conifer encroachment. The assessments were included in the Federal Plans. The FIAT Assessments are described in more detail in the *Wildfire and Invasive Plants* section, below.

Federal Plans Summary

The Federal Plans provide major new regulatory mechanisms to protect sage-grouse from land use activities on more than half of the occupied range. In 2010, the Federal land management plans did not contain, for the most part, sage-grouse specific measures, and areas important to the species were open to land uses that could disturb habitat (75 FR 13910, March 23, 2010, p. 13982). Since then, the BLM and USFS have amended or revised 98 plans to address threats to the species (BLM and USFS 2015, entire). The Federal Plans exclude or reduce habitat-disturbing activities in PHMAs that contain the most important habitats for conservation. General Habitat Management Areas are still being managed for the benefit of sage-grouse, but BLM and USFS have flexibility to site development or leasing in GHMAs to keep priority areas intact. While some disturbance can occur in the GHMAs, as they contain fewer sage-grouse when compared to PHMAs, protective measures for activities in those areas minimize impacts and require mitigation. The combination of restrictive PHMAs and less restrictive GHMAs provide conservation for sage-grouse on approximately 27 million ha (67 million ac) while still enabling the multiple uses that are part of the BLM and USFS missions. While there are impacts associated with on-going activities, the Federal Plans provide adequate mechanisms to reduce and minimize new disturbance in the most important areas for the species. By following COT Report and NTT guidance and restricting impacts in the most important habitat, the Federal Plans ensure that high-quality sage-grouse lands with substantial populations are minimally disturbed and sage-grouse within this habitat remain protected.

Wyoming State and Federal Plans

Approximately 37 percent of estimated sage-grouse abundance occurs in Wyoming (Doherty *et al.* 2010a, p. 21). The Wyoming Basin, the majority of which occurs within the State of Wyoming, has been identified as one of two areas with the highest population connectivity (Knick and Hanser 2011, p. 391). Therefore, conservation of this area is essential to the persistence of sage-grouse into the future. We have also identified this area as a stronghold for the species (USFWS 2014a).

The Wyoming Plan relies on the protection of important sage-grouse habitats in the State using a suite of avoidance and minimization measures. Important habitats (Core Areas) were identified by the highest densities of males attending leks, and added associated habitats through a scientific process engaging State wildlife experts and local working groups. Core Areas encompass approximately 83 percent of the breeding population of sage-grouse in Wyoming on approximately 24 percent of the total land surface of the State (Budd, Wyoming Wildlife and Natural Resource Trust, pers. comm. 2015). Additional connectivity areas were identified for protection to ensure population movements. Protective measures associated with the Wyoming Plan (described below) do not extend to lands located outside the identified Core Areas but that are still within occupied sage-grouse habitat. In non-Core Areas, the minimization measures are implemented to maintain habitat conditions such that there is a 50 percent likelihood that leks will persist over time (Wyoming Game and Fish Department 2009, pp. 30–35). While impacts to sage-grouse are possible in non-core habitats, the majority of primary habitats necessary for long-term conservation of sage-grouse in Wyoming are included in the identified Core Areas. Core Area maps are reviewed and adjusted every 5 years to allow for the incorporation of new data that ensures the most important areas for sage-grouse receive protections. For example, the State of Wyoming reviewed the Plan in 2015 and added 58,191 ha (143,794 ac) to the Core Areas.

The key component of the Wyoming Plan is the application of State regulatory measures associated with the Wyoming Plan on all lands in Wyoming (6 million ha (15 million ac)) as any project requiring a State permit must meet the conditions of the strategy regardless of land ownership. Specifically, the Wyoming Plan applies to all activities that require permits from Wyoming's Industrial Siting Council (ISC) (Wyoming E.O. 2015–4, entire). The Federal Plans in the State incorporate the Wyoming strategy, thereby ensuring implementation of the strategy on Federal land surfaces and subsurface regardless of the need for a State permit (see further discussion below). The completion of the Federal plans also facilitates greater coordination between the State and Federal agencies in implementing and monitoring the Wyoming Plan. This addition to the Wyoming Plan further increases the value of this effort in conserving sage-grouse by covering all lands in the State with a single regulatory framework to reduce affects to sage-grouse in the most important habitats in the State. Therefore, the strategy conserves sage-grouse through an effective regulatory mechanism for conservation.

The Wyoming Plan first encourages projects to be re-located outside of Core Areas by reducing restrictions in non-Core Areas for development activities. Where projects cannot be relocated, the Plan requires a combination of restricted development densities, development disturbance caps, seasonal restrictions, and lek buffers to minimize habitat disturbance within Core Areas. Surface disturbance is limited to 5 percent within Core Areas reducing fragmentation and degradation of habitat (Wyoming E.O. 2015–4, Attachment A, p. 6; Wyoming E.O. 2015–4, Attachment B, p. 5). While 5 percent is greater than the 3 percent used in other States, habitat disturbance monitoring in Wyoming is conducted at a much finer scale and is, therefore, more inclusive in the number and extent of disturbances measured. Additionally, Wyoming includes natural disturbances, such as wildfire, in the

disturbance measure, which is not included in any other State. Therefore, the higher disturbance cap permitted in Wyoming is not more permissive as a simple comparison of the numbers suggests. Limiting development to one site per 259 ha (640 ac) on average reduces the disturbance footprint to a level where impacts to sage-grouse are minimal, if nonexistent (Holloran 2005, p. 58; Taylor *et al.* 2012a, p. 31; Holloran *et al.* 2010, p. 71). Development is not permitted if either of these criteria (development density or disturbance caps) is exceeded. Incentives to consolidate disturbance further reduce development impacts by minimizing habitat loss and degradation within large landscapes. Where development cannot be moved away from breeding habitats, an NSO buffer of 1 km (0.6 mi) of a lek is required, as well as a seasonal restriction on project development. Activity within 6.4 km (4 mi) of a lek is also restricted from March 15 through June 30. These restrictions reduce impacts to the sage-grouse by avoiding disturbance during breeding season (Wyoming E.O. 2015–4, Attachment B pp. 2–6; Fedy *et al.* 2012, p. 1063; Doherty *et al.* 2010a, entire).

Disturbance (including all anthropogenic and natural disturbances) is tracked via a geospatial database (measuring disturbance at 1 m (3.3 ft). Including all disturbances with such precision ensures that all potential impacts to sage-grouse, regardless of source, are being considered prior to authorizing new development. Additional conservation is gained through the enforcement of noise restrictions at the perimeter of leks, which minimizes disturbance to birds visiting the leks (Wyoming E.O. 2015–4, Attachment B, p. 8; Patricelli *et al. 2013*, p. 241; Blickley and Patricelli 2012, p. 33; Blickley *et al.* 2012, p. 470).

Outside of core-habitat, there are NSO restrictions within 0.4 km (0.25 mi) of leks to minimize impacts to sage-grouse (E.O. 2015–4, Attachment B, p. 6), and activities within 3.2 km (2 mi) of a lek are restricted during the breeding season. These relaxed stipulations encourage development to move outside of Core Areas, while still providing some protections to birds in non-Core Areas. While impacts to birds and their habitats may occur outside of Core Areas, only about 17 percent of the sage-grouse bird density occurs in those areas (Budd, Wyoming Wildlife and Natural Resources Trust, pers. comm. 2015), minimizing impacts to sage-grouse and allowing for the continuation of the economies that support the State.

In 2010, we analyzed the Wyoming Plan and noted that it included measures that if fully implemented could ameliorate threats to sage-grouse (75 FR 13910, March 23, 2010, pp. 13974–13975). We now have data that shows how implementation has avoided and minimized impacts in core habitats. Since 2012, the majority of the 600 projects proposed in Core Areas and reviewed by the State complied with the criteria of the Wyoming Plan. Projects that added additional surface disturbance within Core Areas were minimized or co-located with existing disturbance. Less than 8 ha (20 ac) of new disturbance has occurred within Core Areas since 2012 (USFWS 2014b). Other applications were denied that would negatively affect sage-grouse, including a wind lease application on State trust lands (USFWS 2014b). The number of oil and gas wells permitted in Core Areas has also declined as industry seeks to avoid conflict with sage-grouse. Between 2006 and 2012, vertically drilled single well permits declined 65 percent, while directionally and horizontally drilled wells, from outside the Core Areas, increased by 66 and 1,337 percent, respectively (USFWS 2014b). This change in the number and nature of oil and gas well permits further demonstrates the efficacy of the Wyoming Plan. Other industries, such as mining, have initiated restoration efforts to remove existing disturbance and improve habitat for sage-grouse. These data demonstrate the efficacy of the Wyoming Plan in removing and reducing impacts to sage-grouse from development activities.

The Federal Plans in Wyoming have incorporated the Wyoming Plan Core Area strategy. Core habitats designated by the State have been identified as PHMA on BLM and USFS lands, while non-core habitats are designated as GHMA. Both the BLM and USFS have adopted the more precise disturbance measurements developed by the State at 5 percent. With the exception of the fluid and non-energy leasable mineral programs, the Federal Plans in Wyoming are the same as with other States. However, these modifications were made to expand the protections already implemented by the State to Federally managed lands.

The fluid mineral designation in the Federal Plans in Wyoming is different than in the other Federal Plans throughout the range, which was necessary to adopt the Wyoming Plan. For fluid minerals in Wyoming, PHMAs are designated Controlled Surface Use, which means these areas are open to leasing, but would require proposals for surface-disturbing activities only be authorized in accordance with the controls or constraints specified in the Wyoming Plan. For non-energy leasable minerals, PHMAs are open to non-energy leasable minerals, but are subject to measures intended to minimize impact in important (core) areas pursuant to the Wyoming Plan.

A recent analysis of the Wyoming Plan predicted that 83 percent of the landscape within core area boundaries supports increasing or stable populations of sage-grouse (Burkhalter *et al.* 2015, p. 20) due to the conservation of high-quality intact sagebrush habitats. Seventeen percent of the landscape within Core Areas may have declining populations as those areas occur around the edges of Core Areas and, therefore, are subject to disturbances outside these protected areas (Burkhalter *et al.* 2015, p. 20). The factors identified in this report as essential for conservation, such as maintaining connected landscapes in sagebrush cover, and minimizing oil and gas development, are all key components of the Wyoming Plan. The recent completion of the BLM and USFS Federal Plans should reduce disturbance around the edge of Core Areas, thereby increasing the efficacy of the strategy. The Wyoming Plan was renewed in July 2015 ensuring that the protections will continue until at least 2022 (Wyoming E.O. 2015–4, p. 6).

The Wyoming Plan has been in place for 8 years, and has demonstrated its conservation value by protecting areas identified as important to sage-grouse conservation. As described above, development has been removed or minimized in Core Areas, protecting intact habitats from fragmentation and degradation. Carefully controlled development within Core Areas has had minimal to no impact to the sage-grouse as demonstrated by the increasing populations within Core Areas (Burkhalter *et al.* 2015, p. 20). Protections outside the Core Areas also provide additional conservation to habitats and birds by maintaining connectivity between Core Areas. The adoption of the Wyoming Plan into Federal land plans provides additional assurances that protections of Core Areas will be achieved on all lands, regardless of land ownership.

Montana and Oregon Conservation Efforts

State and Private lands account for 42 percent of the sage-grouse occupied range. Plans developed by States for sage-grouse vary widely in the nature of the protective measures, with some measures being regulatory and some being voluntary. State Plans in three States—Wyoming, Montana, and Oregon—contain regulatory measures

that effectively address threats on State or private lands. Wyoming is addressed separately above because of its integration with the Federal Plans in that State (See *Wyoming* section above).

Since 2010, all States within the range of the species, except for California, have drafted, finalized, or implemented conservation plans for the sage-grouse. These plans take different approaches, but, in general, they identify important conservation objectives for sage-grouse, and provide mechanisms to incentivize conservation. While 10 of the 11 States in the range of the sage-grouse updated plans to conserve the species by incorporating new information, which is a testimony to their concern and commitment to protect the grouse and its habitats, not all of these plans have been fully implemented or regulatory in scope. As discussed above, we will assess the conservation actions mandated by the State plans in Wyoming, Montana, and Oregon because they provide the greatest degree of regulatory certainty in addressing potential threats on State and private lands not under the jurisdiction of Federal Plans. We appreciate the work that each State has completed, but we could not include all planning efforts in other States in our analysis because they did not meet a level of certainty for implementation and effectiveness. Regardless of the nature of State conservation efforts, we reviewed and considered the conservation efforts developed and implemented by the States consistent with the Act (16 U.S.C. 1533(b)(1)(A)). A description of the other applicable State laws is included below in *Regulatory Mechanisms* and *Other Conservation Plans.*

Montana—The Montana Sage-Grouse Habitat Conservation Program (Montana Plan) is similar to the Wyoming Plan in that it is a regulatory mechanism that applies to Core Areas across the State. In 2014, the Governor signed an Executive Order that provides sage-grouse conservation directives for activities on State and private lands where approximately 70 percent of sage-grouse habitat in Montana occurs (Montana E.O. 10–2014, entire). The Governor of Montana issued a second Executive Order putting into effect the Montana Sage Grouse Habitat Conservation Program and giving it full regulatory authority (Montana E.O. 12–2015, entire). This second Executive Order included a full review of State regulatory authority over activities in sage-grouse habitat in Montana. The Montana Plan is regulatory on State lands and on any private lands where State permits or authorizations are required; it requires that State agencies adhere to the requirements and stipulations of the Program. The Montana Executive Order created the Montana Sage-Grouse Oversight Team (Montana Oversight Team) composed of State Agency Directors to oversee administration of the Montana Plan. Additional staffing of the Montana Plan includes a Program Manager, GIS Manager and technician, biologists, and support for seasonal work. The Montana Plan and supporting documents clearly identify under what regulatory authority the State and private entities are required to act in accordance with the Executive Order.

In the previous section, we describe in detail how the Wyoming Plan addresses the issues of habitat loss and fragmentation and disturbance to sage-grouse. The Montana Plan closely follows the structure of the Wyoming Plan and, similarly, uses information and guidance from the COT Report to identify and reduce impacts associated with threats to sage-grouse in Montana. The Montana Executive Order also identifies scientifically valid performance standards based upon number of males at leks to ensure that the Montana Plan actions are effective; monitoring protocols are also included. The Montana Plan specifies adaptive management strategies in response to this monitoring information. Implementation of the Montana Plan will occur immediately in response to future and additional actions that occur in sage-grouse habitat; full implementation of the Montana Plan is expected by January 2016.

The Montana Plan includes similar requirements as those identified in the Wyoming Plan including the following: Use of a 5 percent disturbance cap in Core Areas; allowance of only one disturbance (well pad, grouped impacts) per section (259 ha (640 ac)) for oil and gas and mining; prohibition of sagebrush eradication or conversion; and lek buffers and disturbance buffers in both Core Areas and general habitats. For a complete discussion of why these methods are effective in supporting viable sage-grouse populations, please see the previous discussion of the Wyoming State and Federal Plan, above.

The Montana State Legislature recently passed, and the Governor signed, the Montana Sage-Grouse Protection Act during the 2015 legislative session. This Act ensures that critical funding and support are available for necessary sage-grouse conservation efforts in the future. This Act funds staff resources to implement the conservation program, and includes a revolving conservation fund with an initial balance of 10 million dollars. This funding authorization is directly tied to the implementation of the E.O. and provides certainty of implementation. The Governor also signed the Montana Greater Sage-Grouse Stewardship Act, which establishes the Montana Sage-Grouse Oversight Team and provides grant-based funding for voluntary sage-grouse conservation efforts. Unless specifically excluded, all State actions (including those prescribed for sage-grouse conservation) require review under the Montana Environmental Policy Act, which is analogous to the National Environmental Policy Act at the State level. Given this commitment from the State, there is certainty that the Montana Plan will be implemented and effective.

In addition to the Montana Plan, private landowners in Montana have worked with Montana Fish, Wildlife, and Parks to enroll nearly 80,000 ha (200,000 ac) in 30-year sagebrush leases. Montana Fish, Wildlife, and Parks provided 1.2 million dollars for these leases where landowners agreed not to eliminate sagebrush on the enrolled acres (Wightman, Montana Fish, Wildlife, and Parks, 2015, pers. comm.).

Oregon—The Oregon Sage-Grouse Action Plan (Oregon Plan) ensures regulatory protection and enhancement of sage-grouse and their habitat on State and private lands in Oregon. This Plan is backed by two new rules in the Oregon Legislature and an Executive Order. The Oregon Plan includes explicit habitat and population goals with incremental completion dates and prioritizes avoidance with standards for mitigation of impacts if necessary. The Oregon Plan builds on the core area strategies utilized by Wyoming and Montana to address all sage-grouse habitats. The Oregon Plan applies to more than 6 million ha (approximately 15 million ac) of all landownership types and includes regulatory mechanisms, such as disturbance caps and adaptive management triggers, to reduce impacts to sage-grouse in the State.

The Oregon Plan includes similar provisions to those identified in the Wyoming Plan and Montana Plan. Based upon the nature and extent of threats to sage-grouse in Oregon and information in the 2010 Finding and COT Report, the Oregon Plan includes limitations on disturbance in Core Areas through disturbance caps and an avoidance and minimization strategy. Actions permitted through county actions (such as a new subdivision or county road) as well as actions permitted through State agencies (such as a new large-scale energy or utility project) are both subject to the Plan as

outlined in the two Rules (Oregon OAR 635–140–0025, entire; and Oregon OAR 660–023–0115, entire; OR E.O. 2015). For specific discussions of why these stipulations are effective, please see the Wyoming State and Federal Plan discussion. The Oregon Plan identifies fire management measures, such as funding and logistical support for Rural Fire Protection Areas. Wildfire and the fire/invasives cycle can impact large areas of sage-grouse habitat in very short periods of time, making prevention of wildfire important for minimizing effects. This commitment improves the likelihood that wildfires will be effectively controlled to reduce the potential negative effects to sage-grouse habitat. Further, the Oregon Plan includes a State-administered compensatory mitigation program designed to synchronize with BLM mitigation processes. The Oregon Plan has identified an overall population goal of 30,000 birds with interim performance measures and corresponding monitoring protocol to ensure progress towards the larger goal. The Oregon Plan commits to adaptively manage for sage-grouse in response to this monitoring data.

Many of the Oregon Plan measures are similar or complementary to those included in the Federal Plans. This aligned framework of tools, rules, and protocols across local, State, and Federal processes will ensure that coordinated mitigation and voluntary actions conserve the species across all land ownerships in Oregon. It also creates the transparency and credibility necessary for public support of the State's strategy.

The Oregon Plan identifies several State agencies as well as specific staffing and funding requirements necessary for full implementation of the Oregon Plan. In addition to gaining public support and identifying necessary staffing, financial support has been secured through the Oregon Watershed Enhancement Board, which has committed 10 million dollars over the next 10 years. These funds are used to implement aspects of the Oregon Plan that manage impacts from fire and invasive species. In addition, 3.34 million dollars of new funding for sage-grouse conservation was appropriated by the Oregon Legislature for the 2015 through 2017 funding cycle. These commitments ensure that the Oregon Plan will be successfully implemented for the conservation of the species.

Sage Grouse Initiative

The Sage Grouse Initiative (SGI) works with landowners and other partners to design and deliver voluntary conservation practices, including grazing systems and conservation easements, on private lands to ameliorate impacts to sage-grouse while improving the sustainability of working ranches. Private lands account for 39 percent of sage-grouse occupied range. Habitat under private ownership may be at greater risk of conversion through development than neighboring Federal land. The Sage Grouse Initiative's past, present, and future contributions are considerable because, while private lands are less than half of the sage-grouse occupied range, the potential biological value of those lands for various phases of the species' life history is high, as is their potential conservation value. The NRCS carries out conservation through a variety of authorities and tools. We have identified specific activities that are directly benefiting sage-grouse under SGI (Table 4).

TABLE 4—CONSERVATION COMPLETED BY SGI FOR 2010 TO 2014

[From NRCS 2015a, p. 38]

MZ	Grazing systems		Easements		Conifer removal		Seeding		Fence modification	
	ha	ac	ha	ac	ha	ac	ha	ac	km	mi
I	554,529	1,370,269	26,661	65,881	73	181	3,074	7,597	182	113
II	216,285	534,450	95,186	235,210	1,437	3,551	1,023	2,527	37	23
III	15,199	37,557	4,529	11,191	7,630	18,855	2,240	5,534	16	10
IV	127,448	314,930	39,727	98,167	83,405	206,099	12,035	29,740	153	95
V	35,736	88,306	11,684	28,871	71,061	175,595	439	1,085	129	80
VI	33,619	83,073	1,768	4,369	0	0	274	677	47	29
VII	3,667	9,061	3,316	8,193	389	962	388	960	2	1
Total	986,482	2,437,646	182,870	451,882	163,996	405,243	19,474	48,120	565	351

Grazing Management – The objective of SGI's Prescribed Grazing protocol is to ensure that rangelands are managed sustainably and support functional sagebrush ecosystems (NRCS 2015a, p. 23). Since 2010, SGI has improved rangeland health through rotational grazing systems, re-vegetating with sagebrush and perennial grasses, and controlling invasive species (NRCS 2015a, p. 23). The techniques employed by SGI to improve and/or maintain habitat suitability for sage-grouse are consistent with the recommendations provided in the COT Report (USFWS 2013, pp. 45–46).

Easements – The SGI has enrolled 182,109 ha (450,000 ac) in conservation easements; 80 percent of these occur inside occupied sage-grouse habitat, and 94 percent provide permanent protection (NRCS 2015a, p. 1). Under these easements, habitat cannot be subdivided or converted to agriculture, thus protecting sage-grouse habitat from development. By maintaining these lands in sagebrush habitat, these easements support existing sage-grouse populations and decrease likelihood of fragmentation.

Restoration – The SGI ameliorates impacts through restoration of disturbed and degraded habitat. The SGI has reclaimed 163,995 ha (405,241 ac) of otherwise suitable habitat by direct removal of conifers encroaching on sagebrush habitat. Removal of early-stage conifers should improve and expand sage-grouse habitats by precluding ecological type conversion to an otherwise unsuitable habitat (Johnson and Miller 2006, p. 8; Casazza *et al.* 2011, p. 163; Knick *et al.* 2013, p. 1544). Through monitoring data, SGI is working to assess how birds use areas with recent conifer removal. Anecdotal reports suggest that sage-grouse have responded positively to these efforts. Moreover, SGI and others are developing conifer maps in MZs III, VI, V, and VII (NRCS 2015a, p. 19). The SGI will use this new information to target efforts where removal will have the greatest value for sage-grouse (NRCS 2015a, p. 19 and NRCS 2015b, p. 10).

Fence modification is another aspect of SGI restoration. Marking and

removing fences can reduce direct mortality to sage-grouse by reducing fence strikes. NRCS estimates that SGI fence marking prevents 2,600 collisions annually (NRCS 2015a, p. 22).

The SGI uses direct seeding to restore habitat through the addition of native species. Through grazing systems, re-vegetating former rangeland with sagebrush and perennial grasses and controlling invasive weeds, SGI has enhanced rangeland health inside PACs (NRCS 2015a, p. 2).

Monitoring and Adaptive Management – The NRCS has continued to improve conservation of sagebrush habitat through new information and new scientific methods (NRCS 2015a, entire; NRCS 2015b, entire). They employ habitat suitability models to target conservation easements and address conifer encroachment in the early stages of development to improve the benefit of their treatments. By monitoring and tracking the effectiveness of their efforts and their willingness to incorporate this information into their management, SGI has ensured the long-term implementation of their program will achieve conservation for sage-grouse on private lands.

Since 2010, the NRCS, through the SGI, has invested approximately 425.5 million dollars, with 76 percent of investments occurring within PACs (Table 4). To date, 1,129 ranches have participated in the SGI, across all 11 States in the species' range (NRCS 2015a, p. 1). Through the 2014 Farm Bill, NRCS will continue and accelerate its efforts, ensuring a durable and increasingly targeted conservation effort on private lands in sage-grouse country (NRCS 2015a, p. 29; NRCS 2015b, p. 6). Starting in 2015, NRCS will add 198 million dollars to continue sage-grouse conservation on private lands in the future (NRCS 2015a, p. 29; NRCS 2015b, p. 6).

Where they have been implemented, these conservation efforts have addressed certain potential threats to sage-grouse, such as urban and exurban development, infrastructure, and improper grazing (defined for the purposes of this analysis as grazing at an intensity or in ways that impair ecosystem functions of the sagebrush ecosystem) [See *Grazing and Rangeland Management,* below]. The nature of those potential threats and the impact of SGI's conservation in ameliorating some potential threats are discussed in further detail below (see Summary of Information Pertaining to the Five Factors). Given the history of success of this program, the level of local and national support, NRCS' application of adaptive management, demonstrated partnerships, and the recent reauthorization and dedicated resources through the 2014 Farm Bill, we expect that SGI will continue to provide valuable on-the-ground conservation to sage-grouse and its habitat into the future.

Candidate Conservation Agreements

Over the past 2 years, we have prioritized Candidate Conservation Agreements with Assurances (CCAAs) to focus conservation on non-Federal lands for the benefit of sage-grouse. Candidate Conservation Agreements with Assurances provide assurances to both landowners and the Service that conservation will continue into the future without resulting in a regulatory burden on the landowners involved. Through these agreements, landowners agree to avoid certain activities that may be harmful to sage-grouse, or to undertake activities on their property that benefit sage-grouse (*e.g.,* restore degraded habitat, create new habitat, augment existing populations, and restore historical populations). In Oregon, more than 575,000 ha (1.4 million ac) of rangeland have been effectively conserved for sage-grouse through enrollment in a CCAA. In Wyoming, 36 CCAAs have been completed, with more than 180,000 ha (445,000 ac) enrolled. In addition to CCAAs, we also employ Candidate Conservation Agreements; these agreements can exist between the Service and private landowners, local governments, States, and Federal agencies.

Candidate Conservation Agreements operate through tailored conservation strategies that specify required activities that will benefit sage-grouse. Although individual agreements vary, the focus is always on improving sage-grouse habitat or populations. Through CCAAs, landowners may restore existing degraded sagebrush to provide habitat for sage-grouse. They may also create new habitat or simply, as with conservation easements, protect existing habitat for the benefit of the species. As an example, landowners enrolled in the Oregon CCAA have agreed to maintain contiguous habitat by avoiding further fragmentation. The objective for this required conservation measure is for no net loss in: (1) Habitat quantity (as measured in acres) and (2) habitat quality (as determined by the ecological state). Additionally, every enrolled landowner must have at least one conservation measure in place to address each threat identified during the baseline assessment of individual properties.

Candidate Conservation Agreements are voluntary agreements. As such, it is possible for landowners to terminate these agreements. However, based on previous experiences with existing CCAAs for a variety of other species (Anderson and Moore, USFWS, 2015, pers. comm.), we have found that landowners generally do not withdraw from these agreements. Of the 34 CCAAs the Service has finalized nationwide for a variety of species, 32 are still in effect and 2 expired based on the term of the agreement, indicating that landowners continue to implement CCAAs following finalization of the agreements (Anderson and Moore, USFWS, 2015, pers. comm.). Landowners commit to beneficial actions that they are willing to implement to receive the assurances of no further regulatory requirements if the species would become listed. In addition to CCAAs, we work with private landowners through the Partners for Fish and Wildlife Program through Private Landowner Agreements to benefit species and their habitats. A past study on the retention of restored wetlands found that the vast majority of landowners continued to implement the practices from their agreements well after the agreement ended (Fairchild 2004, entire). Further, over the last decade, in an 8-State area roughly equivalent to the Rocky Mountain sage-grouse range, the majority of landowners completed their agreements and continued practices after the agreements were completed (Johnson, USFWS, 2015, pers. comm.). Habitat loss and degradation were identified as threats to the species in 2010; through efforts such as these, sage-grouse habitat remains available to the species. Given the ongoing fidelity these efforts to conserve sage-grouse and its habitat, along with our previous experiences with other species, we conclude that there is sufficient certainty that existing CCAAs will continue to be implemented into the future.

Secretarial Order 3336

On January 5, 2015, the Secretary of the Interior signed Secretarial Order 3336, Rangeland Fire Prevention, Management, and Restoration (Secretarial Order), that provides guidance on wildfire management in the sagebrush ecosystem (Department of the Interior (DOI) 2015b, entire). The Secretarial Order places a priority on ''protecting, conserving, and restoring the health of the sagebrush ecosystem and, in particular, sage-grouse habitat, while maintaining safe and efficient operations,'' and allocates fire resources and assets associated with wildfire to reflect that priority. The Secretarial

Order established a Rangeland Fire Task Force (Task Force) to prepare and oversee an Implementation Plan for accomplishing the objectives of the Secretarial Order. The Task Force completed an ''Initial Report'' outlining actions that can be undertaken during the 2015 western wildfire season and that plan is being implemented (DOI 2015c, entire). The Task Force also prepared a ''Final Report'' that identifies long-term activities, beyond the 2015 fire season, that can be implemented to further address the effects of wildfire in the Great Basin (DOI 2015d, entire). A full discussion of the Secretarial Order, the Initial and Final Reports, and how they address the effects from wildfire and invasive species is provided below (see Wildfire and Invasive Plants).

Summary of New Information Since 2010

Since 2010, there have been several major changes in the regulatory mechanisms that minimize impacts to sage-grouse and their habitats. Foremost among these are the adoption of new Federal Plans specifically tailored to conserving sage-grouse over more than half of its occupied range. These Federal Plans now include substantial provisions for addressing activities that occur in sage-grouse habitats and affect the species, including those threats identified in 2010 as having inadequate regulatory measures. Aside from addressing specific activities, the Federal Plans include provisions for monitoring, adaptive management, mitigation, and limitations on anthropogenic disturbance to reduce impacts authorized in sage-grouse habitats. The Federal Plans are the foundation of land-use management on BLM and USFS managed lands. We are confident that these Federal Plans will be implemented and that the new changes, which are based on the scientific literature, will effectively reduce and minimize impacts to the species and its habitat.

In addition to the Federal Plans, the BLM and USFS have provided new policy guidance and management direction for the management of wildfire and invasive plant in the sagebrush ecosystems. The Secretarial Order establishes new, overarching policy direction for DOI and its wildfire prevention and suppression efforts by prioritizing ''protecting, conserving, and restoring the health of the sagebrush ecosystem and, in particular, sage-grouse habitat, while maintaining safe and efficient operations.'' The Secretarial Order also requires that DOI allocate its wildfire resources and assets in ways that fulfill the priority of protecting, conserving, and restoring the health of the sagebrush ecosystem. The Secretarial Order aims to reduce the size, severity, and cost of suppressing wildfire in sage-grouse habitats by reducing the spread of invasive plants and prioritizing resources to ensure that suppression efforts are effective.

Further, 10 of the 11 States within the occupied range of the sage-grouse have revised and adopted sage-grouse conservation plans. State sage-grouse conservation plans in Wyoming, Montana, and Oregon contain regulatory mechanisms that minimize impacts to the species and its habitat. Most notably, the Wyoming Plan has been in place since 2008 and has effectively minimized impacts within core habitats, protecting the highest density areas for the species within the State. The Montana and Oregon State Plans use proven conservation measures including disturbance caps, density restrictions, and lek buffers to minimize disturbance to important habitats. In combination, the Federal and three State plans cover 90 percent of the sage-grouse breeding habitat where they provide regulatory mechanisms that reduce potential adverse effects to sage-grouse. These State and Federal Plans, together with the private lands conservation provided by SGI and CCAAs, represent a substantial increase in sage-grouse conservation since 2010. These Plans and private land efforts provide conservation for sage-grouse now and into the future and ensure that the most important habitats will remain distributed across the landscape to support the populations identified as critical to the long-term conservation of the species.

Summary of Information Pertaining to the Five Factors

Section 4 of the Act (16 U.S.C. 1533) and implementing regulations (50 CFR 424) set forth procedures for adding species to the Federal Lists of Endangered and Threatened Wildlife and Plants. The Act defines an ''endangered'' species as ''any species which is in danger of extinction throughout all or a significant portion of its range,'' and a ''threatened'' species as one ''which is likely to become an endangered species within the foreseeable future throughout all or a significant portion of its range'' (16 U.S.C. 1532(6), (20)). Under section 4(a)(1) of the Act, we may determine a species warrants listing as endangered or threatened based on any of the following five factors:

(A) The present or threatened destruction, modification, or curtailment of its habitat or range;

(B) Overutilization for commercial, recreational, scientific, or educational purposes;

(C) Disease or predation;

(D) The inadequacy of existing regulatory mechanisms; or

(E) Other natural or manmade factors affecting its continued existence.

In making this finding, we discuss below information regarding the status and potential threats to the sage-grouse in relation to the five statutory factors provided in section 4(a)(1) of the Act. Our evaluation of potential threats is based on information provided in the relevant petitions, information available in our files, and other sources considered to be the best scientific and commercial information available, including published and unpublished studies and reports. In considering what factors might constitute threats to the species, we must look beyond the mere exposure of the species to the factor to determine whether the species responds to the factor in a way that causes actual impacts to the species. If there is exposure to a factor, but no response, or only a positive response, that factor is not a threat. If there is exposure and the species responds negatively, the factor may be a threat to the species and we then attempt to determine if that factor rises to the level of a threat, meaning that it may drive or contribute to the risk of extinction of the species such that the species warrants listing as an endangered or threatened species as those terms are defined by the Act. This does not necessarily require empirical proof of a threat. The combination of exposure and some corroborating evidence of how the species is likely impacted could suffice. The mere identification of factors that could impact a species negatively is not sufficient to compel a finding that listing is warranted; we require evidence that the threats, either alone or when combined, are significant, in that they act on the species to the point that the species meets the definition of an ''endangered species'' or ''threatened species'' under the Act.

Habitat Fragmentation

In the 2010 finding, we determined that the greatest threat to the species was habitat loss and fragmentation (Factor A) due to a variety of causes, including but not limited to, energy development, infrastructure, invasive species, and wildfire (75 FR 13910, March 23, 2010, p. 13986). Sagebrush habitats were becoming increasingly degraded and fragmented due to the impacts of multiple threats, including direct conversion, urbanization, infrastructure such as roads and power

lines built in support of several activities, wildfire and the change in wildfire frequency, incursion of invasive plants, improper grazing, and nonrenewable and renewable energy development. Many of these threats were found to be exacerbated by the effects of climate change, which could influence long-term habitat trends.

As noted in 2010, fundamental characteristics of sagebrush landscapes have changed since Euro-American settlement (Knick and Connelly 2011, p. 7). Very little of the extant sagebrush is undisturbed, with up to 50 to 60 percent having altered understories or having been lost to direct conversion (Knick *et al.* 2003, p. 612). Conversion to cropland and other land uses has reduced the quantity of area that is dominated by sagebrush land cover. The composition of sagebrush communities has changed with the expansion of junipers and *Pinus* spp. (pinyon) woodlands (Miller and Rose 1999, p. 556) and the invasion of nonnative species such cheatgrass (West and Young 2000, p. 262). Habitat suitability has also been affected by the presence of anthropogenic structures such as communication towers and power lines (Connelly *et al.* 2000a, p. 974; Beck *et al.* 2006, p. 1070). Lastly, the configuration of sagebrush mosaics across the species' range has changed, resulting in the risk of increased population isolation, exposure to predators in areas of edge habitat, and invasive plants (Saunders *et al.* 1991, pp. 22–24; Gelbard and Belnap 2003, p. 424; Knick and Connelly 2011, pp. 7–14).

The biology of sagebrush and the ecology of the sagebrush ecosystem makes restoration of disturbed areas very difficult and processes to restore sagebrush habitat are relatively unproven (Knick *et al.* 2003, p. 620). Active restoration activities are often limited by financial and logistical resources (Knick *et al.* 2003, p. 620; Miller *et al.* 2011, p. 147; Pyke 2011, p. 544) and may require decades or centuries to be effective (Knick *et al.* 2003, p. 620). Meaningful restoration for sage-grouse requires action on a landscape, watershed, or eco-regional scale rather than individual, unconnected efforts (Knick *et al.* 2003, p. 623; Wisdom *et al.* 2011, p. 469). Recently, investigations have focused on ascertaining where and how sagebrush habitat restoration is likely to be more effective (Pyke 2011, pp. 531–548; Miller *et al.* 2014, pp. 468–481; Chambers *et al.* 2014b, pp. 440–454). Because loss and fragmentation of habitats due to invasives and wildfire is one of the biggest impacts to sage-grouse, particularly in the Great Basin, it is important that these investigations continue and that management actions continue to focus on effective wildfire suppression and habitat restoration.

Because of the challenges with sagebrush restoration, management efforts in sagebrush ecosystems are usually focused on habitat maintenance (Miller *et al.* 2011, p. 183; Wisdom *et al.* 2011, pp. 470, 472). This goal has primarily been achieved through the management of activities that can result in habitat loss and fragmentations such as non-renewable energy development, agricultural conversion, wildfire, and invasive plants, consistent with the recommendations in the COT Report (USFWS 2013, pp. 40–52). Each of the activities that can cause habitat fragmentation will be discussed further below, as well as any conservation efforts that have been implemented to address those impacts.

Nonrenewable Energy Development

In 2010, we evaluated the effect of nonrenewable energy development on sage-grouse and concluded that the development and related infrastructure were substantial contributors to habitat loss and fragmentation in the past, and that it would continue into the future, particularly in the Rocky Mountain portion of the species' range. We also found that regulations addressing nonrenewable energy development were inadequate at that time to address this threat. It was the lack of regulatory mechanisms that led us to conclude this nonrenewable energy development would continue at rates similar to or greater than historical rates of development. The 2010 finding concluded that habitat fragmentation, caused in part by nonrenewable energy development, and inadequate regulatory mechanisms were significant threats to the species, then and into the foreseeable future, such that listing was warranted under the Act (75 FR 13910, March 23, 2010, pp. 13986–13988).

Nonrenewable energy development includes the exploration, construction, and drilling of wells and installation of supporting infrastructure needed to extract and transport oil, natural gas, coal, coal-bed natural gas, coal-bed methane, and other types of gas. Nonrenewable energy development begins with exploratory surveys and the construction of access roads and well pads, followed by drilling, extracting, and transporting the energy reserves along roads and pipelines. Additional infrastructure needed for nonrenewable energy development often includes compressor stations, pumping stations, electrical generators, and power lines (Connelly *et al.* 2004, p. 7–39; BLM 2007, pp. 2–110).

Nonrenewable energy development has occurred in sage-grouse habitats since the late 1800s (Connelly *et al.* 2004, p. 7–28), with wells historically concentrated in MZs I, II, VII, and the eastern portion of MZ III (IHS Incorporated 2014, entire). Specifically, nonrenewable energy development is concentrated above four geologic basins across the sage-grouse range: The Powder River Basin (MZ I); the Williston Basin (MZ I); the Southwestern Wyoming Basin (MZ II); and the Uinta-Piceance Basin (MZs II, III, and VII). These four basins overlap with the highest density of sage-grouse, and the largest number of leks in the Rocky Mountain portion of the occupied range (Doherty *et al.* 2015, entire). Approximately 10 percent of the species' overall occupied range has been directly or indirectly affected by nonrenewable energy development, with approximately 20 percent affected in MZ I, 20 percent affected in MZ II, and 29 percent affected in MZ VII (Knick *et al.* 2011, p. 240). The existing development and infrastructure has already affected the species distribution (Naugle *et al.* 2011, pp. 489–491). Nonrenewable energy development is expected to continue in the occupied range of the sage-grouse based on the estimates of available energy reserves and projected trends in development rates (Copeland *et al.* 2009, p. 5; Knick and Hanser 2011, p. 394; Wisdom *et al.* 2011, p. 467).

Nonrenewable energy development can remove and fragment sagebrush habitats (Factor A). Well pads vary in size from 0.10 ha (0.25 ac) for coal-bed natural gas wells to greater than 7 ha (17.3 ac) for deep gas wells and multi-well pads (Connelly *et al.* 2004, p. 7–39; BLM 2007, pp. 2–123). Pads for compressor stations typically occupy 5 to 7 ha (12.4 to 17.3 ac) (Connelly *et al.* 2004, p. 7–39). However, where geology permits the use of new horizontal and directional drilling technologies, multiple wells can be placed on one pad, thereby reducing the amount of surface disturbance associated with wells, roads, power lines, and pipelines (Applegate and Owens 2014, p. 288).

The reduction and fragmentation of sagebrush habitats can decrease sage-grouse abundance and reduce the distribution of sage-grouse across the landscape (Knick *et al.*, 2011, pp. 247–250; Leu and Hanser 2011, p. 270). Male sage-grouse may avoid leks if there are five or more wells within 3.0 km (1.9 mi), and sage-grouse are less likely to occupy habitats with wells spaced at 32 ha (80 ac) (Doherty *et al.* 2008, p. 193).

Well densities on Federal lands have typically ranged from 1 well per 16 ha to 32 ha (40 ac to 80 ac), although densities as high as 1 well per 4 ha (10 ac) do occur (BLM 2006, pp. 2–5; Naugle *et al.* 2011, p. 497). Impacts from nonrenewable energy extend beyond the physical footprints of wells and may include indirect effects such as the physical and behavioral changes, increased mortality, and reduced reproductive success (Lyon and Anderson 2003, p. 459; Walker *et al.* 2007a, p. 2651; Holloran *et al.* 2010, p. 70; Knick *et al.* 2011, p. 240).

Sage-grouse avoid habitats near nonrenewable energy developments, including important wintering habitats and leks (Dzialak *et al.* 2013, p. 16; Smith *et al.* 2014, p. 15). Sage-grouse have lower nest initiation and nest success rates near nonrenewable energy development (Aldridge and Boyce 2007, p. 517; Webb *et al.* 2012, p. 9), and reduced survival rates (Holloran *et al.* 2010, p. 70; Kirol 2012, p. 15). Due to the strong habitat fidelity exhibited by adult sage-grouse, declining population trends may take up to 10 years to detect following the onset of nonrenewable energy development. (Doherty *et al.* 2010a, p. 5; Harju *et al.* 2010, pp. 441–445; Taylor *et al.* 2012a, p. 8; Gregory and Beck 2014, p. e97132). This delay poses challenges to detecting population-level impacts resulting from development, and may prevent timely implementation of measures to eliminate, reduce, or mitigate those impacts. As a single conservation tool, mitigation measures (such as habitat restoration and seasonal or timing restrictions) to reduce impacts may not be sufficient to prevent sage-grouse declines due to nonrenewable energy development (Walker *et al.* 2007a, p. 2651; Doherty *et al.* 2008, p. 192; Harju *et al.* 2010, p. 445), as the associated infrastructure persists on the landscape for several generations of sage-grouse. However, as part of a larger tool set that includes avoidance and minimization, mitigation can serve as a helpful conservation measure (USFWS 2014c).

Nonrenewable energy resources are the largest source of energy worldwide, and demand for these resources could increase by up to 1.3 percent annually in the United States and 50 percent worldwide by the year 2030 (National Petroleum Council 2007, p. 46; Naugle *et al.* 2011, p. 490). Nonrenewable energy resources will likely be in demand and used in the United States through the year 2030, although energy forms and extraction techniques may change in the future (EIA 2009, entire). Market conditions and extraction technologies influence the rates of nonrenewable energy development in North America (Applegate and Owens 2014, p. 287); the Energy Policy and Conservation Act (Pub. L. 109–58) and its amendments mandate that the United States increase its domestic energy development. Therefore, nonrenewable energy development is likely to continue throughout the sage-grouse range into the future, although its form and extent across the landscape may change.

In 2010, we assessed impacts to sage-grouse and their habitat based on the portion of occupied range where a nonrenewable energy project was occurring and where there was increased potential for future development (75 FR March 1310, March 23, 2010, pp. 13942–13948). This approach was based on the best available GIS data at that time but may have overestimated some effects, because we had less precise information regarding areas of high oil and gas development potential and we measured impacts against all lands within the occupied range.

For this status review, we used peer-reviewed and published methodologies (Copeland *et al.* 2009, entire) to model the probability of future oil and gas development impacting sage-grouse. The model focused on assessing the risk of nonrenewable energy in MZs I and II, the two areas with the highest potential for future nonrenewable energy development (Figure 2) (Juliusson and Doherty 2015). Although nonrenewable energy development potential exists and will continue in the Uinta-Piceance Basin (MZ VII), we did not apply the model to MZ VII because the relative proportion of potential development was low, even under the highest development scenario. The model used geological information about potentially available oil and gas resources to map areas of likely future development (Juliusson and Doherty 2015). We also used Oil & Gas Resource Assessments developed by the USGS to incorporate future maximum potential development scenarios into the analysis (Juliusson and Doherty 2015). The analysis quantified potential effects to sage-grouse by calculating the percent of the Population Index and breeding habitat distribution potentially exposed to future nonrenewable energy development based on the availability of oil and gas resources. The potential effects from nonrenewable energy development were assessed with and without regulatory mechanisms contained in the Federal Plans, the Wyoming Plan, and the Montana Plan (see Conservation Efforts, below). The estimate of potential non-renewable energy effects without conservation planning efforts is roughly equivalent to what was evaluated in 2010.

Our analysis indicates that the Federal Plans, the Wyoming Plan, and the Montana Plan are reducing the exposure of the sage-grouse to nonrenewable energy, as measured by the portions of the Population Index and breeding habitat, in MZs I and II, the two MZs at greatest risk of future nonrenewable energy development (Table 5). Without the regulatory mechanisms in MZ I, 28 percent of the Population Index and 21 percent of the breeding habitat could be affected by nonrenewable energy development. Without regulatory mechanisms in MZ II, 27 percent of the Population Index and 25 percent of the breeding habitat could be affected (Table 5). However, with the regulatory mechanisms provided by the State and Federal plans, the risk of nonrenewable energy development decreases. With regulatory mechanisms, 17 percent of the Population Index and 14 percent of the breeding habitat could be exposed to nonrenewable energy development in MZ I, and 8 percent of the Population Index and 9 percent of the breeding habitat could be exposed to nonrenewable energy development in MZ II. Our analysis shows that the State and Federal regulatory mechanisms reduce the risk of nonrenewable energy exposure to the Population Index and breeding habitat by more than 35 percent in MZ I and more than 60 percent in MZ II.

TABLE 5—POTENTIAL EXPOSURE TO SAGE-GROUSE POPULATIONS AND BREEDING HABITAT FROM NONRENEWABLE ENERGY DEVELOPMENT IN MZS I AND II, WITH AND WITHOUT THE REGULATORY MECHANISMS, AT THE HIGHEST DEVELOPMENT SCENARIO

Management zone	Without regulatory mechanisms		With regulatory mechanisms	
	% of the population index exposed	% of the breeding habitat exposed	% of the population index exposed	% of the breeding habitat exposed
I	28	21	17	14
II	27	25	8	9

To summarize, our analysis quantifies that without regulation a high proportion of the Population Index and breeding habitat in MZs I and II could be exposed to and potentially negatively affected by nonrenewable energy development. However, with the regulatory mechanisms enacted since 2010, the potential risk from nonrenewable energy development is substantially reduced in MZs I and II (Table 5). Future impacts to sage-grouse from new development could vary based on other factors, such as economic markets, technologies, densities, proximity to existing development, and the location of new development; however, our results show that the Federal and State regulatory mechanisms in MZs I and II reduce habitat loss and fragmentation due to nonrenewable energy development. The next section will discuss these conservation efforts, including those regulatory mechanisms designed to address the effects of nonrenewable energy development and how they ameliorate this potential threat.

Conservation Efforts

Since 2010, State and Federal agencies have worked collaboratively to develop regulatory mechanisms, that is, legally binding and enforceable sage-grouse conservation measures, as well as other nonregulatory conservation efforts, to reduce or eliminate the potential threat of new nonrenewable energy development to sage-grouse and its habitat. Those efforts are discussed in detail below.

State Plans—Three States where nonrenewable energy development has historically been concentrated have implemented regulatory mechanisms to address this potential threat. As described below, Wyoming and Montana Plans provide regulatory mechanisms to address habitat loss, habitat fragmentation, and disturbance associated with nonrenewable-energy development on applicable lands in their States. In addition, the Utah Executive Order contains a regulatory mechanism for potential nonrenewable energy development that is discussed below.

The Wyoming Plan provides regulatory mechanisms to reduce impacts associated with energy development on all lands within Core Areas. The Wyoming Plan features development stipulations to guide and regulate development within the Core Population Areas to avoid as much as possible, but, if avoidance is not possible, to minimize and mitigate, impacts to sage-grouse and its habitat (See *Regulatory Mechanisms* section below; Wyoming E.O. 2015–4, entire). Specific measures include controlled surface use, density of development restrictions, seasonal and noise restrictions, and lek buffers. Since implementation of the plan began in 2008, the number of new nonrenewable energy wells in sage-grouse habitats declined by 80 percent and permits for potential new development of single wells has declined by 65 percent (USFWS 2014b). At the same time, applications for directional and horizontal drilling permits, which congregate disturbance from multiple wells into one area, increased by 66 and 65 percent respectively, representing a decrease in sage-grouse habitat lost to nonrenewable energy development (USFWS 2014b). The BLM analyzed existing lease information and found that only 14 percent of PHMA in Wyoming is already leased (Carmen, BLM, 2015, pers. com.). The Wyoming Plan recognizes valid existing rights. ''Activities existing or permitted in Core Populations Areas prior to August 1, 2008, will not be required to be managed under Core Population Area Stipulations'' (Wyoming E.O. 2015–4, p. 4). Our risk analysis described above confirms that the Wyoming Plan, together with the Federal Plans, reduces the potential exposure of nonrenewable energy development to the Population Index by more than 35 percent in MZ I and 60 percent in MZ II (Table 5) where nonrenewable energy development has historically been concentrated. Results were similar for breeding habitat. Risk of exposure, however, is a measure of areas where regulatory mechanisms would allow development and does not equate to a forecast of where actual impacts will occur; actual energy development and potential impacts are likely to be much lower than the risk analysis. While some development will occur in the future, the Wyoming Plan directs projects to areas that will avoid impacts, includes stipulations to minimize indirect effects, and if necessary, requires mitigation to benefit the species.

The Montana Plan also provides regulatory mechanisms very similar to those described above for Wyoming that reduce impacts from nonrenewable-energy development. Montana's State plan includes controlled surface use, restrictions on density of development, seasonal and noise restrictions, and lek buffers. Similar to the Wyoming Plan, it is designed to reduce impacts associated with energy development in Core Areas on State lands and private lands where a State authorization is required (Montana E.O. 10–2014, entire; see *Conservation Efforts* section above). The Montana Plan includes a controlled surface use, density of development restrictions, seasonal and noise restrictions, and lek buffers.

The Utah Executive Order requires that the Utah Division of Oil Gas and Mining coordinate with the Utah Division of Wildlife Resources prior to issuing energy development permits. Further, the Plan directs the Utah Division of Oil, Gas, and Mining to implement recommendations provided during that coordination that require avoidance and minimization measures on State and private lands consistent with the conservation plan. These measures are subject to the statutory requirements to protect rights on private property and avoid waste of the mineral resource.

To summarize, since the 2010 finding, States have undertaken considerable effort to reduce the impact of nonrenewable energy development on sage-grouse and efforts are consistent with the recommendations in the COT Report (USFWS 2013, pp. 43–44). State Plans in Wyoming and Montana provide regulatory mechanisms that direct

development out of Core Areas and minimize indirect effects, effectively reducing the risk of habitat loss and fragmentation in MZs I and II. In addition, the Utah Executive Order contains a regulatory mechanism that requires consultation with the State Division of Wildlife Resources and implementation of its recommendations to avoid and minimize sage-grouse impacts. The State Plans work together with the Federal Plans, as discussed below, to reduce nonrenewable energy effects to sage-grouse habitat across the range, and particularly in MZs I and II, where the potential for development is the greatest.

Federal Plans – Since 2010, BLM and USFS have completed plan amendments or revisions conserving sage-grouse on more than half its occupied range. Approximately 80 percent of the BLM and USFS lands with high to medium potential for nonrenewable energy development are located outside federally managed PHMAs (Quamen, BLM, 2015, pers. comm.). The Federal Plans in Wyoming adopt the Wyoming Plan, which, as described in the *Regulatory Mechanisms* section above, reduces impacts to sage-grouse from nonrenewable energy development. The Federal Plans include NSO restrictions in 14 million ha (35 million ac) of PHMA, with either no or very limited waivers or modifications. Exceptions to this restriction could occur only if it is determined that the project would not affect sage-grouse or would be beneficial compared to other options. The Federal Plans prioritize the future leasing and development of nonrenewable-energy resources outside of sage-grouse habitats. The plans require disturbance caps, surface occupancy restrictions, seasonal restrictions, and lek buffers to effectively reduce habitat loss, habitat fragmentation, and disturbance to sage-grouse from nonrenewable energy development. Calculation of the percentage of disturbed surface under the disturbance caps incorporates both existing and new authorized disturbances to limit habitat loss and fragmentation from new nonrenewable energy development (See *Sagebrush Landscape Conservation Planning* above).

The Federal Plans recognize valid existing subsurface rights to nonrenewable energy resources, but still reduce impacts to sage-grouse by requiring the agencies to work with lessees, operators, and project proponents to follow an avoidance, minimization, and mitigation approach subject to applicable laws (30 U.S.C. 226(p) and 43 CFR 3162.3). The BLM estimates that approximately 10 percent of all habitat is currently leased rangewide (Carmen, BLM, 2015, pers. comm.). According to BLM's analysis, varying proportions of PHMA are leased across the range of the species: 20 percent in North Dakota; 17 percent in Colorado; 14 percent in Wyoming; 4 percent in Utah; and 2 percent in Montana (Carmen, BLM, 2015, pers. comm.). The Federal Plans provide coordinated monitoring strategies of disturbance caps. In response to monitoring, development allowed under the Federal Plans may be adjusted based on adaptive management criteria to provide an immediate, corrective response to any identified triggers for population or habitat declines. While the development of some valid existing rights may continue, these provisions provide a backstop for other disturbance if adaptive management triggers are exceeded.

In summary, the Federal and three State Plans include closure or NSO restrictions for all PHMAs (except in Wyoming), and limit exceptions to instances where the activity will have no direct, indirect, or cumulative effect on sage-grouse or sage-grouse habitats, or is an alternative action for activities on a nearby parcel and would provide a clear conservation gain to sage-grouse. In GHMAs, Federal Plans dictate that project proponents avoid, minimize, and mitigate impacts from nonrenewable energy development (see *Sagebrush Landscape Conservation Planning* above). The Federal Plans are also consistent with the recommendations in the COT Report (USFWS 2013, pp. 43–44). Together, these measures reduce effects from nonrenewable energy development on approximately 90 percent of the breeding habitat across the range.

Nonrenewable Energy Summary

In the 2010 Finding, we determined that nonrenewable development was a threat to sage-grouse due to the habitat loss and fragmentation it caused. Current information indicates that the global demand for nonrenewable energy resources will continue and will likely increase in sage-grouse habitats through the year 2030. Nonrenewable energy development can negatively affect sage-grouse individuals and populations by reducing and fragmenting sagebrush habitats and by disturbing individual sage-grouse through increased noise and behavioral avoidance of infrastructure and human activity. Nonrenewable energy development could also act cumulatively with other potential threats to increase habitat loss and fragmentation caused by invasive plants, and may increase predation or disease. Our analysis indicates that regulatory mechanisms reduce the risk of nonrenewable energy exposure to the Population Index and breeding habitat by more than 35 percent in MZ I and more than 60 percent in MZ II, the areas with the greatest potential for nonrenewable energy development. State and Federal Plans emphasize protection of the most important habitats from habitat loss, habitat fragmentation, and disturbance, ensuring that large, contiguous expanses of habitat will remain to support sage-grouse populations. Rangewide, the Federal Plans, Wyoming Plan, and Montana Plan reduce impacts from nonrenewable energy development on approximately 90 percent of the modeled breeding habitat (see *Sagebrush Landscape Conservation Planning* for a detailed discussion of conservation measure implementation and effectiveness).

Infrastructure

In 2010, we evaluated the effect of infrastructure (including roads, railroads, power lines, communication towers, and fences) on sage-grouse and concluded that it was a substantial contributor to habitat fragmentation throughout the species' range and that fragmentation from this source would increase in the future. We also found that infrastructure causes direct mortality from collisions and provides perches for predators. We further found that the regulations governing the location and installation of infrastructure were inadequate to address these threats. The 2010 finding concluded that habitat fragmentation, caused in part by infrastructure, and inadequate regulatory mechanisms to address the negative effects of infrastructure were significant threats to the species and likely to continue or increase into the future such that listing was warranted under the Act (75 FR 13910, March 23, 2010, pp. 13986–13988).

The increasing expansion of human settlement into the western United States has led to an increase in demand for natural resources and the necessary infrastructure to support human development. Development of roads, railroads, power lines, communication towers, and fences can result in habitat loss and fragmentation, and can cause sage-grouse habitat avoidance. These types of infrastructure can also provide sources for the introduction and propagation of invasive plants, increase fire risk, and increase concentrations of predators.

The physical footprint of existing infrastructure has directly impacted

approximately 218,535 ha (540,013 ac) of breeding habitat rangewide (Factor A) (Table 6). In addition, infrastructure can influence a larger ecological footprint by negatively affecting sage-grouse use of otherwise suitable habitats through indirect effects from noise disturbance, increased perches for predators, and pathways for invasive species (Manier *et al.* 2013, p. 31; Blickley and Patricelli 2012, p. 26). For infrastructure that has been in place for a number of years, these impacts have likely already been realized. The greatest impact from existing infrastructure has occurred in the Columbia Basin (MZ VI) where approximately 2.9 percent of sage-grouse breeding habitat has been affected. Current infrastructure associated with power lines accounts for the greatest direct disturbance (117,004 ha; 289,125 ac) across the range. Fences occur across the landscape; however, the amount of fencing is unknown (75 FR 13910, March 23, 2010, p. 13929).

TABLE 6—SAGE-GROUSE BREEDING HABITAT DIRECTLY IMPACTED BY EXISTING INFRASTRUCTURE

		Management zone							
		I	II	III	IV	V	VI	VII	Total
Roads [1]	ha	18,344	28,798	17,604	21,210	7,289	4,871	601	98,717
	ac	45,329	71,162	43,501	52,411	18,011	12,036	1,485	243,935
	%	(0.4%)	(0.6%)	(0.5%)	(0.4%)	(0.5%)	(1.1%)	(0.9%)	(0.5%)
Railroads	ha	131	278	115	149		8		681
	ac	324	686	284	369		20		1,683
	%	(<0.1%)	(<0.1%)	(<0.1%)	(<0.1%)	(<0.1%)	(<0.1%)	(<0.1%)	(<0.1%)
Power lines [2]	ha	17,171	37,656	18,455	28,104	7,670	7,950		117,005
	ac	42,431	93,049	45,603	69,447	18,952	19,644		289,125
	%	(0.41%)	(0.78%)	(0.54%)	(0.60%)	(0.55%)	(1.78%)	(<0.1%)	(0.6%)
Vertical Towers [3]	ha	429	756	404	442	26	68	8	2,133
	ac	1,061	1,867	998	1,091	64	168	21	5,270
	%	(<0.1%)	(<0.1%)	(<0.1%)	(<0.1%)	(<0.1%)	(<0.1%)	(<0.1%)	(<0.1%)
Rangewide Totals	ha	36,075	67,487	36,578	49,905	14,984	12,897	610	218,536
	ac	89,144	166,764	90,386	123,318	37,026	31,868	1,507	540,013
	%	(0.9%)	(1.4%)	(1.1%)	(1.1%)	(1.1%)	(2.9%)	(0.9%)	(1.2%)

[1] Includes interstates, State and Federal highways, and secondary roads.
[2] Includes existing, large (>115 kV) transmission lines. Does not include distribution lines.
[3] Includes meteorological towers, communication towers, and wind turbines.

The primary impact of infrastructure is habitat loss and fragmentation (Factor A). Other impacts associated with infrastructure are direct mortality from strikes (Beck *et al.* 2006, p. 1075), spread of invasives (Connelly *et al.* 2004, p. 7–25), wildfire ignition (Havlina *et al.* 2015, p. 2), and increased predator occurrence (Manier *et al.*2013, p. 31; Howe *et al.* 2014, p. 43). Additionally, sage-grouse may avoid infrastructure because of noise or visual disturbance (Blickley and Patricelli 2012, p. 26). However, fences may be beneficial if used to protect areas used by sage-grouse (USFWS 2013, p. 52), such as fencing livestock and free-roaming equids out of mesic areas used as late brood-rearing habitat. The best available information does not forecast where or how much additional infrastructure could be installed across the species' range. However, as discussed in the next section, regulatory mechanisms provided by the Federal and State Plans will exclude or minimize new infrastructure in approximately 90 percent of sage-grouse breeding habitats.

Conservation Efforts

Since 2010, a number of landscape-scale efforts have been undertaken to reduce impacts from existing and future infrastructure to sage-grouse across the range that are consistent with the recommendations in the COT Report (USFWS 2013, pp. 51–52). Those efforts include Federal Plan amendments, State Plans, SGI projects, and CCAs.

Federal Plans – The Federal Plans limit new infrastructure primarily through land use allocations, lek buffers, and disturbance caps (BLM and USFS 2015, entire). In PHMA, these measures are designed to avoid or minimize infrastructure development, with limited exceptions for new ROWs. Any exceptions must include the explicit rationale that biological impacts to sage-grouse are being avoided. Existing designated corridors for future major transmission lines and pipelines remain open. Any impacts from new infrastructure require mitigation and are counted toward the 3 percent disturbance cap, except in Wyoming and Montana where a 5 percent cap exists. The Federal Plans also include seasonal timing restrictions, noise restrictions, buffer distances from leks, and required design features to minimize infrastructure impacts on sage-grouse. Further, in response to monitoring, development allowable under the Federal Plans may be adjusted based on adaptive management criteria to provide an immediate, corrective response to any triggers for population or habitat declines. These provisions provide a backstop to prevent additional disturbance. As a result of these measures, approximately 14 million ha (35 million ac) of PHMA are protected from ROWs. Based on past planning processes, we expect the measures to be implemented for at least the next 20 to 30 years. For additional details about the implementation and effectiveness of Federal Plans, see *Federal Plans* section, above.

State Plans – State Plans in Wyoming, Montana, and Oregon contain regulatory measures to minimize impacts from infrastructure on State lands and, in some instances, on private lands. The Wyoming Plan imposes the following restrictions on all lands in Wyoming: Structure-density limits, timing stipulations, buffers, habitat-disturbance caps, and project-specific reviews for any project subject to State permitting requirements permitted after August 1, 2008, on all lands in Wyoming (Wyoming E.O. 2015–4, entire). Oregon's Plan regulations require avoidance, minimization, and compensatory mitigation actions for development actions in sage-grouse habitat on State and private land and, in conjunction with BLM's Federal Plan, cap the amount of disturbance on sage-grouse core habitat to 3 percent (Oregon OAR 635–140–0025, entire; and Oregon OAR 660–023–0115, entire), while the

Wyoming and Montana Plans cap the amount of disturbance on sage-grouse core habitat to 5 percent (Wyoming E.O. 2015–4, p. 6; Montana E.O. 10–2014, p. 14). For additional details about the implementation and effectiveness of State plans, see the *Wyoming State and Federal Plans* and *Montana and Oregon Conservation Efforts* sections, above.

Sage Grouse Initiative – Marking fences with permanent flagging improves their visibility and reduces fence collisions and was recommended by the COT Report (USFWS 2013, p. 52). The Sage Grouse Initiative has worked with ranchers to implement voluntary conservation projects in sage-grouse habitat, including the marking of fences. To date, NRCS has marked or removed 563 km (350 mi) of high-risk fence to reduce collisions (NRCS 2015a, p. 6). Conservative estimates indicate that fence-marking prevents 2,600 collisions annually (NRCS 2015a, p. 22). Another study found that marking fences reduced collisions by 83 percent over unmarked fences in Idaho during the breeding season (Stevens *et al.* 2012, p. 1). Fence-marking is effective at reducing collisions, but it is unlikely to eradicate collisions completely (Stevens *et al.* 2012, p. 1), and further information is needed to make population-level inferences regarding the impact of reduced collisions (Stevens *et al.* 2013, p. 413).

Candidate Conservation Agreements – Non-Federal lands currently enrolled in CCAAs have restrictions on building infrastructure within sage-grouse habitat, require consolidation of existing infrastructure when feasible, and require relocating or marking existing fences. Rangewide, approximately 745,000 ha (1.8 million ac) of private lands have landowner commitments in the programmatic CCAAs in Oregon and Wyoming. Enrollment of these areas in the CCAAs ensures that no infrastructure will be constructed on those properties in a way that would adversely impact sage-grouse and encourages the modification or management of existing infrastructure to reduce potential adverse effects.

Infrastructure Summary

The potential threat of new infrastructure has changed substantially since the last status review. In 2010, we found habitat fragmentation, due in part to infrastructure, to be a threat to the species, and regulatory mechanisms were not sufficient to address that threat into the future. Since then, regulatory mechanisms provided by Federal Plans reduce potential future infrastructure on more than half the species' range by eliminating or capping new development in important sagebrush habitat and by implementing project design features to minimize impacts (*e.g.,* buffers, noise restrictions, etc.). State Plans in Wyoming, Montana, and Oregon provide similar protections on State and private lands. These protections are most important in Wyoming, where historically infrastructure impacts have been the highest. Further, considerable effort has been undertaken by SGI and private landowners to further reduce impacts from infrastructure, and in particular, existing structures such as fencing. Where existing infrastructure occurs, some localized impacts are likely to continue; however, the Federal and State Plans include measures to avoid placing new infrastructure in the most important habitats for the species, thereby reducing the future risk of infrastructure development in those areas. Together, the Federal Plans and Wyoming, Montana, and Oregon State Plans reduce infrastructure impacts to the areas identified as PHMAs and GHMAs, which encompass approximately 90 percent of the modeled breeding habitat across the species' range (see *Sagebrush Landscape Conservation Planning* for a detailed discussion of conservation measure implementation and effectiveness).

Agricultural Conversion

In the 2010 finding, we concluded that agricultural conversion of sage-grouse habitat was one of the primary causes of habitat loss and fragmentation (75 FR 13910, March 23, pp. 13924–13926). Agricultural conversion describes the removal of sagebrush rangelands to create tilled agricultural crops or re-seeded exotic grass pastures (Schroeder and Vander Haegen 2011, p. 519; Wisdom *et al.* 2011, p. 462; USFWS 2013, p. 48). By converting sagebrush habitats to cultivated croplands and pastures, agricultural conversion can reduce and fragment sage-grouse habitats (Factor A) (Connelly *et al.* 2004, p. 7–203; Davies *et al.* 2011, p. 2575; Wisdom *et al.* 2011, p. 462; Knick *et al.* 2013, p. 1547). Since 2010, new information about potential future risk of agricultural conversion has changed our conclusion about this impact, as discussed below.

In the past, approximately 11 percent of the sage-grouse's historical range was converted to agriculture, with 32 percent of the entire Columbia Basin (MZ VI) and 19 percent of the entire Great Plains (MZ I) converted to agriculture (Knick *et al.* 2011, pp. 208–209). Sagebrush habitats with deep, fertile soils and abundant precipitation were more likely to be converted to agriculture (Connelly *et al.* 2004, p. 1–1; Davies *et al.* 2011, p. 2575). The loss of these productive sagebrush habitats to agriculture displaced some sage-grouse into less productive sagebrush habitats (Manier *et al.* 2013, p. 1). In the rest of the historical range, varied topography, soil types, and drier climates limited the conversion of sage-grouse habitats to agriculture (Knick *et al.* 2011, p. 208). As a result, only 10 percent of the Snake River Plain (MZ IV) and less than 5 percent of the total area of each remaining MZ were converted to agriculture (Connelly *et al.* 2004, p. 5–55; Knick *et al.* 2011, p. 209). Our previous 2010 Finding summarized specific historical losses of sage-grouse habitats from agricultural conversion (75 FR 13910, March 23, pp. 13924–13925).

By reducing and fragmenting sage-grouse habitats, agricultural conversion may reduce sage-grouse populations (Smith *et al.* 2005, p. 314; Walker *et al.* 2007a, p. 2650; Tack 2009, p. iii; Johnson *et al.* 2011, p. 407; Knick *et al.* 2011, p. 208). Although sage-grouse will forage on some crops, such as alfalfa (Schroeder *et al.* 1999, p. 4), they typically will not nest or rear broods in cultivated croplands (Holloran *et al.* 2005, p. 648; Aldridge and Boyce 2007, pp. 508, 523). Agricultural conversion can also reduce the connectivity of habitats and limit the movement of sage-grouse between populations and seasonal habitats (Schroeder and Vander Haegen 2006, pp. 7–8; Knick *et al.* 2011, p. 211). Agricultural conversion may also expose sage-grouse to indirect effects, such as increased predation, exposure to pesticides, and the drying and loss of riparian habitats when water is diverted for irrigation (Knick *et al.* 2011, pp. 208–209). Based on the foraging distances of human-associated predators hunting near croplands and urban areas, agricultural conversion could indirectly influence approximately 49 percent of sagebrush habitats rangewide (Connelly *et al.* 2004, pp. 1–1 and 7–23; Manier *et al.* 2013, p. 30).

Although agricultural croplands and pasturelands do not provide suitable habitat, sage-grouse may feed on irrigated croplands, particularly during the late brood-rearing period when other native plant foods have matured and dried (Connelly *et al.* 2004, pp. 4–1 and 4–10; Knick *et al.* 2011, p. 211). The type of crop and proximity to adjacent sagebrush habitats influences whether sage-grouse will feed on the irrigated croplands (Swensen *et al.* 1987, p. 128; Blus *et al.* 1989, p. 1141; Connelly *et al.* 2004, p. 4–18). Sage-grouse generally do

not feed on dry, unirrigated fields that have fewer forbs and insects than irrigated fields. Additionally, increased predation, exposure to pesticides, WNv, and collisions with fences may outweigh any benefits to sage-grouse provided by cultivated cropland and pastures (Blus *et al.* 1989, pp. 1141–1142; Braun 2006, p. 11; Walker 2008, p. 184, Holloran *et al.* 2005, p. 648, Aldridge and Boyce 2007, p. 508; Coates *et al.,* in press).

Rates of agricultural conversion likely slowed and will continue to slow because the most productive sagebrush habitats have already been converted to croplands or pasturelands (Baker *et al.* 1976, p. 167). Since 1982, acres of new cropland within occupied sage-grouse range have decreased in every State except South Dakota (NRCS 2013, pp. 63–79), likely due to the decreasing suitability of the remaining habitats for agriculture. However, economic incentives for biofuels and technological advances in irrigation and cultivation could potentially increase conversion rates in the future (Knick *et al.* 2011, p. 208). In 2010, we determined that agricultural conversion would continue to affect sage-grouse in the future based on historical loss and fragmentation of sage-grouse habitat from agricultural conversion.

To more precisely evaluate the potential risk to sage-grouse from future agricultural conversion, we compared a new cropland suitability model (Lipsey *et al.* 2015, entire) with the Population Index (Doherty *et al.* 2015, entire). The cropland suitability model uses soil and climate data to predict the probability that an area could be converted to cropland (Lipsey *et al.* 2015, entire). The Population Index model identifies important sage-grouse population centers (Doherty *et al.* 2015, entire). By comparing these two models, we quantified the percent of the sage-grouse Population Index that overlaps with sagebrush habitats in the MZ I that have a high potential to be converted to agriculture in the future. Because the cropland suitability model was only finalized for MZ I for reasons explained below, the results of this exercise specifically apply only to MZ I, but can be used to assess potential probabilities of conversion to agriculture rangewide.

The cropland suitability model was developed only for the Great Plains (MZ I), and not for the Columbia Basin (MZ VI) or the Snake River Plain (MZ IV), where agricultural conversion also occurred, due to the limited availability of land cover data, the small size of the Columbia Basin (MZ VI), and differences in the way sage-grouse use agricultural fields between these three MZs. Additionally, more of the Columbia Basin (MZ VI) has already been converted to cropland (Knick *et al.* 2011, pp. 208–209) and the Great Plains (MZ I) has the highest percentage (69 percent) of private lands (TABLE 2, above), so the potential risk of agricultural conversion is greatest in the Great Plains (MZ I). As a result, the cropland suitability model focused only on the MZ with the greatest potential to be converted in the future, so our overlay analysis with the sage-grouse breeding distribution model could only be calculated in the Great Plains (MZ I). However, by limiting the analysis to the MZ I, the MZ with the greater potential to be converted, the result represents a worst-case scenario that is informative for the rest of the range where future conversion is less likely to occur. Additionally, it would be speculative to analyze future technological agricultural advancements or economic incentives that could potentially increase agricultural conversion on lower quality soils.

Our comparison of the cropland risk model and the Population Index model showed that the majority of the sage-grouse Population Index overlaps with sagebrush habitats in MZ I that have a low probability of being converted to agriculture (Lipsey *et al.* 2015, entire; USFWS 2015a). Specifically, 87 percent of the sage-grouse Population Index in the MZ I occur in sagebrush habitats unlikely to be converted into agriculture due to their soils, climate, and other factors that were incorporated into the cropland suitability model. This analysis confirms that the sage-grouse habitats in MZ I have already been converted to agriculture and the remaining habitats important to sage-grouse are less suitable for agriculture and less likely to be converted in the future.

Although some sage-grouse in MZ I could be exposed to agricultural conversion in the future, 87 percent of the Population Index are not likely at risk from agricultural conversion. Although this result contradicts other sources of information that postulated a greater risk to sage-grouse from future agricultural conversion (RISCT 2012, p. 7; USFWS 2013, pp. 16–29), this analysis quantitatively determined that the risk of exposure to future agricultural conversion is low in MZ I. Because the risk of conversion is greatest in MZ I, a portion of MZ IV in the Snake River Plain in Idaho and the Columbia Basin in Washington (MZ VI) would likely have lower percent overlap between sage-grouse breeding populations and areas likely to be converted to agriculture. With improved land cover datasets, the cropland suitability model could be expanded to the other MZs to test this assumption. However, the overlay analysis indicates that the potential for agricultural conversion is low in the Great Plains (MZ I), and there is no information to indicate that the risk to sage-grouse would be greater in any other MZ.

Conservation Efforts

Since 2010, a number of conservation efforts have been implemented to reduce the risk of new habitat loss due to agricultural conversion or to address effects from historical agricultural conversion. These include the NRCS efforts with private land owners and other State and Federal Plans or programs. As discussed below, these conservation efforts are relevant to the potential threat of agricultural conversion.

Sage Grouse Initiative—In 2010, NRCS launched the SGI to reduce potential threats facing sage-grouse on private lands (see Sage Grouse Initiative, above, for a detailed discussion of this program). Conservation measures used by the NRCS to reduce impacts to sage-grouse from agricultural conversion include conservation easements, the Farm Bill's Sodsaver provision, and the Conservation Reserve Program (CRP).

Conservation easements are voluntary agreements between landowners and land trusts, the NRCS, or other organizations and agencies that maintain the easement in private ownership to benefit natural resources, often in perpetuity. The conservation easements carry binding and enforceable restrictions on development and other activities, and landowners may be reimbursed. Conservation easements may permanently protect sagebrush habitat from ex-urban development or agricultural conversion. The NRCS estimates that, since 2010, approximately 183,013 ha (451,884 ac) have been protected by conservation easements across the overall range of the sage-grouse (NRCS 2015a, p. 6). Conservation easements effectively block the loss and fragmentation of sage-grouse habitats by prohibiting ex-urban development and agricultural conversion on the easement lands and were recommended in the COT Report (USFWS 2013, pp. 48, 50). Approximately 79 percent of the conservation easements are located inside PACs, and 94 percent of the easements provide permanent protection against future agricultural conversion and ex-urban development (NRCS 2015a, p. 8). Although SGI easements address a variety of potential impacts to sage-grouse, including

agricultural conversion, many of the easements that are already in place are not currently located in sagebrush habitats that are at risk of agricultural conversion, according to the new cropland suitability and breeding distribution models (Lipsey *et al.* 2015, entire; USFWS 2015a). However, Montana's recently finalized Greater Sage-Grouse Stewardship Act funds additional sage-grouse conservation that could be used to secure new conservation easements in Montana (NRCS 2015a, p. 3), and with the new models, new easements could be better targeted to conserve sage-grouse habitats that may be vulnerable to future agricultural conversion in Montana. Expanding the cropland suitability model into the Snake River Plain (MZ IV) and the Columbia Basin (MZ VI) would also help target conservation easements to prevent future agricultural conversion in those MZs.

The 2014 Farm Bill's Sodsaver provision also reduces habitat loss and fragmentation from agricultural conversion in Montana, North Dakota, and South Dakota (MZ I) (NRCS 2015a, p. 3). The Sodsaver provision discourages agricultural producers from converting native vegetation to annually tilled crops by reducing their insurance subsidies and disaster assistance if they convert native habitats into croplands (NRCS 2015a, p. 4). The NRCS reports that the Sodsaver policy, in conjunction with proposed policies on State lands and continued investments in conservation easements, reduces sage-grouse population declines that would have occurred without these conservation measures (NRCS 2015a, p. 1).

The voluntary Conservation Reserve Program (CRP) allows private landowners to receive annual payments from USDA's Farm Service Administration in exchange for establishing permanent vegetation on idle or erodible lands that were previously used for growing crops. Enrolled lands are set aside for 10 to 15 years and cannot be grazed or used for other agricultural uses except under emergency drought conditions. The enrollment of CRP lands can be detrimental to sage-grouse when sagebrush rangelands are converted to marginal croplands, and then converted into grasslands, not sagebrush habitats (USFWS 2013, p. 48). However, some CRP lands can provide nesting, brood-rearing, and wintering habitat for sage-grouse (Schroeder and Vander Haegen 2006, p. 32; Schroeder and Vander Haegen 2011, pp. 524–528). When agricultural fields are returned to sage-grouse habitats, enrollment in the CRP generally benefits sage-grouse, especially in the Columbia Basin (MZ VI) and Great Plains (MZ I) where agricultural conversion historically occurred (Knick *et al.* 2011, p. 208). However, enrollment in CRP fluctuates with Federal funding and crop prices, and the long-term effectiveness of the CRP to improve sage-grouse habitats is uncertain. However, in Washington, lands have frequently remained enrolled long enough for sagebrush to reestablish and sage-grouse to return to nest (Schroeder and Vander Haegen 2011, p. 524).

Candidate Conservation Agreements – The CCAAs for sage-grouse in Oregon and Wyoming include appropriate restrictions on agricultural conversion, habitat fragmentation, and removing sagebrush that benefit sage-grouse rangewide. Approximately 745,000 ha (1.8 million ac) of private lands have landowner commitments in the programmatic CCAAs in Oregon and Wyoming. Enrollment in these CCAAs ensures that these lands are managed consistent with sage-grouse habitat objectives.

State Plans—The Wyoming and Montana Plans have regulatory mechanisms that reduce agricultural conversion in these States on applicable lands. The Wyoming Plan covers all land ownership types and contains a 5 percent disturbance cap in Core Areas that includes disturbance from agricultural conversion (Wyoming E.O. 2015–4, Attachment A, p. 6). The Montana Plan allows the State to prohibit agricultural conversion and the eradication of sagebrush on State Trust Lands in core habitat, general habitat, and connectivity areas (Montana 10–2014, pp. 7–14). By regulating where and how much agricultural conversion can occur within sage-grouse habitats, whether by regulating the amount of disturbance or prohibiting habitat loss on State Trust Lands, both the Wyoming Plan and Montana Plan provide effective regulatory mechanisms to limit future agricultural conversion in their State (see *Regulatory Mechanisms,* below).

Federal Plans—The Federal Plans were not designed to address agricultural conversion, because Federal lands are not used or converted for agricultural production (BLM and USFS 2015, entire). However, transfer of Federal lands to private ownership is possible and, once privately owned, could be converted to agriculture. The Federal Plans require that any PHMA and GHMA be retained in Federal ownership, thus preventing agricultural conversion (BLM and USFS 2015, entire). Exceptions to this requirement could occur if the land transaction would benefit sage-grouse or not cause any adverse effects. By prohibiting their transfer to private ownership, the Federal Plans reduce the risk of agricultural conversion on more than half the occupied range of the species.

Agricultural Conversion Summary

In 2010, we identified agricultural conversion as one of three factors contributing to the loss and fragmentation of sage-grouse habitats, based on past rates of agricultural conversion that would likely continue. Historically, agricultural conversion reduced and fragmented sage-grouse habitats, resulting in population declines and the loss of connectivity in some areas (Knick *et al.* 2011, p. 208). Agricultural conversion may also expose sage-grouse to pesticides, increased predation, and invasive plants. However, the sage-grouse habitats most conducive to agriculture have already been converted to crop and pasturelands, and the remaining habitats are generally not suitable for agriculture and will likely not be converted. The new cropland suitability model compared with the breeding distribution model confirms that the sage-grouse habitats in the Great Plains (MZ I) most likely to be converted to agriculture have already been converted and that the remaining habitats have a low probability of conversion because of soil types and climatic limitations. Approximately 87 percent of the important sage-grouse populations in MZ I occur in habitats that have low probabilities of conversion to agriculture. The potential for agricultural conversion is also low in the Columbia Basin (MZ VI) and the Snake River Plain (MZ IV), where more sagebrush habitats have already been converted. Additionally, acres of new cropland decreased in every State except South Dakota over the last 30 years. Further, NRCS SGI conservation easements, the 2014 Farm Bill's Sodsaver provision, USDA's CRP, the Wyoming and Montana Plans, and BLM and USGS land-transfer prohibitions implemented since 2010 help reduce habitat loss and fragmentation from agricultural conversion, consistent with recommendations in the COT Report (USFWS 2013, p. 48–49).

Wildfire and Invasive Plants

In 2010, we evaluated the effect of wildfire on sage-grouse and concluded that wildfire was a substantial contributor to habitat loss and fragmentation, particularly in the Great Basin portion of the range (MZs III, IV, V, and VI). The number and size of fires

has increased compared to historical fire regimes (Miller *et al.* 2011, pp. 169, 176). A spatial analysis of areas burned reveals that approximately 18 percent of sagebrush habitat across the occupied range of sage-grouse burned between 1980 and 2007, including 27 percent of the habitat in the Great Basin portion of the range. Further, increased fire frequency is being driven by the expansion of nonnative invasive annual grasses, primarily cheatgrass. In 2010, we analyzed invasive annual grasses separately and concluded that it was a serious rangewide threat (75 FR 13910, March 23, 2010, pp. 13937). The 2010 finding concluded that habitat fragmentation, caused in part by fire, was a threat to the species such that listing was warranted under the Act (75 FR 13910, March 23, 2010, pp. 13986–13988).

Since 2010, the rangeland fire management community has made strides in addressing wildfire and its effects on habitat fragmentation in sage-grouse range, as well as the interactions between wildfire and invasive plants. Specifically, a suite of efforts such as the revised/amended Federal Plans and the associated FIAT assessments; Secretarial Order 3336; and other, related efforts represent a marked shift by the fire management community toward a more holistic approach to identifying, prioritizing, and managing impacts from wildfire in sage-grouse habitat (with fire fighter and human health and safety remaining as the highest priority in wildfire management). This marked shift is particularly important given the degree to which invasives and wildfire have the potential to reduce available habitat. Given the increased management emphasis, we still expect to lose some habitat to fire, but we now expect those losses to be less than would have otherwise occurred.

This new approach includes numerous updates to wildfire management strategies and planning tools. For example, the FIAT and Secretarial Order established local guidance and set forth enhanced policies and strategies for preventing and suppressing wildfire and for restoring sagebrush landscapes impacted by fire across the Great Basin region. Fuel treatments in sage-grouse habitats are now prioritized over treatments in other areas (Murphy *et al.* 2013, p. 4). Additionally, managers have developed protocols to ensure that plans are current and include guidance for fire management in relation to sage-grouse and sage-grouse habitats. These changes have affected what areas are prioritized for firefighting resources during periods of fire activity (Murphy *et al.* 2013, p. 4). While we do not currently know the extent to which these regulatory and non-regulatory mechanisms will alleviate the wildfire impact to sage-grouse, we are confident that that this strategic and coordinated effort by wildfire managers to protect sage-grouse habitat will reduce the impacts from wildfire. Targeting the protection of important sage-grouse habitats during fire suppression and fuels management activities could help reduce loss of key habitat due to fire if directed through a long-term, regulatory mechanism.

Altered Fire Cycle

Historically, wildfire was the principal natural disturbance in the sagebrush ecosystem (Factor A). Sagebrush likely consisted of extensive sagebrush habitat dotted by small areas of grassland. This ecosystem was maintained by long interludes of primarily numerous small fires, punctuated by large fire events that consumed larger expanses (Baker 2011, pp. 196–197; Bukowski and Baker 2013, pp. 559–561). Historical mean fire-return intervals (the average number of years between two successive fires) have been estimated to be 100 to 350 years in low-lying, xeric, Wyoming big sagebrush communities, and 50 to more than 200 years in more mesic areas and mountain big sagebrush communities (Baker 2006, p. 181; Mensing *et al.* 2006, p. 75; Baker 2011, pp. 194–195; Miller *et al.* 2011, p. 166; Bukowski and Baker 2013, entire). Fire by itself, managed within a historical range of variation, may not necessarily be a threat to sage-grouse. However, altered fire intensity, size, and frequency, due in part to the presence of invasive annual grasses, has resulted in fire posing an increasing threat to sage-grouse, especially in the Great Basin.

Since the mid- to late 1800s, human activities have changed the vegetation composition and structure of the sagebrush ecosystem that has subsequently altered the fire regime (Chambers *et al.* 2014a, p. 3). Changes in wildfire frequency have adversely affected larger parts of sage-grouse range, particularly in the Great Basin (Figure 6). From 1980 to 2007, the number of fires and the total area burned increased in most MZs (Miller *et al.* 2011, pp. 169, 176). We conducted a geospatial analysis of burned areas that shows that between 2000 and 2008, within the Great Basin, more than 2.7 million ha (6.7 million ac) burned within the occupied range of sage-grouse, with more than 2 million ha (5 million ac) occurring in MZ IV alone (Table 7). Between 2009 and 2014, an additional 1.8 million ha (4.6 million ac) burned within the occupied range of sage-grouse, with most of the impact occurring in MZs IV and V in the Great Basin (Table 7). Between 2000 and 2014, the Great Basin experienced an average burn rate of approximately 0.85 percent per year (Table 7).



Figure 6. Fires from 2000 to 2014 in the Great Basin (including the Columbia Basin) in sage-grouse occupied range. Overlap captures fires from 2000 to 2014 that reburned any fires from 2000 to 2008.

TABLE 7—AREA OF SAGE-GROUSE OCCUPIED RANGE BURNED FROM 2000 TO 2014 IN THE GREAT BASIN

[Including the Columbia Basin]

Management zone		2000–2008 area burned	2009–2014 area burned	2000–2014 area burned	Annual burn rate [1] (percent)
III	ha	410,730	148,993	559,723	0.32
	ac	1,014,937	368,171	1,383,108	
IV	ha	2,029,750	1,073,048	3,102,789	1.32
	ac	5,015,622	2,651,560	7,667,182	
V	ha	262,033	580,745	842,788	0.72
	ac	647,499	1,435,053	2,082,552	
VI	ha	27,649	61,963	89,612	0.54
	ac	68,434	153,116	221,550	
Totals	ha	2,730,162	1,864,749	4,594,912	0.85
	ac	6,746,492	4,607,900	11,354,392	

[1] Annual burn rates were calculated using average number of acres burned per year (2000–2014) divided by total occupied range for each area assessed.

We anticipate that these average burn rates will continue in the future and could increase due to cheatgrass expansion, climate change, and drought (see Wildfire and Invasive Plant Impacts, below). These burn rates are based on wildfire-impacted acres each year and do not account for areas previously burned that re-burn each year; as a result, this rate likely overestimates the amount of habitat that could be impacted each year, as re-burn areas may no longer provide habitat. This burn rate is similar to the current and future burn rates analyzed in the 2010 finding.

Fire occurring within the range of sage-grouse can cause direct loss of habitat, resulting in negative impacts to breeding, feeding, and sheltering opportunities for the species (Call and Maser 1985, p. 17). In addition to the direct habitat loss, fire can also create a functional barrier to sage-grouse

movements and dispersal that compounds the influence wildfire can have on populations and population dynamics (Fischer *et al.* 1997, p. 89). In some cases, fire can isolate sage-grouse populations, thereby increasing their risk of extirpation (Knick and Hanser 2011, p. 395; Wisdom *et al.* 2011, p. 469).

Wildfire is associated with sage-grouse declines across the West (Beck *et al.* 2009, p. 400; Johnson *et al.* 2011, p. 424; Knick and Hanser 2011, p. 395). The extent and abundance of sagebrush habitats, the proximity to burned habitat, and the degree of connectivity among sage-grouse populations affects persistence (Johnson *et al.* 2011, p. 424; Knick and Hanser 2011, pp. 403–404; Wisdom *et al.* 2011, p. 461). Fire has been found to cause negative population trends and lek extirpation (Knick and Hanser 2011, p. 395; Johnson *et al.* 2011, p. 422).

Invasive Plants and the Wildfire Cycle

In 2010, we analyzed the effects of wildfire and invasive plants separately (75 FR 13910, March 23, 2010, pp. 13931–13937). Since that time, we have come to better understand the positive feedback loop between cheatgrass and wildfire, and believe that fire and invasive plants must be assessed, and managed, together to fully address potential impacts on sage-grouse and its habitat. Evidence of a significant relationship exists between an increase in wildfire occurrence caused by cheatgrass invasion in the Snake River Plain (MZ IV) and Northern Great Basin (MZ V) since the 1960s (Miller *et al.* 2011, p. 167) and in northern Nevada and eastern Oregon since 1980 (MZs IV and V). The extensive distribution and highly invasive nature of these invasive annual grasses poses increased wildfire risk and permanent loss of sagebrush habitat, because areas disturbed by fire are highly susceptible to further invasion and ultimately habitat conversion to an altered community state (Miller *et al.* 2011, p. 182). Progressive losses of resilience and resistance can result in the crossing of abiotic and biotic thresholds (Beisner *et al.* 2003, pp. 376–382) and may lead to a catastrophic shift in community structure (Scheffer *et al.* 2009, pp. 53–59; Reisner *et al.* 2013, p. 1047). Functional habitat loss is occurring because of long-term loss of sagebrush cover and conversion to nonnative annual grasses (primarily cheatgrass), mainly due to an increase in wildfire occurrence, intensity, and severity (Miller *et al.* 2011, p. 183). The positive feedback process between cheatgrass and wildfires facilitates future fires, sagebrush loss, and cheatgrass dominance, resulting in entire landscapes being converted to nonnative annual grasslands (Miller *et al.* 2011, p. 183). Invasive plants reduce and, in cases where monocultures occur, eliminate vegetation that sage-grouse use for food and cover and fragment existing sage-grouse habitat (Miller *et al.* 2011, pp. 160–164). Invasives do not provide quality sage-grouse habitat and, where invasive plants are present, sage-grouse are potentially impacted both seasonally (*e.g.,* loss of forbs and associated insects) and long term (*e.g.,* functional habitat loss) (Manier *et al.* 2013, p. 88).

Interactions among disturbances and stressors may have cumulative effects (Chambers *et al.* 2014c, pp. 365–368). Invasive annual grasses and noxious perennials continue to expand their range, facilitated by ground disturbances, caused by more frequent and more severe wildfires, improper grazing of native perennial plants by domestic livestock and free-roaming equids, infrastructure, and other anthropogenic activity (Rice and Mack 1991, p. 84; Gelbard and Belnap 2003, p. 420; Zouhar *et al.* 2008, p. 23), but disturbance is not required for invasives to spread (Young and Allen 1997, p. 531; Roundy *et al.* 2007, p. 614). Invasions also may occur sequentially, where initial invaders (*e.g.,* cheatgrass) are replaced by new invasive plants (Crawford *et al.* 2004, p. 9; Miller *et al.* 2011, p. 160). Long-term changes in climate that facilitate invasion and establishment by invasive annual grasses further exacerbate the fire regime and accelerate the loss of sagebrush habitats (D'Antonio and Vitousek 1992, pp. 63–87). The effects of disturbance will likely be amplified by greater susceptibility of habitats to burn as well as decreased likelihood for recovery of sagebrush ecosystems (Miller *et al.* 2011, p. 183).

The arrival of European settlers in the mid-1800s initiated a series of changes in vegetation composition that impacted sagebrush ecosystems (Chambers *et al.* 2014a, p. 3). For example, improper grazing practices decreased native perennial grasses and forbs (Chambers *et al.* 2014a, p. 3; Miller and Eddleman 2001, p. 17; Miller *et al.* 2011, p. 181), which facilitated the invasion of nonnative annual grasses, particularly cheatgrass and *Taeniatherum caput-medusae* (medusahead). This increase in fuel load and the lower fuel moisture content of the invasive annual grasses has resulted in more frequent, higher intensity fires (Brooks *et al.* 2004, pp. 679–680). Moreover, invasive annual grasses expand rapidly after fire disturbances becoming a readily burnable fuel source, and ultimately lead to a recurrent fire cycle that prevents sagebrush reestablishment (Zouhar *et al.* 2008, p. 41; Eiswerth *et al.* 2009, p. 1324; Miller *et al.* 2011, pp. 163–170).

Currently, invasive annual grasses are known to occur across the sage-grouse occupied range, with the greatest infestations occurring in the Great Basin (Figure 7). In the Great Basin, cheatgrass dominates over 6.9 million ha (17 million ac) and occupies an additional 25 million ha (62 million ac) as a component of the plant community (Diamond *et al.* 2012, p. 259). Approximately 58 percent of sagebrush habitat in the Great Basin is believed to be at moderate to high risk of cheatgrass invasion during the next 30 years (Suring *et al.* 2005, p. 138). Although nonnative annual grasses are more pervasive in the Great Basin than the Rocky Mountain States (Figure 7) (Connelly *et al.* 2004, p. 5–9; Miller *et al.* 2011, p. 160), in recent years, cheatgrass (and other nonnative annual grasses) has increased its spread across the eastern portion of the species' range (Mealor *et al.* 2012, p. 427). Without effective management, the invasion of cheatgrass into the eastern portion of the species' range is likely to continue (Mealor *et al.* 2012, p. 427), and even now, with more effective management being employed, we expect that sage-grouse habitat will continue to be lost to some degree in the future.

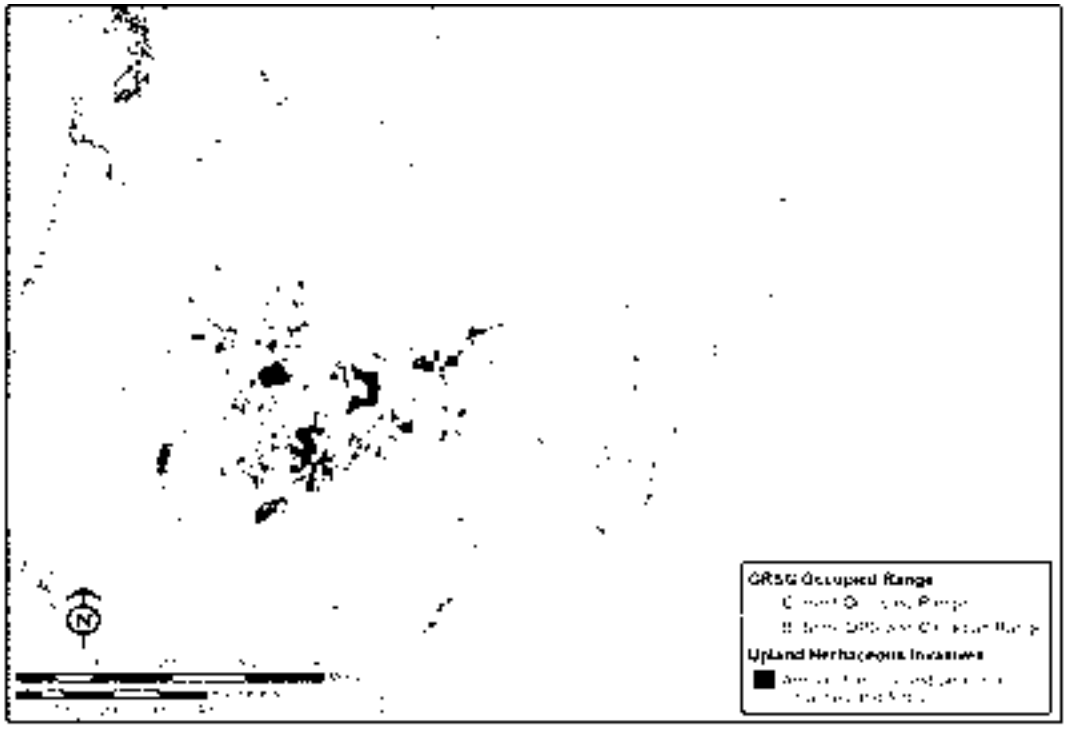


Figure 7 Approximate distribution of upland, herbaceous invasive plants across the occupied range of sage-grouse

Nonnative annual grasses, such as cheatgrass and medusahead, have substantially altered regional fire regimes (Balch *et al.* 2013, p. 179). Cheatgrass-dominated rangelands affect sagebrush ecosystems by shortening fire-return intervals and perpetuating their own persistence and intensifying the role of wildfire (Whisenant 1990, p. 4). Sites dominated by cheatgrass may be four times more likely to burn than native sagebrush (Balch *et al.* 2013, p. 178). Invasive annual grasses increase the amount of fine fuels, resulting in wildfires that burn hotter and more evenly than historical times (Miller *et al.* 2011, p. 167). Hotter and more expansive wildfires frequently burn larger contiguous areas of sagebrush and leave fewer pockets of unburnt sagebrush that would be available to recolonize the burned areas. The positive feedback process between cheatgrass and wildfire converts high-diversity native communities into low-diversity communities dominated by invasive plants that are unsuitable for sage-grouse and at increased risk of wildfire reoccurrence (Chambers *et al.* 2014a, pp. 3–8).

Wildfire and Invasive Plant Impacts

While it is known that sage-grouse respond negatively to wildfire (Johnson *et al.* 2011, pp. 424–425; Knick and Hanser 2011, pp. 395–403), it is challenging to predict the location and extent of future wildfires. However, a recent study provides insight to the wildfire and invasive plant cycle and serves as a useful tool in predicting future impacts (Chambers *et al.* 2014a, entire). This study used soil temperature and moisture regimes as an indicator of landscapes' resilience to disturbance and resistance to invasive annual grasses. This work classified different ecological soil and moisture regimes (Chambers *et al.* 2014a, p. 16) into three categories of resiliency and resistance to wildfire and invasive species disturbance (which is known as the R&R matrix). For example, areas with low R&R values tend to be prone to invasion by cheatgrass (and, therefore, are at higher risk of large catastrophic wildfires) because these ecosystems have relatively lower resilience to disturbance and higher climate suitability for invasive annual grasses; therefore, low R&R areas are less likely to provide ecological benefits within the sagebrush ecosystem in the future. We assessed the risk of future wildfire and invasive plant invasion by examining the amount of breeding habitat occurring within the three R&R matrix classes. Habitat identified as low resistance was considered most likely to be adversely affected by wildfire and invasives. Because nonnative annual grasses are more prevalent in the Great Basin than the Rocky Mountain States (Connelly *et al.* 2004, p. 5–9; Miller *et al.* 2011, p. 160), we limited our analysis to the Great Basin MZs III, IV, and V.

In our analysis, sage-grouse in MZ III appear to be at greatest risk from wildfire and nonnative annual grass invasion, with 54 percent of sage-grouse breeding habitat occurring in areas classified as having low resistance. The majority of sage-grouse breeding habitat in MZs IV and V occur in areas having either high or moderate resistance and resiliency to fire and invasives (Table 8).

TABLE 8—PERCENT OF SAGE-GROUSE BREEDING HABITAT WITHIN EACH GREAT BASIN MANAGEMENT ZONE THAT OCCURS WITHIN THE THREE CLASSES OF RESILIENCY AND RESISTANCE TO INVASIVE PLANTS AND WILDFIRE

	MZ III (%)	MZ IV (%)	MZ V (%)
Wetland/Riparian	2	2	1

TABLE 8—PERCENT OF SAGE-GROUSE BREEDING HABITAT WITHIN EACH GREAT BASIN MANAGEMENT ZONE THAT OCCURS WITHIN THE THREE CLASSES OF RESILIENCY AND RESISTANCE TO INVASIVE PLANTS AND WILDFIRE—Continued

	MZ III (%)	MZ IV (%)	MZ V (%)
High Resistance	16	35	8
Moderate Resistance	28	36	59
Low Resistance	54	27	33

While useful for estimating future wildfire and invasive plant risk, sagebrush resistance and resilience does not necessarily equate to sage-grouse resilience and resistance. Depending on the location and extent of wildfires, the amount of undisturbed habitat may be diminished such that it cannot sustain local populations. In addition, depending upon where wildfires occur, impacts to sage-grouse could be greater due to lost connectivity between populations. However, without the ability to predict the location, size, and severity of a wildfire, it is difficult to predict with certainty the location and degree of habitat fragmentation that may occur in the future or the associated population impacts.

A recent study examined the potential impact of wildfire and invasive plants on future sage-grouse population trends in the Great Basin (Coates *et al.* 2015, entire). This study examined 30 years of wildfire and population trend data to estimate Great Basin population trends over the next 30 years, with and without additional management to reduce wildfire impacts (Coates *et al.* 2015, pp. 6–18). Without additional management, wildfire and invasive plants are forecast to cause sage-grouse abundance in the Great Basin to decline by 43 percent by 2044 (Coates *et al.* 2015, pp. 18–31). Improved management of wildfire suppression and invasive plant infestation could reduce the rate of decline depending upon the success rate of the management approach (Coates *et al.* 2015, p. 34). This study did not consider the impact of post-wildfire restoration projects, which could further reduce the rate of population decline (Coates *et al.* 2015, p. 34). The projected future impact of fire on abundance trends likely also depends upon climatic conditions (Coates *et al.* 2015, p. 34), which, as discussed in *Climate Change and Drought* (see below), is difficult to forecast with certainty 30 years into the future.

Without changes in wildfire and invasive plant management, we anticipate that wildfire would continue to affect the Great Basin at the current rate of about 0.85 percent per year (see Altered Fire Cycle, above). This rate could potentially increase due to the intensifying synergistic interactions among fire, human activity, invasive plants, and climate change (Neilson *et al.* 2005, p. 157; Miller *et al.* 2011, pp. 179–184). Increased human presence and associated infrastructure, such as roads and power lines, could increase the risk of human-caused wildfires. Any future decreases in wildfire and invasive plant risk is dependent upon the successful implementation of wildfire and invasive conservation efforts, as discussed below.

Conservation Efforts

As mentioned above, since 2010, wildfire managers have taken significant steps to better understand and address the impacts of wildfire on sage-grouse habitat. As part of that effort, local, State, and Federal land managers have undertaken considerable efforts to address the impacts of wildfire and invasive plants. Federal, State, and local partners have implemented a number of projects and programs to prevent and suppress the spread of wildfire and invasive plants, and where impacts have already occurred, to restore, consistent with recommendations in the COT Report (USFWS 2013, pp. 40–43). As discussed further below, the Federal Plans, FIAT assessments, and Secretarial Order provide guidance, coordination, and commitments for Federal and State agencies and private landowners to address the wildfire and invasive plants cycle and reduce impacts to sage-grouse.

The BLM has a long history of implementing vegetation management treatments and has made considerable investments in fuels and restoration treatments within the sagebrush ecosystem since 2010. Analyses of more than 4,000 completed BLM projects suggest these treatments provide direct and indirect benefits to sage-grouse populations and have been effective at ameliorating the impacts of wildfire and invasives to sage-grouse (Table 9). The strong emphasis on sage-grouse since 2010 is reflected through focusing additional and existing resources to protect, conserve, and restore sage-grouse habitat. This emphasis has shifted priorities in many of the BLM's programs that treat vegetation, including fuels management and post-fire recovery. The BLM has incorporated emerging science, monitoring results, and adaptive management to influence and modify vegetation management work to achieve the most ecosystem and landscape benefit.

TABLE 9—BUREAU OF LAND MANAGEMENT PROJECTS IMPLEMENTED SINCE 2009 TO AMELIORATE THE IMPACTS OF WILDFIRE AND INVASIVES TO SAGE-GROUSE

[Adapted from DOI 2015e, pp. 3–5]

Treatment	Completed			In-progress			Planned		
	Number of projects	ha	ac	Number of projects	ha	ac	Number of projects	ha	ac
Habitat Restoration	1,395	322,167	796,091	102	33,060	81,692	40	5,805	14,345
Conifer Removal	693	179,756	444,186	119	48,099	118,854	134	154,661	382,175
Wildfire Pre-suppression	608	34,062	84,169	45	13,357	33,005	55	8,415	20,793
Habitat Restoration Following Wildfire	554	620,955	1,534,412	25	40,635	100,410	7	16,442	40,628
Totals	3,250	1,156,940	2,858,858	291	135,149	333,961	236	185,322	457,941

The Federal Plans require that livestock grazing and feral horses be managed at levels necessary to achieve Land Health Standards (LHS) (see *Grazing and Rangeland Management* and *Free-roaming Equids,* below). These standards include minimizing the presence of cheatgrass and other invasive annual grasses within sage-

grouse habitat. These Federal Plan requirements will reduce the infestation of cheatgrass over the long term, reducing wildfire intensity, size, and frequency, and restoring a more natural role of wildfire in the sagebrush ecosystem.

Within the Great Basin, the efforts by BLM, USFS, and DOI to address the impacts of wildfire and invasive plants on a landscape scale are particularly noteworthy. The BLM and USFS are implementing FIAT as part of their Federal Plans to prioritize actions directed at reducing the impacts of invasive annual grasses, wildfires, and conifer encroachment (BLM 2014, entire). Additionally, DOI has committed to the implementation of Secretarial Order 3336, Rangeland Fire Prevention, Management, and Restoration (Secretarial Order), which will result in a multiagency wildfire management paradigm shift that highlights the protection of sagebrush habitat. The BLM and USFS continue to implement measures to reduce the potential threat of wildfire to sage-grouse habitat through greater emphasis on preventing and suppressing wildfire, and restoring sagebrush landscapes threatened by wildfire and invasive species by means of improved Federal–State–local collaboration and coordination. Those efforts, as well as work by local and State wildfire managers, are discussed in further detail below.

Fire and Invasives Assessment Tool – The FIAT is a collaborative multiagency effort by Federal, State, and local wildlife, forestry, and firefighting organizations that identified potential project areas and management strategies in highly valued sage-grouse habitats. As committed to in the Federal Plans, implementation of the FIAT assessments will reduce the potential impacts to sage-grouse resulting from invasive annual grasses, wildfires, and conifer expansion by prioritizing and focusing wildfire and invasive plant management efforts on the most important sage-grouse habitat while still prioritizing fire fighter and human safety. Focal habitats were identified within PACs based on patterns of ecological resistance and resilience, landscape sagebrush cover, burn probability, and conifer expansion, resulting in the following priority landscapes: Central Oregon, Northern Great Basin, Snake/Salmon/Beaverhead, Southern Great Basin, and Western Great Basin/Warm Springs Valley. For each priority landscape, regional findings were stepped down to describe local conditions by Project Planning Area and associated treatment needs and management priorities (BLM 2014, p. 9). Assessment of treatment needs and priorities were based on recent scientific research on resistance and resilience of Great Basin ecosystems (Chambers *et al.* 2014a, entire, which was described above) and NRCS soil surveys that include geospatial information on soil temperature and moisture regimes (BLM 2014, p. 3; and Campbell 2014, entire).

Potential management actions to resolve resource issues were divided into proactive approaches (*e.g.,* fuels management and habitat recovery/restoration) and reactive approaches (*e.g.,* fire operations and post-fire rehabilitation) (BLM 2014, p. 3). Proactive management strategies are intended to favorably modify wildfire behavior and restore or improve desirable habitat to provide greater resistance to invasive annual grasses and/or resilience after disturbances such as wildfires. Reactive management strategies are intended to reduce the loss of sage-grouse habitat from wildfires or stabilize soils and reduce impacts of invasive annual grasses in sage-grouse habitat after wildfires. Proactive management strategies, if implemented and effective, will result in long-term sage-grouse habitat improvement and stability, while effective reactive management strategies are essential to reduce current impacts of wildfires on sage-grouse habitat, thus maintaining habitat stability, and allowing for long-term improvements (BLM 2014, pp. 2–3).

Cumulatively, the FIAT assessments of the five priority areas identify more than 16,000 km (10,000 mi) of potential linear fuel treatments, approximately 2.99 million ha (7.4 million ac) of potential conifer treatments, more than 2 million ha (5 million ac) of potential invasive plant treatments, and more than 7.7 million ha (19 million ac) of post-fire rehabilitation (*i.e.,* should a fire occur, the post-fire rehabilitation identifies which areas BLM would prioritize for management) within the Great Basin region (Table 10). The FIAT assessments also identify site-appropriate management strategies for fire operations and post-fire decisions. These assessments provide direction about the extent, location, and rationale for management opportunities to address potential threats to sage-grouse. This comprehensive and forward-looking approach to both prevention and post-fire treatments in the Great Basin represents a distinct change in approach and emphasis since we made our 2010 finding.

TABLE 10—FIAT ASSESSMENT PROJECTS FOR FIVE PRIORITY LANDSCAPES IN THE GREAT BASIN REGION

[Adapted from BLM 2015a, entire]

Potential treatment type		FIAT Assessment area					Totals
		MZ III	MZ IV		MZ V		
		Southern Great Basin	Northern Great Basin	Snake/ Salmon/ Beaverhead	Central Oregon	Western Great Basin/Warm Springs Valley	
Habitat Restoration	ha	1,203,333	1,951,113	603,792	436,589	840,277	5,035,104
	ac	2,973,499	4,821,300	1,492,000	1,078,835	2,076,367	12,442,001
Fuels Treatments	ha	7,322	185,508	35,329	231	n/a	228,390
	ac	18,092	458,400	87,300	571	n/a	564,363
Linear Fuels Treatments	km	2,398	8,530	644	156	5,309	17,036
	mi	1,490	5,300	400	97	3,299	10,586
Fire Operations [1]	ha	3,689,627	4,829,644	2,121,162	361,645	3,268,267	13,270,346
	ac	9,117,260	11,934,300	5,241,500	893,643	5,605,006	32,791,709
Post-Fire Rehabilitation (ESR) [2].	ha	7,133	3,960,905	1,502,963	203,865	2,069,505	7,744,370
	ac	17,625	9,787,600	3,713,900	503,760	5,113,853	19,136,738
Conifer Treatments	ha	954,090	1,254,729	205,621	224,530	354,151	2,993,121
	ac	2,357,606	3,100,500	508,100	554,824	875,126	7,396,156

TABLE 10—FIAT ASSESSMENT PROJECTS FOR FIVE PRIORITY LANDSCAPES IN THE GREAT BASIN REGION—Continued

[Adapted from BLM 2015a, entire]

Potential treatment type		FIAT Assessment area					Totals
		MZ III	MZ IV		MZ V		
		Southern Great Basin	Northern Great Basin	Snake/ Salmon/ Beaverhead	Central Oregon	Western Great Basin/Warm Springs Valley	
Invasive Plant Treatment [3]	ha	1,196,979	164,748	90,407	212,909	396,197	2,061,239
	ac	2,957,796	407,100	223,400	526,109	979,024	5,093,429

[1] Fire operations include preparedness, prevention, and suppression activities. As opposed to proactive, site-specific planned treatments, fire operations and post-fire rehabilitation treatments are reactive responses to random wildfires.

[2] Post-fire rehabilitation includes the BLM's ESR Program and the USFS's BAER Program. Program policies limit available funding from 1 to 3 years.

[3] For the purposes of FIAT, invasive species were limited to invasive annual grasses.

The planning, implementation, and monitoring of the FIAT assessments are a multiyear process. Planning is completed for some FIAT assessment projects, and implementation has begun (Table 11). Others similar projects are in early planning stages, but are expected to be implemented in the near future. To date, the BLM has made substantial investments in fuels and restoration treatments to address the impacts of fire and invasives on sage-grouse habitats, especially within the FIAT assessment areas.

TABLE 11—FIAT PROJECTS IMPLEMENTED IN FISCAL YEAR 2015 AS OF AUGUST 30, 2015

[BLM 2015h, attachment 1]

FY15 FIAT and other sage-grouse fuels program work						
Treatment	Completed			In-progress		
	Number of projects	ha	ac	Number of projects	ha	ac
Conifer Removal	324	56,052	138,508	146	22,210	54,884
Wildfire Pre-suppression	130	16,778	41,460	74	2,217	5,480
Habitat Restoration	248	74,111	183,134	90	25,971	64,176
Totals	702	146,941	363,102	310	50,398	124,540

Secretarial Order 3336—On January 5, 2015, the Secretary signed Secretarial Order 3336 (Secretarial Order), which sets forth enhanced policies and strategies for preventing and suppressing rangeland fire and for restoring sagebrush landscapes impacted by fire across the Great Basin region (DOI 2015b, entire). The Secretarial Order establishes a Rangeland Fire Task Force (Task Force), which completed an Implementation Plan (DOI 2015d, entire) that established a roadmap to accomplish the objectives of the Secretarial Order. The Implementation Plan also provided a timeline and methodology to be used in developing two separate reports on short- (2015 western fire season) and long-term (2016 western fire season and beyond) actions and activities that will be implemented to further address the impacts of wildfire in the Great Basin. The Secretarial Order complements the FIAT process by providing support and resource commitments for some of the projects identified in the FIAT assessments. For example, the Secretarial Order emphasizes the research on wildfire and invasive plant prevention and restoration (DOI 2015b, entire) that will support the adaptive management of FIAT assessment projects.

Further, the Secretarial Order provides clear direction to all affected Department of the Interior bureaus (DOI 2015b, entire), in particular BLM, for prioritizing actions to address key elements of wildfire management, including effective rangeland management, fire prevention, fire suppression, and restoration at a landscape scale. Building on BLM and USFS' long and successful history of managing wildfire in the Western United States, the Secretarial Order focuses the existing rangewide commitment to effective wildfire management—as well as invasive species control and restoration—to protect large, intact sagebrush landscapes against the destructive effects of wildfire and invasive species. For example, BLM has dedicated increased resources to all aspects of fire management within the species' range for the 2015 wildfire season. Similarly, BLM is actively pursuing the long-term directives in the Final Report component of the Secretarial Order, such as a national seed strategy, to support effective restoration efforts (DOI 2015a).

Initial Report

On March 1, 2015, the Task Force completed ''SO 3336—The Initial Report: A Strategic Plan for Addressing Rangeland Fire Prevention, Management, and Restoration in 2015'' (DOI 2015c, entire), detailing activities that could be undertaken in advance of the 2015 western fire season to improve the efficiency and effectiveness of wildfire management efforts. The actions identified in the Initial Report included priorities to strengthen planning and preparedness, such as increasing capabilities of rangeland fire protection associations (RFPA) and volunteer departments, utilizing veteran crews, ensuring fire management organizations are prepared and functional, and increasing initial attack and extended attack capability. In

response, the BLM has allocated additional resources to reflect these FY15 priorities (BLM 2015h; DOI 2015a; DOI 2015e), including:

- Allocating 6 million dollars in additional base funding to bolster fire programs for the long term.
- Allocating approximately 10.6 million dollars to hire additional seasonal firefighters and to support equipment (*e.g.,* dozers, water tenders, etc.). Using this funding, the BLM hired 100 additional firefighters in 2015, and DOI gave each Great Basin State supplemental funding to cover staffing shortages. With supplemental funds from the DOI, the BLM also purchased new equipment for the 2015 fire season. An additional 20 single-engine air tankers were pre-positioned near critical sagebrush habitat throughout the western United States. Helicopters were mobilized to address sage-grouse priority areas, and the helitack crew size was increased in order to provide more efficient initial attack. An additional jet lead plane was available to insure support for retardant planes mobilized to protect these critical areas. The BLM has also purchased several dozers, dozer transports, water trailers, and semi-trucks to boost or maintain the BLM's initial attack resource capability and initial attack success rate in critical sagebrush areas in the Great Basin.
- Committing 500,000 dollars to train rural fire departments and RFPAs in important sagebrush ecosystems and sage-grouse habitat areas.
- Providing training for more than 200 veterans to work on 20-person firefighting crews. California, Nevada, and Oregon BLM offices have hired returning veterans who bring skills such as physical fitness, endurance, leadership, communications, and operation of heavy equipment.

In addition to these actions, the BLM dedicated fuels program funding for fuels treatment and fire suppression to Great Basin States (BLM 2015h). Fuels treatment projects are prioritized and implemented based on location, opportunities for success, and overall benefit to protecting, conserving, and restoring sagebrush ecosystems and key sage-grouse habitat. Fire management actions taken by the BLM during the 2015 wildfire season has resulted in fewer acres of sage-grouse habitat burned in the early fire season compared to past years with similar weather and fuel conditions (BLM 2015h). For example, the Fuels Treatment Effectiveness Monitoring (FTEM) system is a database that captures anecdotal information when a wildfire intersects a past fuels treatment (BLM 2015h). So far in 2015, two fires in sage-grouse habitat (*i.e.,* the ''499'' wildfire in Prineville, Oregon and the ''Hwy 290'' wildfire in Winnemucca, Nevada) have been entered into the system and demonstrate the effectiveness of the fuels treatment. Additionally, fuels treatments have reduced the size of unplanned wildfires, assisted in providing opportunities to stop or slow the spread of the wildfire, provided for greater firefighter safety, and protected sage-grouse habitat (BLM 2015h). Currently the BLM has completed more than 80 percent of the action items and activities outlined in the Initial Report (Table 12).

TABLE 12—SECRETARIAL ORDER INITIAL REPORT ACTIONS IMPLEMENTED IN FISCAL YEAR 2015

[McKnight, BLM, 2015, pers. comm.]

Status	Action item and description	Deliverable
	Section 7.b.i. Integrated Response Plans	
Completed ...	Action Item #1: Increase the capabilities and use of rural/volunteer fire departments and RFPAs and enhance the development and use of vet- eran crews.	Coordinate with State, tribal, and local government partners to leverage training assets and capabilities. Specifically, the DOI/BLM will seek to deliver training to approximately 2,500 cooperators and increase the utilization of veteran crews.
Completed ...	Action Item #2: Ensure local, multi-agency coordination (MAC) groups are functional and MAC plans are updated.	Report out from States. MAC groups, working with local Federal wildland fire suppression agencies, tribes, State fire suppression agencies, local fire departments, RFPAs, and other cooperators.
Completed ...	Action Item #3: Develop and implement minimum draw-down level and step up plans to ensure availability of resources for protection in priority greater sage-grouse habitat.	Report out from States. All units managing priority sage-grouse habitat will develop and implement a minimum draw-down level and step up plans to clearly identify those suppression resources necessary in order to main- tain an effective, aggressive initial attack capability.
Completed ...	Action Item #4: Apply a coordinated, risk-based approach to wildfire response to ensure initial attack response to priority areas.	Report out from States. Review and update CAD systems to ensure initial attack response to priority sage-grouse areas in protection of sage- grouse habitat.
Completed ...	Action Item #5: Develop a standardized set of briefing materials.	Prepare standardized briefing materials on sagebrush-steppe and sage-grouse wildfire protection for incoming Type 1–3 Incident Management Teams and other fire management resources.
Completed ...	Action Item #6: Review and update local plans and agreements for consistency and currency to ensure initial attack response to priority greater sage-grouse areas.	Report out from States. Update and approve all Fire Prevention Plans, Wildland Fire Decision Support System data, Fire Danger Operating Plans, Preparedness Level Plans, and Agreements and Annual Operating Plans.
Completed ...	Action Item #7: Develop supplemental guidance for the use of ''severity funding''.	Review severity funding policy and update guidance.
Ongoing	Action Item #8: Evaluate the effectiveness of ac- tion plans.	Develop annual reporting metrics for effectiveness monitoring of wildland fire response, with particular emphasis on the effectiveness of measures to improve success in rangeland fire response, based upon CAD changes, and reporting of success and/or failure as it pertains to Federal Plans and FMPs, and effectiveness of enhanced training and capacity measures.
Ongoing	Action Item #9: Increase the availability of technology and technology transfer to fire management managers and suppression resources.	Increase access to digital maps and mapping software by providing appropriate technology (such as smartphones and tablets) to fire managers and suppression personnel. Remove barriers for acquisition of appro- priate software and hardware.

TABLE 12—SECRETARIAL ORDER INITIAL REPORT ACTIONS IMPLEMENTED IN FISCAL YEAR 2015—Continued

[McKnight, BLM, 2015, pers. comm.]

Status	Action item and description	Deliverable
Completed ...	Action Item #10: Improve the description and awareness of critical resource values threatened in various stages of the fire response process including large fire management.	Improve the collection of information about critical resource values threatened, including sage-grouse habitat and populations, on the existing Incident Status Summary (ICS 209) and ensure this information is captured in the Incident Management Situation Report (SIT Report).
Completed ...	Action Item #11: Ensure compliance and evaluation of the implementation plan action items.	During annual preparedness reviews, review all CAD systems and MAC plans for compliance with the action plans outlined in Action Items #1 through #4.
	Section 7.b.ii. Prioritization and Allocation of Resources	
Completed ...	Action Item #1: Communication plan	Establish protocols for providing Federal agency leadership with regular briefings and information on wildfire activity, fire conditions, and signifi- cant issues in relation to rangeland fire and the implementation of the Secretarial Order throughout the 2015 wildfire season in order to provide leadership with an accurate understanding and insight to the conditions on the ground. Senior leadership will regularly communicate national stra- tegic priorities and expectations to line officers and fire staffs during the wildfire season.
Completed ...	Action Item #2: Review and update the delegation of authority for the National Multi-Agency Coordination (NMAC) Group.	Ensure roles and responsibilities.
Completed ...	Action Item #3: Issue national level ''Leader In- tent''.	Provide expectations for 2015.
Completed ...	Action Item #4: Engage Geographic Multi-Agency Coordination (GMAC) groups.	Communicate Leaders Intent.
Ongoing	Action Item #5: Develop ''Delegation of Authority'' template for use by local line officers.	Create standard language for use in a Delegation of Authority template that identifies the sage-steppe ecosystem and protection of species as a priority. Line officers will use this standard template when delegating authority to an Incident Commander who has responsibility for managing a wildfire incident within a FIAT area or has nexus to one. Delivery to Districts.
Completed ...	Action Item #6: Engage line officers to communicate Leaders' Intent and expectations.	Each agency use appropriate internal mechanisms to communicate intent and expectations to regional and unit-level managers.
	Section 7.b.v. Post Fire Restoration	
Ongoing	Action Item #1: Review and update Emergency Stabilization (ES) and Burn Area Rehabilitation (BAR) policy guidance to address rating and evaluation criteria, project design to promote the likelihood of treatment success, cost containment, monitoring, and continuity and transition to long-term restoration activities and treatments.	Update BAR evaluation and rating criteria and review ES policy and procedures.
Ongoing	Action Item #2: Address acquisition, financial management, and other procedures that pose challenges to timely project implementation.	Work with Departmental and bureau acquisition and finance offices to pro- vide funding and project continuity at the beginning of, and across, fiscal years.
Ongoing	Action Item #3: Accelerate schedule approving BAR projects consistent with the guidelines established for the 2015 fire season.	Accelerate preliminary approvals that will allow sufficient lead time to complete cultural and other clearances (e.g., NEPA and National Preservation Act of 1966 [Section 106]6), procurement planning, and other advance work that will take place prior to the application of full funding at the be- ginning of the fiscal year.
Completed ...	Action Item #4: Identify non-fire programs and activities that will fund treatments and restoration activities for the long term in conjunction with BAR and ES policy and program review to be conducted in 2015.	Funding of ES and BAR projects will be evaluated based on opportunities and commitments from non-fire program and activities if the work that is proposed will extend beyond the ES and BAR duration.
Ongoing	Action Item #5: Identify requirements for National Fire Plan Operations and Reporting System (NFPORS) capabilities.	Implementation of new criteria for project evaluation and oversight may require updates and changes to NFPORS.
	Section 7.b.ix. Seed Strategy	
Completed ...	Action Item #1: Develop the draft National Seed Strategy and Implementation Plan.	Complete the National Seed Strategy and Implementation Plan.
Completed ...	Action Item #2: Identify a forum to discuss and highlight current native seed and restoration techniques and research.	Attend the Institute for Applied Ecology's National Native Seed Conference.
Completed ...	Action Item #3: Provide an opportunity to discuss current research, case-studies, and tools that inform applied restoration opportunities in the Great Basin.	A series of 15 webinars on seeding and restoration entitled, ''The Right Seed in the Right Place at the Right Time: Tools for Sustainable Restoration'' are offered through May 2015.

The BLM has longstanding national and local policies that require monitoring vegetation treatments (both implementation and effectiveness monitoring) and guidance to apply monitoring data for adaptive management. These planning policies require the BLM to set land use goals and objectives, and to ensure that all vegetation treatments are responding to those goals and objectives. The FIAT process requires partnership with cooperators, agencies, and others involved in land or wildlife management in the FIAT assessment areas, which helps ensure BLM's treatments are benefitting the sagebrush ecosystem and that proposed treatments provide direct and indirect benefits to sage-grouse populations.

The management strategies identified by the FIAT process are consistent with broader land use plan direction. Habitat restoration treatments (*e.g.,* biological, chemical, seeding, and broadcast burning) are effective at reducing fine fuel loads and ultimately decrease fire spread and area burned. Chemical applications are effective at removing nonnative annual grasses and promoting growth and establishment of native species. Seeding treatments implemented by the BLM are effective at reducing undesirable species and promote the establishment of desirable species because they are timed to achieve a high probability of success. Conifer removal treatments are implemented to reduce fuel loading and effectively reduce fire intensity, fire spread, and area burned. Wildfire pre-suppression activities alter vegetation composition, reducing the negative impacts from wildfire and invasives. Projects are planned using fire behavior analysis tools that consider topography, weather patterns, fire history, and fuel conditions to ensure effectiveness. These treatments ultimately slow fire spread and reduce fire size and area burned (DOI 2015e, entire). Fuels treatment effectiveness monitoring reports of 722 wildfire/fuels treatment intersections since 2001 demonstrate fuels treatment effectiveness within the BLM (BLM 2015b, p. 1). Of the wildfire/treatment interactions reported, 85 percent of the treatments helped control the wildfire, and 90 percent changed the fire behavior (BLM 2015b, p. 2). The BLM found that hazardous fuels treatments reduced the size of many unplanned ignitions, assisted in providing opportunities to stop or slow the spread of wildfire, provided for greater firefighter safety, allowed opportunities to manage unplanned ignitions for resource benefits, reduced the burn area rehabilitation needs and costs, reduced smoke emissions, and allowed for greater resiliency of the environment in returning to a functional ecosystem following wildfire (BLM 2015b, p. 1). The BLM's post-fire emergency stabilization and burned area rehabilitation treatments are planned, deliberate actions that promote land stabilization and rehabilitation of burned landscapes. The BLM is aggressively treating burned areas where there is a high probability of cheatgrass invasion (BLM 2015h). Post-fire recovery treatments are designed to promote native vegetation and to inhibit the establishment of nonnative annual grasses. Some previous post-fire seeding restoration attempts were found to be ineffective, with seeded areas as likely to have sage-grouse occupancy compared to non-seeded areas (Arkle *et al.* 2014, p. 15). However, post-fire seeding restoration was more likely to be successful in higher elevation areas with particular climate regimes and when projects were implemented in years preceding cool, wet growing seasons (Arkle *et al.* 2014, p. 15). Therefore, the FIAT process prioritizes restoration activities in areas with higher resiliency and resistance to fire based on soil and moisture regimes (Chambers *et al.* 2014b, p. 453). These treatments are effective at addressing the impacts posed by invasive plants and ultimately address future wildfire threats.

Once implemented, projects and treatments identified by FIAT will follow the same monitoring protocols as non-FIAT management actions, in accordance with overarching guidance in the Federal Plans. Specifically, monitoring that evaluates the implementation and effectiveness of FIAT management strategies will follow The Greater Sage-Grouse Monitoring Framework (BLM and USFS 2014, entire). Given past effectiveness and ongoing monitoring efforts, the BLM expects 95 to 99 percent of all habitat restoration, wildfire pre-suppression, and conifer removal projects that are completed or in progress to effectively ameliorate the impacts of wildfire and invasive plants to sage-grouse (DOI 2015e, p. 9).

At the time of this writing, the 2015 fire season is under way, and we cannot currently predict the outcome of the season in terms of impacts to sage-grouse habitat. Similarly, it is premature to assess how implementation of the wildfire and invasive plant conservation efforts discussed above are working to address impacts during this fire season. At the time of publication, approximately 200,000 ha (500,000 ac) of sage-grouse habitat has been estimated to be affected by wildfires this year, including approximately 12 ha (30 ac) of SFA. Much of the area burned is associated with a single wildfire that occurred along the Idaho and Oregon border—the Soda Fire. This fire does provide some insight into the implementation of the wildfire conservation measures.

The Soda Fire started on August 10, 2015, burning approximately 114,000 ha (283,000 ac) of Federal, State, and private lands in southwestern Idaho and eastern Oregon (NIFC 2015). Almost all of the burned area is sage-grouse habitat, with more than 20,000 ha (about 50,000 ac) designated by BLM as PHMA for the species. Despite extreme fire behavior, firefighters safely suppressed this wildfire with no loss of life and no serious injuries to firefighters or the public. An interagency Emergency Stabilization and Rehabilitation (ES&R) team of more than 40 natural resource specialists has completed 5 days working on the ground to assess damage and threats to life, property, and resources on BLM-managed lands in both Idaho and Oregon. The ES&R team is now designing treatments to mitigate threats and begin the rehabilitation of the burned area (BLM2015h). Rehabilitation of burned areas on State and private lands affected by the Soda Fire is being handled through similar authorities and processes by Idaho Department of Lands (IDL) and the NRCS. Other local, State, and Federal organizations are participating throughout the process. A Memorandum of Understanding (MOU) established in 2014 between BLM, Idaho Department of Fish and Game, and IDL plays a key part in authorizing restoration efforts and processes on State land, particularly in PHMAs and Important Habitat Management Areas (IHMAs).

The Soda Fire is one of many examples of why the Secretary of the Interior issued Secretarial Order 3336 to prioritize resources to address the threat of wildfire in sagebrush habitats for Federal land managers. We expect that the actions outlined in the Secretarial Order and BLMs commitments to implement other new strategies and tools identified (BLM 2015h) above will ultimately prove valuable in reducing the negative effects of wildfire on sage-grouse habitat. Importantly, the rapid completion of many of the near-term action items outlined in the Initial Report – many of these measures were in place *before* the onset of the 2015 fire season – signal a strong commitment from wildland fire managers to implement these measures into the future.

Final Report

The ''SO3336—Final Report: An Integrated Rangeland Fire and Management Strategy'' (DOI 2015c, entire), completed May 1, 2015, outlines a long-term approach to improving the efficiency and efficacy of actions to better prevent and suppress wildfire and to improve efforts to restore fire-impacted landscapes both including and beyond 2016. This approach involves targeted investments to enhance efforts to manage wildfire in the Great Basin, based on relative resilience and resistance of habitat to fire. The Final Report also outlines longer term actions to implement the policy and strategy set forth in the Secretarial Order, including the continued implementation of approved actions associated with the National Cohesive Wildland Fire Management Strategy (DOI 2014, entire) that provides guidance for the safe and effective suppression of wildfires. The actions outlined in the Final Report primarily focus on the Great Basin region, but DOI intends for the strategies developed under the Final Report to be applied rangewide where there is benefit to sagebrush ecosystem habitat and sage-grouse. Measures outlined in the Final Report include the following:

- Designing and implementing comprehensive, integrated fire response plans for the FIAT assessment areas in the Great Basin subject to fire and invasives;
- Providing clear direction on the prioritization and allocation of fire management resources and assets;
- Expanding the focus on fuels reduction opportunities and implementation;
- Fully integrating the emerging science of ecological resilience into design of habitat management, fuels management, and restoration projects;
- Reviewing and updating emergency stabilization and burned area rehabilitation policies and programs to integrate with long-term restoration activities;
- Committing to multiyear investments for the restoration of sagebrush ecosystems, including consistent long-term monitoring protocols and adaptive management for restored areas;
- Implementing large-scale experimental activities to remove cheatgrass and other invasive annual grasses through various tools;
- Committing to multiyear investments in science and research; and
- Developing a comprehensive strategy for acquisition, storage, and distribution of seeds and other plant materials.

The Secretarial Order places a priority on ''protecting, conserving, and restoring the health of the sagebrush-steppe ecosystem and, in particular, sage-grouse habitat, while maintaining safe and efficient operations,'' and looks to the allocation of fire resources and assets associated with wildfire to reflect that priority. In preparing the Final Report, the Task Force considered a wide variety of possible actions for conserving habitat for the sage-grouse and other wildlife species as well as economic activity, such as ranching and recreation, associated with the sagebrush ecosystem in the Great Basin. The strategy outlined in the Final Report builds upon the National Cohesive Wildland Fire Management Strategy (DOI 2014, entire) and is intended to ensure improved coordination with local, State, Tribal, and regional efforts to address the potential threat of wildfire at a landscape level.

In 2015, BLM initiated implementation of the National Seed Strategy, a key program included in the Secretarial Order (BLM 2015c, entire; BLM 2015h, entire). The ''National Seed Strategy for Rehabilitation and Restoration 2015–2020'' (Seed Strategy) provides a coordinated approach for stabilization, rehabilitation, and restoration treatments. The Seed Strategy also provides a framework for actively working with the private sector in order to build a ''seed industry'' for rehabilitation and restoration. This program was developed specifically in response to concerns about the wildfire and invasive plant cycle in the sagebrush ecosystem, and was identified in the Secretarial Order. The Seed Strategy has the following four goals:

1. Identify seed needs, and ensure the reliable availability of genetically appropriate seed;
2. Identify research needs and conduct research to provide genetically appropriate seed and to improve technology for native seed production and ecosystem restoration;
3. Develop tools that enable managers to make timely, informed seeding decisions for ecological restoration; and
4. Develop strategies for internal and external communication.

The Seed Strategy ensures that adequate supplies of native seed will be available for sagebrush ecosystem restoration. The use of locally appropriate native seed will improve restoration success, serving as an important tool in the suppression of invasive plant infestations after habitat disturbances, such as wildfire. The measures in the Seed Strategy are consistent with COT Report conservation recommendations for post-wildfire restoration (USFWS 2013, p. 40). The initiation of the Seed Strategy by BLM is evidence of DOI's commitments to fully implement the measures included in the Secretarial Order and serves as an important tool for the minimization of the wildfire-invasive plant cycle across the species' range (BLM 2015h, entire).

We analyzed the certainty of implementation and effectiveness of the Secretarial Order pursuant to PECE (68 FR 15100, March 28, 2003). As noted above, the purpose of PECE is to ensure consistent and adequate evaluation of recently formalized conservation efforts when making listing decisions. The policy provides guidance on how to evaluate conservation efforts that have not yet been implemented or have not yet demonstrated effectiveness. The evaluation focuses on the certainty that the conservation efforts will be implemented and the effectiveness of the conservation efforts to contribute to make listing a species unnecessary.

The majority of the actions identified in the Initial Report have been implemented (BLM 2015h, entire). Specifically, the following actions have taken place: Investments targeted to enhance efforts to manage wildfire in the Great Basin; a process has been established for allocating funds to support policies and strategies for preventing and suppressing wildfire and for restoring sagebrush landscapes impacted by fire across the Great Basin; and funds were provided this year to support efforts under the Secretarial Order (BLM 2015h, entire). The agencies have the legal authorities to carry out the responsibilities under the Secretarial Order and it builds on the BLM and USFS' long and successful history of managing wildfire in the Western United States. Therefore, we expect that the efforts will continue to be implemented to accomplish the objectives of the Secretarial Order.

The Secretarial Order is expected to work with FIAT and other authorities to further help address the effects associated with wildfire suppression and restoration and the spread of invasive species. The Secretarial Order provides an implementation plan and specific objectives including short-term actions for the 2015 fire season and long-term actions needed to meet the objectives identified in the order. Pursuant to the Secretarial Order, protocols for monitoring vegetation treatments (both implementation and effectiveness monitoring) were established and guidance was developed to apply monitoring data for adaptive management (BLM 2105h, entire).

We expect that the measures will be effective in reducing the impacts of wildfire and invasive plants to sage-grouse and its habitats. The COT Report recommends containing wildfire within the normal range (including size and

frequency), eliminating intentional fires, and restoring burned sagebrush habitats (USFWS 2013, p. 40). As the COT Report noted, reduction of the threat of wildfire is difficult (USFWS 2013, p. 40). However, the Secretarial Order, FIAT and other authorities and actions working in concert have provided the direction needed as described in the COT Report. Many of the actions identified in the Initial Report have already been implemented (BLM 2015h, entire). The actions yet to be fully implemented from the Initial and Final Report have a high level of certainty of implementation, given BLM's past track record of implementation and their commitments and policy direction for future implementation(BLM 2015h, entire). The Secretarial Order and associated actions, both short and long term directly address the recommendations found in the COT Report, are based on the best available information, and address the major issues related to wildfire prevention and suppression, as well as restoration of areas impacted by wildfire and invasive plants. We expect that the Secretarial Order and associated actions, both short- and long-term, will be implemented and will be effective in reducing the effects to sage-grouse and its habitat from wildfire and invasive species sufficient enough be considered in making our determination.

Resilient Landscapes Funding and Projects – The Wildland Fire Resilient Landscapes (WFRL) program is a new approach to achieve fire resiliency goals across landscapes with the collaborative efforts defined in the National Cohesive Wildland Fire Management Strategy (DOI 2014, entire), and in support of Secretarial Order 3336—Rangeland Fire Prevention, Management, and Restoration. The WFRL program provides opportunities for the DOI bureaus, working together with other Federal, tribal, State, and local governmental and nongovernmental partners, to identify and complete projects that are intended to contribute significantly to restoring fire resilience in a variety of fire-adapted ecosystems across the country. The Fiscal Year 2015 appropriation provided 10 million dollars to the Fuels Management program to fund resilient landscape activities, as a pilot initiative. Ten proposals were selected for funding in 2015; three projects, representing 68 percent of the funding, are located within the range of sage-grouse, and support the goals of the Secretarial Order (Table 13). The Fiscal Year 2016 President's Budget proposes funding for the WFRL program at 30 million dollars to provide multiyear support for landscape-scale projects and expand the program to new partnerships.

TABLE 13—FISCAL YEAR 2015 WILDLAND FIRE RESILIENT LANDSCAPES PROGRAM PROJECTS FUNDED WITHIN THE RANGE OF SAGE-GROUSE

Collaborative	Location/lead agency	Project objective	Project acres (millions)	Approved funding
Bruneau-Owyhee	Located in Idaho Lead: BLM	Treat conifer encroachment to benefit fire resiliency and sage-grouse habitat.	>1	$166,000
Greater Sheldon-Hart Mountain.	Located in parts of Oregon, Nevada, California. Lead: Service	Focus on restoring sagebrush shrub and native perennial grass/forb communities by controlling juniper expansion.	~4	3,984,250
Southern Utah	Located in Utah Lead: BLM	Remove encroaching pinyon pine and juniper, diversify age class of sagebrush communities, estab- lish desired understory to restore resilience, bene- fitting sagebrush-dependent wildlife.	7.4	2,605,000
Totals			>12	6,755,250

State Fire Management Programs – Federal, State, and local land and wildlife management agencies collaborate and work under national fire guidance strategies to achieve common goals and objectives. Within the Great Basin region, State Forest Action Plans address the coordinated management of wildfire. State and local fire management agencies view all wildfires as ''full suppression'' incidents, and make every effort to suppress fires safely and quickly with a strong initial attack. Many States have agreements with their neighboring States to ensure that a rapid initial attack is possible, even if it is from a neighboring State or jurisdiction. Additionally, they may utilize a ''unified command'' concept to assist in coordination and cooperation (Havlina *et al.* 2015, p. 26). Specific projects are detailed in the State Forest Action Plans to reduce fuels, improve preparedness and initial attack response, identify equipment and training needs, and ensure safe, rapid, and aggressive response to wildfire ignitions, and address rehabilitation of wildfire-damaged lands to mitigate the spread of invasive plants (Havlina *et al.* 2015, pp. 25–27). For example, Utah's Forest Action Plan (UDFFSL 2015; pp. 33–35) was updated in 2015 to include five Sage-grouse Management Areas (SGMAs) (Box Elder, Bald Hills, Sheep Rock Mountains, Hamlin Valley, and Ibapah) as high priorities in the wildfire risk assessment and as part of the Governor's Catastrophic Wildfire Reduction Strategy. Collectively, these five SGMAs hold 26 percent of the sage-grouse in the State of Utah (UDFFSL 2015, p. 35).

The Oregon State Plan recognizes wildfire as one of the most significant impacts to sage-grouse and their habitat in Oregon and the Great Basin. The Plan also recognizes the interrelated nature of the threat from wildfire with the threats from nonnative annual grasses and juniper encroachment. The Plan outlines more than 40 conservation actions to address the impacts from wildfire, which are defined as any activity or action which, when implemented or continued to be implemented, will reduce potential threats to sage-grouse and will improve or maintain healthy sagebrush-steppe habitat. These conservation actions are categorized into four areas: Reducing wildfire risk, wildfire suppression, building capacity and supporting local efforts, and post-fire rehabilitation. All of the conservation actions for wildfire are predicated on the FIAT as well as the Secretarial Order, use data specific to Oregon, and are coordinated with the goals and objectives of the BLM's Federal Plans as well as local jurisdictions.

Local Fire Management Programs – Many communities throughout sage-grouse habitat in the Great Basin have rangeland fire protection associations

(RFPAs). The RFPAs are remotely located firefighting units staffed by public volunteers. The RFPA volunteers are trained and equipped to respond to wildland fires with the intent to control wildfires at the smallest size that can be safely accomplished. Their location in remote areas allows firefighters to access fires quickly, which increases success of controlling fires before they grow in size, become more challenging to suppress, and cause greater effects to sage-grouse. In Oregon, 18 RFPAs have been created and currently field more than 600 volunteer fire fighters and more than 200 pieces of water-handling fire equipment to protect more than 2 million ha (5 million ac) from wildfire. In southern Idaho, there are currently seven RFPAs with 230 trained members who support wildland firefighters to protect more than 1.4 million ha (3.5 million ac) of the sagebrush ecosystem from catastrophic wildfire. On June 23, 2015, Governor Brian Sandoval signed emergency regulations related to the formation of RFPAs within the State of Nevada (NRS 472 per AB 163, sec. 3.5(1) of the 78th Session of the Nevada legislature).

Wildfire and Invasive Plants Summary

In 2010, we concluded that wildfire was one of the primary factors linked to declines of sage-grouse due to long-term loss of sagebrush and conversion of sagebrush habitats to invasive annual grasses. Loss of sagebrush habitat to wildfire had been increasing in the western portion of the sage-grouse range mainly due to an increase in wildfire occurrence, intensity, and severity (Miller *et al.* 2011, p. 183). We found this change to be the result of incursion of nonnative annual grasses, primarily cheatgrass. The positive feedback loop between cheatgrass and wildfire facilitates future fires and precludes the opportunity for sagebrush, which is killed by fire, to become reestablished. Cheatgrass and other invasive plants also alter habitat suitability for sage-grouse by reducing or eliminating native forbs and grasses essential for food and cover.

While the manner in which wildfire and invasive plants affect sage-grouse has not changed since the 2010 finding, there has been a significant change in the approach to rangeland firefighting and fuels management to address these potential threats. Through development of the FIAT, as well as the Secretarial Order, the BLM and USFS have developed and implemented wildfire management strategies and actions intended to reduce the impact of wildfire and invasive plants (BLM 2015h, entire). Similarly, a paradigm shift is occurring in the way land managers and the larger conservation community approach invasive plant control and in particular the relationship between invasive plants and wildfire.

Without management, current burn rates would likely continue, potentially impacting another 17 to 25 percent of the species' range within the Great Basin over the next 20 to 30 years. If this level of wildfire did occur, sage-grouse populations in the Great Basin could decline 43 percent over the next 30 years (Coates *et al.* 2015, p. 32), and some small populations could be extirpated. However, we expect that the rates of wildfire and invasive plant habitat loss seen over the past decades will be reduced by conservation efforts. The FIAT assessments that are included in the Federal Plans and the actions implemented under the Secretarial Order provide enhanced policies, strategies, and tools for preventing and suppressing wildfire and for restoring landscapes affected by fire across the Great Basin region. Many of those measures are in place for the current fire season (DOI 2015a). As a result, sagebrush habitats will now be given priority consideration in the treatment of fuels, the deployment of firefighting resources, and the rehabilitation of burned areas. Much of that effort will be focused in those areas most resistant to wildfire and invasive plants, where more than half the breeding habitat in the Great Basin occurs and where prevention and restoration projects are most likely to be successful; this strategy is consistent with recommendations provided in the COT report (USFWS 2013, pp. 40–42) and a recent study of wildfire impacts over the next 30 years (Coates *et al.* 2015, p. 34). Further, if wildfires do occur, monitoring of sage-grouse habitat and population responses to that impact will occur so that other land use activities can be adjusted, if necessary. In response to monitoring, development allowable under the Federal Plans may be adjusted based on adaptive management criteria to provide an immediate, corrective response to any identified triggers for population or habitat declines. While not directly related to habitat losses due to fire, these provisions provide a backstop for other disturbance if adaptive management triggers are exceeded. The continued long-term implementation of these wildfire management strategies, in coordination with the Federal Plans and Oregon State Plan (see *Sagebrush Landscape Conservation Planning* for additional details) reduce the risk, or the degree to which, fire and invasive plants are likely to impact sage-grouse. We expect that the current management emphasis will reduce future losses.

Grazing and Rangeland Management

In 2010, we evaluated the effect of grazing on sage-grouse (including domestic livestock, free-roaming equids, and wild ungulates) and concluded that improper grazing was likely having negative impacts to sagebrush and sage-grouse at local scales, but that population-level impacts were unknown. However, given the widespread nature of grazing, the potential for population-level impacts could not be ignored (75 FR 13910, March 23, 2010, p. 13942). In this section we evaluate the best available information on the impacts of livestock grazing on sage-grouse and on conservation actions since 2010 intended to ameliorate those impacts. We have no new information regarding impacts of native ungulates on sage-grouse populations, which were not considered a substantive threat in 2010; therefore, our analysis focuses exclusively on domestic livestock grazing. The impacts on the species and its habitat of free-roaming equid grazing are addressed in a separate section of this document (see *Free-Roaming Equids*).

Improper grazing by domestic livestock during the late 1800s and early 1900s, along with severe drought, affected sagebrush ecosystems across the range of sage-grouse (Knick *et al.* 2003, p. 616). Improper grazing, for the purposes of this assessment, is defined as grazing practices that are inconsistent with local ecological conditions and result in degradation of habitat for local wildlife species. This historical improper grazing caused long-term changes in plant communities and soils (Knick *et al.* 2003, p. 611). In low-elevation Wyoming big sagebrush and low sagebrush habitat, improper grazing reduced perennial herbaceous vegetation and caused high levels of ground disturbance, which promoted the establishment of exotic annual grass species such as cheatgrass (Mack 1981, pp. 148–152). In higher elevation mountain big sagebrush habitat, improper grazing likely reduced fine fuels and decreased fire frequency, resulting in the expansion of fire-sensitive native conifers (Miller and Tausch 2001, pp. 19–26). In both instances, these shifts in the vegetative community have facilitated changes in the wildfire cycle, leading to loss of sage-grouse habitat (see *Wildfire and Invasive Plants,* above).

Livestock grazing is currently the most widespread land use in the sagebrush ecosystem and occurs in all MZs (Knick *et al.* 2011, p. 219; Boyd *et al.* 2014, p. 62). Livestock grazing may positively or negatively affect the structure and composition of sage-grouse habitat (Factor A), depending on the intensity and timing of grazing and local climatic and ecological conditions (Crawford *et al.* 2004, pp. 10–12; Aldridge *et al.* 2008, p. 990; Boyd *et al.* 2014, p. 63). As a result, drawing broad inferences regarding the current impact of grazing on sagebrush habitats across the range of sage-grouse is difficult.

The total number of livestock that currently graze within sage-grouse habitats is unknown. No rangewide data set is available describing the level of livestock grazing that occurs on private lands across the occupied range. Most grazing on Federal lands is managed by BLM and USFS (GAO 2005, p. 5). The BLM and USFS index the number of livestock grazed by Animal Unit Months (AUMs), which takes into account both the number of livestock and the amount of time they spend on public lands. An AUM is defined by BLM as the amount of forage needed to sustain one cow and her calf, one horse, or five sheep or goats for 1 month. The number of AUMs allowed depends upon land health assessments that evaluate the ecological condition of an area and its ability to support grazing (BLM and USFS 2015, entire). The number of AUMs permitted on Federal lands has gradually declined since the 1960s (Mitchell 2000, pp. 64–68). This decline was concurrent with a decline in productivity of western shrublands due to previous grazing history, changes in soils and vegetation, or drought (Knick *et al.* 2011, p. 232). The reduction in AUMs permitted on public lands over time may not translate to a reduction in the effects of grazing in sagebrush systems (Knick *et al.* 2011, p. 232).

Properly managed grazing may benefit sage-grouse. Light to moderate livestock grazing can help maintain perennial vegetation that provides important food and cover for sage-grouse (Crawford *et al.* 2004, pp. 2–12; Boyd *et al.* 2014, p. 63). It can also help control invasives and woody plant encroachment, which may improve habitats and may reduce wildfire risk (Connelly *et al.* 2004, p. 7–49; Boyd *et al.* 2014, p. 68). The net impact of different use levels will vary in accordance with climatic variability, local environment, and season of use (Crawford *et al.* 2004, pp. 10–12). Implementing proper grazing practices that maintain adequate residual grass height and cover under shrubs provides for suitable cover and minimizes the negative effects of grazing on sage-grouse productivity (Boyd *et al.* 2014, p. 64).

Alternatively, improperly managed grazing can have adverse impacts to sage-grouse habitat. Improper grazing directly influences the composition, productivity, and structure of herbaceous plants in sagebrush plant communities (Boyd *et al.* 2014, p. 64), which in turn influences the quality and quantity of food and cover for sage-grouse (Fleischner 1994, pp. 633–635). By reducing protective vegetative cover, improper grazing may make nesting and brood-rearing habitats less suitable for sage-grouse. Sage-grouse rely on the cover of tall grasses and shrubs to hide from predators, especially during the nesting season, and females will preferentially choose nesting sites based on the height of grasses and shrubs (Hagen *et al.* 2007, p. 46). Grass height is a strong predictor of nest survival and hiding cover can increase nest success, a key vital rate for sage-grouse (Doherty *et al.* 2014, pp. 322–323). Loss of this hiding cover may increase predation during nesting and brood-rearing, subsequently reducing reproductive success rates (Gregg *et al.* 1994, p. 165). Maintaining adequate residual grass height and cover under shrubs minimized the negative effect of grazing on sage-grouse productivity (Boyd *et al.* 2014, p. 64).

Improper livestock grazing can reduce food available to sage-grouse, which can impact reproductive success and chick survival (Coggins 1998, p. 30; Aldridge and Brigham 2003, p. 30; Pederson *et al.* 2003, p. 43). Improper livestock grazing in mesic, brood-rearing habitat may further reduce food resources by altering soils and hydrology and reducing herbaceous plants (Braun 1998, p. 147; Dobkin *et al.* 1998, p. 213). Improper livestock grazing may also reduce the cover and height of sagebrush in key wintering habitats (Rasmussen and Griner 1938, p. 852), potentially affecting the condition and survival of sage-grouse during the winter when resources are scarce. However, implementing appropriate grazing practices can maintain habitat and food resources for sage-grouse or, under very specific conditions, improve conditions by stimulating succulent forb growth (Evans 1986, p. 67; Crawford *et al.* 2004, p. 12; Beck and Mitchell 2000, p. 997).

Beyond habitat impacts, improper grazing can also directly affect sage-grouse (Factor E). Nearby livestock can cause females to flush from their nests (Coates *et al.* 2008, p. 426), inadvertently revealing the nest and its eggs to predators, such as ravens (*Corvus corax*) (Coates 2007, p. 33) and the abundance of raven predators in sage-grouse habitats may increase near livestock grazing (Coates *et al.*, in press). Livestock can trample or disturb nests (Crawford *et al.* 2004, p. 12). However, no information is available about the extent these potential impacts may be occurring across the occupied range. When they do occur, adverse impacts are likely limited to the local population.

Construction and development associated with grazing, such as watering developments and fences, can have a variety of impacts such as habitat fragmentation and the facilitation of predators and disease. There have been documented incidences of sage-grouse drowning in stock tanks, which can have localized population-level effects (Boyd *et al.* 2014, p. 65), but the rangewide impact is unknown. Grazing management that strategically considers placement and design of fences and livestock water developments could protect other habitats by localizing and minimizing the area of impact. In addition, the timing of water diversions can minimize these impacts and provide mesic vegetation and wet meadow habitats during critical brood-rearing periods when the availability of succulent plants may be limited (Boyd *et al.* 2014, pp. 65–66).

Conservation Efforts

Since 2010, State and Federal agencies have worked collaboratively to develop regulatory mechanisms to reduce or eliminate the impact of improper livestock grazing on sage-grouse habitats. The BLM and USFS amended or revised Federal Plans to set appropriate rangeland health standards in sage-grouse habitats that are required to maintain a Federal grazing permit. States developed and implemented State plans that govern issuance of grazing permits on some State lands. Other conservation efforts designed to improve grazing, including voluntary efforts, are discussed below.

Federal Plans—The BLM and USFS are currently the principle land managers within the range of the sage-grouse, and collectively manage more than 98 percent of the livestock grazing on Federal lands (GAO 2005, p. 5). Nearly all federally owned sage-grouse habitat is managed for livestock grazing (BLM and USFS 2015, entire). Grazing permits and leases generally cover a 10-year period and are renewable if the BLM or USFS determine that the terms and conditions of the expiring permit or lease are being met (BLM and USFS 2015, entire). Permits include standards and guidelines that describe specific conditions required to achieve land

health and the recommended techniques to achieve these standards on each allotment (Knick *et al.* 2011, p. 222; BLM and USFS 2015, entire), as well as mandatory terms and conditions to ensure that land health standards (LHS) are being met (43 CFR 4130). If LHS are not being met or terms and conditions are not being followed, the BLM and USFS have the authority to modify the terms and conditions of grazing permits to correct any deficiencies, suspend the permit, or to revoke the grazing permit entirely (33 CFR 222.4; 43 CFR 4180.2).

In our 2010 finding, we identified concerns with BLM and USFS management of rangelands, contributing to our finding that regulatory mechanisms were not sufficient (75 FR 13910, March 23, 2010, pp. 13975–13980). Historically, not all allotments have been monitored to ensure compliance with LHS and permit terms and conditions, and there was no mandated prioritization of field checks to ensure compliance within sage-grouse habitats. Between 1997 and 2007 the percent of allotments monitored for LHS ranged from 22 percent to 95 percent across surveyed States, with an overall average of 57 percent (Veblen *et al.* 2014, p. 72). Of the allotments monitored, 15 percent failed to meet LHS due to improper livestock grazing (Veblen *et al.* 2014, p. 72).

The Federal Plans represent a major shift in grazing management and monitoring since 2010, with respect to meeting LHS and sage-grouse conservation objectives (BLM and USFS 2015, entire). The Federal Plans manage grazing specifically for sage-grouse habitat objectives by evaluating the numbers and distribution of livestock, evaluating environmental conditions such as drought, closing or changing allotments, managing riparian habitat for sage-grouse, and authorizing water developments only if they would not adversely impact sage-grouse. Specific grazing guidelines have been developed based on the best available science and are applied in upland and riparian/wet meadow habitats to maintain or achieve desired conditions of sagebrush, forbs, and perennial grasses. Upland vegetation guidelines will be applied seasonally and within 4 to 6.2 miles from leks, depending on site-specific information. Riparian and wetland protective measures will be applied in all sage-grouse habitat areas. Further, BLM directed resources in 2015 to fund monitoring crews, and funded activities, like data management, to ensure successful implementation of the monitoring commitments (Lueders, BLM, 2015, pers. comm.). The President's Budget request for BLM included 8 million dollars to directly support monitoring the implementation and effectiveness of the land use plans (BLM 2015d, p. II–5–6).

Given the large number of allotments across the occupied range, the Federal Plans ensure that the most important habitats are prioritized for protection. Permit review, renewal, and/or modifications occur first in SFAs, followed by PHMA and allotments containing riparian areas. The same prioritization is used for field checks to ensure compliance with permit terms and conditions. In addition, the USFS commits to modify grazing permit conditions and existing livestock improvements within 2 years and mitigate any adverse effects from grazing improvements within 5 years (BLM and USFS 2015, entire). Progress at achieving rangeland health objectives at multiple spatial scales is monitored by BLM and USFS using a habitat assessment framework that provides a consistent approach and similar data set (BLM and USFS 2015, entire).

The Federal Plans' vegetation standards and grazing management measures are consistent with the best available science on sage-grouse habitat needs and the COT report recommendations to minimize grazing impacts (USFWS 2013). The Federal Plans also include monitoring requirements and adaptive management that will ensure that the measures will be effective for the long term and that grazing occurs at proper levels for sage-grouse conservation. With changes in management direction and immediate allocation of resources, full implementation of the Federal Plans will, over time, address effects due to improver grazing. As a result of the Federal Plans, and associated monitoring commitments and adaptive management approach, the risk of improper grazing occurring on Federal lands across the occupied range is greatly reduced from 2010 levels.

State Plans—State plans in Montana and Wyoming include measures to reduce the impact of improper grazing to sage-grouse on State-owned or managed lands. Montana's State plan requires that State Trust grazing lands maintain and improve sage-grouse habitat in core and connectivity areas on State Trust lands in Montana (Montana EO 10–2014, pp. 7–17). In addition, Montana's plan includes voluntary incentives to conserve sagebrush habitats on private and State-owned lands in core and general habitat areas (Montana EO 10–2014, pp. 7–27). Under the Wyoming Plan, in order to receive a permit, new grazing operations on State Trust Lands must demonstrate that they will not cause declines in sage-grouse populations. While the amount of grazing on lands subject to these State requirements and incentives is minimal compared to that on Federal lands, these measures will reduce the potential for improper grazing that could negatively affect sage-grouse.

Sage Grouse Initiative—Rangeland health inside PACs has been improved through SGI practices by applying grazing systems, re-vegetating former rangeland with sagebrush and perennial grasses, and controlling invasives. To date, grazing systems have been implemented on more than 985,000 ha (2.4 million ac); seeding projects have occurred on more than 19,000 ha (over 48,000 ac); and weed management projects were implemented on more than 6,000 ha (over 15,509 ac), and restoring more than 70 ha (179 ac) of wet meadow (NRCS 2015a, p. 6). To maximize conservation gain, SGI targets their efforts within PACs. Of the more than 985,000 hectares (2.4 million acres) enrolled in grazing systems, 76 percent are clustered within the following five populations: Powder River Basin, Yellowstone Watershed, and the Dakotas in MZ I; Wyoming Basin in MZ II; and Snake/Salmon/Beaverhead in MZ IV (NRCS 2015a, p. 7). In addition more than 74 percent of the newly seeded acres are concentrated in the following five populations: Dakotas, and Yellowstone Watershed in MZ I; Northwest Colorado in MZ II; and Northern Great Basin and Box Elder in MZ IV (NRCS 2015a, p. 7). Although participation in SGI programs is voluntary, participants that receive financial assistance enter into binding contracts or easements to ensure that conservation practices are applied according to schedule and in compliance with NRCS standards and specifications. As part of implementation, the SGI includes a monitoring and evaluation component that measures the response of sage-grouse populations and associated vital rates in order to gauge effectiveness and provide an adaptive management framework to SGI programs. For the private lands involved with this program, SGI has removed the risk of habitat degradation due to improper grazing through the implementation of accepted habitat management tools, and restored previously affected habitat to benefit sage-grouse.

Candidate Conservation Agreements—Lands currently enrolled in CCAAs reduce the potential threat of improper grazing on private lands through implementation of grazing management plans that we have

determined maintain or enhance habitat for sage-grouse. Approved grazing management plans include measures concerning the types of livestock and the appropriate timing, location, duration, and frequency for grazing. All private lands within the species' range in Oregon and Wyoming are eligible for enrollment in CCAAs. Rangewide, approximately 745,000 ha (1.8 million ac) of private lands have landowner commitments in the programmatic CCAAs in Oregon and Wyoming. In addition, approximately 1.4 million ha (about 3.5 million ac) are covered by CCAs covering range management on BLM-administered lands in Oregon and Wyoming, and covering maintenance operations on DOE lands in Idaho (BLM 2013a). The CCAs require the same conservation measures as the CCAAs, including grazing management plans and habitat enhancement. These CCAAs and CCAs are consistent with the recommendations of the COT Report (USFWS 2013, p. 45) for conservation measures that will effectively reduce impacts to sage-grouse.

Grazing and Rangeland Management Summary

Livestock grazing is the most widespread land use in the sagebrush ecosystem, and impacts can be positive, negative, or neutral depending on management practices and site-specific characteristics. Improper grazing practices can have adverse effects to sage-grouse and its habitat, and may work synergistically with other potential threats, such as invasive plants and wildfire, to increase impacts. However, well-managed grazing practices can be compatible with sagebrush ecosystems and sage-grouse persistence. In 2010, we concluded that grazing was likely having localized negative effects, but due to the widespread extent of the activity, greater impacts were possible. Since our 2010 finding, updated Federal Plans have been amended or revised in the species' range to ensure that appropriate grazing prescriptions are applied on Federal lands, covering more than half of the range of sage-grouse. As discussed in the *Federal Plans* section above, monitoring and adaptive management provisions within the Plans contribute to the certainty that livestock grazing will be permitted at levels compatible with sage-grouse persistence. Further, prioritization of field checks and permit reviews provides additional assurances that these regulatory mechanisms will be effective in those areas with the highest breeding bird densities. Rangewide, the Federal Plans, along with the Wyoming, Montana, and Oregon State Plans, reduce impacts from grazing to approximately 90 percent of the modeled breeding habitat across the species' range (see *Sagebrush Landscape Conservation Planning* for a detailed discussion of conservation measure implementation and effectiveness). In addition to these regulatory mechanisms on Federal lands, SGI and State CCAAs provide well-coordinated programs to encourage private landowners to address the impact of improper grazing on non-Federal lands. Taken together, these conservation efforts reduce the potential threat of improper livestock grazing from the levels assessed in 2010. Therefore, we conclude that, although livestock grazing is widespread in the sagebrush ecosystem, and we expect some continued impacts from improper grazing at local scales, existing Federal regulations with full implementation, in combination with voluntary efforts on non-Federal rangelands are reducing the prevalence of improper grazing and its impacts to sage-grouse.

Free-Roaming Equids

In 2010, we evaluated the effect of free-roaming equids (also known as free-roaming horses and burros) on sage-grouse and concluded that grazing (including grazing by free-roaming equids, native ungulates, and livestock) can have negative impacts to sagebrush (Factor A) and consequently to sage-grouse at local scales. Further, we concluded that the impacts of grazing at large spatial scales, and thus on population-levels, was unknown, but given the widespread nature of grazing, the potential for population-level impacts could not be ignored (75 FR 13910, March 23, 2010, p. 13942).

Free-roaming horses (*Eques cabalas*) and burros (*E. sinus*) were first brought to western North America in the late 16th century. A number of equids subsequently escaped captivity or were released forming free-roaming populations (Beever 2003, p. 888; Garrott and Oli 2013, p. 847). When the BLM began monitoring free-roaming equid populations in the 1970s, they reported the total number of free-roaming horses to be approximately 17,000 individuals, although some believe this was an underestimate (BLM 2005a, p. 3). With protection afforded by the Wild Free Roaming Horse and Burro Act of 1971 (Pub. L. 92–195) (Horse and Burro Act), the number of horses on public lands rose sharply, and by 1980 the number of free-roaming equids had increased to 65,000–80,000 animals (Beever 2003, p. 888, BLM 2005a, p. 3). Active management, starting in the 1980s, reduced free-roaming equid numbers to more than 40,000 by 1999 and to about 37,186 in 2003 (BLM 2005a, p. 3).

The BLM and USFS manage free-roaming equids on Federal lands according to the Wild Free-Roaming Horses and Burros Act of 1971. The BLM's implementing regulations designated Herd Areas as places used as habitat by a herd of free-roaming equids at the time the law was passed (43 CFR part 4700). The BLM evaluated each Herd Area to determine if it had adequate food, water, cover, and space to sustain healthy and diverse free-roaming equid populations over the long term. The areas that met those criteria were designated as Herd Management Areas (HMAs). The BLM manages HMAs to maintain the appropriate management level (AML) of free-roaming equids to be in balance with other public rangeland species, resources, and uses in a given area. The USFS has designated Territories for the management of free-roaming equids and manages them in a similar way. The HMA/Territories currently overlap with about 12 percent of the sage-grouse occupied range, primarily in Oregon, Nevada, and Wyoming (Figure 8).

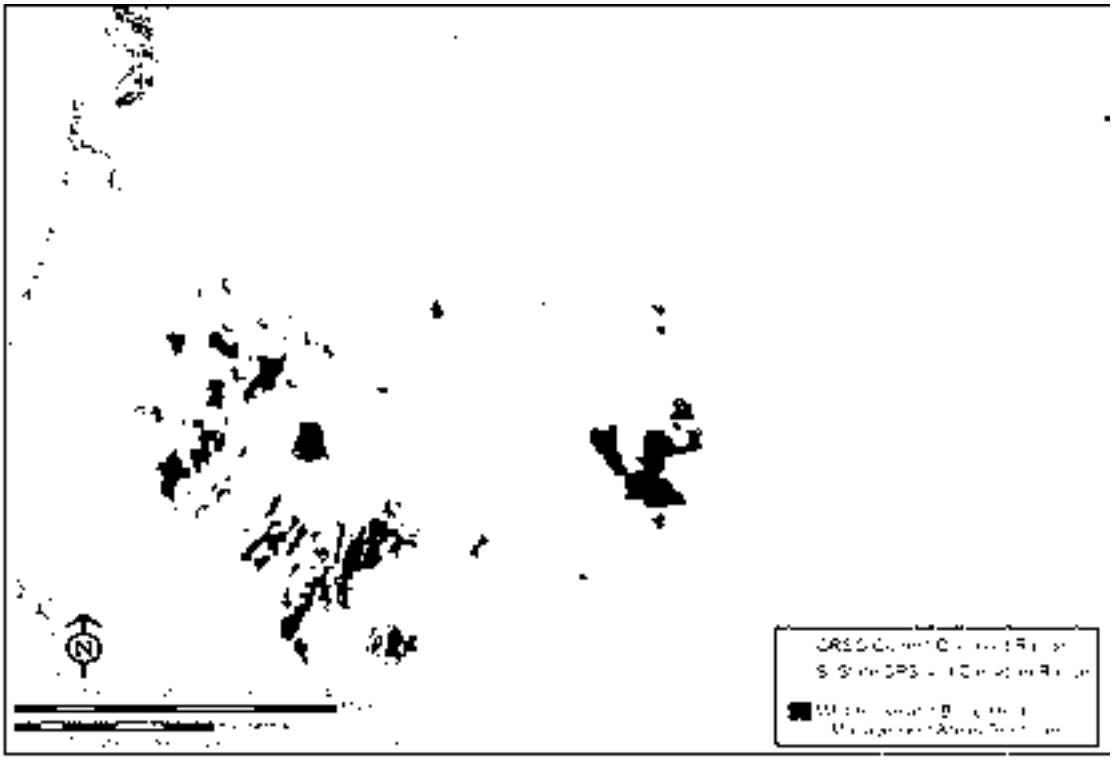


Figure 8 Free-roaming Equid Management Areas within the sage-grouse occupied range

In 2010, the BLM estimated that 31,000 free-roaming equids were found on BLM-administered lands (75 FR 13910, March 23, 2010, p. 13941). Currently, the BLM estimates 58,150 free-roaming equids (about 47,329 horses and 10,821 burros) exist on BLM-administered rangelands in 10 western States, including two States outside the range of the sage-grouse (BLM 2015e). In 2014, USFS estimated that, on lands it manages, there are an additional 7,447 free-roaming equids (Shepherd & Frolli 2015, BLM and USFS, pers. comm.). The number of free-roaming equids on public lands has been over AML for more than 15 years (BLM 2014c, p. 1). The extent to which free-roaming equids occur on land outside of designated Federal management areas is unknown.

The current population of free-roaming equids is estimated to be nearly double the amount that the BLM and USFS have determined can exist in balance with other public land resources and uses (BLM 2015e, p. 1). Free-roaming equids reproduce rapidly and can have rates of increase averaging 15 to 20 percent annually (BLM 2015e, p. 1). Assuming a population of 45,000 animals and a 20 percent annual growth rate, Garrott *et al.* (1991, p. 647) estimated that 9,000 horses must be removed annually to maintain a stable population. The number of horse and burro removals by BLM have not kept this pace in recent years, with removals declining from 8,255 in 2012, to 4,176 in 2013, to 1,863 in 2014 (BLM 2015e, entire). At the same time, numbers of horses and burros in BLM corrals and pastures is close to capacity (BLM 2015e, entire).

Free-roaming equids' use of sagebrush landscapes have different ecological consequences than livestock grazing at both local and landscape scales due to biological and behavioral differences (Beever 2003, pp. 888–890; Beever and Aldridge 2011, p. 273). Equids are generalists, but grasses comprise the majority of their diet throughout the year (McInnis and Vavra 1987, p. 61). Because of physiological differences, a horse forages longer and consumes 20 to 65 percent more forage than a cow of equivalent body mass (Wagner 1983, p. 121; Menard *et al.* 2002, p. 127). Unlike domestic cattle and other wild ungulates, equids can crop vegetation closer to the ground, potentially limiting or delaying recovery of plants (Menard *et al.* 2002, p. 127). Equids tend to move to higher elevations in late spring until early fall, which may increase the interactions with sage-grouse, as sage-grouse often move to higher elevation communities to more mesic habitats with forbs throughout the summer (Beever and Aldridge 2011, pp. 285–286). Conversely, equids tend to spend less time at water, and range farther from water sources than cattle (Beever and Aldridge 2011, p. 286). Because of these differences, greater habitat impacts occur when both horses and cattle are present, compared to when only cattle are present (Beever and Aldridge 2011, p. 286).

As with all herbivores, equid effects on ecosystems vary markedly with elevation, density, season, and duration of use (Beever and Aldridge 2011, p. 273). In some contexts, equid grazing can reduce shrub cover as equids trample, rub against, and consume shrubs (Plumb *et al.* 1984, p. 132; Beever *et al.* 2003, pp. 119–120; Beever *et al.* 2008, p. 180). Equid grazing has also been associated with reduced plant diversity, altered soil characteristics, lower grass cover, lower grass density, and 1.6 to 2.6 times greater abundance of cheatgrass (Beever *et al.* 2008, pp. 180–181). Sage-grouse need grass- and shrub-cover for protection from predators, particularly during nesting season (Connelly *et al.* 2000a, pp. 970–971). Reduction in shrub and grass cover can result in increased predation pressure on both nests and birds. The greatest risk of adverse effects to habitat occurs in the areas with large numbers of horses over AML; the area of greatest concern is Nevada (MZs III, IV, and V)

where free-roaming equid populations are estimated to be more than twice AML.

In addition to adverse effects in sagebrush habitats, free-roaming equids can also negatively affect important meadow and brood-rearing habitats that provide forbs and insects for chick survival (Beever and Aldridge 2011, p. 277; Crawford *et al.* 2004, p. 11; Connelly *et al.* 2004, p. 7–37), as streams and springs within sagebrush ecosystems receive heavy use by horses (Crane *et al.* 1997, p. 380; Beever and Brussard 2000, pp. 243, 246–247). Brood-rearing habitat is often limited in availability compared to other sage-grouse habitats; therefore, any impacts to these areas can adversely affect local populations (NRCS 2015a, p. 44).

Conservation Efforts

Wild Free-Roaming Horses and Burros Act of 1971—The Wild Free-Roaming Horses and Burros Act of 1971, as amended, charges the BLM and USFS with managing wild [free-roaming] equids to achieve a thriving ecological balance with the land (Pub. L. 92–195). The BLM and USFS manage free-roaming equids by conducting surveys, administering fertility control drugs, gathering excess horses, and facilitating adoptions (National Academy of Sciences 2013, pp. 55–73). The BLM plans gathers based on population estimates and vegetation monitoring, but takes into account issues such as areas where equids have moved onto private property or severe local conditions are affecting the health of the herd. The scheduled gathers may be influenced by court orders or emergency situations. Planned gather numbers are based on the available space in holding facilities, anticipated adoptions, and budgets (BLM 2015e, p. 1).

Management of herd size by Federal agencies is an ongoing challenge. Free-roaming equid populations grow rapidly, and in most areas, they have no natural predators (National Academy of Sciences 2013, p. 1). The Wild Free-Roaming Horses and Burros Act (Pub. L. 92–195) requires that free-roaming equid populations be managed at appropriate management levels, and allows for the removal of excess animals for adoption, sale, or destruction. Free-roaming equid management is expensive and often controversial, sometimes limiting options to manage free-roaming equids at appropriate levels (National Academy of Sciences 2013, pp. 1–2).

Federal Plans – The Federal Plans address the impacts of free-roaming equids by prioritizing management in areas most important for sage-grouse conservation (BLM and USFS 2015 entire). Management actions are prioritized for SFAs and PHMAs, and are managed for AML. Rangeland health assessments will be conducted in PHMAs and SFAs, and herd management area plans (HMAPs) will be amended to incorporate sage-grouse habitat objectives. The plans provide that, if needed to achieve AML and sage-grouse habitat objectives, gathers and population growth suppression techniques would be utilized in prioritized areas. Additionally, if needed, free-roaming equids would be removed or excluded from areas following emergencies, such as wildfire or drought. Further, monitoring and adaptive management criteria provide an additional layer of management to address species or habitat declines regardless of the sources of the impact. The BLM has committed to completing the actions within SFAs in the next 5 years; free-roaming equid management in PHMAs will be the next priority after SFAs (BLM 2015h, entire; DOI 2015a, p. 3).

The Federal Plans' direction to manage free-roaming equid populations at appropriate levels reduces impacts from free-roaming equids into the future. The inclusion of sage-grouse objectives in HMAPs ensures that future decision making is done with consideration of sage-grouse ecological needs. Managing SFAs and PHMAs at AML substantially reduces the potential for habitat degradation in those areas. Based on past BLM and USFS plans and planning efforts, we expect the Federal Plans, including these free-roaming equid measures to be implemented for the next 20 to 30 years.

Sheldon-Hart Mountain National Wildlife Refuge Complex—The Hart Mountain National Wildlife Refuge (NWR) removed free-roaming equids and cattle in the 1990s. Cattle were also removed from the Sheldon NWR in the 1990s. The last gather to remove all equids from Sheldon NWR occurred in the fall of 2014 (Collins, USFWS, pers. comm. 2015). Recovery of plant communities in sagebrush ecosystems, aspen woodlands, and riparian habitats have been documented since these removals (Earnst *et al.* 2012, entire; Davies *et al.* 2014, entire; Batchelor *et al.* 2015, entire). Together, free-roaming equid and livestock removals from Sheldon-Hart Mountain NWR have improved conditions for 9.1 percent of the sage-grouse modeled breeding habitat in MZ V. This area has been identified as important to long-term sage-grouse viability due to the high density of breeding birds and the connectivity to adjacent populations (USFWS 2014a, entire).

Candidate Conservation Agreements—CCAAs and CCAs, which together can cover up to about 1.4 million ha (3.5 million ac) in Oregon, include conservation measures for free-roaming equids. To date, approximately 745,000 ha (1.8 million ac) are currently enrolled in CCAAs rangewide. Measures include monitoring of free-roaming equid impacts in sage-grouse habitat and reporting to BLM for consideration of horse and burrow relocation (USFWS 2014d, p. 52; USFWS 2015b, p. 55; USFWS 2015c, p. 53; USFWS 2015d, p. 54; USFWS 2015e, p. 53; USFWS 2015f, p. 54). Although not regulatory in nature, these measures will assist BLM in their management of free-roaming equids.

Free-Roaming Equid Summary

In our 2010 finding, we reported that approximately 36,000 free-roaming equids occurred in 10 western States (including 2 States outside the range of sage-grouse) and HMAs/Territories occupied approximately 12 percent of the range of sage-grouse. The number of free-roaming equids has increased since 2010, with about half occurring in Nevada where estimated free-roaming equid population levels are twice AML. Since our 2010 finding, the Federal Plans provide a suite of actions that, with full implementation, will manage free-roaming equids to substantially reduce potential impacts to sage-grouse, as recommended by the COT Report (USFWS 2013, pp. 46–47). Some localized degradation of habitat will likely continue, particularly in Nevada, as implementation of these actions will take time. However, full implementation of the measures outlined in the Federal Plans will reduce impacts in the most important areas for sage-grouse (see *Sagebrush Landscape Conservation Planning* for a detailed discussion of conservation measure implementation and effectiveness). Important habitats that are designated as SFAs will receive priority management to reduce wild-equid population levels that can exist in the sagebrush ecosystem without adverse effects to sage-grouse habitats (BLM 2015h, entire). In addition, conservation efforts directed at these issues have been implemented on other lands since 2010, most notably the removal of horses from Sheldon NWR in 2014, which provides habitat for an important breeding bird stronghold. As a result, while some localized impacts to habitat are likely to continue in the near future, management measures by the BLM and USFS substantially reduce

the impact of free-roaming horses and burros across the range of the species.

Conifer Encroachment

In 2010, we evaluated the effect of pinyon juniper encroachment and concluded that it contributed to habitat fragmentation, particularly in the Great Basin portion of the range. Pinyon and juniper and some other native conifers were expanding due to decreased fire-return intervals, livestock grazing, and increases in global carbon dioxide concentrations associated with climate change, among other factors. The 2010 finding recognized the potential value of conifer removal treatments, particularly when done in the early stages of encroachment when sagebrush and forb understory is still intact (75 FR 13910, March 23, 2010).

Prior to 1860, two-thirds of the Great Basin was treeless and occupied by sagebrush ecosystems (Miller *et al.* 2008, p. 13), but since that time the extent of pinyon-juniper has increased ten-fold (Miller and Tausch 2001, pp. 15–16). Based on 1999–2012 imagery (LANDFIRE 1.3.0), approximately 4.7 million ha (more than 11.5 million ac) of conifer woodlands occur within the current range of sage-grouse, comprising more than 6 percent of the current occupied range. Conifer encroachment is of greatest concern in MZs III, IV, and V, but is present at least locally in all MZs (USFWS 2013, pp. 23–36).

Conifer expansion presents a stressor to sage-grouse because sites invaded by conifers do not provide suitable sage-grouse habitat (Factor A). For example, when juniper increases in mountain big sagebrush communities, shrub cover declines and the season of available succulent forbs is shortened due to soil moisture depletion (Crawford *et al.* 2004, p. 8). Sage-grouse have been found to avoid areas where conifers have encroached (Doherty *et al.* 2010b p. 1547; Casazza *et al.* 2011, p. 163; Baruch-Mordo *et al.* 2013, p. 239). Trees may also offer perch sites for avian predators, potentially increasing the predation risk (see *Predation,* below).

The extent of conifers within the species' range is anticipated to expand in the future unless effectively treated. Rangewide, 6 to 13 percent of sage-grouse habitat may be at risk of conifer encroachment (Manier *et al.* 2013, p. 92). The most pronounced risks are across the Great Basin (Manier *et al.* 2013, p. 92) where approximately 35 percent of sagebrush habitat is estimated to be at high risk of alteration by pinyon-juniper in 30 years, 6 percent at moderate risk, and 60 percent at low risk (Connelly *et al.* 2004, pp. 7–8 to 7–14). While pinyon-juniper expansion appears less problematic in the eastern portion of the range (MZs I, II and VII) and silver sagebrush communities (primarily MZ I), conifer encroachment is an impact mentioned in Wyoming, Montana, and Colorado State sage-grouse conservation plans, indicating that this is of some concern in these States as well (Stiver *et al.* 2006, pp. 2–23). Based upon current habitat information, approximately 10 percent of the occupied range in the Great Basin and 2 percent of the occupied range in the Rocky Mountains are impacted by conifer encroachment (USFWS 2015a). Efforts are under way to more precisely identify areas at risk of conifer encroachment; that information is currently unavailable, but will help target removal efforts in the future. Conifer encroachment rates have been estimated between 0.4 and 4.5 percent annually (Sankey and Germino 2008, p. 413). Encroachment rates are predicted to increase with long-term changes in climate (see Climate Change and Drought, below; Neilson *et al.* 2005 cited in Miller *et al.* 2011, p. 145).

Miller *et al.* (2005, p. 24) characterized three stages of woodland succession: Phase I, where conifer are present but shrubs and herbaceous species remain the dominant vegetation that influence ecological processes (*e.g.,* hydrologic, nutrient and energy cycles); Phase II, where conifer are co-dominant with shrubs and herbaceous species, resulting in modifications of ecological processes; and Phase III, where conifer becomes the dominant species, with reduced shrub canopy cover and herbaceous species diversity. Approximately 80 percent of sites invaded by conifers are still in Phase I and Phase II, where some native shrubs and bunchgrasses are present (Miller *et al.* 2008, p. 9). Transition of sagebrush habitats from Phase II to Phase III is of particular concern because treatment options become more limited in Phase III (Johnson and Miller 2006, p. 8). Without intervention, 75 percent of conifer encroachment in the western portion of the sage-grouse range may transition into Phase III within the next 30–50 years (Miller *et al.* 2008, p. 12).

Conservation Efforts

Since 2010, considerable effort has been undertaken to remove conifers, thus reducing the impacts of conifer encroachment to sage-grouse habitat. Federal Plans and State Plans provide commitments to reduce conifer encroachment. The SGI has been actively treating conifer encroachment on private lands across the species' range. Lastly, private land owners have pursued conifer removal projects, including commitments associated with enrollment in CCAAs.

The effectiveness of these current and planned treatments varies with the technique used and proximity of the site to invasive plant infestations, among other factors (Knick *et al.* 2014, p. 553). The plant-community response to these treatments is not always consistent or predictable, and succession may not move in a desirable direction following treatment (Miller *et al.* 2014, entire). Areas treated for conifers have the greatest likelihood of sage-grouse using them after treatment when implemented in areas still containing some sagebrush, near mesic habitats, and near sage-grouse populations (Cook 2015, p. 96). Sage-grouse appear to be more likely to use treated areas when suitable habitat is limited in an area (Frey *et al.* 2013, pp. 269–270). We are not aware of any study documenting a direct correlation between conifer treatments and sage-grouse population response. Successful treatment of conifers in the future requires targeted management of conifers in the most important habitats for sage-grouse.

Sage Grouse Initiative—Most of the conifer treatments completed to date have been accomplished on private lands by the SGI. Since 2010, SGI has removed conifers from 163,995 ha (405,241 ac) primarily in Phase I and II encroachment areas in the Great Basin (MZs III, IV, V) (NRCS 2015a, p. 7). Eighty-four percent of these treatments occurred in PACs in the Great Basin. Nearly half of these acres are in Oregon (MZ V), where conifer encroachment was reduced by 68 percent on private lands (NRCS 2015a, p. 2). The SGI in Oregon targeted conifer removal in PACs near active leks and other occupied seasonal habitats (NRCS 2015a, p. 18). SGI will invest an additional 80 million dollars over the next 3 years to implement restoration and enhancement projects on approximately 1.4 million ha (3.4 million ac), including conifer treatment projects (NRCS 2015a, p. 29; NRCS 2015b, p. 6). Given the past accomplishments and the continued dedication of NRCS to sage-grouse conservation, we are confident that these investments in conifer treatments will continue.

Candidate Conservation Agreements—Approximately 745,000 ha (1.8 million ac) are currently enrolled in CCAAs rangewide. Lands enrolled in CCAAs require removing undesirable conifers/junipers encroaching into sage-grouse habitats (USFWS 2014d, p. 47; USFWS 2015b, p. 50; USFWS 2015c, p. 48; USFWS 2015d, p. 49; USFWS 2015e, p. 48; USFWS 2015f, p. 49).

Federal Plans—The Federal Plans completed in 2015 include commitments to remove conifers through implementation of the FIAT. The FIAT assessments include treatment schedules for mechanical and prescribed fire removal. Conifer removal is prioritized in areas closest to occupied sage-grouse habitat and where juniper encroachment is in Phase I or Phase II. Cumulatively, the FIAT step-down assessments identify approximately 3 million ha (7.4 million ac) of conifer treatments for five priority landscapes (*i.e.,* Central Oregon, Northern Great Basin, Snake/Salmon/Beaverhead, Southern Great Basin, and Western Great Basin/Warm Springs Valley) in the Great Basin region (MZs III, IV, and V).

Conifer Encroachment Summary

The potential threat of conifer encroachment has changed since the last status review. In 2010, we found habitat fragmentation, due in part to conifer encroachment, to be a threat to the species; regulatory mechanisms and conservation efforts were insufficient to address this threat. Based on past trends and the current distribution of pinyon-juniper relative to sagebrush habitat, we anticipate that expansion will continue at varying rates across the landscape and cause further loss of sagebrush habitat. However, projects to remove conifers near sage-grouse habitat have been implemented for PACs, and regulatory measures included in Federal and State plans have resulted in a paradigm shift in land management objectives and practices that will further reduce conifer impacts on sage-grouse and sagebrush habitat. The Federal agencies have committed to continue conifer removal projects in the most important habitats identified in the COT Report (USFWS 2013, pp. 16–29) and the FIAT Assessments (BLM 2015a, entire). For a detailed discussion of conservation measure implementation and effectiveness, see *Sagebrush Landscape Conservation Planning*.

Mining

In 2010, we evaluated mining as part of the energy development assessment and concluded that energy projects contributed to habitat loss and fragmentation. Mining was identified as occurring across the species' range, but was most prevalent in Nevada (MZs III, IV, and V) and Wyoming (MZs I and II). At that time, regulations addressing effects from mining were determined to be inadequate. As a result, the 2010 finding concluded that habitat loss and fragmentation, caused in part by mining and inadequate regulatory mechanisms, were significant threats to the species such that listing was warranted under the Act (75 FR 13910; March 23, 2010).

Mining has occurred throughout the range of sage-grouse since the mid-1800s (Nevada Mining Association 2015), and mining in sagebrush habitats continues today (American Mining Association 2014). Mining is generally divided into three categories, based on the type of mineral extracted: Locatable, leasable, and salable minerals (BLM 2015f, p. 1). Additionally, each of these mining categories has its own specific regulations. Locatable minerals are hard rock minerals whose extraction is subject to the General Mining Law of 1872, such as gold, silver, and copper. Leasable minerals include resources such as coal, oil, and gas. Saleable minerals are more common, lower value resources, such as sand and gravel (BLM 2015f, p. 1). The extent of mining for any individual mineral varies widely, as does the size and activity of individual mines, making generalizations of impacts difficult.

Consistent with our 2010 finding (70 FR 13910, March 23, 2010, pp. 13948–13949), we do not have a comprehensive dataset about existing and proposed mining activity to do a quantitative analysis of potential impacts to sage-grouse. In 2010, we were aware of approximately 25,500 ha (63,000 ac) of existing mining-related disturbance within the range of sage-grouse; those mining projects and associated impacts are likely continuing today. These projects likely removed sagebrush habitat when first implemented (70 FR 13910, March 23, 2010, pp. 13948–13949) and continue to have indirect effects to sage-grouse populations near the project sites through disturbance from noise, human presence, equipment, and explosives (Moore and Mills 1977, entire). Overall, the extent of these projects directly affects less than 0.1 percent of the sage-grouse occupied range. Although direct and indirect effects may disturb local populations, ongoing mining operations do not affect the sage-grouse rangewide.

Currently, surface and subsurface mining activities are conducted in all 11 States within the sage-grouse range (Minerals Education Coalition 2015; National Mining Association 2014a BLM 2011, entire). Minerals are not distributed evenly across the sage-grouse landscape, and as a result, mining activities tend to be localized or regional. Coal is primarily found in the Rocky Mountain States, while lithium has been mined exclusively in Nevada (although a more recent discovery has been made in southwestern Wyoming) (Mining.com 2014). Precious metals, while being mined to some degree in all 11 States across the sage-grouse range, primarily occur in Nevada and Colorado (USGS 2013).

By reducing and fragmenting habitats and disturbing individual sage-grouse, mining can directly or indirectly affect sage-grouse. Surface and subsurface mining can reduce sagebrush habitat, ranging from potential losses of many thousands of hectares at large industrial mines to 4 ha (10 ac) or less at smaller mining operations (Factor A). Habitat loss and fragmentation could preclude movements of sage-grouse between seasonal habitats (Connelly *et al.* 2011a, pp. 82–83; Knick and Hanser 2011, entire). In addition, indirect effects associated with mining include disturbance from increased human presence, traffic, blasting, reduced air quality, noise, increased dust, and an increased abundance of human-associated predators (Factor E) (Moore and Mills 1977, entire; Brown and Clayton 2004, p. 2). Mining operations can also contaminate water sources in sage-grouse habitats (Moore and Mills 1977, pp. 115, 133; Adams and Picket 1998, p. 486; Ramirez and Rogers 2002, pp. 434–435). Settling ponds near mines could also provide breeding areas for mosquitos and increase the risk of WNv (Walker and Naugle 2011, p. 132).

Projections of future mining activities are difficult, as market prices for any specific mineral commodity vary greatly. The overall extent of mining activities in the United States has remained fairly consistent over the past 5 years (National Mining Association 2014b, p. 1), although coal production, including the number of coal mines, within the range of sage-grouse has generally declined since 2008 (EIA 2015, p. 93). We anticipate that some amount of mining will occur within the range of the sage-grouse indefinitely, depending on the extent of the desired mineral resource, development of new mining techniques, and market conditions. Conservation efforts are discussed below.

Conservation Efforts

Since 2010, a number of landscape-scale efforts have been undertaken to reduce impacts to sage-grouse across the range, including habitat loss and fragmentation from mining. The Federal Plans are the primary tools for managing mining impacts to sage-grouse. State plans in Wyoming and Montana include regulatory mechanisms to address impacts from mining. These conservation efforts are consistent with the recommendations in the COT Report (USFWS 2013, p. 49). The Federal and State plans, as well as individual efforts

reported to the CED, are discussed in detail below.

Federal Plans – In the United States, mining activity is authorized under an array of statutes affecting resources administered or leased by the BLM, both on federally administered lands as well as other lands where mineral rights have been reserved to the United States (*i.e.,* split-estate lands). The BLM's statutory and regulatory authority depends upon the nature of the mineral deposit (*i.e.,* leasable, salable, or locatable). The General Mining Law of 1872 called for all locatable mineral deposits on Federal lands to be free and open to exploration and purchase (BLM 2011c, p. 3), limiting the ability to manage these activities for sage-grouse conservation. Only areas that have been withdrawn to mineral entry by a special act of Congress, regulation, or Secretary of the Interior public land order are truly closed to locatable mineral entry. Coal is administered by the Office of Surface Mining Reclamation and Enforcement, which in turn may delegate their authority to the States.

The majority of mining activity within the sage-grouse range occurs on Federal lands where the Federal Plans direct the management of mineral development (BLM and USFS 2015, entire). Except in Wyoming, all PHMA is closed to new mineral material sales and leasable mineral operations, with exceptions for Free Use Permits and the expansion of existing operations. Free Use Permits allow governmental agencies and nonprofit organizations to extract and use mineral materials for up to 10 years (BLM 2013b, p. 1). Any proposed expansion of existing mining operations in PHMA would require design features to minimize impacts and would require mitigation of any impacts. Wyoming remains open to new mining activities within PACs, but those activities are restricted by a disturbance and density cap as per the Wyoming Plan (see *Wyoming State and Federal Plans,* above).

The Federal Plans designate the most important sagebrush habitat as SFAs where locatable mineral withdrawal is recommended, except in Wyoming where only a portion is recommended for withdrawal. For proposed coal projects, the BLM will determine at the time of a new lease if an area is suitable for development. During that evaluation, PHMA will be considered essential for sage-grouse conservation, ensuring that decisions are made with consideration of sage-grouse conservation needs. General sage-grouse habitats (GHMA) are open to mineral development, but are subject to stipulations designed to protect sage-grouse. In addition to these mining-specific measures, no discretionary anthropogenic activities in PHMA would be allowed to impact more than 3 percent (or 5 percent in Wyoming and Montana) of the total sage-grouse habitat within a Biologically Significant Unit (BSU). Any authorized activities that result in loss of sage-grouse habitat would require mitigation in an amount or manner that results in a net conservation benefit to the species. Further, in response to monitoring, activities allowable under the Federal Plans may be adjusted based on adaptive management criteria to provide an immediate, corrective response to identified triggers for population or habitat declines. Due to limitations explained above, the disturbance caps may have limited applicability to some types of mining activities, but do place limits on other disturbance if adaptive management triggers are exceeded.

These measures reduce potential mining impacts to sage-grouse on approximately 14 million ha (35 million ac) of PHMA. The restrictions on leasable and salable mining in PHMA eliminate nearly all potential habitat loss associated with those activities. To the limited extent those activities could occur in PHMA, design features would be required to minimize disturbance, and mitigation would be required for any impacts. The laws governing locatable mineral development and coal mining limit the ability to completely remove this threat from PHMA. Locatable mineral development is likely to continue in the future, but it is difficult to know the location or extent of future mining activity within the range of sage-grouse. The SFAs contain the habitats and populations most important to the long-term conservation of the species and needing protection from future mining impacts, and at this time we are currently unaware of planned mining activity in these areas that rise to the level of causing population-level impacts to sage-grouse.

Within the areas of greatest conservation importance (SFAs), DOI will recommend withdrawal from locatable mineral entry. We support the recommendations for mineral withdrawal in SFAs that would remove potential impacts on approximately 4 million ha (10 million ac) of sage-grouse habitat. In Wyoming, the BLM adopted the State strategy, which has proven to be effective in directing activities outside of habitat and limiting impacts when they do occur (see *State Plans,* below). These measures minimize mining impacts in priority habitats for the life of the management plans, estimated to be the next 20 to 30 years. Based on what we know today, no mining activities are likely to result in loss of these important areas for conservation, but we recognize that economic changes or technological advances may increase the risk of development in the future. Therefore, the long-term protection of the sage-grouse habitat in the SFAs from locatable mineral development will ensure that these important populations are conserved into the future.

State Plans – State plans in Wyoming and Montana include regulatory mechanisms that reduce impacts to sage-grouse from mining on applicable lands. The Wyoming and Montana Plans include controlled surface use, lek buffers, and seasonal and noise restrictions to reduce impacts in Core Areas (Montana EO 10–2014, pp. 14–19; Wyoming EO 2015–4, entire).

The States also implement Federal regulations for coal mining. Coal mining is regulated by the Surface Mining Control and Reclamation Act of 1977 (SMCRA), which is implemented by the Office of Surface Mining and Reclamation. This Federal law requires consideration of fish and wildlife resource information for the permit and adjacent area, along with a detailed analysis by the permittee on how impacts will be minimized or avoided. Permittees must also include a plan for enhancement of fish and wildlife resources on the permit area. The OSM has delegated the regulatory authority for implementing the SMCRA to five States within the range of sage-grouse: Wyoming, Montana, Utah, Colorado, and North Dakota. Sage-grouse, therefore, must be considered in the implementation of the SMCRA, and coal mining, in those States. The implementation agency must consider impacts on fish and wildlife, including sage-grouse. Sage-grouse are also typically addressed in all States within its range during the development of coal resources simply due to its status as a State trust resource.

Mining Summary

The impacts of mining have been reduced since the last status review. In 2010, we concluded that habitat fragmentation, due in part to mining, was a significant threat to the species, and regulatory mechanisms were not sufficient to address the threat. The scattered nature and intensity of mining, coupled with market uncertainty, makes it difficult to accurately predict impacts to sage-grouse on a rangewide basis. If future locatable mineral development occurred, it could have local impacts to leks and populations. This type of mining impact is most likely to occur in

Nevada where locatable mineral development has occurred the most historically; however, predictions of future mining activities would be speculative. The regulatory mechanisms in the Federal and State Plans will be effective in reducing potential mining impacts on State owned-lands, and in the case of Wyoming and Montana, in Core Areas. Controlled surface use directs activities outside of sage-grouse habitat to minimize the potential for habitat loss and fragmentation. Indirect impacts from human activity, noise, and traffic are reduced by lek buffers and seasonal and noise restrictions. When mining does occur, disturbance caps ensure that no more than 3 percent of the habitat in an area is impacted in most areas, and no more than 5 percent in Wyoming and Montana. Collectively, the Federal and State plans reduce impacts related to various types of mining on 90 percent of sage-grouse breeding habitat (see *Sagebrush Landscape Conservation Planning* for a detailed discussion of conservation measure implementation and effectiveness).

Renewable Energy

In 2010, we evaluated the impacts of renewable energy development (wind, solar, and geothermal) on sage-grouse, and concluded that it was a threat to the species (75 FR 13910, March 23, 2010, pp. 13949–13954). At that time, renewable energy development was increasing across the species' range, and regulatory mechanisms were inadequate to address impacts to the species.

Development of commercially viable renewable energy continues to increase across the sage-grouse range (EIA 2015, entire; DOE 2014, entire). Studies examining the impacts of renewable energy development on sage-grouse populations are limited. Renewable energy facilities typically require many of the same features for construction and operation as do nonrenewable energy resources, and, therefore, we anticipate their impacts will be similar. These include direct habitat loss and habitat fragmentation (Factor A) through construction and operation of an energy facility, and indirect effects resulting from the presence of power lines, human activity, introduction of invasive plants and novel predators, and noise (Connelly *et al.* 2004, pp. 7–40 to 7–41; Holloran 2005, p. 1; Pruett *et al.* 2009, p. 1258; Patricelli *et al.* 2013, p. 231; Howe *et al.* 2014, p. 46; see *Nonrenewable Energy, Mining,* and *Infrastructure*).

Given the incentives provided by the Energy Policy and Conservation Act, and State mandates, we anticipate the development of commercially viable renewable energy will continue into the future. However, since 2010, conservation efforts have been implemented to direct the location of development to reduce renewable energy impacts across the occupied range of the species. The potential future extent and impacts of the three primary kinds of renewable energy within the occupied range of sage-grouse (wind, solar, and geothermal) are discussed further below, as well as the conservation efforts that ameliorate the effects.

Wind

Wind energy development is facilitated by Federal and State energy laws and policies that encourage its development. In 2008, the DOE issued an initiative to increase wind energy production by 20 percent by 2030 (DOE 2014, entire). Idaho and California provide tax incentives and loan programs for renewable energy development (State of Idaho 2015; California Energy Commission 2015), and Colorado and Nevada have laws requiring increased renewable energy production (AFWA and USFWS 2007, p. 8; Nevada Public Utilities Commission 2015). With the advent of Federal tax credits for wind energy facilities, wind development increased 20 percent in 2013 (Esterly and Gelman 2013, p. 3).

The current amount of implemented wind development within the species' occupied range is low. A geospatial assessment of currently implemented projects reveals that, within the species' occupied range, about 1,400 ha (3,500 ac) have been impacted by wind energy development; these projects occur in MZs I, II, III, and IV and impact less than approximately 0.002 percent of the occupied range (USFWS 2015a). The BLM has issued several ROWs in support of continued and future wind development that may influence sage-grouse habitats, but actual development of these ROWs into commercial facilities is not certain (Manier *et al.* 2013, p. 61).

Wind energy has the potential for development throughout the sage-grouse's occupied range. The National Renewable Energy Laboratory has modeled and mapped the wind resources in each of the States and classified the potential for wind power generation. All MZs contain areas where wind resources have been identified as economically developable over the next 20 years. More than 14 percent of the sage-grouse occupied range has high potential for commercial wind power, with MZs I and II having the greatest potential (BLM 2005b, p. 5–103; NREL 2014, p. 2). In a separate assessment, the BLM estimated that 600 km^2 (232 mi^2) of BLM-administered lands could be developed within the sage-grouse's range before 2025 (BLM 2005b, pp. ES–8, 5–2). We are aware of four preliminary, planning-stage wind project proposals in Montana (MZ I) that may encroach into sage-grouse habitat (USFWS 2015a). Adverse impacts to sage-grouse could occur if these projects were implemented, but whether or not these proposals may be further refined, or even constructed, is unknown.

Wind development projects can have a variety of direct and indirect impacts to sage-grouse (LeBeau *et al.* 2014, entire). Habitat loss and fragmentation can occur from the construction of wind farms and associated facilities such as power lines, roads, power substations, meteorological towers, and work facilities (BLM 2005b, pp. 3.1–3.4). Sage-grouse, similar to other lekking birds, have been found to avoid human-made structures such as power lines and roads (*e.g.,* Holloran 2005, p. 1; Pruett *et al.* 2009, p. 1258). Wind power facilities may provide perches and subsidized food that attracts predators and increases predation on sage-grouse (LeBeau *et al.* 2014, p. 528). Noise from turbines or associated human activities may interfere with normal foraging, resting, and breeding behaviors and contribute to higher stress levels and reduced fitness (Patricelli *et al.* 2013, p. 231). Sage-grouse could be killed by flying into turbine rotors or towers (Erickson *et al.* 2001, entire), although reports of this happening are limited.

Solar

Like other forms of renewable energy, solar energy development has increased in recent years, but minimal activities have occurred within the range of sage-grouse. Currently, only two solar projects have been constructed within the range of sage-grouse, in Nevada and Oregon (USFWS 2015a). The primary impact from solar facilities is habitat loss due to the installation of solar panels and diversion of water to support the facilities (Manier *et al.* 2013, p. 66). However, at this time large-scale solar-generating systems have not contributed to any calculable direct habitat loss for sage-grouse.

Future impacts from solar energy development are forecast to be extremely limited. In 2012, the BLM assessed potential solar development on their lands within six western States (BLM 2012). That assessment provided direction to exclude solar development from identified sage-grouse habitat on BLM public lands in Nevada and Utah.

Future development on private lands is possible, but the best available information does not indicate that any large-scale solar projects are planned on private lands within the range of sage-grouse at this time.

Geothermal

Geothermal exploration and development activity on Federal lands has been sporadic, but activity has increased in recent years. Currently, four geothermal facilities have been constructed within the range of sage-grouse in MZs III and IV, totaling 57,384 ha (141,800 ac; Manier *et al.* 2013, p. 70). The BLM has approved several geothermal leases throughout MZs III, IV, and V and covering approximately 0.29 percent of the occupied range, but the potential of these leases being developed is unknown. Many of these leases have existing stipulations protecting sage-grouse seasonal habitats (BLM and USFS 2015, entire). No geothermal development has occurred in MZs I and II, although geothermal potential exists throughout these MZs (Manier *et al.* 2013, p. 70).

The greatest potential for future commercial geothermal energy development is within MZs III, IV, and V (EIA 2009, entire). Currently, approximately 1,800 km^2 (694 mi^2) of active geothermal leases exist on public lands primarily in the Southern (MZ IV) and Northern Great Basin (MZ III) (Knick *et al.* 2011, p. 245). However, it is unknown what portion of these leases will ever realize an operational geothermal project. Nevada is predicted to experience the greatest increase in geothermal growth across the United States (BLM and USFS 2008, pp. 2–35).

Impacts from geothermal energy development have not been studied, but are expected to be similar to oil and gas development (Manier *et al.* 2013, p. 70). Direct habitat loss could occur from development of well pads, structures, roads, pipelines, and transmission lines. Sage-grouse could be disturbed by human activity during installation and operation of geothermal projects (EIA 2009, entire). Water needed for installation and operation of geothermal facilities could deplete local water sources and potentially impact brood-rearing habitat.

Conservation Efforts

Since 2010, State and Federal agencies have worked collaboratively to develop regulatory mechanisms to reduce or eliminate the potential threat of new renewable energy development. The BLM and USFS amended or revised Federal Plans to restrict development in priority habitats. States developed and implemented State plans that govern development on State and private lands. These efforts are in addition to direction to conserve sage-grouse that was provided by wind, solar, and geothermal assessments conducted by the BLM.

Federal Plans – The Federal Plans substantially reduce potential impacts to sage-grouse from renewable energy development on more than half the species' occupied range. The Federal Plans generally exclude new utility-scale and commercial solar and wind developments on 14 million ha (35 million ac) of PHMA (BLM and USFS 2015, entire). Within the 13 million ha (32 million ac) of GHMA, renewable energy project locations are to be prioritized for development outside sage-grouse habitat. In addition, in Nevada, California, Utah, and Colorado, the Solar Energy Development Programmatic Environmental Impact Statement (EIS) (BLM 2012, entire) excludes solar development in sage-grouse habitat, protecting a majority of the habitat areas on BLM lands with solar potential. Based on a geospatial assessment of these measures, the Federal Plans reduce the percentage of modeled breeding habitat potentially impacted by solar development from 15 percent to less than 1 percent and by wind development from 42 percent to 6 percent.

For geothermal projects, NSO is required in the 14 million ha (35 million ac) of PHMA for all States except Nevada and Wyoming. In Nevada, limited geothermal development could occur on Federal lands if it is determined that sage-grouse will not be impacted (BLM and USFS 2015, entire). In Wyoming, geothermal projects are subject to use restrictions including disturbance caps. Geothermal projects are allowed in GHMA, with measures such as timing limitations to minimize impacts. Priority will be given first to leasing and authorizing developing geothermal projects outside of PHMA and GHMA, then to non-habitat areas within PHMA and GHMA, and lastly to the least suitable sage-grouse habitat. Based upon a geospatial assessment of the land uses, the Plans reduce the percentage of breeding habitat potentially impacted by geothermal development from 33 percent to 4 percent (USFWS 2015a).

State Plans – Three State Plans provide regulatory mechanisms that effectively reduce impacts from renewable energy development in that State. In Wyoming, the Wyoming Plan does not allow wind energy development, the primary type of renewable energy pursued in Wyoming, in Core Areas, effectively removing this potential threat on approximately 6 million ha (15 million acres) of important sage-grouse habitat. Since 2007, Wyoming has denied 27 lease applications for wind development on State trust lands due to this restriction in Core Areas. On State lands or where State authorizations are required, Montana's Plan requires avoidance of wind development in Core Areas and recommends no such development within 4 miles of active leks in general habitat (unless best available science demonstrates there will be no decline in sage-grouse populations) (Montana EO 10–2014, pp. 18, 19, 21). Oregon's Plan requires avoidance, minimization, and compensatory mitigation actions for development in sage-grouse habitat on State and private land and, in conjunction with BLM's Federal Plan, caps the amount of disturbance on sage-grouse core habitat to 3 percent per PAC (Oregon OAR 635–140–0025, entire; and Oregon OAR 660–023–0115, entire).

Renewable Energy Summary

In 2010, renewable energy was identified as a potential contributor to habitat fragmentation, and we concluded that regulatory mechanisms were not sufficient to address the threat in the future. Since 2010, regulatory mechanisms provided by Federal Plans and Wyoming, Montana, and Oregon Plans that eliminate or restrict most new renewable energy development in important sagebrush habitats substantially reduce this potential impact on approximately 90 percent of the sage-grouse breeding habitat. Some renewable energy development will occur in the future, primarily on private land or in GHMA, but it is impossible at this time to predict if, where, or how much development could occur. Avoidance and minimization measures included in the Wyoming, Montana, and Oregon Plans and the Federal Plans would reduce potential impacts if those projects did occur (see *Sagebrush Landscape Conservation Planning* for a detailed discussion of conservation measure implementation and effectiveness), consistent with recommendations in the COT Report (USFWS 2013, pp. 43–44). Based on previous land use planning efforts, we expect these regulatory measures to be in place for the next 20 to 30 years.

Urban and Exurban Development

In 2010, we evaluated the impact of urban and exurban development together with agricultural conversion and infrastructure, and determined that collectively those land uses were contributing to habitat fragmentation (75 FR 13910, March 23, 2010, p. 13931).

Furthermore, the 2010 finding concluded that habitat fragmentation and inadequate regulatory mechanisms were threats to the species such that listing was warranted under the Act (75 FR 13910, March 23, 2010).

Impacts from European settlement began in the southwestern portion of the sage-grouse range (MZ III) as early as the 1600s and were widespread in the northern portion of the range by the mid-1800s (Schroeder *et al.* 2004, pp. 371–372). Today, urban and exurban development are part of the human footprint on the landscape along with other anthropogenic features, such as roads and power lines (Leu *et al.* 2008, p. 1119; Bar-Massada *et al.* 2014, p. 429). We consider urban areas to be those areas that are densely developed residential, commercial, and industrial built-up areas (U.S. Census Bureau 2012, p. 1) and typically have a housing density of more than one unit per 0.4 ha (more than one unit per ac) (Brown *et al.* 2005, p. 1853). Exurban development includes both development at the fringe of urban areas and rural residential development, typically with a housing density of one unit per 0.4 to 16 ha (1 to 40 ac) (Brown *et al.* 2005, p. 1853). Exurban development has been one of the fastest growing land uses in the United States in recent years (Hansen *et al.* 2005, pp. 1893–1894; Theobald 2005, p. 1).

Most urban development is at the edge of the sage-grouse range while exurban development is scattered throughout the range, though limited to private lands (Connelly *et al.* 2004, p. 7–25; Knick *et al.* 2011, p. 212). Major urban areas include the Columbia River Valley in Washington (MZ VI), the Snake River Valley in Idaho (MZ IV), and the Bear River Valley in Utah (MZ II) (Connelly *et al.* 2004, p. 7–25). Using the information in Theobald 2014 (entire), we completed a geospatial assessment of 2010 Census data and estimated that urban and exurban development directly affects less than 1 percent of the sage-grouse occupied range. Indirect areas of influence related to increased predator impacts may extend up to 3.0 km (1.86 mi) from these direct footprints (Bui *et al.* 2010, p. 65). Factoring in these indirect effects, urban and exurban development could influence approximately 12.4 percent of the sage-grouse's occupied range. Since human population data only considers primary residences, the impact of exurban development in rural areas, especially areas affected by seasonal and recreational use, is likely underestimated (Brown *et al.* 2005, p. 1852).

Urban development affects sage-grouse habitat through the removal of vegetation and subsequent construction of buildings and associated infrastructure (Factor A; Knick *et al.* 2011, p. 217). In contrast to urban areas, exurban areas may continue to provide some sagebrush habitat, but it is typically less suitable due to associated anthropogenic disturbances (Connelly *et al.* 2004, p. 7–26). Both urban and exurban development can result in an increase in predation from pets and novel predators typically associated with humans (*e.g.,* ravens, skunks [*Mephitis mephitis*], fox), invasive plants, and recreation impacts. Noise associated with urban and exurban development may also affect breeding activity and other sage-grouse behavior (Factor E); however, little information is available that assesses this impact relative to urban activities (Blickley *et al.* 2012, p. 470). Sage-grouse avoid human development for nesting and brood-rearing (Aldridge and Boyce 2007, p. 508). Approximately 99 percent of active leks are in landscapes with less than 3 percent developed lands; whereas inactive leks have more than 25 times the development and human density of active leks (Wisdom *et al.* 2011, p. 462; Knick *et al.* 2013, p. 1547). Sage-grouse extirpation was determined to be most likely in areas that had a human population density of at least four persons per 100 ha (four persons per 0.01 km^2 or 247 ac) (Aldridge *et al.* 2008, pp. 983 and 991).

Human populations have increased in size and spatial extent over the past century, particularly in the western portion of the sagebrush biome (Stiver *et al.* 2006, Appendix C–2; Torregrosa and Devoe 2008, p. 10). Between 2000 and 2039, the U.S. population is projected to increase by 29 percent, with much of that increase likely to happen in western States (Torregrosa and Devoe 2008, p. 10). The areas of the species' occupied range at highest risk of development are private lands along the southeastern, southwestern, and southern portions of the species' range, and south of the Snake River, and in the Columbia Basin (USFWS 2013, pp. 16–29). If these projected population increases occur, the human footprint from development and resultant impacts will also increase, leading to additional habitat loss and fragmentation in those areas. Over half of the sage-grouse's occupied range is on federally owned lands that are not at risk of urban and exurban development. Nonetheless, development on adjacent private lands could have indirect impacts, as discussed above.

Conservation Efforts

Avoiding or minimizing additional urban and exurban development in sage-grouse habitats requires identifying habitats most at risk to development, developing and implementing land policies to acquire, maintain, or enhance habitat, and promoting ecologically sustainable private lands and ranches in sage-grouse habitat (Stiver *et al.* 2006, p. 33). Because urban and exurban development occurs primarily on private lands, conservation efforts focused on private land management, such as CCAAs and SGI, are most effective in ameliorating this impact.

Candidate Conservation Agreements – CCAAs are an effective tool for eliminating future development on private lands within the occupied range of sage-grouse. This outcome is because landowners enrolled in sage-grouse CCAAs have agreed not to pursue subdivision of rangeland, new building construction, or other new associated infrastructure. To date, all private lands within the species' range in Oregon and Wyoming are potentially covered by CCAAs; approximately 745,000 ha (1.8 million ac) have landowner commitments, effectively removing the risk of urban and exurban development in these areas.

Sage Grouse Initiative – Conservation easements are voluntary agreements between a landowner and with a land trust, the NRCS, or other organizations or agencies that maintain the land in private ownership with development restrictions that are typically permanent. Conservation easements can permanently protect sagebrush habitat from subdivision while providing compensation to landowners. The NRCS, through implementation of the SGI, has entered approximately 182,870 ha (451,884 ac) into conservation easements through fiscal year 2013 (NRCS 2015a, p. 38). Most easements for sage-grouse are located inside PACs (79 percent), and 94 percent of them provide permanent protection from future development.

State Plans – The Montana, Wyoming, and Oregon Plans include measures to address urban and exurban development. The Montana Plan regulates habitat loss due to urbanization on State lands and on private lands if a project needs an authorization from the State. The Montana Plan includes seasonal, timing, and noise restrictions; disturbance caps; lek buffers; and other conservation measures to reduce the potential threat of urbanization (Montana EO 10–2014, pp. 13–21). The Wyoming Plan includes

disturbances from exurban and urban development in calculations of their disturbance caps, which are used to limit overall disturbance in Core Areas. Oregon's State regulations require cities and counties to avoid sage-grouse habitat when amending land use planning designations that could increase opportunities for urban and exurban development or when making changes to their codes that may affect sage-grouse habitat. To the extent that urban and exurban development were to occur, it also would be subject to regulations (requiring avoidance, minimization, and compensatory mitigation) and a cap on the amount of disturbance on sage-grouse core habitat to 3 percent per PAC (Oregon OAR 635–140–0025, entire; and Oregon OAR 660–023–0115, entire).

Federal Plans – Lands administered by the BLM and USFS are not directly affected by urban and exurban development, as those agencies are not authorized to permit those land uses. The Federal Plans require that any PHMAs and GHMAs be retained in Federal management, thus preventing transfer to private landownership that could result in urban or exurban development. Limited exceptions to this provision could be allowed if transfer of land ownership would benefit sage-grouse or not cause any adverse effects. As a result of the Federal land ownership and limitations on transference provided by the Federal Plans, the risk of urban and exurban development is reduced on approximately 90 percent of the breeding habitat across the species' range.

Summary of Urban and Exurban Development

The 2010 finding concluded that growing human populations and associated urban and exurban development were adversely affecting sage-grouse. Urban and exurban development is expected to continue to affect sagebrush habitat throughout the sage-grouse range, causing localized impacts to individuals and populations. The impacts are not anticipated to occur evenly across the range; they are expected to occur primarily upon private lands and likely near existing developed areas as populations expand. Fifty-three percent of the occupied range is on federally owned lands where urban and exurban development is unlikely to occur, although associated infrastructure and indirect effects are possible. Existing urban and exurban development will continue to affect sagebrush habitat at many locations scattered throughout the sage-grouse's range, causing impacts to individuals or populations. Substantial private land conservation efforts that are consistent with the recommendations of the COT Report (USFWS 2013, pp. 50–51), including SGI's completion of more than 182,870 ha (451,884 ac) of conservation easements, have minimized potential impacts of new development throughout the range.

Recreation

In 2010, we evaluated the effect of recreation on sage-grouse and concluded that it was not a threat to the species (75 FR 13910, March 23, 2010, pp. 13984–13985). We have no new information at this time to change the conclusion that recreation is not a threat to the species. Recreational hunting of sage-grouse is discussed in another section (see, *Hunting*) and is not discussed in this section.

Recreational activities occur across the range of the species (42 of the 48 sage-grouse populations; USFWS 2013, pp. 16–29), but are of limited severity and typically concentrated in specific, designated areas, such as trails and campgrounds. Recreational activities include hiking, camping, fishing, horseback riding, mountain biking, off-highway vehicle use, and wildlife viewing (Ouren *et al.* 2007, p. 2; Ibrahim and Cordes 2008, p. 14; Knight 2009, p. 167; NDOW 2014, p. 1). The majority (72 percent) of recreational visits to BLM-administered lands occurred in areas not containing sagebrush (ECONorthwest 2014, p. 13), indicating that sage-grouse habitat may be affected less frequently by recreation than other areas. Little information exists about the level of impacts that may be occurring from recreational activities (ECONorthwest 2014, p. 13); however, off-highway vehicle impacts to sage-grouse habitat have been reported in a few areas in Oregon (Hagen 2011, pp. 197–198). Impacts have also been reported at leks in Oregon and Nevada, where regular lek viewing has caused disturbance (Budeau, Oregon Department of Fish and Wildlife, 2014a, pers. comm.; Espinosa, Nevada Department of Wildlife, 2014a, pers. comm).

Though limited in extent and frequency, recreational activities can have a variety of direct and indirect effects to sage-grouse. Although rare, people can crush eggs or strike birds with vehicles (Factor E) (Connelly *et al.* 2000b, p. 228; Wiechman 2013, p. 12). Activities could degrade habitat, introduce invasive plants, or increase wildfire risk (Factor A) (NWCG 1999, pp. 6–7, Ouren *et al.* 2007, p. 16; Knick *et al.* 2011, p. 219). Noise and movement associated with recreational activity may disrupt sage-grouse behavior or movement patterns (Factor E) (Blickley *et al.* 2012, pp. 467–470, Patricelli *et al.* 2013, p. 242). Predation (Factor C) may increase due to increases in trash associated with recreational activities or due to the presence of pets accompanying humans (Knick *et al.* 2011 p. 219; Young *et al.* 2011, pp. 126–127).

Given the limited data about recreational activities occurring in sage-grouse habitat, it is difficult to accurately predict future impacts on sage-grouse throughout the range. However, based on historical and current trends, recreational activities are likely to continue on the landscape indefinitely. Recreational activities may increase over time in correlation to predicted increases in human populations.

Conservation Efforts

Federal Plans—The Federal Plans include conservation measures consistent with the COT Report recommendations (USFWS 2013, p. 50) to reduce recreation impacts (BLM and USFS 2015, entire). The Federal Plans exclude new recreational facilities in PHMA, with limited exceptions when needed for safety or when beneficial to sage-grouse. Off-highway vehicle travel will be limited to existing routes and trails and that have neutral or net positive impacts on sage-grouse in PHMA and GHMA. Additional measures to minimize potential impacts that might result from development of recreational facilities and infrastructure include seasonal and timing restrictions, lek buffers, disturbance caps, and mitigation.

State Plans—The Montana State Plan includes conservation measures, such as seasonal and noise restrictions and lek buffers, to reduce impacts from new recreation facilities on State lands and private lands where State authorization is required (Montana E.O. 10–2014, pp. 4, 13–21). In addition, most States discourage recreational viewing of sage-grouse during the breeding season and do not provide lek locations to the general public (Budeau, Oregon Department of Fish and Wildlife 2014a, pers. comm.; Robinson, North Dakota Game and Fish Department, 2014a, pers. comm.; Schroeder, Washington Department of Fish and Wildlife 2014, pers. comm.; Wightman, Montana Fish, Wildlife, and Parks 2014a, pers. comm.). In addition, Wyoming and Washington have measures to minimize impacts from recreational lek viewing, including wildlife harassment laws (Christiansen, Wyoming Game and Fish Department,

2014a, pers. comm.; Schroeder, Washington Department of Fish and Wildlife, 2014, pers. comm).

Summary of Recreation

In the 2010 finding, we concluded that recreation was not a threat to the species. No additional evidence has been discovered or presented suggesting that recreational activities or the associated impacts have changed since the 2010 finding. Recreation continues to be an activity that occurs sporadically across the range of the species, with some localized impacts, but no population-level effects to the species. Together, the Federal Plans and Wyoming, Montana, and Oregon State Plans reduce impacts from recreation to the areas identified as PHMA and GHMA, which encompass approximately 90 percent of the modeled breeding habitat across the species' range (see *Sagebrush Landscape Conservation Planning* for a detailed discussion of conservation measure implementation and effectiveness). Therefore, we conclude that recreation is not a threat to the species, now or in the future.

Climate Change and Drought

In 2010, we evaluated the effect of climate change and drought on sage-grouse (75 FR 13910; March 23, 2010; pp. 13954–13957). While the direct impact of climate change on sage-grouse was unknown, we found climate change to be intensifying other threats such as fire and invasive species. We found drought not to be a substantial threat to the species across its range.

Climate Change

Our analysis of impacts to sage-grouse attributable to climate change includes the consideration of ongoing and projected changes in climate across the sage-grouse's range. The terms ''climate'' and ''climate change'' are defined by the Intergovernmental Panel on Climate Change (IPCC). ''Climate'' refers to the mean and variability of different types of weather conditions over time, with 30 years being a typical period for such measurements, although shorter or longer periods also may be used (IPCC 2007, p. 78). The term ''climate change'' thus refers to a change in the mean or variability of one or more measures of climate (*e.g.,* temperature or precipitation) that persists for an extended period, typically decades or longer, whether the change is due to natural variability, human activity, or both (IPCC 2007, p. 78). Various types of changes in climate can have direct or indirect effects on species. These effects may be positive, neutral, or negative, and they may change over time, depending on the species and other relevant considerations, such as the effects of interactions of climate with other variables (*e.g.,* habitat fragmentation) (IPCC 2007, pp. 8–19). In seeking to evaluate the potential impacts of climate change on sage-grouse, we have weighed relevant information, including areas of uncertainty, together with our understanding of sage-grouse biology and ecology.

Increases in global and regional ambient temperature and variable changes in precipitation are projected out to the end of the 21st century (IPCC 2013, p. 19). Some degree of uncertainty is inherent in these and other projections of future change; however, climate change will likely affect to some degree the entire range of sage-grouse, with the greatest potential adverse impacts occurring in the southern Great Basin (Schlaepfer *et al.* 2011, p. 380).

Direct impacts of climate on individual birds are unknown for most species, including sage-grouse (Factor E), but climate is likely to influence the distribution and quality of sage-grouse habitat (Factor A) (Miller *et al.* 2011, pp. 174–179, Gardali *et al.* 2012, p. 3). The natural distribution of sagebrush is driven by soil-water availability (Schlaepfer *et al.* 2014, p. 349; Schlaepfer *et al.* 2015, pp. 7–8), which is influenced by the amount and seasonality of precipitation and by temperature (Bradford *et al.* 2014, p. 595). Changes in precipitation timing and increases in ambient temperature are projected to lead to increased evaporation and transpiration in sagebrush habitat and a lengthening summer period of dry soil conditions (Bradford *et al.* 2014, p. 599). These conditions are projected to be most pronounced along the southern edge of the current distribution of sagebrush (MZs III and VII), and particularly at low elevations (Schlaepfer *et al.* 2015, p. 13; Still and Richardson 2015, p. 33). In these areas, climate change may result in northward and upslope shifts in frost-sensitive woodland vegetation into areas currently suitable for sagebrush (Neilson *et al.* 2005, pp. 153–155; Comer *et al.* 2012, p. 142; reviewed in Friggens *et al.* 2012, pp. 8–11; Rehfeldt *et al.* 2012, p. 126), potentially altering, or displacing sagebrush habitat. It is unknown to what extent these changes could result in habitat loss and fragmentation, but adverse effects to populations could occur if habitat loss exacerbates impacts from other stressors (Johnson *et al.* 2011, pp. 447–450; Miller *et al.* 2011, pp. 183–184; Wisdom *et al.* 2011, pp. 465–468).

Beyond affecting sagebrush directly, the effects of climate change can interact with and increase effects from other stressors (Chambers *et al.* 2014c, p. 368), such as invasive plants, drought, and wildfire. For example, cheatgrass grows best with wet and warm conditions, so increasing temperature coupled with increased winter and spring precipitation is likely to facilitate its spread (Balch *et al.* 2013, p. 174). Combined, these stressors could have additive impacts to sagebrush habitat (Bradford *et al.* 2014, p. 599; Chambers *et al.* 2014c, entire) as discussed further in *Cumulative Effects.* Climate change is likely to shift the distribution of sagebrush at the southernmost extent of the species' range, including areas in MZ III (Schlaepfer *et al.* 2011, p. 380). Any other effects of climate change are unknown at this time, and the extent of potential cumulative effects is also unknown.

Drought

Drought is a natural, periodic occurrence throughout the range of the sage-grouse. Large-scale drought lasting a decade, similar to the 1930s Dust Bowl drought, has occurred once or twice per century on average (Woodhouse and Overpeck 1998, p. 2706; Ault *et al.* 2014, p. 7529), and periodic drought regularly influences sagebrush ecosystems (Bar-Massa *et al.* 2006, p. 1; Miller *et al.* 2011, p. 145; Miller *et al.* 2011, p. 145). In the future, certain portions of the range (MZs I and VI and portions of MZs II and IV) are forecast to have increased risk and higher severity of drought, though the entire range will likely be affected (Cook 2015, p. 6).

Drought impacts to sage-grouse habitat may affect adult survival, nesting success, and chick survival (Factor A). Structural composition of plants vital for sustaining sage-grouse nesting success, including plant height and percent plant cover, may be affected during drought (Hanf *et al.* 1994, p. 41). Decreases in insects and forbs important for sage-grouse chick survival during drought may negatively affect sage-grouse populations (Johnson and Boyce 1990, p. 91; Crawford *et al.* 2004, p. 6; Aldridge and Bridgham 2003, p. 31; Fischer *et al.* 1996, p. 197). Drought has been correlated with declines in populations (Patterson 1952, p. 33; Braun 1998, p. 139) and has coincided with periods of low population levels (Connelly and Braun 1997, pp. 231–232). In the period 1950–2003, drought had a weak negative effect on sage-grouse persistence, with extirpation most likely in areas having three or

more severe droughts per decade (Aldridge *et al.* 2008, pp. 983, 992).

Based on precipitation and temperature projections, drought frequencies are expected to increase across the country, especially in the Rocky Mountain and southwestern States, including all sage-grouse MZs (Strzepek *et al.* 2010, p. 1).

The risk of decade-scale drought occurring within the southern MZs within the sage-grouse range (MZs III, V, and VII and portions of MZs II and IV) this century is estimated between 20 and 70 percent (Ault *et al.* 2014, pp. 7541–7542). The probability of decade-scale drought in the northern MZs (MZs I and VI and portions of MZs II and IV) is between 10 and 50 percent (Ault *et al.* 2014, pp. 7541–7542).

Conservation Efforts

Ameliorating the impacts of climate change and drought to sage-grouse involves addressing other impacts to the species to improve the resilience of the species and its sagebrush habitat under changing environmental conditions. Maintaining large expanses of undisturbed habitat is the best way to address potential impacts that could lead to habitat fragmentation; as discussed in other impacts sections and *Sagebrush Landscape Conservation Planning,* new regulatory mechanisms and conservation efforts are in place to address those potential impacts. In addition, many conservation actions have been implemented to address those other impacts that are most influenced by climate change and drought, such as wildfire, invasive plants, improper grazing, and conifer encroachment. Full discussions of the best management practices, conservation efforts, and regulatory mechanisms associated with these compounding impacts are included under each impact section in *Summary of Information Pertaining to the Five Factors.*

Climate Change and Drought Summary

The understanding of impacts from climate change and drought has not changed substantially from the 2010 finding. Climate change effects on the timing and amount of precipitation could adversely affect sagebrush habitat and food availability, with potential negative consequences for sage-grouse survival and recruitment; however, the extent and nature of this potential impact is not understood. Drought is a natural part of the sagebrush ecosystem, and sage-grouse abundance has been shown to fluctuate in correlation to drought conditions. Climate change and drought are most likely to affect individuals and populations at the southern extent of the species' range; however, the extent or nature of those effects to sage-grouse are unknown at this time. The greatest concern from climate change and drought is their potential to increase wildfire and invasive plant impacts in the Great Basin. If hotter and drier conditions lead to increased burn rates, then increased habitat loss due to wildfire could be predicted (see *Wildfire and Invasive Plant*s, above); however, the extent to which climate change and drought may change burn rates is unknown. Therefore, based on the best available information, climate change and drought are not threats to sage-grouse, now or in the future.

Predation

In 2010, we evaluated the effect of predation on sage-grouse and concluded that predation was not a threat to the species (75 FR 13910, March 23, 2010, p. 13973). We concluded that landscape fragmentation is likely contributing to increased predation on sage-grouse. However, except in localized areas where habitat is compromised, we found no evidence to suggest that predation is limiting sage-grouse populations rangewide. New information developed since that time does not alter our conclusion.

Predation (Factor C) is the most commonly identified cause of direct mortality for sage-grouse during all life stages (Blomberg *et al.* 2013b, p. 347; Caudill *et al.* 2014, p. 808). Rangewide, sage-grouse are exposed to a number of different predators, including raptors, small mammals, and snakes (Schroeder *et al.* 1999, pp. 10–11; Coates *et al.* 2008 pp. 424–425; Lockyer *et al.* 2013, p. 248). However, sage-grouse have co-evolved with their predators, resulting in the development of cryptic plumage and behavioral adaptations that have allowed them to persist despite this mortality factor (Coates and Delehanty 2008, p. 635; Hagen 2011, p. 96). Sage-grouse mortality rates due to predation vary widely by location and time of year, and short-term studies are often not representative of population dynamics for the species across the range (Taylor *et al.* 2012b, p. 337).

The habitat fragmentation and development that began across the sagebrush ecosystem in the late 19th century (see *Habitat Fragmentation,* above) has caused predator dynamics to change (Fichter and Williams 1967, p. 225; Baxter *et al.* 2007, p. 266; Coates and Delehanty 2010, p. 240). Decreased habitat quality and quantity has created a situation in which the sage-grouse are more vulnerable to predation (Connelly *et al.* 1991, p. 524; Coates 2007, pp. 38–39; Hagen 2011, p. 96). Agricultural development, landscape fragmentation, and encroaching human populations may increase the diversity and density of predators (Summers *et al.* 2004, p. 523; Coates and Delehanty 2010, p. 246; Dinkins *et al.* 2014, p. 639). Degraded and fragmented landscapes can benefit predators by increasing their kill efficiency, as well as subsidizing their food and nest or den substrate (Hagen 2011, p. 100). The abundance of red foxes (*Vulpes vulpes*), raccoons (*Procyon lotor*), crows (*Corvus brachyrhynchos*), and ravens, which historically were rare in the sagebrush landscape, has increased in association with human-altered landscapes (Luginbuhl *et al.* 2001, p. 570). Raven abundance has increased as much as 1,500 percent in some areas of western North America since the 1960s (Coates and Delehanty 2010, p. 244). Several studies have documented negative effects to sage-grouse associated with increased corvid populations (corvids are a group of birds that include ravens, crows, magpies (*Pica* spp.), and jays) (Holloran 2005, p. 58; Coates 2007, p. 130; Conover *et al.* 2010, p. 335; Lockyer *et al.* 2013, p. 242; Coates *et al.* 2014, pp. 73–74; Howe *et al.* 2014, p. 36). Ravens may prefer certain sage-grouse habitats, such as big sagebrush communities and wet meadows, and the abundance of ravens may increase near livestock grazing and agriculture (Coates *et al.,* in press).

High predator abundance within a sage-grouse nesting area may negatively affect sage-grouse productivity without causing direct mortality. The increase in the numbers of corvids within the sagebrush ecosystem is an important change because sage-grouse nests are at greater risk of predation by these visual predators (Conover *et al.* 2010, p. 335). Even low but consistent raven presence can influence sage-grouse reproductive behavior (Bui 2009, p. 32; Dinkins *et al.* 2012, p. 606). Sage-grouse females tend to select nest and brood-rearing locations that are farther away from predator perches and have lower densities of avian predators (Dinkins *et al.* 2012, p. 606; Dinkins *et al.* 2014, p. 637). When nesting in areas with relatively higher abundances of ravens, females reduce the amount of time they spend off their nests, potentially compromising their ability to secure sufficient nutrition to complete the incubation period (Coates and Delehanty 2008, p. 636).

Data are lacking that definitively link sage-grouse population trends with predator abundance. At the rangewide scale, predation is not believed to be a widespread factor limiting sage-grouse

population growth (Connelly *et al.* 2000a, p. 975; Connelly *et al.* 2004, p. 10–1). However, in localized areas where habitat is compromised by human activities, predation could be limiting local sage-grouse populations (Coates 2007, p. 131; Bui 2009, p. 33; Lockyer *et al.* 2013, p. 242). Holloran (2005, p. 58) attributed increased sage-grouse nest depredation to high corvid abundances in western Wyoming, which resulted from anthropogenic food and perching subsidies in areas of natural gas development. Mammalian predators and ravens are suspected of causing sage-grouse population decline and extirpation in Washington (Schroeder *et al.* 2014, p. 10). Raven abundance was also strongly associated with sage-grouse nest failure in Nevada, resulting in negative effects on sage-grouse reproduction (Coates 2007, p. 130; Lockyer *et al.* 2013, p. 242). Studies on increasing raven populations have also been recently conducted in Idaho (Coates *et al.* 2014, entire; Howe *et al.* 2014, entire) and central Utah (Conover *et al.* 2010, entire).

Since 2010, conservation efforts have been implemented to address predation and associated impacts. Conservation measures can limit the effects of predation by preventing habitat fragmentation caused by transmission lines, roads, and nonnative vegetation (Howe *et al.* 2014, p. 46). As discussed in other sections of this finding, regulatory measures provided by the Federal Plans and certain State Plans limit new development within important sage-grouse habitat, thus reducing habitat fragmentation that facilitates increased predation (see *Nonrenewable Energy Development, Mining, Renewable Energy,* and *Urban and Exurban Development*). Measures to remove predator perches or subsidized food sources could minimize effects, but predator removal programs have not yet proven to be effective, as predator populations quickly rebound without continual control (Coates 2007, p 152; Hagen 2011, p. 99).

In summary, predation was identified as a potential threat in the 2010 finding and will likely continue to have adverse impacts to local populations, particularly in areas where habitat fragmentation has occurred. Mortality due to nest predation by ravens or other human-subsidized predators is increasing in some areas (*e.g.,* in MZs III, VI, and VII), at times causing local population declines, and in extreme cases, local extirpations. However, information about the rangewide extent of predation is limited and there is no indication that predation is causing a rangewide decline in population trends. Since the 2010 finding, regulatory mechanisms from Federal Plans and Wyoming, Montana, and Oregon State Plans have been implemented that limit additional future habitat loss and fragmentation to the areas identified as PHMA and GHMA which encompass approximately 90 percent of the modeled breeding habitat across the species' range (see *Sagebrush Landscape Conservation Planning* for a detailed discussion of conservation measure implementation and effectiveness). These restrictions on future development will effectively eliminate new disturbances that remove cover habitat and facilitate the expansion of predators, thus reducing the potential for predation on sage-grouse.

Disease

In 2010, we evaluated the effect of disease (Factor C) on sage-grouse and concluded that disease was not a threat to the species (75 FR 13910, March 23, 2010, p. 13970). In that finding, we determined that, while WNv was affecting some populations, no evidence existed that disease was a substantial mortality factor for the persistence of sage-grouse across the species' range (75 FR 13910, March 23, 2010, p. 13970). We have no new information to indicate that analysis has changed.

Sage-grouse are host to numerous parasites and pathogens (Connelly *et al.* 2004, pp. 10–4 to 10–8; Christiansen and Tate 2011, pp. 114–118). The presence of parasites or pathogens is not synonymous with the presence of disease or population-level impacts (Connelly *et al.* 2004, p. 10–3; Christiansen and Tate 2011, p. 114). To date, most parasites and pathogens found in sage-grouse are not known to cause substantial, chronic mortality or other adverse impacts to sage-grouse populations (reviewed in Christiansen and Tate 2011, pp. 114, 119–125).

West Nile virus is known to have localized impacts to sage-grouse populations (Christiansen and Tate 2011, p. 122; Walker and Naugle 2011, p. 139). Similar to other North American bird species (McLean 2006, p. 54), sage-grouse are highly susceptible to WNv, with mortality rates nearing 100 percent of infected birds (McLean 2006, pp. 53–54; Clark *et al.* 2006, p. 18). West Nile virus is transmitted among birds mainly through a mosquito-bird-mosquito infection cycle that relies on optimal climate conditions and movement of birds (McLean 2006, p. 52). The mosquito (*Culex tarsalis*) is the primary vector of WNv in sage-grouse (Naugle *et al.* 2005, p. 617). Most sage-grouse infected with WNv die in as few as 6 days, but a small proportion of infected birds survive, as evidenced by the presence of WNv-specific antibodies in live birds (Walker *et al.* 2007b, p. 691; Dusek *et al.* 2014, p. 726). High mortality rates from WNv can reduce average annual adult survival, a limiting factor in sage-grouse population growth (Johnson and Braun 1999, p. 81; Taylor *et al.* 2012b, p. 343). Population-level impacts can also result from WNv mortality in juvenile sage-grouse by decreasing recruitment into the breeding population the following year (Kaczor 2008, p. 65; Taylor *et al.* 2012b, p. 343).

West Nile virus has been detected across the species' range, with localized outbreaks occurring in 10 of 11 States and 1 of 2 Canadian provinces in the species' range (WNv has not been detected in Washington or Saskatchewan (USFWS 2014b)); however, sage-grouse are likely to have been infected in Saskatchewan as well (Walker and Naugle 2011, p. 133). West Nile virus infections in other species in Washington suggest that sage-grouse in the Columbia Basin could be exposed to the disease (USGS NWHC 2014). West Nile virus was first detected in sage-grouse in 2003, with localized outbreaks occurring from 2004 to 2009 (Naugle *et al.* 2004, p. 705); no outbreaks have been recorded since 2009 (USFWS 2014b). However, no rangewide disease surveillance program exists to know for certain the extent of outbreaks across the species' range, and it is likely that many WNv-related sage-grouse mortalities go undocumented.

Although WNv is present throughout the range of sage-grouse, on a finer scale WNv presence depends upon water sources that provide aquatic breeding habitat for mosquitoes (Zou *et al.* 2006, p. 1035; Doherty 2007, pp. 60–61). The development of anthropogenic water sources could provide breeding habitat for mosquitoes that contribute to WNv outbreaks. In addition, WNv outbreaks in humans are associated with drought conditions and high ambient temperature in spring and summer (Epstein and Defilippo 2001, p. 106), and drought conditions likely increase the probability of WNv outbreaks in sage-grouse as well. When high temperature and drought combine, sage-grouse are concentrated in shrinking mesic habitats (Schrag *et al.* 2011, p. 2). Under these conditions, contact between mosquitoes and birds increases, and the risk of WNv transmission and an outbreak among sage-grouse is elevated (Walker and Naugle 2011, p. 131).

The primary conservation measure for WNv is the control of mosquitoes and their breeding habitat (Walker and

Naugle 2011, pp. 140–141). Measures that limit development that creates new mosquito breeding habitat or measures that manage existing water features so that mosquitos cannot use them to breed (*e.g.,* circulating water, using larvicides, or mosquito fish (*Gambusia* spp.)) are most effective in reducing future WNv outbreaks. As discussed in other sections of this finding, regulatory measures provided by the Federal Plans and the Wyoming, Montana, and Oregon Plans limit new development within important sage-grouse habitat, thus reducing the risk of anthropogenic water sources being constructed that could provide mosquito breeding habitat (see *Nonrenewable Energy Development, Mining, Renewable Energy,* and *Urban and Exurban Development*). In addition, the Federal Plans contain RDFs that will minimize the risk of WNv outbreaks, such as requirements for water feature installation to minimize the likelihood of mosquito breeding (see *Sagebrush Landscape Conservation Planning* for a detailed discussion of conservation measure implementation and effectiveness). The SGI program includes assistance to private landowners to manage water features in a way that minimizes the likelihood of mosquito breeding.

With the exception of WNv, we could find no evidence that disease poses an impact to sage-grouse across the species' range. West Nile virus currently is a localized stressor that has had impacts on some sage-grouse populations, having caused declines and in some cases local extirpations of populations in North Dakota, South Dakota, southeast Montana, and Idaho. In those affected areas, WNv is likely to have an adverse effect on population growth rates, with small populations being at greatest risk of extirpation if outbreaks reduce population size below a threshold where recovery is no longer possible (Walker and Naugle 2011, pp. 137–139, 140). The incidence of WNv is likely to continue across the species' range in the future. The factors most likely to affect future occurrence are climate change and the abundance and the distribution of anthropogenic surface water. Conservation measures that limit and or manage the development of new artificial water sources will minimize habitat availability for mosquitoes that could spread WNv. As noted in our 2010 finding, a complex set of environmental and biotic conditions that support the WNv cycle must coincide for an outbreak to occur, and the annual patchy distribution of the disease is currently keeping population-level impacts at a minimum (75 FR 13910, March 23, 2010, p. 13970).

Recreational Hunting

In 2010, we evaluated the effect of recreational hunting on sage-grouse and concluded that recreational hunting is not a threat to the species (75 FR 13910; March 23, 2010; p. 13965). In 2010, we also determined that the effects of falconry hunting and poaching are negligible due to their extremely limited extent (75 FR 13910; March 23, 2010; p. 13965). We have no new information about falconry hunting or poaching to change those determinations; therefore, they will not be discussed further in this status review.

During the late 1800s and early 1900s, the sage-grouse was heavily exploited by both commercial and sport hunters (Factor B) (Patterson 1952, pp. 30–33; Autenrieth 1981, pp. 3–11). State wildlife agencies were sufficiently concerned with the observed declines in the 1920s and 1930s that many closed their hunting seasons and others reduced bag limits and season lengths as a precautionary measure (Patterson 1952, pp. 30–33; Autenrieth 1981, p. 10). By the 1950s, populations were considered recovered and recreational hunting was again allowed throughout the range (Patterson 1952, p. 242; Autenrieth 1981, p. 11). In recent years, hunting seasons and bag limits have fluctuated and become more conservative across the species' range as States responded to changing population numbers and perceived threats to birds (Reese and Connelly 2011, p. 104).

In 2014, sage-grouse hunting took place in 8 of the 11 States where sage-grouse occur. Sage-grouse are listed as a threatened species in Washington (Stinson *et al.* 2004, p. 1), and hunting has been closed since 1988. Sage-grouse has not been hunted in Saskatchewan since 1938, and Alberta closed the season in 1996 (Aldridge and Brigham 2003, p. 25). In 1998, sage-grouse was designated as endangered in Canada, and hunting is prohibited there (Connelly *et al.* 2004, p. 6–3). North Dakota closed its hunting season in 2008 due to low lek count numbers, and it has remained closed. South Dakota closed its hunting season in 2013 due to low lek count numbers; it also remained closed in 2014. Montana Fish and Wildlife Commission closed all or parts of 32 counties to sage-grouse hunting in 2014, and shortened the hunting season from 2 months to 1 month.

Sage-grouse hunting is regulated by State wildlife agencies. Hunting seasons are reviewed annually, at which time States can adjust harvest management based on updated abundance information and adaptive management criteria established in State wildlife management plans. Information on abundance and local habitat conditions is used to make any adjustments to the hunting season necessary to reduce the potential for additive mortality. Seasonal adjustments take the form of changes to the number of permits issued, changes to the season length or bag limit, or total closure of the hunting season. Bag limits and season lengths are relatively conservative compared to prior decades (Connelly 2005, p. 9; Gardner, California Department of Fish and Game, 2008, pers. comm.; USFWS 2014b). Emergency closures, changes in permit numbers, and implementation of more conservative hunting seasons have been used for populations in decline or in areas experiencing other issues of potential concern (Budeau, Oregon Department of Fish and Wildlife, 2014b, pers. comm.; Christiansen, Wyoming Game and Fish Department, 2014b, pers. comm.; Espinosa, Nevada Department of Wildlife, 2014b, pers. comm.; Griffin, Colorado Parks and Wildlife, 2014, pers. comm.; Moser, Idaho Department of Fish and Game, 2014, pers. comm.; Robinson, Utah Division of Wildlife Resources, 2014b, pers. comm.; Wightman, Montana Fish, Wildlife, and Parks, 2014b, pers. comm.).

Recreational hunting is anticipated to continue into the future, though it is difficult to make accurate predictions about specific levels of hunting mortality because States make adjustments annually. Given the downward trend in hunting mortality reported over the last several decades, mortality rates from hunting will likely continue to decrease. Rangewide, hunting seasons are more conservative than in the past, which has resulted in a reduction in sage-grouse hunting mortality across all sex and age classes (USFWS 2014b). Many States have reported estimated hunting mortality to be lower than the 10 percent mortality cap recommended by Connelly *et al.* (2000a p. 976) (Christiansen 2010, p. 12; Budeau 2014b, pers. comm.).

In 2010, we concluded that hunting was not a threat to the species and based on current information about harvest rates, it continues not have substantial impacts to sage-grouse. To date, changes in the management of sage-grouse hunting have resulted in a substantial reduction in sage-grouse hunting mortality rangewide.

Scientific and Educational Use

In 2010, we evaluated the potential overuse of sage-grouse for scientific and educational purposes and determined

that it was not a threat to the species (75 FR 13910, March 23, 2010). Scientific use was occurring at low levels, but no evidence existed to indicate that scientific use was affecting populations or abundance trends. No educational use was known at that time. As discussed further below, we have no new information indicating that the level of utilization for scientific purposes has changed since the 2010 status review.

Sage-grouse are one of the most intensely researched and monitored birds in North America. Scientists researching or monitoring sage-grouse typically observe, approach, capture, handle, band, or attach radio transmitters to individual sage-grouse to study their movements, behaviors, and population dynamics. Translocations have been used for a variety of scientific purposes, such as a management tool to restore or augment declining populations of sage-grouse and to improve the genetic diversity of populations (Alberta Environment and Sustainable Resource Development 2013, p. viii; White 2013, p. 9; Schroeder *et al.* 2014, p. 8; Yakama Nation 2015, entire).

During research-related activities, scientists could unintentionally kill, disturb, or reduce the survival of individual sage-grouse (Factor B) (Connelly *et al.* 2003, p. 32; Gibson *et al.* 2013, p. 773). Despite these potential impacts, sage-grouse mortalities from scientific activities are extremely rare. Annually, less than 3 percent of the sage-grouse captured for research or monitoring activities die as a result of their capture and handling (USFWS 2014b). Radio transmitters have had negative impacts to individual birds (Connelly *et al.* 2003, p. 32; Colorado Parks and Wildlife 2013, p. 48; USFWS 2014b), but no population-level impacts have been observed.

Survival rates of translocated sage-grouse vary from 36 percent in central Idaho (Musil *et al.* 1993, p. 88) to greater than 45 percent in north-central Utah (Baxter *et al.* 2013, p. 809) and 62.4 percent in northeastern California (Bell and George 2012, p. 373). The efficacy of translocation efforts have been questioned because translocation success, as measured by persistence of reintroduced populations or increases of extant populations, has been low (Reese and Connelly 1997, pp. 235–238). However, more recent attempts have been successful (Alberta Environment and Sustainable Resource Development 2014, p. 6; Baxter *et al.* 2006, p. 182). When translocation protocols are followed, translocated female sage-grouse survive just as well as resident individuals and quickly integrate into the local population (Bell and George 2012, p. 373). Sage-grouse translocated into the Columbia Basin in Washington (MZ VI) have generally survived (White 2013, p. 9; Schroeder *et al.* 2014, pp. 8, 17, 21). Translocations will likely continue at similar rates, and there is no evidence that the removal of sage-grouse from source populations has caused declines in abundance.

In summary, although research or monitoring of sage-grouse could potentially affect individuals, the best available information does not indicate that adverse impacts are occurring at the population level. Information gained through these methods has directly benefited the species. In addition, while translocations have variable success rates, the best available information does not indicate that the translocations affect the populations from which the birds were removed. Although sage-grouse are intensely studied and monitored, there is no evidence to indicate that sage-grouse use for scientific purposes is affecting the species locally or rangewide.

Contaminants

In 2010, we determined that contaminants were not a threat to the sage-grouse (75 FR 13910, March 23, 2010, pp.13982–13984). Sage-grouse exposed to contaminants may become sick or die (Factor E), and contaminants may reduce or remove sage-grouse habitats (Factor A). Types of contaminants that potentially affect sage-grouse include but are not limited to pesticides, products from mining and energy development, human waste, fire retardants, and airborne pollutants from roads, vehicles, and other machinery (Beck and Mitchell 2000, p. 997; Olsgard *et al.* 2009, p. 178; Hansen *et al.* 2011, p. 593; Christiansen and Tate 2011, p. 125). Contaminants may be intentionally introduced into sage-grouse habitats to improve conditions for crops and livestock, extract nonrenewable and nuclear energy resources, construct infrastructure, and manage wildfires (Larson *et al.* 1999, p. 115; Gibbons *et al.* 2015, p. 105). Spills or leaks along pipelines, highways, roads, and railroads can also unintentionally release contaminants into sage-grouse habitats.

In the past, pesticides were used to remove sagebrush, other unwanted woody shrubs, invasive plants, and nuisance insects in sage-grouse habitats in order to improve conditions for agricultural crops and livestock (Connelly *et al.* 2004, p. 7–28; Beck *et al.* 2012, p. 445). Exposure to pesticides and herbicides can kill sage-grouse, cause abnormal behavior, or degrade sagebrush habitat (Blus and Connelly 1998, p. 23; Christiansen and Tate 2011, p. 125; Mineau and Palmer 2013, p. 20; Gibbons *et al.* 2015, p. 105). However, Federal and State regulations to protect air and water quality and ban certain pesticides have likely reduced applications in sagebrush habitats. Generally, pesticides and herbicides are now used to improve sagebrush habitats for native wildlife rather than for livestock (Beck *et al.* 2012, p. 446), and properly applied pesticides should not poison sage-grouse (Call and Maser 1985, p. 15; APHIS 2002, p. 10). Furthermore, light applications of some herbicides may benefit sage-grouse by decreasing the shrub canopy and increasing the cover of grasses and forbs that are important to sage-grouse during the nesting and brood-rearing periods (Crawford *et al.* 2004, p. 2). Therefore, pesticides do not likely affect more than individual sage-grouse.

Nonrenewable energy development and chemical spills could expose sage-grouse to contaminants, such as oil, gas, and waste products. Sage-grouse may encounter harmful radiation, metals, minerals, or contaminated fluids and waste released by nuclear facilities, nonrenewable energy developments, and mines (Ramirez and Rogers 2002, pp. 434–435; Beyer *et al.* 2004, p. 116; Hansen *et al.* 2011, p. 593). Although nonrenewable energy development can expose sage-grouse to contaminants, there is only one documented case of a dead, oil-covered sage-grouse discovered in a wastewater pit near an oil and gas well (Domenici 2008, USFWS, pers. comm.). Deaths or injury from wastewater pits are likely rare as sage-grouse typically do not require free water (Schroeder *et al.* 1999, p. 6) and the intense noise, activity, and lack of vegetative cover around the pits likely deter sage-grouse. Therefore, contaminants released from nonrenewable and chemical spills are not likely to affect more than individual sage-grouse.

Conservation Efforts

The risk of exposure to contaminants is often related to anthropogenic activities that also present potential impacts to sage-grouse, such as nonrenewable energy development and mining, as discussed in other sections of this finding. Any conservation measures that minimize the exposure of sage-grouse to those activities also minimize the risk of exposure to contaminants. Regulatory measures provided by the Federal Plans and the Wyoming Plan limit new development within important sage-grouse habitat, thus

potentially reducing the risk of contaminant exposure in those areas (see *Nonrenewable Energy,* and *Mining*). Based on previous Federal plans, we expect these regulatory mechanisms to be implemented for the next 20 to 30 years.

Summary of Contaminants

While potential exposure to contaminants occurs across the species' range, the best available information indicates that killing or injury of birds is rare and has not had population-level impacts. Regulatory mechanisms that substantially reduce new energy development and mining in important habitats further reduce the potential for impacts to sage-grouse. For a detailed discussion of conservation measure implementation and effectiveness, see *Sagebrush Landscape Conservation Planning*.

Military Activity

In 2010, we did not identify military activity as an impact to the species. Since 2010, we have become aware of several military facilities that overlap to varying degrees with the occupied range of sage-grouse and which have confirmed sage-grouse presence. Military installations in Idaho, Montana, Nevada, Utah, Washington, and Wyoming encompass less than 1 percent of the currently estimated sage-grouse range. With the exception of YTC, most of the installations have little habitat or sage-grouse on the property. The YTC contains one of the two sage-grouse populations in MZ VI (Stinson and Schroeder 2014, p. 3), and was designated as a PAC in the COT Report (USFWS 2013, p. 39).

Military training and testing activities have the potential to negatively impact sage-grouse (Factor E) and their habitats. Training activities can ignite wildfires resulting in habitat loss and fragmentation (Factor A). This issue has been a particular concern in MZ VI, where approximately one quarter of the remaining sage-grouse in the MZ are located on YTC (Stinson and Schroeder 2013, p. 3). In addition to impacts from wildfire, habitat can be degraded by cross-country maneuvers with military vehicles if they crush vegetation, compact soil, or introduce invasive plants (Stinson and Schroeder 2014, p. 3). These kinds of impacts are limited, because the levels of military surface training occurring across the sage-grouse range are limited.

Compared to surface training, the military manages more extensive sections of the sage-grouse occupied range as Special Use Airspace for both testing and training. Military training airspace occurs over portions of all MZs. Recent research has demonstrated that sage-grouse are sensitive to noise (Blickley *et al.* 2012, p. 467); however, this study did not examine aircraft noise (Blickley *et al.* 2012, entire). The behavioral response of sage-grouse to overflight noise has not been examined. Potential impacts include increased detectability by predators and disruption of breeding and nesting behavior if sage-grouse repeatedly flush in response to the noise (Blickley *et al.* 2012, pp. 467–470).

The U.S. military must balance its role of public land steward with its primary mission of maintaining a well-trained, combat-ready fighting force. The Sikes Act (16 U.S.C. 670a–670f, as amended), enacted in 1960 with subsequent amendments, provides for cooperation between the DoD and DOI for planning, developing, and maintaining fish and wildlife resources on military lands (see *Regulatory Mechanisms,* below). The Sikes Act applies to Federal land under DoD control and requires military services to establish Integrated Natural Resources Management Plans (INRMPs) to conserve natural resources for their military installations. Through installation-specific INRMPs, developed in cooperation with the Service and State fish and wildlife agencies, the military has implemented conservation and mitigation actions for sage-grouse.

The YTC continues to manage habitat in Washington that supports one of two populations of sage-grouse in the State. Management of sage-grouse and its habitat at YTC is described in the Western Sage-Grouse Management Plan (Livingston 1998, entire), which is incorporated in the Cultural and Natural Resource Management Plan (CNRMP) (DoD 2002, entire). The CNRMP specifies management prescriptions and actions for sage-grouse and their habitat, including identifying conservation objectives and measures for habitat quantity and quality necessary for maintaining a sage-grouse population at or above the 10-year average of 200 birds. Direct protection of sage-grouse and their habitat is done through timing and area restrictions, including air space restrictions. Vegetation restoration of sagebrush ecosystems is required to address habitat impacted by wildfire and military training activities. Wildfire protection measures are required to prevent, contain, and rapidly extinguish wildfires. Monitoring of sage-grouse and their habitats, including monitoring of habitat restoration activities, is conducted within YTC jurisdictional boundaries.

In 2011, additional measures were implemented to protect sage-grouse on YTC. The Fort Lewis Army Growth and Force Structure Realignment Record of Decision's realigned sage-grouse protection area (SGPA) boundaries to incorporate new sage-grouse habitat use information and updated habitat management objectives (DoD 2011, entire). As a result, all but one active lek on the installation are protected. In addition, vegetation management of five primary containment areas within SGPAs was changed to fit with wildfire management objectives; flight restrictions were revised to cover newly proposed SGPAs; WNv surveillance and control was increased; and construction of forb greenhouse facilities was proposed for use in habitat restoration projects. The Army is currently updating the YTC resource management plan to reflect these improved sage-grouse conservation measures.

Overall, military installations cover less than 1 percent of the species' occupied range, and most installations have little or no sage-grouse habitat on or near their property. The YTC is the only installation where impacts to sage-grouse are a potential concern, in part because two of the four populations in MZ VI occur on that installation. The CNRMP has been effective in minimizing impacts to these populations, and its implementation is expected to continue into the future. Based on studies of noise impacts from others activities, it is possible that overflight noise could affect sage-grouse, but no research has been done to know if this impact actually occurs and any assessment of potential impacts would be speculative.

Small Populations

In 2010, we determined that small population size could result in extirpation of some populations, but was not a threat to sage-grouse rangewide (75 FR 13910, March 23, 2010, p. 13985). As summarized below, although small population size likely places some populations at risk of extirpation, sage-grouse is a widely distributed species with large, interconnected populations at the core of the range (USFWS 2013, pp. 16–29 and Appendix A). As discussed below, we again find that small population size is not a rangewide threat to the species, now or in the future.

Overall, small, isolated populations are more susceptible to impacts and relatively more vulnerable to extinction due to potential losses of genetic diversity, demographic and environmental fluctuations, and susceptibility to environmental

catastrophes (Pimm *et al.* 1988, p. 757; Frankham and Ralls 1998, p. 442). As population size decreases, a population's susceptibility to adverse impacts and its risk of extinction can increase. In general, the minimum population size needed to sustain the evolutionary potential of a species has been estimated to be approximately 500 to 5,000 adult individuals so that the population retains sufficient genetic diversity needed to avoid the detrimental effects of inbreeding (Traill *et al.* 2010, p. 32). Although we know of no published estimates of minimum population sizes in sage-grouse, up to 5,000 individual sage-grouse may be necessary to maintain an effective population size of 500 birds based on individual male breeding success, variation in reproductive success of males that do breed, and the survival rate of juvenile birds (Aldridge and Brigham 2003, p. 30; 75 FR 13910, March 23, 2010, p. 13985).

A number of sage-grouse populations across the species' range have been identified as at risk due to their small population size (Figure 9 and Table 14). These small populations (Table 14) may lack connectivity to other habitats and populations, and may have experienced negative population impacts from other stressors, such as WNv outbreaks, recent wildfire, habitat loss, and habitat fragmentation (USFWS 2014b). These populations may be at increased risk of extirpation due to their isolation, low population numbers, and continued impacts from natural and human-caused sources (Pimm et al. 1988, p. 757). Further, these small populations may be at risk from loss of genetic diversity. For example, populations in Jackson Hole and Gros Ventre in Wyoming and southeastern Montana were genetically isolated with reduced genetic diversity compared to nearby populations (Schulwitz *et al.* 2014, p. 567). Sage-grouse populations in Canada (MZ I) are also small, with less than 100 sage-grouse counted in 2012 (Alberta Environment and Sustainable Resource Development 2013, p. 8). Some of the small populations have already been estimated below minimum population values (Garton *et al.* 2011, entire; WAFWA 2015, entire), suggesting their ability to persist long term may have already been compromised if that value is correct.

Although small, some of the identified sage-grouse populations may not have experienced declines in genetic diversity. For example, small sage-grouse populations in northern Montana may have a sufficient number of dispersing sage-grouse to maintain genetic diversity. Additionally, despite population declines and habitat loss, sage-grouse populations occupying fragmented landscapes at the northern extent of the species' range (Bush *et al.* 2011, p. 539) and in a peripheral population in northeastern California (Davis *et al.* in press) exhibited high genetic diversity with no evidence that these populations were genetically depressed. However, increased habitat fragmentation could cause demographic declines in these small, peripheral populations (Bush *et al.* 2011, p. 539).

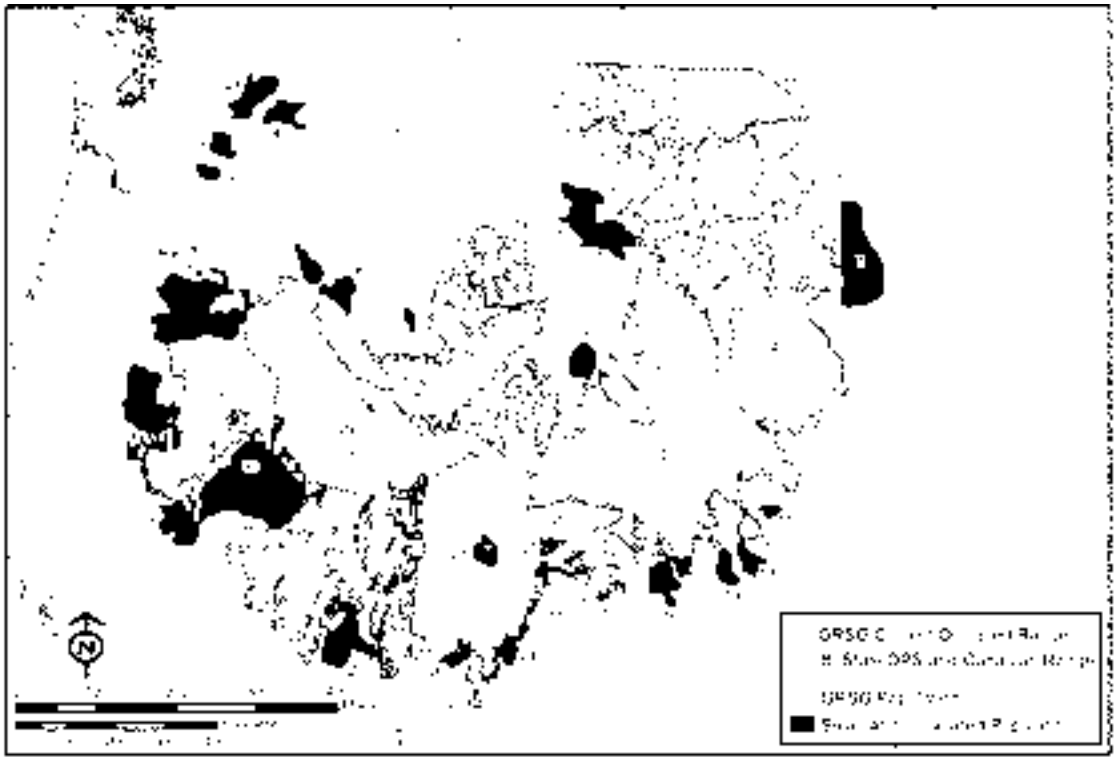


Figure 9. Sage-grouse populations identified as 'small' and/or 'isolated' in the Conservation Objection Team Final Report (USFWS 2013, pp. 16–29). For the purposes of the status review, Ibapah (UT) and Hamlin Valley (UT) were joined with the rest of the southern Great Basin population.

TABLE 14—SAGE-GROUSE POPULATIONS THAT HAVE BEEN IDENTIFIED AS SMALL AND/OR ISOLATED

[USFWS 2013, pp. 16–29]

Management zone	Population ID No.	Population name (state)
I	3	Dakotas (ND/SD).
II	6	Jackson Hole (WY).
	11	Laramie (CO/WY).
	13	Middle Park (CO).
	14	Eagle-South Routt (CO).
III	21	Strawberry Valley (UT).
	22	Carbon (UT).
	23	Sheeprock Mountains (UT).
	24	Parker Mountain & Emery (UT).
	26	Bald Hills (UT).
	30	Northwest Interior (NV).
	27	Quinn Canyon Range (NV).
	[1]28 [1]28	Ibapah (UT; *portion of the Southern Great Basin*).
		Hamlin Valley (UT; *portion of the Southern Great Basin*).
IV	7	Belt Mountains (MT).
	10	East Central (ID).
	35	Sawtooth (ID).
	36	Weiser (ID).
	37	Baker (OR).
V	31	Warm Springs Valley (NV).
	33	Klamath (OR/CA).
VI	38	Yakama Indian Nation (WA).
	39	Yakima Training Center (WA).
	40	Crab Creek (WA).
	41	Moses Coulee (WA).
VII	15	Meeker-White River (CO).
	16	Parachute-Piceance-Roan Basin (CO).

[1] For the purposes of the status review, the Ibapah (UT) and Hamlin Valley (UT) populations were joined with the rest of the southern Great Basin population.

As summarized above, the potential loss of the small, Columbia Basin populations in Washington (MZ VI), which contain approximately 0.6 percent of the estimated rangewide abundance (Doherty *et al.* 2015, entire), would not represent a significant loss for the status of the sage-grouse as a whole (See *Columbia Basin Population* section). However, the four populations in MZ VI are identified above as being at risk due to small population size and are reliant on management actions, such as translocations, to maintain the population size and its genetic diversity. These populations also face potential habitat loss and fragmentation from agricultural conversion (See *Agricultural Conversion* section above) and military training activities (See *Military Activities* section above). Connectivity between these populations is also very limited (Crist *et al.* 2015, p. 12). Although the populations in MZ VI have declined from historical levels, are exposed to a variety of potential impacts, and have limited connectivity, population trends in MZ VI are currently stable (WAFWA 2015, pp. 40–41), likely due to active management and translocations. Further, the State of Washington has protected sage-grouse as a State threatened species since 1998 and developed a recovery program (Stinson *et al.* 2004, entire).

Although some populations of sage-grouse are small and/or isolated (Table 14), with some at risk of extirpation, the remaining populations of sage-grouse are well distributed across the overall range of the species (see Distribution and Population Abundance and Trends, above). The number and size of these more robust populations provide redundancy for the sage-grouse, and the wide distribution of the populations across the species' overall range provides resiliency. Additionally, the rangewide distribution of the larger populations provides representation, by capturing the variation of habitat and climatic conditions across the species' range such that the loss of any of the small populations will not result in the loss of ecological diversity. These small or isolated populations represent only a small percentage of the overall species' range, and the relative population index and their potential loss may affect connectivity (Crist *et al.* 2015, p, 18) but is unlikely to put the entire species at risk now or in the future.

Regulatory Mechanisms

In the 2010 finding, we concluded that existing regulatory mechanisms were inadequate to protect the species (75 FR 13910, March 23, 2010, p.13982). Since 2010, there have been substantial changes in regulatory protections for sage-grouse and their habitats (Factor D). The most significant change is the Federal Plans and the Montana, Wyoming, and Oregon State Plans, which collectively manage approximately 90 percent of the breeding habitat (See *Sagebrush Landscape Conservation Planning* section above). Combined, these efforts have substantially improved the regulatory mechanisms across the range of the sage-grouse since the 2010 finding, such that we now determine that existing regulatory mechanisms adequately address effects to the species and its habitats (Factor D). Other Federal and State laws and local authorities are discussed below.

Federal Laws

In addition to the Federal Plans, other Federal laws provide regulatory authorities to Federal agencies to address sage-grouse and habitat management for the species.

Other BLM Authorities—The Mineral Leasing Act of 1920, as amended, and the Mineral Leasing Act for Acquired Lands of 1947, as amended, gives the BLM responsibility for oil and gas leasing on BLM, USFS, and other

Federal lands, as well as private lands where mineral rights have been retained by the Federal Government. The Geothermal Steam Act of 1970, as amended (84 Stat, 1566; 30 U.S.C. 1001–1025), provides the Secretary of the Interior with the authority to lease public lands and other Federal lands, including USFS lands, for geothermal exploration and development in an environmentally sound manner. This leasing authority has been delegated to the BLM. The BLM implements the Mineral Leasing Act through 43 CFR 3200.

The General Mining Law of 1872, as amended, opened the public lands of the United States to mineral acquisition by the location and maintenance of mining claims. Mineral deposits subject to acquisition in this manner are generally referred to as locatable minerals. Locatable minerals include metallic minerals (*e.g.,* gold, silver, lead, copper, zinc, and nickel), nonmetallic minerals (*e.g.,* fluorspar, mica, gypsum, tantalum, heavy minerals in placer form, and gemstones), and certain uncommon variety minerals. Under the new Federal Plans, locatable minerals have been recommended for withdrawal in the SFAs. Valid existing rights would not be impacted by these recommended withdrawals. Withdrawals on BLM and USFS lands are processed under the BLM's withdrawal regulations (43 CFR 2310) and, if 5,000 acres or more, shall be subject to the Congressional review provision (43 U.S.C. 1714(c)).

Other Federal Agencies—Other Federal Agencies in the DoD, DOE, and DOI (including the Bureau of Indian Affairs, the Service, and National Park Service) are responsible for managing less than 5 percent of the species' occupied range (Knick 2011, p. 28). Regulatory authorities and mechanisms relevant to these agencies' management jurisdictions include the National Park Service Organic Act (39 Stat. 535; 16 U.S.C. 1, 2, 3, and 4), the National Wildlife Refuge System Administration Act (16 U.S.C. 668dd–668ee), and the Department of the Army's Integrated Natural Resources Management Plans for their facilities within sage-grouse habitats. Due to the limited amount of land administered by these agencies, we have not described them in detail here. However, most of these agencies do not manage specifically for sage-grouse on their lands, except in localized areas (*e.g.,* specific wildlife refuges, reservations). A notable exception, where substantial populations of sage-grouse occur, is the YTC (discussed above under *Military Activity*).

The YTC continues to manage habitat in Washington that supports one of two populations of sage-grouse in the State. As a joint base, YTC is now a sub-installation of the Fort Lewis McChord Army installation. Management of sage-grouse and its habitat at YTC is dictated by management direction described in their Western Sage Grouse Management Plan (Livingston 1998, entire), which is tiered to their CNRMP (DoD 2002, entire), combined with changes contained in the Fort Lewis Army Growth and Force Structure Realignment Record of Decision (DoD 2011, entire) (also known as Grow the Army). The 2002 CNRMP is currently being updated into a newer Integrated Natural Resources Management Plan, but is not yet final. The Grow the Army Final Environmental Impact Statement analyzed the environmental and socioeconomic impacts of stationing approximately 5,700 soldiers and their families at Fort Lewis and additional aviation, maneuver, and live-fire training needs at both installations.

The CNRMP specifies management prescriptions and actions for sage-grouse and their habitat, including identifying conservation objectives and measures for habitat quantity and quality necessary for maintaining a sage-grouse population at or above the 10-year average of 200 birds. Direct protection of sage-grouse and their habitat (*i.e.,* mating, nesting, and brood-rearing) is achieved through timing and area restrictions, including air space restrictions. Vegetation restoration of sagebrush ecosystems is required to address habitat impacted by wildfire and military training activities. Wildfire protection measures are required to prevent, contain, and rapidly extinguish wildfires. Monitoring of sage-grouse and their habitats, including monitoring of habitat restoration activities, are conducted within YTC jurisdictional boundaries. Army participation in sage-grouse recovery planning efforts and adaptive management through implementation reviews are also required.

The Grow the Army Record of Decision realigned sage-grouse habitat and core use area protection boundaries to incorporate new sage-grouse habitat use information and updated habitat management objectives. New leks were incorporated into the management scheme, SGPAs were reconfigured, vegetation management of fire primary containment areas within SGPAs were changed to fit with wildfire management objectives, flight restrictions were revised to cover newly proposed SGPAs, WNv surveillance and control was increased, and construction of forb greenhouse facilities were proposed for use in habitat restoration projects. The SGPAs currently protect almost all active leks at YTC. The Grow the Army Record of Decision also established Army commitment to updating their Sage-Grouse Management Plan; participating in sagebrush ecosystem conservation partnerships to promote sagebrush ecosystem conservation, restoration, and protection from wildfire in and around the PAC; and establishment of a candidate conservation agreement with the Service.

Coal mining is regulated by the provisions identified in the Surface Mining Control and Reclamation Act of 1977 (SMCRA), which is implemented by the Office of Surface Mining and Reclamation. This Federal law requires consideration of fish and wildlife resource information for the permit and adjacent area, including species listed under the Endangered Species Act, along with a detailed analysis by the permittee on how impacts will be minimized or avoided. SMCRA also requires that activities permitted under this law cannot result in the jeopardy of a listed species, or the destruction of adverse modification of designated critical habitat. Species-specific standards and procedures must also be developed if necessary to protect listed species and their habitats (USFWS 1996). Permittees must also include a plan for enhancement of fish and wildlife resources on the permit area. While SMCRA does not specifically address candidate species, protection must be given to all potential future listed species that may be affected by coal mining activities (USFWS 1996, p. 4).

The OSM has delegated the regulatory authority for implementing SMCRA to five States within the range of sage-grouse: Wyoming, Montana, Utah, Colorado, and North Dakota. Sage-grouse, therefore, must be considered in the implementation of SMCRA, and coal mining, in those States. The implementation agency must consider impacts on fish and wildlife, including sage-grouse. Sage-grouse are also typically addressed in all States within the species' range during the development of coal resources simply due to its status as a State trust resource.

State Mining Regulations

The Utah Executive Order provides a regulatory mechanism to minimize potential effects from mining to sage-grouse habitat on State and private lands (Utah EO 2015–002). The Utah Executive Order requires the Utah Division of Oil, Gas and Mining to coordinate with the Utah Division of Wildlife Resources before issuing

permits for energy development. The Executive Order further directs the Utah Division of Oil, Gas and Mining to implement recommendations provided by the Utah Division of Wildlife Resources that could require avoidance and minimization measures on State and private lands consistent with the conservation plan. However, these measures are subject to the statutory requirements to protect rights on private property and avoid waste of the mineral resource.

State General Wildlife Protection Laws

All States across the range of sage-grouse have laws and regulations that provide for the general protection, conservation, propagation, management, and use of wildlife and that regulate the taking of wildlife, including sage-grouse (see Connelly *et al.* 2004, pp. 2–2 through 2–11). While these statutes limit direct taking of sage-grouse, none provide specific and binding protections for sage-grouse habitat.

Many States have laws to list and protect threatened and endangered species, but these laws vary in their statutory provisions to protect species from threats (George and Snape 2010, pp. 345–346). Sage-grouse are listed as a threatened species by the State of Washington under the authorities of RCW 77.12.020. Threatened status in Washington means that a species cannot be hunted (WAC 2015, 232–12–011) and also requires the State to develop a recovery plan, which must include target population objectives, criteria for reclassification, an implementation plan, and a monitoring plan (WAC 2015, 232–12–297). However, implementation of recovery plan actions is discretionary and subject to funding.

Several States list the sage-grouse as a ''species of concern,'' (*e.g.,* Montana) or ''species of special concern (*e.g.,* California, South Dakota), but these are administrative designations and do not afford any substantive regulatory protections.

State Sage-Grouse Hunting Regulations

Sage-grouse hunting is regulated by State wildlife agencies. Hunting seasons are reviewed annually, and States can adjust limits on updated abundance information and adaptive management criteria established in State wildlife management plans. States maintain flexibility in hunting regulations through emergency closures or season changes in response to unexpected events that affect local populations. As discussed in more detail under the *Hunting* section, 8 of the 11 States with sage-grouse had open hunting seasons for sage-grouse in 2014, with hunting prohibited in Washington, South Dakota, North Dakota, and Canada (Aldridge and Brigham 2003, p. 25; Connelly *et al.* 2004, p. 6–3; Stinson *et al.* 2004, p. 1). In 2014, Montana closed hunting of sage-grouse across much of the State and reduced the length of the hunting season to respond to population declines (Montana Fish, Wildlife and Parks 2014). South Dakota closed its hunting season for sage-grouse in 2013 and 2014. As evidenced by recent changes, States can and have adopted more conservative hunting seasons based on new information and population levels. Rangewide, hunting seasons are more conservative than in the past, which has resulted in a large reduction in sage-grouse hunting mortality. Therefore, hunting regulations are adequate in managing hunting impacts to sage-grouse.

State Noxious Weed Laws

Some State regulations require that landowners control noxious weeds on their property, but designations of noxious weeds and the development of noxious weed lists vary by State. For example, only five States list medusahead as a noxious, regulated weed, but the grass is problematic in at least two additional States. Similarly, despite the proliferation of cheatgrass across the range of the sage-grouse, Colorado is the only western State that recognizes the grass as a noxious weed (USDA 2015). Therefore, State regulations that address noxious weeds may help reduce impacts to sage-grouse in local areas, but large-scale control of the most problematic invasive plants is currently unfeasible and uncoordinated (Pyke 2011, p. 543; Ielmini *et al.* 2015, pp. 2–3). While State noxious weed laws are not effectively addressing potential impacts from invasive plants, measures provided by the Federal and State plans, as discussed above, have substantially reduced the potential threat of invasive plants (see *Wildfire and Invasive Plants*).

Canadian Federal and Provincial Laws and Regulations

Sage-grouse were first listed in Canada in 1997 as threatened by the Committee on the Status of Endangered Wildlife in Canada because of very small and declining populations in Saskatchewan and Alberta. The species' status was changed to endangered in 1998, and sage-grouse are now federally protected in Canada as an endangered species under schedule 1 of the Species at Risk Act (SARA). This designation protects sage-grouse and their nests and eggs on Federal lands and prohibits unauthorized killing, harming, harassing, capturing, taking, possessing, collecting, buying, selling, or trading of individuals of the species (SARA 2002, p. 17). SARA also provides for identification of habitat on Federal lands that is critical to the survival and recovery of species designated as threatened or endangered, and the Canadian Government is responsible for ensuring that critical habitat is protected. Although voluntary measures are the preferred method for protecting critical habitat, SARA provides the means for the government to promulgate regulations to ensure that critical habitat is not destroyed (SARA 2002, pp. 27–30). However, at this time, no such regulations have been developed for sage-grouse critical habitat.

On December 4, 2013, the Canadian Government issued an Emergency Order for the protection of the sage-grouse under SARA (CWS 2013, entire). The Emergency Order prohibits construction of new tall (greater than 1.2 m [3.9 ft]) structures, new roads, and new fences and destruction of native plants, and requires nightly noise reduction in April and May (CWS 2013, p. 112). These restrictions apply to critical habitat identified on 1,672 km^2 (646 mi^2) of Federal and provincial crown lands in southeastern Alberta and southwestern Saskatchewan (CWS 2013, p. 111).

In 2014, the Canadian Government finalized an amended recovery strategy for sage-grouse (Environment Canada 2014, entire). In addition to updating the 2008 document to reflect the most recent scientific information about the status of sage-grouse in Canada and establishing population objectives, the 2014 amended strategy completed the identification of critical habitat for the species in accordance with SARA (Environment Canada 2014, p. 23). The 2008 recovery strategy did not identify critical habitat, citing a lack of information (Lungle and Pruss 2008, p. 27). In 2009, a replacement for the critical habitat section of the strategy identified ''necessary, but not sufficient'' critical habitat in breeding, nesting, and brood-rearing habitat for sage-grouse in Alberta and Saskatchewan (Lungle and Pruss 2009, p. 2) for a total of 165 km^2 (63 mi^2). The amended recovery strategy identifies 2,812 km^2 (1,086 mi^2) of year-round habitat and 12.5 km^2 (4.8 mi^2) of lek critical habitat in Saskatchewan and Alberta (Environment Canada 2014, pp. 23–30). Therefore, as a result of the amended recovery strategy and the Emergency Order combined, a total of 3,354 km^2 (1,295 mi^2) of Federal and provincial crown lands in Saskatchewan and Alberta, including Grasslands National Park in Saskatchewan, is

identified as critical habitat for sage-grouse (Environment Canada 2014, p. iv; Parks Canada 2015, p. 693). The amended recovery strategy also includes numerous nonregulatory actions for the protection of critical habitat and the recovery and conservation of sage-grouse.

The sage-grouse is listed as endangered at the provincial level in Alberta and Saskatchewan, affording additional protections to the species on provincial and private lands. Recreational hunting has been closed in Saskatchewan since at least the 1930s (Weiss and Prieto 2014, p. 1), and in Alberta since 1995 (Alberta Environment and Sustainable Resource Development 2013, p. 1). In Saskatchewan, sage-grouse were designated as threatened in 1987 under The Wildlife Regulations (Saskatchewan 1981, entire), and as endangered in 1999 under the province's Wildlife Act of 1998 (Weiss and Prieto 2014, pp. 1, 13). The Wildlife Act states that, without a license, no one may ''kill, injure, possess, disturb, take, capture, harvest, genetically manipulate or interfere with or attempt to do any of those things . . . export or cause to be exported from Saskatchewan . . . [or] traffic in'' designated species (Saskatchewan 1998, p. 20). Sage-grouse habitat in Saskatchewan is protected under The Wildlife Habitat Protection Act, which prohibits sage-grouse habitat from being sold or cultivated (Saskatchewan 1983, p. 4). Restrictions put in place under the Wildlife Act formerly prohibited development within 500 m (1,640 ft.) of leks and prohibited construction activities within 1,000 m (3,281 ft.) of leks between March 15 and May 15 (Aldridge and Brigham 2003, p. 32). In our 2010 finding, we deemed these buffers inadequate to protect sage-grouse from disturbance. These activity restrictions were revised in 2012 to increase lek buffers to 3,200 m (10,499 ft.); include 1,000-m (3,281-ft) buffers between development and lekking, brood-rearing, and wintering habitat; and make these restrictions apply year-round instead of only during the breeding season (Environment Canada 2014, p. 16; Weiss and Prieto 2014, p. 13).

Alberta's Wildlife Act requires that an Endangered Species Committee provide recommendations to the provincial Minister regarding designation of endangered species in Alberta and development of recovery plans, which may include population goals, conservation strategies, and the identification of critical habitat (Alberta Wildlife Act 2000, p. 13). The law states that ''[a] person shall not willfully molest, disturb or destroy a house, nest or den of prescribed wildlife'' (Alberta Wildlife Act 2000, p. 25), but does not require development and implementation of recovery plans for species designated as endangered. However, Alberta Environment and Sustainable Resource Development has designated more than 3,880 km^2 (1,500 mi^2) as conservation habitat for sage-grouse, including areas adjacent outside of federally identified critical habitat (Nicholson, Alberta Environment and Sustainable Resource Department, 2015, pers. comm.). All known active and inactive leks are protected by 12-ha (30-ac) Protective Notations designated by the Province, and Protective Notations covering the range of sage-grouse in Alberta prohibit public land sales and potentially restrict surface development (Alberta Environment and Sustainable Resource Development 2013, pp. 19–20). In addition, in 2013 the Alberta Department of Energy restricted all new surface access for oil and gas development through subsurface addenda to leases or other drilling rights accorded to private businesses (Nicholson, Alberta Environment and Sustainable Resource Department, 2015, pers. comm.). Aside from Protective Notations, regulation of new surface access, and the protection of individual sage-grouse by provincial law, efforts to recover the species and protect its habitat in Alberta (*e.g.,* Alberta Environment and Sustainable Resource Development 2013, pp. 18–21) are nonregulatory.

Regulatory Mechanisms Summary

In 2010, we concluded that regulatory mechanisms in place at that time were not adequate to reduce the threats to the species and its habitat, and that the absence of adequate regulatory mechanisms was a threat to the species, then and into the foreseeable future. Since then, there have been major changes in the regulatory mechanisms that avoid or minimize impacts to sage-grouse and their habitats. Most importantly, BLM and USFS adopted amended or revised Federal Plans to conserve sage-grouse over more than half of its occupied range (See *Federal Plans* section above). The Federal Plans include provisions to address activities that could occur in sage-grouse habitats and threats identified in 2010 as having inadequate regulatory measures including: Oil and gas development, wildfire and invasive plants, infrastructure, and improper livestock grazing. In addition, the Federal Plans include provisions to avoid or minimize impacts authorized in sage-grouse habitats for monitoring, adaptive management, limitations on anthropogenic disturbance, and requirements for mitigation. The Federal Plans are the foundation of land-use management on BLM and USFS managed lands. We are certain that the Federal Plans will be implemented and that the measures included are based on the best scientific information and are effective at avoiding and minimizing impacts to the species and its habitat.

Since 2010, of the 11 States within the occupied range of the sage-grouse, 10 have revised and adopted grouse conservation plans and regulatory mechanisms to address threats to the species and its habitat identified in 2010. State sage-grouse conservation plans in Wyoming, Montana, and Oregon contain regulatory mechanisms that minimize impacts to the species and its habitat. Since 2008, the Wyoming Plan has effectively minimized impacts within core habitats, protecting the highest density areas for the species within the State. The Montana and Oregon regulatory mechanisms include proven conservation measures, including disturbance caps, density restrictions, and lek buffers, to minimize disturbance to important habitats. In combination, the Federal and three State plans, cover 90 percent of the sage-grouse breeding habitat. Taken together, these efforts have substantially altered the regulatory landscape across the range of sage-grouse since the 2010 finding, such that we now determine that existing regulatory mechanisms adequately address effects to the species and its habitat (Factor D).

Other Conservation Plans

Since 2010, all States except California have drafted, revised, finalized, or implemented conservation plans for the sage-grouse to address threats to the sage-grouse. These plans take different approaches, but in general, they identify important conservation objectives and provide mechanisms to incentivize conservation. We anticipate that state plans and related efforts will continue into the future and will strengthen as implementation continues. In this section we provide a summary of the non-regulatory conservation plans (See *Conservation Efforts* section above for a description of the Wyoming, Montana, and Oregon Plans and the *Regulatory Mechanisms* section above for a description of the Utah Executive Order).

California

California does not have a State Sage-grouse Conservation Plan. California

recognizes sage-grouse as a State-species of special concern that should be considered during the State's environmental review process. The California Environmental Quality Act (CEQA) (Public Resources Code sections 21000–21177) requires that State agencies, local governments, and special districts consider impacts that their proposed project may have to species of concern, including sage-grouse.

Colorado

Colorado has contributed to greater sage-grouse conservation and research, working with numerous partners over the last several decades. This coordination spans from local and State levels, to rangewide participation. The State conservation plan for greater sage-grouse (State of Colorado 2008, entire) has been implemented since 2008 over 1.5 million ha (approximately 3.7 million ac) across all landownership types. The plan uses voluntary conservation strategies to address and promote the conservation of sage-grouse in Colorado. It provides guidance to address impacts to sage-grouse from habitat fragmentation and conversion, agriculture, urbanization, conifer encroachment, recreation, nonrenewable energy, and other impacts.

The plan and the State of Colorado recommend measures to help reduce impacts from nonrenewable energy development. Colorado regulations require that effects to sage-grouse be considered by the Colorado Oil and Gas Conservation Commission (COGCC) and the Colorado Department of Reclamation and Mining Safety during their permitting processes. In addition, Colorado Parks and Wildlife (CPW) makes recommendations based on the State's conservation plan designed to reduce impacts to greater sage-grouse from nonrenewable energy development (State of Colorado 2008, pp. 22, 109, 123, 313, 325–331).

In addition, the State of Colorado issued an Executive Order (Colorado E.O. D 2015–004) in May 2015 to promote the conservation of greater sage-grouse and further implement the 2008 conservation plan. This order enhances communication and coordination among State agencies, including CPW, the State Land Board, and COGCC, as well as designating a single point of contact for external greater sage-grouse communications. Under the order, the COGCC will evaluate its existing wildlife siting rules for potential improvement and develop a comprehensive tracking system for development in sensitive wildlife habitat. Lastly, the order also prioritizes the completion of the Colorado Habitat Exchange, a voluntary compensatory mitigation tool for impacts to the species.

Dakotas

North and South Dakota finalized State management plans that emphasized working cooperatively with private landowners due to the relatively large acreages of private lands in those States. Both States have provided assistance working through the Sage Grouse Initiative under NRCS and are continuing sage-grouse research efforts to prioritize the best sage steppe habitat for conservation, expand core areas, and further their understanding of WNv. Both States have closed sage-grouse hunting seasons.

South Dakota has provided additional firefighting resources and in the past has restricted off-road travel if drought conditions may elevate fire danger during hunting seasons (State of South Dakota 2014, p. 23). Further, the South Dakota Department of Game, Fish and Parks works with the South Dakota School and Public Lands Office, Public Utilities Commission, and the Department of Environment and Natural Resources to provide comments and input if oil and gas development, wind development, or other proposed projects may impact sage-grouse core areas (State of South Dakota 2014, pp. 23, 24).

Idaho

Earlier this year, the Governor signed an Executive Order adopting Idaho's Sage-grouse Management Plan, which focuses on the management of invasive vegetation, fuels and wildfire (Idaho E.O. 2015–04). The plan provides wildfire suppression guidance to complement Secretarial Order 3336, and commits the State to assist with fire rehabilitation and with implementation of fuel breaks, weed control, and conifer removal in mixed State and Federal ownerships. Under the plan, Idaho assumes responsibility for development, coordination, and equipping and training for Rangeland Fire Protection Associations to provide rapid response to sagebrush fires. In FY 2016 the Idaho legislature appropriated over $500,000 for various sage-grouse conservation efforts of which $120,000 was dedicated to better support RFPA implementation and effectiveness (S–1128). In Idaho, RFPAs currently account for approximately 230 firefighters in 6 areas in Idaho resulting in protection of approximately 5.7 million acres within greater sage-grouse habitat. An additional 4 RFPAs are in development within greater sage-grouse habitat. Idaho's Governor directed that all State agencies, to the extent consistent with existing State law, apply the elements of Idaho's Sage-grouse Plan to all land ownerships across the State (Idaho E.O. 2015–04).

Nevada

The State of Nevada has implemented several measures to conserve habitat in the State. On September 26, 2008, the Governor of Nevada signed Executive Order 2008–10–29 calling for the preservation and protection of sage-grouse habitat in the State of Nevada. The Executive Order directs the Nevada Department of Wildlife (NDOW) to work with State and Federal agencies and the interested public to implement Nevada's conservation plan for sage-grouse (Nevada E.O. 2008–10–29). The Executive Order also directs other State agencies to coordinate with the NDOW in these efforts. Further, the Nevada Conservation Credit System establishes a mitigation market to facilitate exchanges between credit sellers and buyers. In November 2012, the Governor signed Executive Order 2012–09 establishing the Sagebrush Ecosystem Council, a multiagency and multidiscipline group that was tasked with developing a conservation strategy for sage-grouse in Nevada. In October 2014, the Sagebrush Ecosystem Council finalized the Nevada Greater Sage-grouse Conservation Plan (State of Nevada 2014, entire). The Nevada plan creates the Conservation Credit System, which creates financial incentives for private landowners to conserve sage-grouse habitat for use as compensatory mitigation. Nevada's plan requires that any development that affects greater sage-grouse habitat in Nevada will need to acquire credits to compensate for those effects before the development proceeds. In addition, on June 23, 2015, the Governor signed emergency regulations related to the formation of Rural Fire Protection Associations (RFPAs) within the State of Nevada (NRS 472 per AB 163, sec. 3.5(1) of the 78th Session of the Nevada legislature). RFPAs, as seen in other States, help support fire suppression efforts by adding capacity and resources for fire suppression.

Utah

Utah issued a final conservation plan for the sage-grouse on February 14, 2013, and the Governor of Utah's Executive Order (Utah E.O. 2015/002) mandated its implementation on February 25, 2015. Utah's Plan and Executive Order includes mechanisms aimed at addressing threats to sage-grouse associated with fire, invasive species, predation, conifer

encroachment, recreation, energy development, and the removal of sagebrush. The Utah Plan applies to all lands within the State's 11 Sage-Grouse Management Areas (SGMAs) across approximately 3 million ha (7.5 million ac), which conserves 90 percent of the State's greater sage-grouse habitat and approximately 94 percent of the State's population. Many of the conservation measures in the plan are voluntary and rely on negotiated incentive-based covenants, easements, or leases to achieve conservation on private lands, School and Institutional Trust Administration Lands, and local government lands (See Regulatory Mechanisms section above for a discussion of the Utah Executive Order). In 2014, Utah's incentive-based approach, coupled with efforts from State, Federal, and private partners, exceeded the Utah conservation plan objectives, reporting 249,170 acres of habitat enhancement and restoration (UDNR 2014, p. 5).

The Utah Plan addresses fire control, suppression, and rehabilitation by providing an organizational framework for partners to prioritize suppression efforts and fire rehabilitation, and leverage funding and agency resources (State of Utah 2013, p. 13). The Utah Governor's Executive Order also directs the Utah Division of Forestry, Fire and State Lands to prioritize fuels-mitigation activities and pre-attack planning and coordination with other Federal and local fire suppression partners, second only to the protection of human life and structures (State of Utah 2015, p. 4). Furthermore, the Utah Governor's Catastrophic Wildfire Reduction Strategy was completed in 2013, establishing a Statewide steering committee and regional working groups to develop a Statewide risk map that will include prioritized sage-grouse habitat areas (UDNR 2014, page 10).

Washington

Sage-grouse are State-listed as threatened in Washington. The State's recovery plan and actions implemented to date have relied heavily on voluntary conservation actions, on which the State and its partners have made progress (Stinson *et al*. 2004, entire). For example, sage-grouse have been translocated to the Columbia Basin from Idaho, Oregon, Nevada, and Wyoming to help supplement and maintain the Washington population (Livingston *et al*. 2006, pp. 2–3; Schroeder *et al*. 2014, pp. 8, 14–15).

Finding

As required by the Act, we considered the five factors in assessing whether the sage-grouse is endangered or threatened throughout all of its range. We examined the best scientific and commercial information available regarding the past, present, and foreseeable future threats faced by sage-grouse. Foreseeable future describes the extent to which we can reasonably rely upon predictions about the future (DOI 2009). In this context, ''reliable'' does not mean ''certain'': It means sufficient to provide a reasonable degree of confidence in the prediction. Because information for each threat may be reliable for different periods of time, each threat may have different extents of foreseeability. The final conclusion may be a synthesis of this information.

For the purposes of this determination, we conclude that the foreseeable future is 20 to 30 years. This timeframe is based on the time horizons for which various threats can be reliably projected into the future. Many of the analyses on which we have relied, such as the fire modeling and the period for climate change predictions, cover a 30-year timeframe. Additionally, other potential threats will be governed by Federal and State Plans across the most important habitats as long as these plans are in place. Based on our assessment of existing BLM and USFS land use plans, the typical lifespan is 20 to 30 years (BLM 2015g). While these plans are in place, the extent of impacts from energy development, infrastructure, grazing, mining, and other regulated activities will be dictated by stipulations in these plans. Therefore, we can reliably predict over 20 to 30 years the extent of impacts from fire, climate change, and potential effects to the species and habitat addressed by the Federal Plans. Beyond these timeframes is a high degree of uncertainty, which precludes credible predictions of the effectiveness of actions that will be implemented beyond the planning horizon and how the species may or may not respond. Exceeding this timeframe, we have concluded, goes into the realm of speculation.

Our regulations direct us to determine if a species is endangered or threatened due to any one or a combination of the five threat factors identified in the Act (50 CFR 424.11(c)). We consider cumulative effects to be the potential threats to the species in totality and combination; this finding constitutes our cumulative effects analysis. The discussions above evaluated the individual impact of the following potential threats to the sage-grouse: Nonrenewable energy development (Factor A), infrastructure (Factor A), agricultural conversion (Factor A), wildfire and invasive plants (Factor A and E), improper grazing (Factor A), free-roaming equids (Factor A), conifer encroachment (Factor A), mining (Factor A), renewable energy (Factor A), predation (Factor C), disease (Factor C), urbanization (Factor A), recreation (Factor A), climate change (Factor E), drought (Factor A), hunting (Factor B), scientific and educational use (Factor B), contaminants (Factor A), military activities (Factor A), and small populations (Factor E). We also evaluated the inadequacy of existing regulatory mechanisms (Factor D). As discussed above, based on new information and effective regulatory mechanisms implemented since the 2010 finding, we determined that none of these impacts are substantial threats to the sage-grouse individually. Additionally, despite past reductions in occupied range, sage-grouse currently occupy 56 percent of their historical range. In this section, we evaluate whether some or all of these impacts act cumulatively to increase the overall scope and magnitude of potential effects to the sage-grouse now and into the foreseeable future such that cumulative effects are a threat to the species.

The sagebrush ecosystem has changed over time. Prior to the influence of human settlement, the sage-grouse inhabited parts of 13 states and 3 Canadian provinces. Before European settlers converted sagebrush habitats to croplands and pasturelands in the 1800s, natural events, such as blizzards, droughts, and large wildfires historically impacted sage-grouse. With the arrival of European settlers, agricultural conversion, urbanization, energy development, and other activities increased the loss and fragmentation of sage-grouse habitats across the overall range. Due to the historical loss and fragmentation of sagebrush habitats, sage-grouse now occupy approximately 56 percent of their historical range. Despite historical losses of occupied range, today the sage-grouse is relatively well-distributed across portions of 11 states and 2 Canadian provinces. The sagebrush ecosystem upon which the sage-grouse depends remains one of the largest, most widespread ecosystems in the United States, spanning approximately 70 million ha (173 million ac).

Declines in the extent of the sagebrush ecosystem and sage-grouse populations have been a concern for more than 25 years. Since 1999, we have reviewed 8 petitions and reviewed the status of the species 3 times. In our first evaluation completed in 2005, we found that listing the sage-grouse was not warranted because the species occurred over a large area and potential threats

were not well defined. In 2010, we determined that sage-grouse were warranted for listing due to a long-term decline in abundance throughout their range, habitat loss and fragmentation, and inadequate regulatory mechanisms to address threats.

The 2010 finding serves as the baseline for this current review. In the 2010 finding, we concluded that sage-grouse was warranted for listing because of habitat loss and fragmentation due to a variety of causes, such as nonrenewable energy development, agricultural conversion, wildfire, and infrastructure and the inadequacy of regulatory mechanisms to address these conditions. We acknowledged the existence of substantial landscape elements containing high-quality habitat and abundant sage-grouse, particularly in southwestern Wyoming and in the northern Great Basin, but expressed concern that, without adequate regulatory mechanisms, habitat loss, and abundance, declines would continue (75 FR 13910, March 23, 2010, pp. 13986–13988). As noted in that finding, when determining its listing priority status, we considered the threats that the sage-grouse faced to be moderate in magnitude because the threats did not occur everywhere across the range, and, where they were occurring, they were not of uniform intensity or of such magnitude that the species required listing immediately to ensure its continued existence. While sage-grouse habitat had been lost or altered in many portions of the species' range, substantial habitat still remained to support the species in many areas of its range (75 FR 13910, March 23, 2010, pp. 14008–14009).

In the 2010 finding, we identified the types of conservation actions that would remediate or ameliorate these threats, and encouraged land managers and other interested parties to implement such measures. In particular, we noted that the Federal Plans could provide adequate regulatory mechanisms to address the threats of nonrenewable and renewable energy development and infrastructure if they were amended to consider sage-grouse conservation needs (75 FR 13910, March 23, 2010, p. 13982). Further, we recommended changes in prevention, suppression, and restoration activities to address threats from the wildfire and invasive plant cycle. This current finding describes the extent to which recent conservation efforts—particularly the Federal and State Plans—have addressed the impact of potential threats and positively affected the species' status.

Since 2010, Federal and State agencies have collaborated on the development of landscape-scale conservation efforts to protect the most important habitats across the range of the species (as discussed in detail in Changes Since the 2010 Finding, above). The 2013 COT Report outlined where those most important habitats occurred (also known as PACs) and identified them as the areas necessary for species' resilience, redundancy, and representation. The COT Report also provided conservation objectives and recommended conservation actions to preserve the PACs and served as the foundation of a landscape-level conservation strategy (Federal, State, and private) developed and implemented by BLM, USFS, SGI, the States of Wyoming, Montana and Oregon, and private landowners. Together, the Federal Plans, Wyoming Plan, Montana Plan, and Oregon Plan reduce potential threats on 90 percent of sage-grouse breeding habitat across the species' range. These conservation efforts result in the preservation of large expanses of undisturbed habitat supporting the largest, best-connected sage-grouse populations into the foreseeable future.

The Federal Plans, Wyoming Plan, Montana Plan, and Oregon Plan provide adequate regulatory mechanisms to reduce the threats of human-caused habitat disturbance on the most important sage-grouse habitats (as discussed in detail in the Changes Since the 2010 Finding, above). The Federal Plans designate PHMAs, and the State Plans designate Core Areas, all of which correspond closely with the PACs identified in the COT Report and include important breeding and seasonal habitats for the species. The PHMAs and Core Areas are managed for sage-grouse habitat objectives, primarily by excluding or avoiding major new surface-disturbing activities that could cause habitat destruction (BLM and USFS 2015, entire). For example, in many important habitats, the Federal Plans require NSO for nonrenewable energy development, which results in no new oil and gas wells or associated infrastructure being constructed within PHMAs. For the few ongoing land uses that could continue to occur in PHMAs, such as limited wind development in certain areas and existing rights for nonrenewable energy or mining, the Federal, Wyoming, Montana, and Oregon Plans work together to limit the total amount of human-caused habitat disturbance on PHMAs and Core Areas to no more than 3 to 5 percent. To prevent indirect impacts to sage-grouse that could occur from land uses in areas outside of PHMAs and Core Areas, the Federal Plans, Wyoming Plan, Montana Plan, and Oregon Plan all require lek buffers so that breeding birds will not be disturbed by human activities. Lastly, the Federal Plans require any project that may adversely affect sage-grouse (in both PHMA and GHMA) to minimize impacts by implementing RDFs and mitigating to a net conservation benefit for sage-grouse. As a result of these measures, the Federal and three State Plans reduce the potential threat of habitat loss caused by human-caused disturbances on approximately 90 percent of breeding habitat across the species' range. These measures were effective immediately upon the implementation of the Federal Plans, the Wyoming Plan, the Montana Plan, and the Oregon Plan and will be in place for the next 20 to 30 years.

Wildfire and its interaction with invasive annual grasses, especially cheatgrass, is a significant risk to the sage-grouse and its habitat. In 2010, we determined that the combination of wildfire and invasive plants was a threat to the sage grouse and a major contributor to our finding that protection for the sage-grouse was warranted. Some wildfires will continue in the Great Basin, as we cannot manage the lightning strikes that spark many wildfires. Between 2000 and 2014, just less than one percent of sage-grouse habitat has burned per year. A recent modeling study predicts there could be a 43 percent decline in sage-grouse abundance within the next 30 years unless effective management is implemented to reduce the effects of wildfire and invasive plants.

The Federal and State Plans include commitments to change ongoing land uses and to prioritize wildfire management and invasive plant treatments in ways that reduce the synergistic threat of flammable invasive vegetation and altered wildfire regimes to sage-grouse habitats (as discussed in detail in Changes Since the 2010 Finding, above). Within the Great Basin, where wildfire is most prevalent, the majority of breeding habitat is in habitats that are most resilient to invasive plants and wildfire. To reduce the magnitude and severity of future wildfires, FIAT assessments prioritize wildfire and invasive plant management strategies in those most resilient areas that reduce the risk of habitat loss from wildlife and invasive plants. Fire and its impacts will be managed across the landscape by the implementation of the FIAT assessments and the Secretarial Order that prioritize suppression of wildfire in sage-grouse habitat. When a wildfire occurs in sage-grouse habitat, suppression in sage-grouse habitat will

continue to receive the highest priority allocation of wildfire suppression and rehabilitation management, after human safety. After a wildfire, the FIAT assessments and the commitments in the Secretarial Order ensure that restoration will be initiated in the immediate aftermath of the fire, when restoration is most effective in preventing invasive plant infestations. To reduce impacts from grazing and free-roaming equids that could stimulate the wildfire and invasive plant cycle, the Federal Plans require that livestock and free-roaming equids be managed at levels that achieve sage-grouse habitat objectives in the 4.5 million ha (11 million ac) of SFAs, and after that in the 14 million ha (35 million ac) of PHMA. Implementation of these measures began in 2015, with the completion of the Secretarial Order, and will continue throughout the 20- to 30-year lifespan of the Federal Plans. The work needed to protect the highest priority areas for conservation (SFAs) will be completed within 5 years (BLM 2015h, entire; DOI 2015a, p. 3). The new focus and prioritization of wildfire suppression and restoration for sage-grouse is an unprecedented change in wildfire fighting in sagebrush habitats that has been successfully implemented during the 2015 wildfire season. As described in the Wildfire and Invasive Plants section above, we expect the Secretarial Order and all other wildfire related actions will be implemented and effective. This sustained change in wildfire strategies reduce the risk that fire and invasive plants are likely to impact sage-grouse now and into the future. While we expect to see some continued loss of habitat and sage-grouse in the future due to wildfire and invasive plants, we do not expect that the species will be at risk of extinction or likely to become so due to risks posed by wildfire and invasive plants.

In addition to the benefits provided by the regulatory mechanisms and management activities in PHMAs and SFAs, the Federal Plans require new minimization measures in GHMA, where habitat is important for connectivity between populations and restoration opportunities (as discussed in detail in Changes Since the 2010 Finding, above). In GHMA, the plans reduce potential threats from human-caused disturbances by avoiding certain uses, such as infrastructure. When land-uses are allowed, science-based lek buffers (Manier *et al.* 2014, entire) are required for any projects implemented in GHMAs to ensure that the project is sited at a distance away from leks so that breeding sage-grouse are not disturbed. All projects implemented in GHMAs include RDFs to minimize indirect effects to sage-grouse, such as design and management of water features so that mosquito habitat is not created that could provide a vector for WNv. Lastly, all projects implemented in GHMAs (and PHMAs) are required to be fully mitigated to a net conservation gain for sage-grouse; these measures are a substantial improvement from management in 2010, where no avoidance, minimization, or mitigation was required. GHMA corresponds with approximately 27 percent of breeding habitat rangewide. These measures were effective immediately upon the implementation of the Federal Plans and will be in place for the next 20 to 30 years.

Some other minor potential threats exist such as hunting, disease, predation, recreational activities, and scientific use. As discussed in the assessment of those potential threats (see Summary of Information Pertaining to the Five Factors, above), some minor or localized adverse effects may occur, but the best available information does not indicate that rangewide population-level effects are occurring. For example, while sage-grouse hunting continues to be allowed in several States, it is highly regulated and monitored with season and bag limits adjusted based on population monitoring so that this activity does not negatively impact the sustainability of this species. In addition, some of those potential threats are ameliorated by the Federal and State Plans, as the exclusion or limitation on land uses thereby further minimizes these minor potential threats. For example, exclusion of surface development of nonrenewable energy in PHMA and Core Areas and RDFs for those projects in GHMA prevents the creation of human-made water sources that provide breeding habitat for mosquitos that are vectors for WNv, thus reducing the potential for disease outbreaks in sage-grouse populations.

In addition to the Federal and State Plans, extensive work by private landowners is an important part of the rangewide sage-grouse conservation effort that has been implemented since 2010 (as discussed in detail in Changes Since the 2010 Finding, above). Private lands comprise about 39 percent of the species' range and contain some key habitat types that are important to sage-grouse. Since 2010, SGI has completed targeted sage-grouse habitat restoration and enhancement actions on more than 1.8 million ha (4.4 million ac) of private ranchlands throughout the species' occupied range. This work includes conifer removal, which will be strategically implemented through use of new conifer mapping (NRCS 2015a, 19). It also includes more than 180,000 ha (450,000 ac) of conservation easements that protect sage-grouse habitat from future agricultural conversion or urban and exurban development. The SGI is also actively engaged in the BLM and USFS efforts to address the wildfire and invasive plants cycle by working with ranchers to implement grazing practices and fuels treatments to improve resistance and resilience of the sagebrush ecosystem. The NRCS has committed 198 million dollars to continue these efforts, with a goal of doubling previous accomplishments by 2018 (NRCS 2015a, p. 30, NRCS 2015b, p. 6).

Private lands conservation has occurred in Oregon and Wyoming with the completion of CCAAs that provide opportunities for enrollment for all private lands within those States (as discussed in detail in Changes Since the 2010 Finding, above). Programmatic and Umbrella CCAAs in these States provide sage-grouse guidance for ranch management practices, ensuring that enrolled lands will be managed to benefit sage-grouse. The programmatic agreements in Oregon provide a framework for other landowners to easily enroll without a large amount of time and paperwork, making it likely that others will enroll in the future. These agreements have resulted in substantial private lands conservation for sage-grouse. For example, landowners in Oregon have either completed enrollment or have signed formal letters of intent to enroll, representing more than 575,000 ha (1.4 million ac) of private rangeland in Oregon. In Wyoming, a completed umbrella CCAA covers important private lands in the range of the sage-grouse, and 36 private landowners have completed CCAAs in Wyoming under this programmatic CCAA. Collectively, there are 180,223 ha (445,343 ac) of private and State lands in the umbrella CCAA.

To summarize, in the 2010 finding, we determined that the regulatory mechanisms needed to address the loss and fragmentation of sage-grouse habitats were inadequate. Five years later, and following an unprecedented conservation planning effort by Federal, State, local, and private partners, we now determine that regulatory mechanisms and conservation efforts adequately address the loss and fragmentation of sage-grouse habitats based on the following reasons:

- The BLM and USFS have successfully amended or revised 98 land use plans that

govern approximately 50 percent of the sage-grouse occupied range. These plans now clearly out outline the expectations for management that will conserve sage-grouse habitat on BLM and USFS lands.

- The States of Wyoming, Montana, and Oregon completed plans with regulatory mechanisms that effectively reduce the loss and fragmentation of sage-grouse habitats. Collectively, the Federal Plans and three State Plans reduce impacts on more than 90 percent of sage-grouse breeding habitat under this umbrella of Federal and State protection.
- The implementation of the FIAT and Secretarial Order is reducing and restoring habitat lost to wildfire in important sage-grouse habitats and making the protection and rehabilitation of sage-grouse habitats a priority second to human health and safety. During the 2015 wildfire season, we are already seeing the positive results of these focused efforts to reduce habitat loss and fragmentation from wildfire.
- The SGI, led by the NRCS, is working with private landowners across the range of the sage-grouse. The initiative targets land within priority sage-grouse habitat and is improving rangeland health on more than 2.4 million acres.
- We have worked with the States and private landowners, especially in Oregon and Wyoming, to implement CCAAs that cover more than 1.8 million acres. These agreements will ensure the conservation of sage-grouse habitat while providing working landscapes for the landowners.

The Act defines an endangered species as any species that is ''in danger of extinction throughout all or a significant portion of its range'' and a threatened species as any species ''that is likely to become endangered throughout all or a significant portion of its range within the foreseeable future.''

We recognize that all impacts to the species have not been completely eliminated, and that existing and ongoing activities will continue to affect the species and its habitat. Therefore, it is likely that, over the foreseeable future, there will be some reduction in available habitat quantity and quality, some decrease in the relative population index, and local range contraction (including the loss of some small populations on the edges of the species' range). The conservation efforts included in this analysis, however, have significantly reduced the impacts in the most important habitats for the species. These areas are highly correlated with the PACs identified in the COT Report as areas necessary for sufficient representation, resilience, and redundancy to ensure persistence of the species.

The conservation efforts by Federal, State, and private partners have greatly changed the likely trajectory of the species from our 2010 projections when we determined that the species warranted listing. We conclude that, taking into account the potential, but now minimized, effects to the species over the foreseeable future, the species is not likely to become endangered within the foreseeable future because of the number of large, connected populations distributed across the species' range and the unprecedented level of conservation actions now in place for 90 percent of the breeding habitat across the species' range. In other words, even with the remaining likely reduction in habitat and populations discussed above, the sage-grouse will retain sufficient representation, resilience, and redundancy throughout the foreseeable future.

The sage-grouse has a broad distribution across the seven MZs, 11 States, and 2 Canadian Provinces. Despite historical reductions in occupied range, sage-grouse occupy approximately 703,453 km^2 (271,604 mi^2), more than 50 percent of their historical range. The species occurs over a variety of habitats that vary by vegetation, elevation, soil type, and precipitation. Through this broad distribution in these varied ecological conditions, the species will maintain representation. The species will continue to exist in the large and most of the small populations across the range, providing species redundancy now and into the future. The larger populations, which comprise the core of the species' range and are protected through Federal and State Plans, will be more resilient to direct impacts and are expected to rebound following disturbance. In summary, for sage-grouse, maintaining representation, redundancy, and resilience means having multiple and geographically distributed populations throughout the varied habitats across the species' range, and we conclude that this goal is achieved through the Federal and State Plans.

The new Federal land-management paradigm is established in 98 amended Federal Plans that reduce and minimize threats to the species in the most important habitat for the species. Several States have adopted their own regulatory measures to reduce habitat loss and fragmentation on non-Federal lands. Many private landowners have also engaged in proactive conservation efforts that provide additional benefits to the species and indicate a shift in cultural attitudes towards the sagebrush ecosystem. Together, the Federal Plans and State Plans in Wyoming, Montana, and Oregon reduce threats on approximately 90 percent of the breeding habitat across the species' range. Looking ahead, we expect these conservation efforts will continue to be implemented for the next 20 to 30 years, ensuring the protection of the most important habitats so that large sage-grouse populations continue to be distributed across the species' range. These conservation efforts occur in the areas needed for redundancy, representation, and resilience of the species.

Therefore, we find that the magnitude and imminence of threats either individually or in combination do not indicate that sage-grouse is currently in danger of extinction (endangered). Further, based on our analysis and the conservation provided by the conservation efforts described throughout this document, we find that the magnitude and imminence of threats either individually or in combination do not indicate that the sage-grouse is likely to become endangered within the foreseeable future (threatened). Therefore, based on our assessment of the best available scientific and commercial information, we find that listing the sage-grouse as a threatened or an endangered species is not warranted at this time.

Significant Portion of the Range

Under the Act and our implementing regulations, a species may warrant listing if it is in danger of extinction or likely to become so throughout all or a significant portion of its range. The Act defines ''endangered species'' as any species which is ''in danger of extinction throughout all or a significant portion of its range,'' and ''threatened species'' as any species which is ''likely to become an endangered species within the foreseeable future throughout all or a significant portion of its range.'' The term ''species'' includes ''any subspecies of fish or wildlife or plants, and any distinct population segment (DPS) of any species of vertebrate fish or wildlife which interbreeds when mature.'' We published a final policy interpreting the phrase ''Significant Portion of its Range'' (SPR) (79 FR 37578, July 1, 2014). The final policy states that (1) if a species is found to be endangered or threatened throughout a significant portion of its range, the entire species is listed as an endangered or a threatened species, respectively, and the Act's protections apply to all individuals of the species wherever found; (2) a portion of the range of a species is ''significant'' if the species is not currently endangered or threatened throughout all of its range, but the portion's contribution to the viability of the species is so important that, without the members in that portion, the species would be in danger of extinction, or

likely to become so in the foreseeable future, throughout all of its range; (3) the range of a species is considered to be the general geographical area within which that species can be found at the time the Service or the National Marine Fisheries Service makes any particular status determination; and (4) if a vertebrate species is endangered or threatened throughout an SPR, and the population in that significant portion is a valid DPS, we will list the DPS rather than the entire taxonomic species or subspecies.

The SPR policy is applied to all status determinations, including analyses for the purposes of making listing, delisting, and reclassification determinations. The procedure for analyzing whether any portion is an SPR is similar, regardless of the type of status determination we are making. The first step in our analysis of the status of a species is to determine its status throughout all of its range. If we determine that the species is in danger of extinction, or likely to become so in the foreseeable future, throughout all of its range, we list the species as an endangered (or threatened) species and no SPR analysis will be required. If the species is neither in danger of extinction nor likely to become so throughout all of its range in the foreseeable future, we then determine whether the species is in danger of extinction or likely to become so in the foreseeable future throughout a significant portion of its range. If it is, we list the species as an endangered or a threatened species, respectively; if it is not, we conclude that listing the species is not warranted.

When we conduct an SPR analysis, we first identify any portions of the species' range that warrant further consideration. The range of a species can theoretically be divided into portions in an infinite number of ways. However, there is no purpose to analyzing portions of the range that are not reasonably likely to be significant and endangered or threatened. To identify only those portions that warrant further consideration, we determine whether there is substantial information indicating that (1) the portions may be significant and (2) the species may be in danger of extinction in those portions or likely to become so within the foreseeable future. We emphasize that answering these questions in the affirmative is not a determination that the species is endangered or threatened throughout a significant portion of its range—rather, it is a step in determining whether a more detailed analysis of the issue is required. In practice, a key part of this analysis is whether the threats are geographically concentrated in some way. If the threats to the species are affecting it uniformly throughout its range, no portion is likely to warrant further consideration. Moreover, if any concentration of threats applies only to portions of the range that clearly do not meet the biologically based definition of ''significant'' (*i.e.,* the loss of that portion clearly would not be expected to increase the vulnerability to extinction of the entire species), those portions will not warrant further consideration.

If we identify any portions that may be both: (1) Significant; and (2) endangered or threatened, we engage in a more detailed analysis to determine whether these standards are indeed met. The identification of an SPR does not create a presumption, prejudgment, or other determination as to whether the species in that identified SPR is endangered or threatened. We must go through a separate analysis to determine whether the species is endangered or threatened in the SPR. To determine whether a species is endangered or threatened throughout an SPR, we will use the same standards and methodology that we use to determine if a species is endangered or threatened throughout its range.

Depending on the biology of the species, its range, and the threats it faces, it may be more efficient to address the ''significant'' question first, or the status question first. Thus, if we determine that a portion of the range is not ''significant,'' we do not need to determine whether the species is endangered or threatened there; if we determine that the species is not endangered or threatened in a portion of its range, we do not need to determine if that portion is significant.

Because we determined that the sage-grouse is neither endangered nor threatened throughout all of its range, due largely to the effective reduction and amelioration of threats by ongoing and future regulatory mechanisms and other conservation efforts, we must next determine whether the sage-grouse may be endangered or threatened in a significant portion of its range. To do this, we must first identify any portion of the species' range that may warrant consideration by determining whether there is *substantial information* indicating that: (1) The portions *may be* significant, and (2) the species *may be* in danger of extinction in those portions or is likely to become so within the foreseeable future. We note that a positive answer to these questions is not a determination that the sage-grouse is endangered or threatened within a significant portion of its range, but rather a positive answer to these questions confirms whether a more detailed analysis is necessary.

While the overall range of the sage-grouse could be subdivided into numerous portions, there are four primary biological divisions based on differences in populations and the concentrations of potential threats. These four portions are: The bi-State population in Nevada and California; the Columbia Basin population in Washington; and the Rocky Mountain and Great Basin portions of the range. We previously evaluated the status of the bi-State population and determined that listing is not warranted. We now consider the Columbia Basin population to be part of the Great Basin portion of the range. The range of the sage-grouse is the general geographical area within which the species is found at the time of this finding. Specifically, the current range of the sage-grouse covers 11 States (Washington, Oregon, California, Nevada, Idaho, Montana, Wyoming, Colorado, Utah, South Dakota, and North Dakota), and two Canadian provinces (Alberta and Saskatchewan), and encompasses all the current populations of sage-grouse, with the exception of the bi-State sage-grouse Distinct Population Segment, and the intervening habitat (Figure 1, above). Analyzing the threats to the Rocky Mountain and Great Basin populations also satisfies the requirement of the Act to address populations and threats in significant portions of the sage-grouse's overall range.

We first evaluated whether potential threats to the sage-grouse might be geographically concentrated in any one portion of its range. We examined impacts to sage-grouse from fire, invasive plants, conifer encroachment, agricultural conversion, renewable- and nonrenewable-energy development, mining, infrastructure, fences, improper grazing, free-roaming equids, urban and exurban development, recreation, climate change, drought, recreational hunting, scientific and educational purposes, disease, predation, contaminants, military activities, small populations, the inadequacy of regulatory mechanisms, and cumulative effects. In our rangewide finding, we determined that impacts to the sage-grouse are found throughout its range. Although these potential threats occur throughout the current range, they are concentrated differently between eastern and western portions of the range. Additionally, there are differences in the composition and ecology of sagebrush habitats in the eastern versus the western portions of the range, and sage-grouse are variably distributed across the landscape from

east to west (see Habitat and Distribution section above). The type and focus of conservation efforts to reduce and ameliorate potential threats vary between eastern and western portions of the range due to the differences in concentration. Therefore, these differences in sagebrush habitats, the distribution of sage-grouse, the concentrations of potential threats, and conservation efforts suggest that eastern and western portions of the range could be significant and warrant additional analysis.

The eastern, or Rocky Mountain portion (MZs I, II, and VII), of the species' current range covers approximately half of the occupied range, contains approximately 49 percent of the sage-grouse estimated abundance, and generally contains sagebrush habitat that is higher in elevation and receives greater amounts of precipitation (Figure 1). The western or Great Basin (MZs III, IV, V, and VI) portion of the species' current range similarly covers about half of the occupied range and approximately 51 percent of the sage-grouse, but contains sagebrush habitat that is lower in elevation and receives less precipitation (Figure 1). Concentrations of potential threats differ between these two portions of the range, with nonrenewable energy development, agricultural conversion, and infrastructure more concentrated in the Rocky Mountain portion, while wildfire and invasive species are more concentrated in the Great Basin portion. The Great Basin portion of the range includes the sage-grouse populations in the Columbia Basin (MZ VI).

Because some potential threats are more concentrated in either the Rocky Mountain or Great Basin portions, we determine that the Rocky Mountain and Great Basin portions warrant further consideration as potential significant portions of the range. Next we evaluate whether the sage-grouse is threatened or endangered in either the Rocky Mountain or Great Basin portions of its current range.

The current range of the sage-grouse could theoretically be divided into an infinite number of portions. In the first step of our significant portion of the range analysis, we identified the Rocky Mountains and the Great Basin as portions that warrant further consideration. Both portions represent approximately half of the current range, and the entire sage-grouse population is distributed equally between both portions. As we discussed in the Bi-State Distinct Population Segment section of this document above, the Columbia Basin represents less than 1 percent of the species' occupied range less than 3 percent of the breeding habitat, and its loss would not result in a significant gap in the occupied range of the sage-grouse. Therefore, the Columbia Basin does not contribute to the overall viability of the species and does not meet the definition of ''significant'' under the SPR policy. We did not identify any other portions within these larger portions that warrant further consideration because the potential threats are not substantially concentrated within any areas other than the Rocky Mountain or Great Basin portions, that are particularly large, constitute a particularly high percentage of the species' range, or are likely to be particularly important for the representation, resilience, or redundancy of the species. Therefore, we conclude that any portions of the range within the Rocky Mountain and Great Basin portions that we have identified do not warrant further consideration as significant portions of the range.

Status of the Rocky Mountain Portion of the Current Range

In our 2010 finding, we were concerned with long-term declines in abundance trends for the Rocky Mountain MZs (MZs I, II, and VII), and we identified a number of threats likely contributing to those declines (75 FR 13910, March 23, 2010). The most important threats identified for the Rocky Mountain portion of the range were habitat loss and fragmentation from energy development, infrastructure, and agricultural conversion; disease—particularly WNv; loss of habitat from improper livestock management; and inadequacy of regulatory mechanisms limiting human-caused impacts. Of these threats, the most significant of these involved a combination of habitat loss and fragmentation from infrastructure and energy development, and inadequate regulatory mechanisms to address these impacts.

The potential threats from fire, invasive grasses, free-roaming equids, conifer encroachment, and urban and exurban development have only limited, localized impacts to sage-grouse in the Rocky Mountain portion of the range now and into the foreseeable future. In addition, our evaluation of the Rocky Mountain portion of the current range focuses primarily on those potential threats most likely to affect, individually or cumulatively, sage-grouse in the Rocky Mountains, which does not include urban and exurban development, recreation, climate change and drought, recreational hunting, scientific and educational uses, contaminants, and military activity. Those threats that are likely to affect sage-grouse in the Rocky Mountains are summarized below. Full discussions of each of these potential threats can be found in Summary of Information Pertaining to the Five Factors (above).

Due to new regulatory mechanisms and conservation efforts, the potential threats identified in 2010 have been adequately ameliorated in the Rocky Mountain portion of the range. Historically, agricultural conversion reduced and fragmented sage-grouse habitats in the Rocky Mountain portion of the range, primarily in MZ I. However, the new cropland risk model (described above in the *Summary of Information for Agricultural Conversion*) indicates that future agricultural conversion is unlikely to have substantial impacts in MZ I of the Rocky Mountain portion of the current range, and future conversions to agriculture are unlikely to occur at greater rates or magnitudes outside of MZ I. Further the implemented regulatory mechanisms effectively reduce impacts from nonrenewable energy development, such that less than 17 percent of the sage-grouse population and 12 percent of the breeding habitat in the Rocky Mountain portion of the range could be exposed to nonrenewable energy development in the future.

We identified improper livestock management as a source of habitat loss and fragmentation in 2010. Since that time, rangeland-health standards in the Federal Plans, Wyoming and Montana State Plan requirements, and SGI practices of applying grazing systems, vegetating former rangeland with sagebrush and perennial grasses, and controlling invasive grasses, effectively ameliorate this threat to the sage-grouse in the Rocky Mountain portion of the range, now or in the future.

Renewable energy development has not occurred extensively within the Rocky Mountains, but potential exists, particularly for wind development. Infrastructure exists throughout the Rocky Mountains and will likely continue into the future. For each of these impacts, the regulatory mechanisms provided by Federal Plans, the Montana Plan, and the Wyoming Plan substantially reduce this potential impact by restricting new development in important sagebrush habitats. Coal mining, the primary kind of mining occurring in the Rocky Mountains, has generally declined since 2008. Regulatory mechanisms provided by the Federal Plans exclude new leasable (except coal) and saleable mineral

development on more than 14 million ha (35 million ac) of PHMA. Because of the effective regulatory mechanisms that protect important habitats, these types of development are not threats to sage-grouse within the Rocky Mountain portion of the range, now or in the future.

As described in the Summary of Information Pertaining to the Five Factors (above), we also evaluated the impacts of predation and disease and found that, although they present localized impacts, they were not likely to result in population-level effects. This remains true when reviewing the information for the Rocky Mountain portion of the range.

Conservation Efforts in the Rocky Mountain Portion of the Current Range

Since the 2010 finding, many parties have collaborated to develop comprehensive strategies that ameliorate the major potential threats, consistent with the COT Report. The Federal Plans and Wyoming and Montana Plans provide adequate regulatory mechanisms to reduce the threats of human-caused habitat disturbance on the most important sage-grouse habitats (as discussed in detail in the Changes Since the 2010 Finding, above). The Federal Plans designate PHMA, and the Wyoming and Montana Plans designate Core Areas, all of which correspond closely with the PACs identified in the COT Report. In the Rocky Mountain portion of the range, more than 67 percent of the sage-grouse breeding habitat distribution is protected as PHMA and more than 30 percent is protected as GHMA.

The Federal Plans address the primary potential threats that reduce and fragment sage-grouse habitats on BLM- and USFS-administered lands in the Rocky Mountain portion of the range, including infrastructure and energy development. All forms of development—from energy, to transmission lines, to recreation facilities and grazing structures—would be avoided in PHMA unless a further assessment found that the project would not adversely affect the sage-grouse. Consistent with COT guidance, a limited amount of development could occur in GHMAs, although additional conservation measures, such as lek buffers, seasonal and timing restrictions, and project-design features, will minimize potential effects in GHMA.

In conjunction with the Federal Plans, the Wyoming Plan incorporates stipulations and conservation measures, such as controlled surface use, seasonal and noise restrictions, consultation requirements, density of development restrictions, and lek buffers to reduce impacts associated with energy development on all lands within Core Areas in Wyoming. The Montana Plan includes a regulatory mechanism similar to the Core Area Strategy to reduce impacts associated with energy development in Core Areas on State-owned lands and private lands when a State authorization is required. The Montana Plan also requires similar conservation measures to reduce impacts, such as seasonal and noise restrictions, density development restrictions, and lek buffers.

Finally, conservation efforts on private lands through SGI and CCAAs reduce potential threats in the Rocky Mountain portion of the range. SGI efforts with ranchers to address grazing systems and fences, to implement habitat restoration, and to provide conservation easements have protected sage-grouse habitat from further fragmentation; NRCS' commitment to adaptive management, partnerships, and flexibility in conservation approaches ensures continued and constantly improving conservation on private lands within sage-grouse habitat. In Wyoming, a completed umbrella CCAA covers important private lands in the range of the sage-grouse, and 30 private landowners have completed CCAAs in Wyoming under this programmatic CCAA. Collectively, there are 180,223 ha (445,343 ac) of private and State lands committed within the umbrella CCAA, 112,212 ha (277,282 ac) of which are located within sage-grouse Core Areas, and 8,235 ha (20,348 ac) are in connectivity areas.

By taking a landscape-level view that spans land ownership in the Rocky Mountain portion of the range, these conservation efforts have significantly reduced the potential threats to sage-grouse now and in the foreseeable future. Many of these conservation efforts are regulatory mechanisms on Federal lands that are managed consistently by BLM and USFS in the five Rocky Mountain States (MT, WY, CO, ND, and SD). Similar regulatory mechanisms are provided by Montana and Wyoming State Plans and Executive Orders to reduce potential impacts on non-Federal lands in those States. These regulatory mechanisms are finalized, are currently being implemented, and are likely to continue to be implemented for the next 20 to 30 years. In addition, SGI and private land owners have implemented conservation projects across the Rocky Mountain portion of the range, further contributing to sage-grouse conservation. The SGI has committed to continue this work for the next 3 years, ensuring private land conservation will continue to be implemented through the authorization of the next Farm Bill (NRCS 2015a, p. 2). All of these conservation actions are consistent with the COT Report recommendations and scientific literature, which indicates they will effectively conserve sage-grouse.

Conclusion for the Rocky Mountain Portion of the Current Range

Based on Federal and State regulations and conservation efforts, the risk and exposure of the sage-grouse to the potential threats of nonrenewable-energy development, agricultural conversion, and habitat fragmentation from infrastructure and other development are significantly reduced. These conservation efforts are ameliorating the potential threats and decreased the amount and rate of development well below what was expected, and by minimizing and mitigating impacts to sage-grouse, have significantly addressed threats facing sage-grouse as described in the 2010 finding, the COT Report, and other published scientific findings. In the Rocky Mountain portion, some habitat loss associated with energy development, infrastructure, agricultural conversion, and urbanization will continue into the future.

Some sage-grouse populations may continue to decline in some parts of the Rocky Mountains. However, the existing and future effective regulatory mechanisms and conservation efforts in the Rocky Mountain portion of the range will protect the most important habitats and maintain relatively large, well-distributed, and interconnected sage-grouse populations across much of the eastern portion of its range. Since the 2010 finding, there has been an unprecedented and substantial proactive conservation effort to reduce potential habitat loss and fragmentation from infrastructure and energy development. More than 67 percent of the sage-grouse breeding habitat in the Rocky Mountains is protected by PHMA, where no development will occur, and more than 30 percent is protected by GHMA, where required conservation measures will avoid and reduce adverse effects. Therefore, we determined that, due to the combination of regulations on Federal lands and regulatory and voluntary measures on private lands that provide adequate avoidance and mitigation, these potential threats are effectively being reduced in the Rocky Mountain portion of the range.

Therefore, we conclude that sage-grouse in the Rocky Mountain portion of

the current range are not in danger of extinction or likely to become so within the foreseeable future, due to the existing effective conservation efforts implemented since 2010 and future conservation efforts. Sage-grouse will remain well-distributed and interconnected into the foreseeable future as these conservation efforts are implemented. Therefore, the sage-grouse is not threatened or endangered in the Rocky Mountain portion of its current range.

Status of the Great Basin Portion of the Current Range

In our 2010 finding, we identified long-term declines in sage-grouse abundance trends for the Great Basin MZs, and we identified a number of threats likely contributing to those declines (75 FR 13910, March 23, 2010). The most important threats identified in the 2010 finding for the Great Basin were: Wildfire, invasive plants, conifer invasion, habitat fragmentation, climate change, loss of habitat quality due to improper livestock and free-roaming equid grazing, and the inadequacy of regulatory mechanisms to address human-caused impacts such as energy and infrastructure development. Of these threats, the greatest concern in the Great Basin was habitat loss and fragmentation from wildfire and invasive plants. Currently, the primary potential threats to sage-grouse in the Great Basin include wildfire and its synergistic effects with invasive plants. We will also specifically summarize habitat loss and fragmentation due to conifer encroachment, mining, renewable energy, and infrastructure in the Great Basin. Our evaluation of the Great Basin portion of the current range focuses primarily on those potential impacts most likely to affect, individually or cumulatively, sage-grouse in the Great Basin and does not include urban and exurban development, recreation, predation, climate change and drought, recreational hunting, scientific and educational uses, contaminants, and military activity. Full discussions of each of these potential threats can be found in Summary of Information Pertaining to the Five Factors (above).

Wildfire and its synergistic relationship with invasive species, climate change and drought, improper grazing, and free-roaming equids was identified in the 2010 finding as the most serious threat to sage-grouse populations in the Great Basin. Wildfire is a natural and integral part of the Great Basin landscape, and will continue into the future. A recent study predicts that a 43 percent decline in Great Basin sage-grouse populations could occur by 2044 if no additional management is implemented to address the wildfire and invasive plant cycle. If conservation measures reduce the area burned by at least 25 percent, the rate of population decline is likely to be reduced. Further, the study emphasizes the importance of implementing conservation actions in areas of moderate and high resistance and resiliency and containing high densities of sage-grouse. The FIAT Assessments and Secretarial Order conservation measures are consistent with this recommendation to prioritize implementation actions in places most likely to be effective and to provide the greatest benefit for sage-grouse. Therefore, we conclude the continued implementation of FIAT and the Secretarial Order will reduce the rate of decline in the Great Basin over the next 30 years.

Through the Federal Plans, the BLM and USFS have established land health standards that now consider and incorporate sage-grouse habitat needs. The Federal Plans restrict grazing in areas that are not meeting standards, and the agencies will manage free-roaming equid populations at levels that minimize impacts to the most important sage-grouse habitats. Voluntary conservation through SGI's invasive species removal programs, improved grazing practices, and the enhancement and protection of healthy rangeland conditions further improve habitat for sage-grouse in the Great Basin. Finally, State conservation efforts in Oregon have further reduced the impacts of wildfire, invasive plants, grazing, and free-roaming equids through regulatory mechanisms.

These and many other positive conservation activities described in this finding were not implemented, planned, or certain to occur when the 2010 warranted finding was completed, leading us to conclude that sage-grouse warranted protections of the Act. The regulatory mechanisms and commitments to manage wildfire and invasive plants will result in a substantial reduction of habitat lost to these impacts, such that sage-grouse populations will continue to be distributed and connected across the Great Basin. Therefore, because the potential impacts have been substantially reduced by effective regulatory mechanisms and the ongoing implementation of conservation efforts, wildfire and the associated synergistic effects from invasive species, climate change and drought, improper grazing, and free-roaming equids are not substantial threats to the sage-grouse within the Great Basin portion of the range, now or in the future.

In addition to wildfire and its synergistic impacts, habitat loss from conifer encroachment has also been identified as a concern in the Great Basin. Conifers are a natural component of the sagebrush ecosystem, and, if not actively managed, are expected to continue to expand, resulting in additional loss of habitat in the Great Basin. However, Federal and State Plan vegetation objectives and on-the-ground removal of conifers through SGI and State efforts have reduced impacts of this potential threat. For the next 3 years, SGI has committed to continue this work, ensuring private land conservation will continue to be implemented (NRCS 2015a, p. 2; NRCS 2015b, p. 6). As a result of direction provided in State and Federal Plans and ongoing implementation of SGI, the rate of encroachment and habitat loss is reduced such that conifer encroachment is not a threat in the Great Basin portion of the range, now or in the future.

Development due to mining, renewable energy, and infrastructure continues to occur in the Great Basin. As discussed above (see *Mining*), mining potential is difficult to predict. The Federal Plans contain regulatory mechanisms to avoid and minimize potential impacts from mining in important sage-grouse habitat. Similarly, infrastructure and development of renewable energy is currently present across the Great Basin and will likely continue at some level, but regulatory mechanisms provided by Federal Plans reduce potential future development by eliminating or capping disturbance in important sagebrush habitat and by implementing project design features to minimize impacts (*e.g.*, buffers, noise restrictions, etc.).

Conservation Efforts in the Great Basin Portion of the Current Range

Since the 2010 finding, many parties have collaborated to develop comprehensive strategies that would substantially ameliorate the major potential threats, consistent with the COT Report. Through Federal Plans, State Plans, and voluntary conservation on private lands through CCAA and SGI, the Great Basin is being actively managed for the benefit of sage-grouse.

The Federal Plans provide clear management regulations with measurable objectives to address invasive annual grasses, conifer encroachment, improper grazing, and free-roaming equids. They prioritize management in the most important habitat (PHMA), which encompasses approximately 60 percent of the

breeding habitat in the Great Basin. All forms of development—from energy, infrastructure, and grazing structures—would be avoided in PHMA unless further assessment found the project not to have any adverse effects on the species. Consistent with COT guidance, a limited amount of development could occur in GHMAs, which support 23 percent of the breeding habitat in the Great Basin (USFWS 2013, pp. 43–52). In those instances, additional measures such as lek buffers, seasonal and timing restrictions, and project design features will minimize potential indirect effects that could occur. A more comprehensive discussion on these measures and their expected effects is provided earlier in this finding (see Summary of Information Pertaining to the Five Factors, above).

The majority of sage-grouse habitat in the Great Basin occurs on Federal lands, making the Federal Plans' implementation most important for sage-grouse conservation in the Great Basin. However, States can help reduce potential threats through collaboration with Federal land managers and by promoting conservation outside Federal lands. To date, Oregon is the only State in the Great Basin that completed and implemented a plan that provides regulatory mechanisms. The Oregon Plan provides regulatory protections for sage-grouse habitat across all land ownerships, a coordinated mitigation system, wildfire management measures, and a development cap for Core Areas that is coordinated with the Federal Plans.

Threat reduction is also enhanced on private lands in the Great Basin through the SGI and associated Farm Bill programs. Throughout the western States, SGI has implemented targeted sage-grouse conservation practices on more than 4.4 million acres, and has allocated more than $424 million in project funding. In the Great Basin portion of the Range, SGI efforts with ranchers to address grazing systems and fences, to implement habitat restoration, and to provide conservation easements have protected sage-grouse habitat from further fragmentation. The NRCS made funding available from 2010 through 2018 to fund and implement the SGI program (NRCS 2015a, p. 2, NRCS 2015b, p. 6). Since 2010, SGI has implemented action on more than 1,000 ranches. NRCS' commitment to adaptive management, partnerships, and flexibility in conservation approaches ensures continued and constantly improving conservation on private lands within sage-grouse habitat. Based on the track record of successfully implemented conservation actions consistent with the COT Report recommendations and commitments to continue implementing the program, we conclude that the SGI program provides substantial conservation benefits to sage-grouse in the Great Basin, now and in the future.

The greatest amount of private lands conservation in the Great Basin has occurred in Oregon. In 2015, we completed a series of programmatic CCAAs for sage-grouse that potentially covers all private lands in the range in Oregon. In Oregon, more than 575,000 ha (1.4 million ac) of rangeland have been effectively conserved for sage-grouse through enrollment of private landowners in CCAAs. These programmatic agreements provide a framework for other landowners to easily enroll without a large amount of time and paperwork, making it likely that others will be enrolled in the near future.

This coordinated approach to conserve sage-grouse and sagebrush habitat has resulted in substantial reductions in all of the potential threats facing sage-grouse in the Great Basin in the foreseeable future. Many of these conservation efforts on Federal lands are consistent across the five States due to the management by BLM and USFS, while programs on non-Federal lands vary from State to State due to different regulatory, political, ecological, and economic circumstances in the respective States. Since 2010, many of the specific measures described in this finding are under way or are being finalized with actions to be implemented during the coming years. We have a high degree of certainty that the majority of the planned future actions will be implemented and will reduce the magnitude of potential threats facing the sage-grouse in the Great Basin.

Conclusion for the Great Basin Portion of the Current Range

Based on Federal, State, and private landowner efforts, the potential threats of wildfire (and associated, synergistic impacts from invasive plants, climate change and drought, improper grazing, and free-roaming equids), conifer encroachment, mining, and infrastructure have been reduced. Some habitat loss in the Great Basin portion associated with wildfire and invasive plants and conifer encroachment will continue into the future, and it is likely that sage-grouse populations will continue to decline in some parts of the Great Basin. However, we expect that the existing and future effective conservation efforts in the Great Basin portion of the range will reduce declines and will protect the most important sage-grouse habitat, resulting in relatively large, well-distributed, and interconnected populations across much of the western portion of its range. Since the 2010 warranted finding, Federal, State, and local entities to identify specific needs of this species and to provide resources for the conservation and protection of the species and its habitat. Due to these conservation efforts, the species will remain well-distributed and interconnected into the foreseeable future as these measures are implemented. Therefore, the sage-grouse is not a threatened or endangered species in the Great Basin portion of its range.

Conclusion

Our review of the best available scientific and commercial information indicates that the sage-grouse is not in danger of extinction nor likely to become endangered within the foreseeable future throughout all of its range. Additionally, we determined that the sage-grouse is not in danger of extinction now or within the foreseeable future throughout either the Rocky Mountain or Great Basin portions of its range. Therefore, the sage-grouse is not in danger of extinction nor likely to become endangered within the foreseeable future throughout a significant portion of its range. Therefore, we find that listing the sage-grouse as an endangered or threatened species under the Act is not warranted at this time.

The completion of this status review is not the end of our commitment to sage-grouse conservation. Our determination today is based on the best scientific and commercial data currently available. That determination, however, cannot guarantee that the sage-grouse (or other sagebrush ecosystem species) will not in the future warrant listing under the Act. New threats may develop, management may change, or the species may not prove as resilient as we concluded based on the currently available science. Thus, although our best judgment today indicates that successful sage-grouse conservation will be achieved by continued implementation of the regulatory mechanisms and conservation efforts we relied on in our finding above, we and our partners must carefully monitor threats to the sage-grouse and its response to those threats. Therefore, we will work with our Federal and State partners to conduct a sage-grouse status review in 5 years. This status review will inform adaptive management and guide future research needs to ensure that conservation efforts continue to

benefit sage-grouse into the future. In the meantime, to ensure the long-term successes of this unprecedented conservation effort, we will continue to work with our partners to augment and improve current management within the sagebrush ecosystem. If at any time new information indicates that the provisions of the Act may be necessary to conserve sage-grouse, we can initiate listing procedures, including, if appropriate, emergency listing pursuant to section 4(b)(7) of the Act.

References

A complete list of references cited is available on the Internet at *http://www.regulations.gov* and upon request from the Mountain-Prairie Regional Office (see **ADDRESSES**).

Author(s)

The primary author(s) of this notice are the staff members of the U.S. Fish and Wildlife Service.

Authority

The authority for this action is section 4 of the Endangered Species Act of 1973, as amended (16 U.S.C. 1531 *et seq.*).

Dated: September 21, 2015.

Daniel M. Ashe,

Director, U.S. Fish and Wildlife Service.

[FR Doc. 2015–24292 Filed 10–1–15; 8:45 am]

BILLING CODE 4310–55–P

OREGON
WATERSHED
ENHANCEMENT BOARD

Agenda Item H

Council Capacity Grant Awards

Public Comment

Board Meeting July 25-26, 2023

COLUMBIA COUNTY

Board of Commissioners Office

ST. HELENS, OR 97051

Commissioners
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Kelli Jo Smith
Casey Garrett

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Katie Goldsberry

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Mark Parsons

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June 8, 2023

TO: OWEB Grants Committee

Re: Lower Columbia River Watershed Council Capacity Grant

Dear Committee Members,

It has come to our attention that the Lower Columbia River Watershed Council (LCRWC) has not been recommended for capacity funding. The LCRWC has been an active and vital participant in implementing the Oregon Plan for Salmon and Watersheds since the Council was formed in 1996. The LCRWC has been a significant partner with Columbia County in many projects over the years, especially in important culvert replacements to address fish passage issues. The LCRWC encompasses highly significant stream reaches in Columbia County and has historically had active relationships with landowners and successfully implemented many effective projects.

It appears that the issues of membership and management play a role in the OWEB staff recommendation to not fund the LCRWC. We have reached out to the Columbia SWCD and OSU Extension in Columbia County and would like to offer staff support to assist in the development of a plan to remedy these issues and maintain the operations of the LCRWC. We request that the capacity funding for the LCRWC be granted for the next biennium so that the Council would have the funding to continue operations and to work with us while we address the underlying issues.

We would be happy to meet with OWEB staff to receive the guidance and information required to successfully carry out this project to support the LCRWC in meeting the necessary criteria.

Thank you for your consideration of our request.

Sincerely,

Casey Garrett, Chair

Kelli Jo Smith, Commissioner

Margaret Magruder, Commissioner

Oregon State University

Extension Service – Columbia County
Oregon State University
505 N. Columbia River Hwy
St. Helens, Oregon, 97051

P 503-397-3462 | **F** 503-397-3467
extension.oregonstate.edu/columbia

6/12/23

Oregon Watershed Enhancement Board
OWEB Grants Review Committee
75 Summer St NE, Salem, OR 97301

Dear Committee members:

I was informed by the Council Coordinator that the Lower Columbia River Watershed Council has received a "no fund" capacity grant recommendation from OWEB staff.

I attended the LCRWC meetings for many years as an "ex-officio" partner (OSU Extension), helping as I could with membership and clientele recruitment, providing technical advice and recruiting outside expertise as needed. I was elected to the Council about 7 years ago and have, over the last year, been the Secretary.

The combination of the pandemic and the inability of a previous coordinator to translate some good concepts into on the ground action was frustrating for all of us. The Council came close to disbanding when it let the previous coordinator go about a year ago but chose to move forward.

There is a lot to be done within the LCRWC. While most of the culvert passage work has been done under the guidance and hard work of Margaret Magruder, the previous coordinator until she was elected as the Columbia County Commissioner, a lot of other watershed improvement opportunities still remain.

The Clatskanie river system is a high priority at the state/regional level and the current coordinator has made significant strides in engaging the key industrial and small woodland owners that abut the river and its tributaries. This is a relatively small group of owners/managers for most of the riparian habitat.

The relationship with the Columbia SWCD has continued (they are the LCRWC fiscal managers) and have been significantly improved with the current Coordinator.

Getting Council engagement is a challenge with less than 5,500 total residents within the Clatskanie School District Boundaries. That represents ~ 90% of the anadromous fish habitat within the Council's border. Many residents commute to work in the Longview/Kelso area. That said, the Council has had several potential new members attend recent meetings.

Agricultural Sciences & Natural Resources, Family and Community Health, 4-H Youth, Forestry & Natural Resources, Extension Sea Grant, and Open Campus programs. Oregon State University, United States Department of Agriculture, and Oregon counties cooperating. The Extension Service offers its programs and materials equally to all people.

I know this is a tough decision. Please feel free to call or email me if you wish to discuss this further.

Sincerely,



Chip Bubl

Chip Bubl
Oregon State University/Columbia County
Home Horticulture, Small Farms, Agriculture, Livestock
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7/13/23

OWEB Board
775 Summer Street NE Suite 360
Salem, OR 97301-1290

RE: Lower Columbia River Watershed Council Capacity Grant Application

Dear Co-Chairs McAlister and Boyer and Members of the Board:

We have learned that the Lower Columbia River Watershed Council has received a "no fund" capacity grant recommendation from OWEB staff.

I attended the LCRWC meetings for many years as an "ex-officio" partner (OSU Extension), helping as I could with membership and clientele recruitment, providing technical advice and recruiting outside expertise as needed. I was elected to the Council about 7 years ago and have, over the last year, been the Secretary.

The combination of the pandemic and the inability of a previous coordinator to translate some good concepts into on the ground action was frustrating for all of us. The Council came close to disbanding when it let the previous coordinator go about a year ago but chose to move forward. Very recently, the Council and the new Coordinator came to a mutual understanding to end that working relationship.

This past Monday, we spent an evening putting together a strategy for going forward.

We are determined to patch some relationships with some of the large timber owners that straddle a lot of the important Clatskanie river drainage. We have a great relationship with the Columbia County Public Works with regards to some of the remaining fish and/or lamprey passage barriers that remain. We still believe that there are opportunities for creating more complex lower elevation resting areas and lamprey/chum reproductive sites.

Significant portions can be done by volunteers. Ideally, we would like to be fully funded by a new Capacity grant. At a minimum, we would like to be able at least retain the funds from the past Capacity grant to allow us to fund some very part time help. Sooner than later, we would like to get a professional rapid bio-assessment to put more teeth to our instincts about where our efforts would provide the largest return in ecological restoration.

Agricultural Sciences & Natural Resources, Family and Community Health, 4-H Youth, Forestry & Natural Resources, Extension Sea Grant, and Open Campus programs. Oregon State University, United States Department of Agriculture, and Oregon counties cooperating. The Extension Service offers its programs and materials equally to all people.

There is a lot to be done within the LCRWC. While most of the culvert passage work has been done under the guidance and hard work of Margaret Magruder, the previous coordinator until she was elected as the Columbia County Commissioner, a lot of other watershed improvement opportunities still remain.

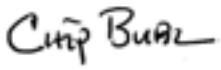
The Clatskanie river system is a high priority at the state/regional level and the current coordinator has made significant strides in engaging the key industrial and small woodland owners that abut the river and its tributaries. This is a relatively small group of owners/managers for most of the riparian habitat.

The relationship with the Columbia SWCD has continued (they are the LCRWC fiscal managers) and is solid.

Getting Council engagement is a challenge with less than 5,500 total residents within the Clatskanie School District Boundaries. That represents ~ 90% of the anadromous fish habitat within the Council's border. Many residents commute to work in the Longview/Kelso area. That said, the Council has had several potential new members attend recent meetings and we spent quite a bit of time last Monday brainstorming some good outreach strategies that should bring a larger group to the Council.

I know this is a tough decision. Please feel free to call or email me if you wish to discuss this further.

Sincerely,



Chip Bubl

Chip Bubl
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CITY OF CLATSKANIE

July 13, 2023

OWEB Board
775 Summer Street NE Suite 360
Salem, OR 97301-1290

RE: Lower Columbia River Watershed Council Capacity Grant Application

Dear Co-Chairs McAlister and Boyer and Members of the Board:

This letter is in support of the request to provide OWEB Capacity Grant funding for the Lower Columbia River Watershed Council to allow members to rebuild the Council to its former high functioning status. The City of Clatskanie has been an avid participant in the Council and desires to see it continue. As you may know, the Council was chartered in 1996 and has actively implemented many successful Oregon Salmon and Watershed projects over the years.

The City has partnered with the LCRWC on many successful projects and hope to continue to have the opportunity to implement more restoration projects in the LCRWC area.

We urge your support for their funding request. Thank you for your consideration.

Sincerely,

Greg Hinkelman
City Manager

7/18/2032

OWEB Board
775 Summer Street NE Suite 360
Salem, OR, 97301-1290

Re: Lower Columbia River Watershed Council Capacity Grant Application

Dear OWEB Board,

The Scappoose Bay Watershed Council (SBWC) is writing this letter in support of the Lower Columbia River Watershed Council (LCRWC). There is a significant need in the local community for the LCRWC. The current board for the LCRWC is working very diligently with a plan moving forward to be the fundamental organization it once was within the local community. The plan includes seeking new board members, a new coordinator, expanding community outreach, updating council documentation, and seeking the means to do the bio-assessments and surveys that need to be done to perform the most effective restoration within the watershed. There is a need for an effective Watershed Council in this region. The SBWC receives inquiries from homeowners and organizations within the LCRWC region with questions as their neighboring watershed council. The SBWC knows of this need and wants to continue to work in conjunction with the LCRWC to effectively help the community with any conservation needs. The SBWC urges the OWEB Board to consider working with the LCRWC to determine a path forward for an effective transition to meet all OWEB merit requirements. The LCRWC has the support of the SBWC, other local agencies, and a real need within the community to continue.

If you have any questions or need more information, please contact me at 503-298-6996 or coordinator@scapposebay-wc.org.

Sincerely,
Scappoose Bay Watershed Council

Rachell Meyers
Council Coordinator
Scappoose Bay Watershed Council

COLUMBIA COUNTY

Board of Commissioners Office

ST. HELENS, OR 97051

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July 18, 2023

OWEB Board
775 Summer Street NE Suite 360
Salem, OR 97301-1290

RE Lower Columbia River Watershed Council Capacity Grant Application

Dear Co-Chairs McAlister and Boyer and Members of the Board:

This letter is to request approval of providing OWEB Capacity Grant funding for the Lower Columbia River Watershed Council to allow for the members to rebuild the Council to its former high functioning status. The Council was chartered in 1996 and has actively implemented many successful Oregon Plan for Salmon and Watershed projects over the years.

I recently became aware that the Council was struggling to maintain membership and to identify and implement projects. After learning this, I contacted several LCRWC members, SWCD staff and OWEB staff to develop a path forward to enable the Council to continue operations. After reviewing the OWEB Council Capacity Grant Review document, this core group has developed a plan to facilitate rebuilding the LCRWC

The Council has a remaining balance, approximately $35,000, in its current OWEB Capacity grant fund which, if extended, would allow the Council some funding to work on rebuilding. If required to wait 2 years for the next OWEB Capacity grant funding opportunity, the Council would not be able to fund hiring a new Coordinator to provide the necessary time and expertise to rebuild in a timely manner.

The goals identified

- Seek a volunteer or part time Coordinator
- Increase membership
- Schedule regular meetings in Clatskanie and Rainier
- Update Strategic Plan
- Update Board Self-Assessment Plan
- Improve community outreach
- Build landowner relationships
- Seek funds/talent for a rapid bio-assessment to inform our updated strategic plan
- Identify potential projects

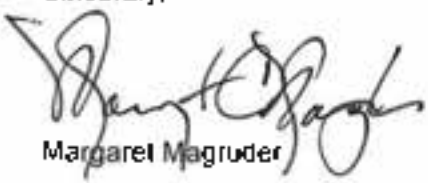
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We propose:

- Extending the existing Capacity Grant to cover the interim until the next OWEB Capacity Grant window
- Develop an Action Plan which includes the goals noted above
- Meet regularly with OWEB staff to assess progress
- Reevaluate progress at monthly Council meetings

We would welcome other recommendations or requirements that the OWEB Board might suggest Our goal is to preserve the Council and its ability to advance projects within the Lower Columbia Watershed.
Thank you for your consideration of this request.

Sincerely,



Margaret Magruder

YAMHILL SOIL & WATER CONSERVATION DISTRICT

July 20, 2023

Oregon Watershed Enhancement Board
c/o Nicole Bettinardi
via email: Nicole.Bettinardi@oweb.oregon.gov

RE: Capacity Grant Funding for Greater Yamhill Watershed Council

Dear Oregon Watershed Enhancement Board,

On behalf of the Yamhill Soil & Water Conservation District (District), I am writing to express our support for the Greater Yamhill Watershed Council (Council) to receive full funding of their 2023-2025 capacity grant. We consider the Council a vital partner, with nearly three decades of success in collaborative conservation efforts. Council staff often provide technical expertise and support District efforts. We are concerned that reducing funding for the Council will not only limit their own capacity to do work in the watershed, but also decrease the capacity of the District to implement collaborative restoration projects.

Over the past year, the Council has partnered with the District on several projects, including the successful completion of three OWEB grants: the Fromherz-Cooke oak habitat restoration project, the Miller Woods Phase 1 upland prairie habitat restoration, and a culvert replacement to improve fish passage on a tributary of Mill Creek. The Council is also an active participant in District-led aquatic weed surveys, invasive weed outreach efforts, water quality sampling, and serves as a member of the County's Roadside Vegetation Technical Advisory Committee. Together, we have accomplished more than either organization could have accomplished individually.

With full capacity grant funding, this partnership will continue to thrive. We are currently developing several collaborative projects, including multiple riparian habitat restoration projects within the Deer Creek, Muddy Creek, and South Yamhill Strategic Implementation Area (SIA), and areas adjacent to agricultural land near Yamhill. Other projects include groundwater monitoring in the Chehalem Mountain area, culvert replacements benefiting fish passage on and near commercial timber harvest areas in western portions of Yamhill County, establishment of a carbon planting area on agricultural land outside Dayton, and spawning surveys and monitoring along Panther Creek adjacent to agricultural land.

In the spirit of continuing our successful partnership and the goal of accomplishing multiple projects together that will support Yamhill County and its residents, we hope that you will consider fully funding the Greater Yamhill Watershed Council's capacity grant.

Sincerely,

Andy Bleckinger
District Manager

Columbia Soil & Water Conservation District

35285 Millard Road
St. Helens, OR 97051
Ph: 503.433.3205

www.columbiaswcd.com

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

Dear OWEB Board Members,

On behalf of the Board and Staff of the Columbia SWCD, we offer our full support to helping to keep the LCRWC funded. During the meetings I have been attending, the LCRWC is dedicated to improving landholder engagement, conducting a rapid biological assessment, increasing board membership, and getting out into the community to remind them who the Council is what they can do for them.

We have been a proud partner of the LCRWC since the beginning and we would hate for them to lose their funding and not be able to regrow the Council to what it has been in the past. Without the LCRWC's efforts and support a lot of the great work that has been done in Columbia County would not have happened.

We encourage you to support them in some way that they can accomplish their goals and get the LCRWC back on the right track. This is a time of transition and with some help from partners and volunteers, I fully believe that the Council can be strong once again.

Sincerely,

Malyssa Legg
Columbia SWCD
District Manager

OREGON
WATERSHED
ENHANCEMENT BOARD

Agenda Item K

Water Acquisition Grant Awards

Public Comment

Board Meeting July 25-26, 2023

KWUA Klamath Water Users ASSOCIATION

Phone (541) 883-6100 Fax (541) 883-8893 ~ 2312 South 6th Street, Suite A, Klamath Falls, Oregon 97601

July 19, 2023

Via Electronic Mail Only

Oregon Watershed Enhancement Board
Attn: Nicole Bettinardi
725 Summer Street NE, Suite A
Salem, OR 97301
Nicole.Bettinardi@oweb.oregon.gov

Re: Comments on Grant Application 224-9902-22741 (Acquisition of Wood River 1864 Priority Water Right)

Dear Co-Chairs McAlister and Boyer and Board Members:

Klamath Water Users Association (KWUA) respectfully requests your consideration of the following comments regarding the subject grant application.

The application should be denied because it is premised on a "paper" water transfer. That is, the application asks that the Oregon Watershed Enhancement Board ("Board" or "OWEB") assume that refraining from the surface application of 3,755.4 acre-feet (AF) of water on a property in the lower Wood River Valley will result in an increase, beyond what would otherwise be present, of exactly 3,755.4 AF in streams, lakes, and rivers downstream of the historic points of diversion for the irrigation right of the transferor property, all the way down to a new point of diversion for consumptive use on another property. That assumption does not withstand technical scrutiny. Approval of the application would amount to the Board paying for a specific quantity of water, but acquiring only a *much* lesser quantity for uses downstream of the transferor property.

KWUA leaves to the Board (and other potential funders) the question of whether to pay for water that will not materialize and thus not provide benefit. But there is an additional negative impact of the transfer and transaction that is under consideration. The plan of action being pursued will result in *reducing* water availability to irrigation water users in the Klamath Project (Project). In other words, the applicant's proposed approach involves payment of money to one irrigator or one group of irrigators outside the Project, in a manner that results in taking water away from Project irrigators. This is not acceptable.

KWUA is a non-profit, mutual benefit corporation, formed in 1953. Our members are irrigation districts and similar water distribution entities who divert and deliver water to irrigated land and two national wildlife refuges in southern Klamath County, Oregon, and Modoc and Siskiyou Counties, California. KWUA's mission is "to preserve and enhance the viability of

irrigated agriculture for our membership in the Klamath Basin, for the benefit of current and future generations."

KWUA members are parties to contracts with the U.S. Bureau of Reclamation (Reclamation) related to the storage, diversion, and delivery of water by facilities that are part of, or associated with, the Project, which was authorized in 1905. The irrigation infrastructure operated by KWUA members is also the sole means by which water from the Klamath Basin can be delivered to Tule Lake National Wildlife Refuge (TLNWR) and Lower Klamath National Wildlife Refuge (LKNWR).

Although the subject application references instream water uses, the driver for the application is to obtain additional supplies of water for diversion to, and consumptive use on, LKNWR. The application indicates that the current temporary transfer is seen as an initial step toward similar, permanent transfers for 30,000 AF of additional water rights to LKNWR. The applicant's motives are understandable. But the problem that the application is attempting to address has nothing to do with water rights or some deficiency of existing water rights.

In this regard, LKNWR already has considerable water rights determined in the Oregon Water Resources Department's (OWRD) Amended and Corrected Findings of Fact and Order of Determination (ACFFOD) in the Klamath Basin Adjudication (KBA). *See* https://www.oregon.gov/OWRD/programs/WaterRights/Adjudications/KlamathRiverBasinAdj/Pages/ACFFOD.aspx (OWRD website location for the Bates-stamped copy of the ACFFOD, cited here as KBA_ACFFOD_[page]. LKNWR's determined water rights claims include a share of a 1905 priority state water right for irrigation associated with the Project, and various federal reserved rights with priorities of 1925 and earlier. KBA_ACFFOD_07017, 07118-7126 (1905 priority state water rights); KBA_ACFFOD_03715, 03728-3744 (federal reserved water rights). These water rights are more than adequate to meet all demand on LKNWR. They have never been curtailed or otherwise had their use restricted as a matter of water law.

In recent years, the once-reliable source of water for Project irrigation and wildlife refuges has been curtailed due to federal water management policies, particularly under the Endangered Species Act (ESA). As a direct result, both irrigators and wildlife refuges have been deprived of water they need. The ESA-driven regulation of the Project-based diversions does not consider water rights; it applies to one group of water right holders (Project irrigators and refuges) irrespective of their water right priority. Other water right holders in the basin are not curtailed under the ESA, even though many of them have later priority water rights. KWUA objects to the federal policies that cause both dry farms and dry refuges, and KWUA and its members have worked diligently to minimize negative impacts to wildlife through various means. But the situation will not improve unless federal ESA administration becomes more reasonable.

Applicant California Waterfowl Association is a respected and effective advocate for waterfowl. Unfortunately, in this instance, the applicant launched an effort without adequate due diligence and based on incorrect assumptions. The erroneous assumptions fed advocacy that has

generated political momentum, private donor attention, and expectations which, in turn, make it more difficult to abandon the erroneous assumptions. KWUA does not seek to be the "bad guy" in this situation. But KWUA insists that decisions be based on facts, and the most complete, correct understanding of facts that is possible.

Setting and Overview of Transaction

The application involves water in the Upper Klamath Basin and rights to the use of water for irrigation on a specific property in the Wood River Valley. The land is a diked-off portion of wetlands that formerly existed at the confluence of the Wood River and Crooked Creek. A substantial portion of the property is below the water level in the Wood River.[1] The owner, Thomas Family Limited Partnership (Thomas), holds a determined claim for irrigation of the property from points of diversion on Wood River and Crooked Creek (a short tributary of Wood River). The duty of water under the determined claim is 3.0 acre-fee per-acre (AFA), and the priority date of the water right is October 14, 1864.[2] The acreage within the place of the determined claim is 1,500.5 acres. Thus, Thomas holds a determined claim for a water right for diversion and application of up to 3.0 AFA, during the period April 1 through October 1 of each year. *See* KBA_ACFFOD_01054, 01057-1059.

The Wood River flows into the interconnected Upper Klamath/Agency Lakes. Water levels in Upper Klamath/Agency Lakes are controlled by Link River Dam, a concrete structure at the lake outlet that is owned by Reclamation as part of the Project. There are also multiple diversions of water directly out of Upper Klamath Lake. The largest, and southernmost, of these is A Canal, also part of the Project, which is operated and maintained by Klamath Irrigation District to deliver water to irrigation water users in Oregon and California. Water released at Link River Dam flows through the short stretch of Link River, then Lake Ewauna, and into the Klamath River proper. On the Klamath River, there are several diversions of water by, and for the benefit of, Project contractors. Two of these diversions, North Canal and Ady Canal, are operated by the Klamath Drainage District (KDD). Ady Canal delivers water to private landowners in KDD and to LKNWR. The LKNWR land within KDD and Oregon is primarily agricultural land leased to growers, and the remainder of LKNWR is in Siskiyou County, California.

On April 20, 2021, Thomas applied to OWRD for approval of a temporary (five-year) change in points of diversion and place of use of the Thomas property water right. As subsequently amended, the application sought approval for new points of diversion at the North Canal and Ady Canal, with the place of use being LKNWR. Also, during the processing of the application, OWRD concluded that approximately 20 percent of the Thomas property is not

[1] The Board can consult LiDAR data from the Oregon Department of Geology and Mineral Industries on this issue. *See also* https://www.oregongeology.org/pubs/ldq/reports/Wood_River_Lidar_Report_2005.pdf.

[2] The property is land formerly part of the Klamath Indian Reservation. The priority date for the water right is the date of the treaty between the Klamath Tribes and the United States and not the date when irrigation commenced. *See United States v. Adair*, 723 F.2d 1394 (9th Cir. 1983).

eligible for transfer. Thus, the application was amended to request temporary transfer from 1,251.8 acres of 3.0 AFA, or 3,755.4 AF per year total. *See* OWRD Special Order, vol. 122, at 204-209.

On August 26, 2021, OWRD approved the amended transfer application, and it issued a revised order approving the amended application on December 27, 2021. According to the grant application (at 6), "payments of $400,000 and $500,000 were made by CWA to the water right holder in 2021 and 2022," with the funds having come from a California agency and private donors for the first two payments. OWEB is being asked for $400,000 to complete a third payment in 2023. The application is not clear or consistent regarding the amount of water expected to be delivered to LKNWR. For example, it states that the current transfer is limited to two-thirds the full duty on the transferor property, and that Reclamation "will determine" how much will be conveyed to LKNWR. Application at 7. Elsewhere, the application states that the transfer will provide "over 10% of the [30,000 AF of] wet water that FWS seeks to acquire for the LKNWR." Application at 11.

It is our understanding that total diversion that has actually occurred under the temporary transfer was 333 AF in 2021, 458 AF in 2022, and 958 AF to date in 2023.[3]

Evaluation of "Wet Water"

The application states that the transfer will increase instream water amounts downstream of the transferor diversion locations by the same amount as the amount of water that could otherwise be applied on the transferor land. We do not concur.

Hydrologic Balance

Under ordinary circumstances, crop (here, irrigated pasture) water demands are met in part by precipitation and sub-irrigation (subsurface water flows) as well as by applied surface water. In such circumstances, the application of additional water can result in the available water being greater than the plant needs.[4] In turn, this results in water exiting the property as surface tailwater and subsurface flows that move to downstream water bodies. This is a universally recognized phenomenon, but not addressed or acknowledged in the application. The evaluation of this issue is site-specific and requires consideration of the consumptive use of water on a property, with and without applied irrigation water, and other factors. The difference between the face value of the water right and the quantity of water that actually manifests at a downstream location due to non-irrigation of the property, is commonly known as "paper" water (which contrasts with actual "wet" water). It is not an original concept that "paper" water cannot

[3] The value for 2021 is taken from Reclamation's annual ESA report. The 2022 and 2023 values are from daily water emails; the 2023 value was identified a few days before this letter was sent.

[4] KWUA has no direct knowledge of historical application of irrigation water or whether the quantity has ever been as high as 3 AFA. For the purposes of these comments, that information is not essential.

be transferred to another consumptive use without resulting in additional consumptive use (i.e., "enlargement" of the right) and harm to other consumptive and nonconsumptive water users.[5]

In the Wood River Valley in particular, the face value of water rights is significantly greater than the net change in consumptive use that results from withholding applied irrigation water. There is no lack of technical information to support this conclusion.

For example, during 2013-2016, several parties, including private landowners, the state of Oregon, the Klamath Tribes, and federal agencies, negotiated, signed, and began implementation of an agreement known as the Upper Klamath Basin Comprehensive Agreement (UKBCA). That agreement has terminated for reasons that are not relevant. But as part of their implementation efforts, these parties made evaluations of the quantity of "wet water" that would result from withholding the application of water for irrigation on properties upstream of Upper Klamath Lake. The reason for this work was that the UKBCA called for the instream dedication of specific quantities of water for instream purposes. The agencies providing funds for these transactions, and the Klamath Tribes, wanted to receive the benefit of their bargain. That is, they required the quantification of "wet" water that would appear instream as a result of non-irrigation of transferor lands. The University of Idaho conducted a study that is significantly at odds with the present application's assumption that non-irrigation of the subject parcel would result in 3.0 AFA of "wet water" for instream uses. For properties in the lower Wood River Valley, the analysis supports that the expected quantity of wet water is closer to 0.5 AFA, which would be 625.9 AF. *See* Attachment A. Based on site-specific conditions for this property, the quantity could well be less than 0.5 AFA.

KWUA also recommends that the Board consult available satellite-based data from openetdata.org (OpenET). According to OpenET, the majority of the subject property has consumed in excess of 35 inches of water per acre annually during the last two years (2022 and 2023) during which the property has not been actively irrigated. This reinforces that a very significant amount of the plant water need is met by sources other than applied irrigation water.

For context in considering the value of any of these quantities, the annual average net inflow to Upper Klamath Lake[6] is approximately 1.2 million AF, and 1.0 foot of depth on Upper Klamath Lake comprises 70,100 AF on average.[7]

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[5] In the context of this transfer, diversion of paper water holds the potential of decreasing river flows downstream of the transferee point of diversion in the Klamath River. In the context of Project operations, this question is not simple, but it is appropriate to recognize the hydrologic principle. The actual flow in the Klamath River is controlled by the operation of Link River Dam and other infrastructure, but in all events the total amount available for other uses is affected by diversions of paper water.

[6] "Net inflow" is a calculated value that reflects the combined surface and groundwater inflow to Upper Klamath Lake less the sum of evaporative losses, groundwater outflow, and depletions from diversion from non-Project (i.e., non A Canal) facilities.

[7] Reclamation spreadsheets are relied upon for these data.

It has been asserted to KWUA that the excess water that accumulates on the Thomas property, even in the absence of active irrigation diversions, is not hydrologically connected to either the Wood River or Crooked Creek, in that it presumably does not emanate from or return to those sources. Further, it has been asserted that given this disconnection, the pumping of this excess water off the property is additive to downstream flows. This circumstance, it is claimed, is caused by the earthen levee that separates the property from and prevents it from being flooded by the Wood River. These claims are not technically or logically supportable and we are aware of no direct supporting evidence. In addition, the fact that there is water to be pumped off the property despite the lack of direct diversions confirms the condition described above: most of the property is irrigated (very considerably) by natural sub-irrigation.

Existing Instream Protections

The application refers to instream leasing of water and assumed streamflow enhancement of unspecified magnitude. The currently effective temporary transfer is limited to changes in authorized points of diversion and place of application for consumptive use. The temporary transfer, effective for only two more years, does not provide any assurance of any quantity of water that will be added or protected instream below the transferor points of diversion.

In any event, and whatever the quantity of wet water generated by the transfer, the Board should be aware of already-existing streamflow protections for the Wood River and Crooked Creek that preclude the ability to divert water for use on the Thomas property even in the absence of a transfer.

Specifically, in the ACFFOD, there are determined claims for instream flow in both the Wood River and Crooked Creek. These flows have been determined to provide healthy and productive habitat to support tribal fisheries and have a priority of time immemorial. KBA_ACFFOD_05319, 05328, 05330. Thus, diversion for use on the Thomas property is not permissible if it will reduce flows below the level determined to provide healthy and productive fish habitat, and diversions can be curtailed in order to increase streamflow to provide healthy and productive fish habitat. In fact, during the 2021 and 2022 irrigation seasons (April 1-September 30), flows in Crooked Creek fell below the determined claim values on 138 out of 368 days; meaning that on 37.5 percent of all days, water could not have been diverted even without the temporary transfer. During that same period, where flows were above the determined claim, the average excess above the claim was 4.34 cubic feet per second (cfs), which is less than the authorized rate of diversion. In such situations, the transfer adds no instream water that would not otherwise be present. At the time of this letter, it appears that flows in Crooked Creek are just above the determined claim values.[8]

The application states that the "[t]he Tribal Claims are met 100% of the time" as a result of the transaction. The evidence in hand does not support that statement. The application also states that the transfer will, in most instances, "result in an additional 25 cfs remaining in

[8] https://apps.wrd.state.or.us/apps/sw/hydro_near_real_time/display_hydro_graph.aspx?station_nbr=11504109.

Crooked Creek and Wood River on top of the Tribes' instream claims." Again, KWUA does not believe the evidence supports this assertion. KWUA also notes that 25 cfs over the authorized period of diversion for the Thomas property right would amount to approximately 9,000 AF of water, which is far more than the determined claim for the property.

Existing Temporary Change Order and Incomplete Evaluation (USFWS)

As discussed above, OWRD's 2021 order approving temporary changes in the Thomas water right include the diversion right of 3.0 AFA. It is apparently true that, in determining whether a transfer would result in water right "injury,"[9] OWRD presumptively follows an anachronistic policy of approving the full duty of water allowed in the transferor property water right. But water right "injury" occurs if "there is a reduction in return flows available to downstream water right holders." *See* J. Neuman, *Oregon Water Law: A Comprehensive Treatise on the Law of Water and Water Rights in Oregon*, 1st ed. (2011) at 198. In this instance, OWRD did not take into consideration any information related to harm to other water users or negative effects of the transfer on irrigation return flows. KWUA believes this was at least in part because of the relatively short-term nature of the 2021 temporary transfer order. KWUA would object to this kind of superficial analysis by OWRD in the future, and will oppose, and quite probably challenge, any temporary or permanent transfer order that is not limited to the volume of wet water generated by non-use on the transferor parcel. The appraisal document accompanying the application correctly states (at 17) that the volume of water that may be approved in any future order is "presently uncertain."

In the meantime, however, Reclamation and the U.S. Fish and Wildlife Service (USFWS) have acknowledged the uncertainties in the amount of wet water that may result from the transfer, and the potential harm to other water users from transfers of paper water. KWUA respects, and is grateful to regional leadership of the USFWS, who has been clear in not being willing to support a transfer that harms the interests or water supply of Project irrigators. In this regard, in September of 2021, Reclamation and USFWS entered into a Memorandum of Understanding "Regarding 2021-2025 Pilot Program to Transfer Determined Water Rights from the Wood River Valley to Lower Klamath National Wildlife Refuge" (MOU) (Attachment B).

The MOU commits to a study process to "quantify the net change in water available downstream of the original place of use as a result of the transfer." MOU at 1. The reason for quantifying the "wet water" resulting from the transfer is "to avoid negative impacts to other water uses and users in the basin." *Id.* at 1. The federal agencies recognize, for example, that "prior to the transfer, the return flow from [the Thomas Property water right] would have entered Upper Klamath Lake … ." *Id.* at 2.

[9] "Injury" is a term of art in water law and a finding of absence of water right injury does not equate to an absence of negative impact.

KWUA recommends that OWEB seek any information that may be available as a result of work completed under the MOU.

In the meantime, Reclamation and USFWS agree in the MOU that the diversion of water under the temporarily transferred right will be limited to 2.0 AFA. MOU at 3. KWUA believes that this "placeholder" of 2.0 AFA is generous, but KWUA is committed to reciprocate, and cooperate in, the federal leaders' good faith actions related to the temporary transfer that will expire in two years.

The application states that the amount that can be diverted during the five-year period of the temporary transfer is "two thirds of what is restored instream" as a result of the transfer. KWUA disagrees, for the many reasons discussed above.

Negative Effects on Project Farms and Local Communities

As discussed previously, LKNWR is not lacking inwater rights. And, in all years, there is adequate water present at Ady Canal – the point of diversion to LKNWR – to meet all of LKNWR's needs that can be served through Ady Canal. The challenges for Project irrigators and LKNWR are that their diversions are curtailed by federal administration of the ESA that has nothing to do with water rights. Rather, ESA-based management is driven by projected a**ctual inflow** to Upper Klamath Lake, and ultimately controlled by the presence of **wet water** and not state water right entitlements.

Specifically, under present circumstances, the Project is tasked under the ESA with assuring that specific minimum Upper Klamath Lake elevations will be maintained, and with assuring that specific minimum flows will be maintained in the Klamath River in California. Diversion of water for the Thomas property has some effect on the Project's ability to meet those ESA mandates, and thus can affect water availability for Project irrigators. But if the Thomas right is transferred and used to deplete the system of more water than occurs by diversion for the Thomas property, the Project can find itself responsible for making up the difference. In other words, Project irrigators will be required to subsidize the paper water component of the Thomas transfer with their own wet water, despite the fact that they receive no compensation at all.

The Board should also take note that, overall, the advocated transfer plan is based on an unfair double standard. Specifically, if Project irrigators were to arrange for a transfer of water rights from upstream areas, the irrigators would *not* realize more water for irrigation than they otherwise would have. We know this, for two reasons.

First, we have direct experience. Under the current, ESA-driven logic, in the spring of each year, Reclamation calculates a maximum "Project Supply," which is based on then-existing Upper Klamath Lake elevations and forecasted, actual inflow to Upper Klamath Lake. In some years and circumstances since 2013, when the Project Supply would be inadequate to meet demand, the Project has been able to make a priority call that has resulted in regulating off the junior water users. But Project irrigators did not experience an increase in Project Supply equal

to the face value of the water rights that were regulated off. In fact, Reclamation and federal regulatory agencies have insisted that the amount of "wet" water that is generated from non-irrigation of upstream properties is far too uncertain, and to this date there is no agreed methodology for determining the amount of wet water generated. To the (very limited) extent that, in a few years, there was an approved increase in Project Supply due to priority-based regulation of upstream juniors, that only occurred very late in the year, when there was an ability to know how much water had actually flowed into Upper Klamath Lake during the irrigation season.

Second, practically speaking, any increase above Project Supply will frequently be inconsistent with ESA biological opinion requirements. As discussed above, the present approach to Project operations is one that requires the Project to assure minimum flows and minimum Upper Klamath Lake elevations, with wet water, not projections of wet water and not with paper water.

Conclusion

Finally, we are mindful that the staff recommendation is conditioned on the USFWS committing $400,000. The underlying logic may be that USFWS needs to have "skin in the game." But the Board must recognize that if USFWS commits funds to a potential permanent transfer, that almost certainly will not be based on an expectation of any given increase in instream water. Realistically, a USFWS commitment of dollars may create further inertia for the diversion of paper water for consumptive use, to the detriment of Project water users.

The Board should not award the requested grant.

We do not relish the role that has fallen to KWUA in this process. Please contact me at (916) 769-6685 or psimmons@somachlaw.com if you have any questions or if we can provide additional information.

Sincerely,

Paul S. Simmons
Executive Director and Counsel

Attachments
PSS:cr

Water right holder Name	Ausymas Cattle Co	Harlowe Ranch	Hawkins Cattle	Owens and Hawkins
SIF region	Wood	Wood	Wood	Wood
Expiration	12/31/2016	12/31/2016	12/31/2016	12/31/2016
Agent	Andrea	Andrea	Andrea	Andrea
contract acres	1567	1436	379	44.6
Exh C NCU	0.48	0.43	0.43	0.47
2014 NCU	752	617	163	21
Rate (per acft)	$80.00	$80.00	$80.00	$80.00
Lease Payment per Contract	$60,800.00	$49,280.00	$13,040.00	$1,696.00
1st Payment 2014	$30,400.00	$24,640.00	$6,520.00	$0.00
2nd Payment 2014	$30,400.00	$24,640.00	$6,520.00	$1,696.00
final order acres	1508.4	1411	406.2	43.6
difference	58.6	25	27.2	1
1st payment 2015 made ?	no	no	no	yes
revised acres per final Order	1508.4	1411	406.2	43.6
Current WUP Ledger NCU	760	616	163	21.2
Proposed WUP Ledger NCU	724	607	175	20.5
Exh C NCU	0.48	0.43	0.43	0.47
Revised NCU	724	607	175	20.5
Rate (per acft)	$80.00	$80.00	$80.00	$80.00
Revised Lease Payment	$57,922.56	$48,538.40	$13,973.28	$1,639.36
Para. 8.3 2015 payment requires correction for 2014 payment assumptions based on OWRD Order				
Correction for 2014	($2,877.44)	($741.60)	$933.28	($56.64)
Rev Corrected Lease Payment 2015	$55,045.12	$47,796.80	$14,906.56	$1,582.72
Rev 1st Payment 2015	$27,522.56	$23,898.40	$7,453.28	$791.36
Rev 2nd Payment 2015	$27,522.56	$23,898.40	$7,453.28	$791.36
Where 1st Payment 2015 has been made, second payment will correct.				

ATTACHMENT A

MEMORANDUM OF UNDERSTANDING
between
Bureau of Reclamation
and
U.S. Fish and Wildlife Service
Regarding
2021-2025 Pilot Program to Transfer Determined Water Rights
from the Wood River Valley to
Lower Klamath National Wildlife Refuge

This Memorandum of Understanding (MOU) is hereby made and entered into by and between the U.S. Fish and Wildlife Service (Service) and the Bureau of Reclamation (Reclamation). These entities are collectively referred to hereafter as the Agencies. Authority for the Service to enter into this MOU is provided in the National Wildlife Refuge System Administration Act of 1966, as amended by the National Wildlife Refuge System Improvement Act of 1997 (Public Law No. 105-57), and the Fish and Wildlife Coordination Act (16 U.S.C. §§ 661-667). Authority for Reclamation is provided in the Fish and Wildlife Coordination Act and the Klamath Basin Water Supply Enhancement Act of 2000.

I. PURPOSE AND SCOPE

The purpose of the MOU is to establish a five-year agreement in which the Agencies will initiate a pilot project involving the transfer of determined water right claim KA-67 for use at Lower Klamath National Wildlife Refuge (LKNWR). The information learned through this pilot project will be applied in subsequent transfers in an effort to avoid negative impacts to other water uses and users in the basin.

The Agencies will collaborate to assure that transfer of KA-67 will be consistent with the priorities established under the water rights system of the State of Oregon, and also avoid impact to Federal obligations that are not otherwise protected by State water law. The Agencies will use best available science and seek out both monitoring information and the technical input of interested and affected stakeholders.

The transfer of KA-67 will be facilitated by the Agencies as a pilot project with terms identified in this agreement that have been formulated to avoid negative impacts to the Klamath Project (Project) and its obligations under Federal law, and which are based on best available science and professional judgement. Monitoring conducted as part of the pilot project will be used to quantify the net change in water available downstream of the original place of use as a result of the transfer. The intention of the pilot project is to inform the Agencies about the effects of the transfer and to gather information that will be used in considering future transfers.

II. BACKGROUND

LKNWR wetland acreages have plummeted due to a variety of factors, including recent reductions in the reliability of deliveries to the Project from Upper Klamath Lake. From 2013, to

2019, wetlands on LKNWR have averaged just 13,135 acres annually, a 47% decline from the 1982-2012 average of 24,787 acres annually. Importantly, because of the Service's inability to secure water, LKNWR wetlands have often remained dry during the Pacific Flyway's southern migration season through the Klamath Basin, which occurs from August through November.

Shortages to the LKNWR are due to several factors, including changes in regulatory requirements for Klamath River and Upper Klamath Lake supplies under the Endangered Species Act (ESA) that have occurred since 2013, and reduced pumping through the D Plant and the Tule Lake Tunnel. The challenges facing Project supplies and LKNWR are unlikely to find a comprehensive solution in the near term. In response, the Service has sought to secure reliable water to meet wetland and agricultural habitat objectives at LKNWR now and into the future. These efforts include a temporary transfer of water rights from the Barnes-Agency Unit of Upper Klamath National Wildlife Refuge to LKNWR, and other actions to acquire water rights in partnership with private organizations.

Establishing reliable water deliveries throughout wetland units on LKNWR is paramount to the Service's ability to provide diverse wetlands, protect native habitats, and support wildlife diversity throughout the year. This is consistent with the Service's obligation under the National Wildlife Refuge System Administration Act (16 U.S.C. § 668dd(a)(4)(G)) to "…acquire, under State law, water rights that are needed for refuge purposes…". For additional discussion of water supply issues and hydrology at LKNWR, please see the 2016 CCP/EIS pages 3-6 through 3-8 and 5-56 through 5-63 (U.S. Fish and Wildlife Service, 2016). The Service's specific wildlife and habitat objectives for LKNWR are articulated in the Service's 2016 Comprehensive Conservation Plan for LKNWR (along with objectives for four other proximal refuges).

In 2021, the California Waterfowl Association and the owner of KA-67, which is a determined water right claim that is senior to Project water rights, entered into an agreement that resulted in an application temporarily transfer that determined water right claim to LKNWR for a period of five years. California Waterfowl Association seeks to transfer KA-67 determined water rights claim, changing the point of diversion and place of use to provide for delivery of the water to LKNWR. The current points of diversion are on the Wood River and Crooked Creek and the purpose of use is irrigation. As modified by revised tables and maps submitted to OWRD, the proposed transfer includes 1,251.8 acres, the maximum rate of use is 25.04 cubic feet/second (cfs) (which is 11.81 cfs diversion from the Wood River and 13.23 cfs diversion from Crooked Creek), the duty is 3 acre-feet/acre, and the priority date is October 14, 1864.

Upon review of the August 26, 2021, OWRD order approving transfer of KA-67, the Agencies have identified potential for impacts to federal interests that are not completely addressed under Oregon state water law. The OWRD order approved transfer of the full KA-67 water right, including those portions of the right that might otherwise be available for use by others downstream of the original place of use. As an example of potential impacts to federal interests, prior to the transfer, return flow from KA-67 would have entered Upper Klamath Lake and could have helped Reclamation to meet downstream flow requirements in California. Reclamation is required under federal law to meet those downstream flows, but those obligations are not recognized under Oregon state law.

III. RESPONSIBILITIES

A. Reclamation:

1. Agrees to the diversion and conveyance of water rights transfers through all Reclamation-owned or operated facilities and to reflect those operations in its long-term and annual operations plans, limited by and subject to physical constraints, the terms of this MOU, and applicable law.
2. Agrees to acknowledge and support valid agreements and contracts reached by the Service with independent Project irrigation districts, including the Klamath Drainage District.

B. The Service:

1. Agrees to maintain or secure appropriate and valid agreements for the conveyance of transferred water through non-Reclamation facilities.

C. The Agencies:

1. Agree to facilitate the temporary transfer of the KA-67 determined water right, subject to the following:
    a. The temporary transfer of KA-67 over its full five-year duration at volume limited to 2.0 acre-feet per acre, for a total maximum annual volume of 2,503.6 acre-feet . This volume is based on an initial estimate of the net increase of water quantity downstream of the original place of use as a result of the transfer.
    b. In agreeing to the 2 acre-feet per acre limitation on use, the Agencies expressly state that there is no intent to forfeit or abandon any portion of the KA-67 water right. The Agencies will work together to assure that the KA-67 water right is not abandoned or forfeited. If necessary, to avoid abandonment or forfeiture, the Agencies may consider many options, including but not limited to not applying the limitations in ¶ III.C.1.a within the 5-year transfer period when impacts to other interests can be minimized or avoided.
    c. Agencies agree to collaborate on a plan to monitor, quantify, and document changes in water availability as a result of the transfer, using best available science to the extent practical.
    d. The Agencies will use the information gathered under this pilot project or apply the provisions of this MOU when considering future transfers. Application to other transfers would require a new MOU or an amendment of this MOU. As new information is gathered and analyzed the Agencies will seek and apply the best available science (including but not limited to monitoring data and analysis relating to hydrology, climate, land use, and evapotranspiration in the Klamath

Basin) for quantifying net addition of water to the downstream system that would not have been available but for the transfer. In gathering and analyzing information, the Agencies will remain receptive to technical input from interested and affected stakeholders.

2. The Agencies agree to meet on or before March 1 annually to discuss the timing and quantity of transferred water rights available, subject to all applicable federal and state laws.
3. The Agencies agree to jointly hold formal or informal coordination with Tribal and irrigation stakeholders, as appropriate, on or before March 15 annually to report LKNWR and other refuge water delivery plans and solicit feedback, subject to all applicable federal and state laws.
4. In the event of a dispute between the Agencies that arises after the March 1 start date of irrigation season in any given year, the Agencies agree to meet and confer to explore a mutually agreeable modification of operations.

IV. ADMINISTRATION OF THE MOU

A. **Effective Date and Approval.** This MOU becomes effective upon signature by both of the Agencies and shall continue in effect through October 1, 2025, unless terminated pursuant to ¶ IV.D.

B. **Amendment.** This MOU may be amended through written agreement of both the Agencies.

C. **Conflict Resolution and Elevation.** If disagreements regarding implementation of this MOU occur between the Agencies, the parties agree to meet and work in good faith to resolve such disagreements. If attempts to resolve such disagreements are not successful, the parties may elevate the issue within the respective Agencies and the Department of the Interior.

D. **Termination.** Either party may terminate its participation in the MOU by providing written notice to the other party at least 60 days prior to any such termination becoming effective. No such termination shall affect existing operations plans for the Klamath Project prior to November 1st of the given year. If water right KA-67 is acquired by the Service or any other federal agency, this MOU will terminate on the date of acquisition.

E. **Notice.** All written notices required under this MOU are to be provided to the designate Agency Representative set out below. Each party shall promptly notify the other party in writing of any change to its Agency Representative and/or the Agency Representative's contact information.

V. OTHER PROVISIONS

A. **Authorities not altered.** Nothing in this MOU alter, limits, or supersedes the authorities or responsibilities of the Agencies on any matter within their respective jurisdictions. Nothing in this MOU shall require the Agencies to perform any action beyond their respective authorities. This MOU creates no enforceable legal obligations between the Agencies.

B. **Financial obligations.** Nothing in this MOU may be construed to obligate Reclamation, the Service, the Department of the Interior, or the United States to any current or future expenditure of resources in advance of the availability of appropriations from Congress, nor does this MOU obligate Reclamation, the Service, the Department of the Interior, or the Unites States to spend funds on any particular project or purpose, even if funds are available.

C. **Immunity and Defense Retained.** Each party retains all immunities and defenses provided by law with respect to any action based on or occurring as a result of this MOU.

D. **Third-Party Beneficiaries.** This MOU shall not create any right or interest in the public, or any member thereof, as a third-party beneficiary hereof, not shall it authorize anyone not a party to this MOU to maintain a suit of any kind pursuant to the provisions of this MOU. The duties, obligations, and responsibilities of the Agencies with respect to third parties shall remain as imposed under existing federal or state law.

E. **Elected Officials Not to Benefit.** No member of or delegate to Congress shall be entitled to any share or part of this MOU, or to any benefit that may arise from it.

VI. AGENCY REPRESENTATIVES

Each party has a designated representative listed below. Each party may change its representative by providing written notice to the other party.

Service Contact:

PAUL SOUZA

Digitally signed by PAUL SOUZA
Date: 2021.09.07 09:51:36 -07'00'

Paul Souza
Regional Director
U.S. Fish and Wildlife Service

Reclamation Contact:

Ernest A. Conant

Digitally signed by Ernest A. Conant
Date: 2021.09.03 16:56:52 -07'00'

Ernest A. Conant
Regional Director
U.S. Bureau of Reclamation

CAROLLO
LAW GROUP

Dominic Carollo
Managing Attorney
dcarollo@carollolegal.com · 541-957-5900
PO Box 2456, Roseburg, OR 97470
2315 Old Hwy 99 S., Roseburg, OR 97471

July 20, 2023

Via Email and US Mail

Oregon Watershed Enhancement Board
775 Summer St. NE #360
Salem, Oregon 97301
Nicole.Bettinardi@oweb.oregon.gov

Re: Comments of Ft. Klamath Landowners et al. on Application No. 000-0000-22741 for Acquisition and Ecological Use of Wood River Valley 1864 Priority Water Right

I. SUMMARY OF COMMENTS

Fort Klamath Critical Habitat Landowners, Inc., NBCC, LLC, Agri Water, LLC, Roger Nicholson, Martin Nicholson, Goose Nest Ranches, LLC, Randall Kizer, Gerald Hawkins, Harlowe Ranch, LLC, and E. Martin Kerns (collectively "Ft. Klamath Landowners et al.") offer the following comments opposing Application No. 000-0000-22741 submitted by the California Waterfowl Association ("CWA Application") for the funding of an acquisition of a Wood River Valley 1864 priority water right.

First, the CWA Application contains various misrepresentations of fact regarding the water availability within the Wood River Valley. The Klamath Tribes' instream water rights in the Wood River are rarely satisfied, resulting in annual calls on Wood River water users regardless of priority. The CWA Application misleadingly asserts that such calls are rare. The frequent nature of the Tribal calls on Wood River water rights renders the proposed transfer[1] at the foundation of the CWA Application largely ineffective. Therefore, OWEB should reject the CWA Application.

Second, the Thomas Transfer is currently being litigated on account of its impacts on various water right holders, including parties signed onto this letter. The Thomas Transfer is at significant risk of being vacated through this legal action. OWEB should decline to provide any grant funding in favor of the Thomas Transfer until all current legal proceedings are complete.

Third, the CWA Application indicates that its intent is to eventually fund the permanent transfer of the Thomas Family's water right, KA-67, to the LKNWR. Regardless of the results of the pending litigation, the permanent transfer of KA-67 to the LKNWR will be exceedingly difficult under Oregon law. As a practical matter it may be impossible to permanently transfer KA-67 to the LKNWR, as this would constitute an out-of-basin diversion from a basin with a severe

[1] The transfer at the foundation of CWA's application is the Thomas Family Limited Partnership's application to transfer their water right, KA-67, to the Lower Klamath National Wildlife Refuge ("LKNWR"). This transfer is referred to herein as the "Thomas Transfer."

water shortage. Once again, OWEB should reject the CWA application or, at minimum, decline to provide grant funding until the legality of such a permanent transfer is decided.

Fourth, KA-67 is a "Walton" right for irrigation in the Wood River Valley. OWRD's authority to transfer such a right is extremely questionable, and may preclude any permanent transfer. OWEB should reject the CWA Application accordingly.

Fifth, the CWA Application requests that OWEB pay a landowner for their decision to ship water out of state. It is simply poor policy for this state to pay landowners to export their water to a different state, especially where this state already suffers from severe water shortages. Therefore, OWEB should reject the CWA Application.

II. COMMENTER'S INTERESTS AND STATEMENT OF RELEVANT FACTS

Ft. Klamath Landowners et al. are the owners of real property in the Wood River Valley in Klamath County, Oregon. Ft. Klamath Landowners et al.'s properties enjoy appurtenant surface and ground water rights for irrigation and stock watering. Some of these surface water rights have been provisionally recognized in the Klamath Basin Adjudication as having a priority date of 1864, while others were adjudicated in the prior adjudication of the Wood River, with pre-1909 priority dates. Further still, many hold water rights that were issued by OWRD after 1909.

In the Klamath Adjudication the United States in trust for the Klamath Tribes has been awarded instream water rights in many Klamath Basin tributaries, including but not limited to the Wood River, Crooked Creek, Williamson River, Sprague River, and Upper Klamath Lake. These instream "Tribal Claims" have priority dates of "time immemorial," making them the most senior rights in the basin. Within the last few years, Ft. Klamath Landowners et al. have all been issued written shut-off orders for their surface water rights, which have resulted from senior calls on these instream Tribal Claims held by the United States and have, in many cases, required them to cease all irrigation and stock water use from Wood River, Williamson River, Sprague River, and/or their tributaries (*e.g.* Fort Creek, Crooked Creek, Sand Creek, Whiskey Creek).

In 2021, the Oregon Water Resources Department ("OWRD") issued a final order approving the Thomas Transfer, which took water from the Wood River Valley and exported it to the Lower Klamath National Wildlife Refuge in California. Ft. Klamath Landowners et al. protested the approval of the Thomas Transfer on multiple grounds, including but not limited to that the transfer would result in a waste of water, would injure Ft. Klamath Landowners et al.'s water rights, and would constitute an unlawful out-of-basin diversion.

Ft. Klamath Landowners filed a petition for judicial review in the Marion County Circuit Court challenging the Thomas Transfer. The issues raised in the petition were, *inter alia*, that the Thomas Transfer would result in injury, waste, and an unlawful out-of-basin diversion. OWRD disputed these claims. Regarding the claim that the Thomas Transfer was an out-of-basin diversion, OWRD argued that Oregon's out-of-basin diversion statutes do not apply to **temporary** transfers. There is no dispute that Oregon's out-of-basin diversion statutes apply to permanent out-of-basin transfers.

Following summary judgment briefing, the Circuit Court issued judgment for OWRD. Ft. Klamath Landowners appealed, and the case is currently pending before the Oregon Court of Appeals.

III. COMMENTS

A. The CWA Application Contains Misrepresentation of Fact.

In much of the Klamath Basin any persons' ability to utilize their surface water right is wholly dependent on the satisfaction of the Klamath Tribes' instream water rights. The Wood River Valley is no exception. For any party to utilize their surface water rights in the Wood River and/or Crooked Creek, the flows of these streams must first meet or exceed the Tribal Claims. The Klamath Tribe issues a call annually to shut off diversions in the Wood River Valley when streamflows are below the Tribal Claims.

The CWA Application represents that the 1864-priority water right (KA-67) subject to the Thomas Transfer is "satisfied under most hydrologic conditions" and is only subject to regulation "on the infrequent occasions when flows are inadequate to satisfy the subject water right[.]" CWA Application at 16. The CWA Application further represents that only "[d]uring periods of extreme drought" would the Tribal Claims reduce the amount which can be transferred under KA-67. CWA Application at 6.

These representations by CWA are simply false. Ft. Klamath Landowners et al. have intimate knowledge of the effect of the Tribal Claims on their own 1864-priority water rights. In recent years, these water rights on the Wood River have been rendered unusable because the Tribal Claims in the Wood River are rarely satisfied. As Exhibit 1 (attached herein) depicts, the actual flows of the Wood River have fallen below the Tribal Claims every summer since 2015. In the past three years, a period not analyzed in CWA's application, OWRD has ordered the shut-off of 1864-priority water rights on the Wood River. *See* Watermaster District 17 - Klamath Basin Status, OWRD https://apps.wrd.state.or.us/apps/misc/dsb_area_status/Default.aspx?wm_district=17. This has occurred even during very typical hydrologic conditions, as well as historic hydrologic conditions like 2023 when a massive snowpack resulted in heavy spring-and-summer flows.

In short, OWRD's regulation of 1864-priority water rights in the Wood River is not limited to "periods of extreme drought." Rather, even under "most hydrologic conditions" Ft. Klamath Landowners et al. have had their 1864-priority rights regulated on account of the Tribal Claims.

As a result of this frequent regulation, the Thomas Transfer will not result in significant benefits to LKNWR. As the CWA Application acknowledges, the amount which can be transferred is limited by any call on the Tribal Claims. If 1864 water rights on the Wood River are completely regulated off as a result of the Tribal Claims, then the Wood River-portion of KA-67 cannot be transferred to the LKNWR. Because this is a frequent occurrence, that means the benefits of the KA-67 transfer are significantly reduced as a practical matter. Thus, in many years KA-67, or significant portions of it, simply cannot be used to export water to LKNWR.

It makes little sense for OWEB to provide funding for a water right transfer which will not actually occur under most hydrologic conditions. Because that is the exact ask CWA is making, OWEB should reject the CWA Application.

B. The Thomas Transfer is Currently Being Litigated.

As explained herein, the Thomas Transfer at the foundation of the CWA application is currently subject to litigation. Although the Circuit Court ruled in favor of OWRD, the case is now on appeal before the Oregon Court of Appeals.

Ft. Klamath Landowners et al. strongly contest the decision of the Marion County Circuit Court, and respectfully assert that they have strong odds of a favorable decision on appeal. Regardless, there is a likelihood that the ongoing litigation over the Thomas Transfer will invalidate OWRD's final order approving the transfer. If this occurs, then any funding provided to support the Thomas Transfer will be wasted. Ft. Klamath Landowners et al. strongly encourage OWEB not to take exceptional risks with their grant funding. At minimum, OWEB should delay any funding for the Thomas Transfer until the current litigation has concluded.

C. A Permanent Transfer of KA-67 Will Likely Be Subject to More Litigation.

The Thomas Transfer currently exists, and is being litigated, as a temporary transfer of KA-67. As explained herein, one of Ft. Klamath Landowners et al.'s arguments in the litigation is that this transfer of KA-67 is an out-of-basin diversion, which OWRD approved without following the requirements of ORS 537.803 et seq. OWRD contested this claim on the grounds that ORS 537.803 et seq. does not apply to temporary transfers submitted pursuant to ORS 540.523.

The Marion County Circuit Court adopted OWRD's argument that ORS 537.803 et seq. does not apply to temporary transfers submitted pursuant to ORS 540.523. This decision is under appeal. However, it is beyond dispute that ORS 537.803 et seq. does apply to permanent transfers submitted under ORS 540.520. *See* ORS 537.803(1). The only way KA-67 can be permanently transferred, as described in CWA's Application, is through a permanent transfer application submitted under ORS 540.520.

Because KA-67 will eventually need to be permanently transferred to benefit the LKNWR, any such transfer will need to comply with ORS 537.803 et seq. The text, context, and legislative history of ORS 537.803 et seq. all confirm that out-of-state transfers constitute out-of-basin diversions. See ORS 537.801(1)(a) ("'basin' means one of the river basins *within this state*") (emphasis added); Tape Recording, House Committee on Environment and Energy, SB 205, June 24, 1989, Tape 233, Sides A & B at 50:44 (stating intent of SB 205 was to limit out-of-state diversions); Tape Recording, House Committee on Environment and Energy, SB 205, June 24, 1989, Tape 232, Sides, A & B, at 57:25 (same); Tape Recording, House Committee on Environment and Energy, SB 205, June 24, 1989, Tape 233, Sides A & B, at 51:00 (same); Tape Recording, House Committee on Environment and Energy, SB 205, June 24, 1989, Tape 234, Sides A & B, at 15:00-17:20 (same); Tape Recording, Senate Committee on Water Policy, SB 205,

Feb. 7, 1989, Tape 12, Sides A & B, at 8:11 (same); Tape Recording, Senate Committee on Water Policy, SB 205, May 25, 1989, Tape 49, Sides A&B, at 18:44 (same).

Given the forgoing text and legislative history, there is little-to-no question that a permanent out-of-state transfer must comply with ORS 537.803 et seq. Importantly, however, OWEB must recognize how difficult it will be for KA-67 to be transferred consistent with the provisions of ORS 537.803 et seq. Among other things, ORS 537.809 requires that OWRD "reserve an amount of water adequate for future needs in the basin of origin, including an amount sufficient to protect public uses, and subordinate the out-of-basin use to that reservation" before approving any out-of-basin diversion. Unfortunately, in the Klamath Basin there is no excess water to be reserved. OWRD has repeatedly recognized that both the surface water and groundwater resources of the Klamath Basin are woefully over-appropriated. If OWRD cannot reserve water in the basin of origin to offset the transfer of KA-67, then it simply cannot approve the transfer. Moreover, OWRD will be required to subordinate KA-67's priority date, which will render its 1864-priority status meaningless in the context of any subsequent calls on the Tribal Claims.

As a practical matter, ORS 537.803 et seq. prohibits the transfer of KA-67 to the LKNWR. Therefore, OWEB should reject the CWA Application.

D. OWEB Must Analyze Whether KA-67 Can Be Transferred Because it is a Walton Right.

In the Wood River Valley, there are many water rights which are referred to as "Walton Rights." These rights originate from the agricultural uses which occurred on lands within the former Klamath reservation. When portions of the reservation were sold, the water rights which had been used on those lands transferred too. These became "Walton" Rights with 1864 priority dates.

Walton Rights have unique characteristics. First, in the Klamath Basin Walton Rights must be used for irrigation, as that is the use which created the rights under the Klamath Treaty. *See* OWRD's Klamath Adjudication Corrected Findings of Fact and Order of Determination. Second, Walton Rights may only exist within the former Klamath Reservation. Lands outside the former reservation cannot have Walton Rights.

KA-67 is for all intents and purposes a Walton Right.[2] Therefore, it may only be used for the dedicated purpose of irrigation, and can only be used within the former Klamath reservation. Because the Thomas Transfer would both strip KA-67 of its irrigation use and remove KA-67 from the former Klamath reservation, KA-67 would lose both characteristics necessary for a Walton Claim. Consequently, this may invalidate the right entirely. Before OWEB approves the CWA Application it must analyze whether it is legally permissible for a water right holder to transfer a Walton Right outside the former Klamath reservation, for a non-irrigation use.

[2] KA-67 is technically a Klamath Termination Act claim. But, these claims have the same characteristics of Walton Claims. *See* OWRD's Klamath Adjudication Corrected Findings of Fact and Order of Determination at 38.

E. The CWA Application is Bad Policy.

Ft. Klamath Landowners et al. further oppose the CWA Application because it is bad policy. OWEB must clearly recognize what the CWA Applications requests: the export of water from a water-starved area of Oregon to a wildlife refuge in another state. If OWEB approves the application, the State of Oregon will be funding the sale and export of scarce Oregon water to out-of-state users. OWEB should not go down this path. While it is one thing for a water user to transfer water out of state in a manner consistent with ORS 537.803 et seq. (which is impossible here), it's an entirely different issue for the state to fund such a transfer. As water shortages ravage this state, resulting in major hardships in agriculturally-dominated regions, Oregon should take a more protective approach to its scarce recourses. Therefore, OWEB simply should not fund the sale and export of scarce Oregon water to out-of-state users. The CWA Application should be denied accordingly.

IV. CONCLUSION

Ft. Klamath Landowners et al. respectfully request that OWEB reject the CWA Application or, at minimum, delay providing funding for the Thomas Transfer until the issues discussed herein have been resolved.

DATED this 20th day of July, 2023.

Sincerely,



Dominic M. Carollo
Nolan G. Smith
Attorneys at Law

NGS/kh
Cc: client

EXHIBIT 1

Oregon Water Resources Department
Klamath Tribal Instream Claim Dashboard

Main Help
Return Contact Us

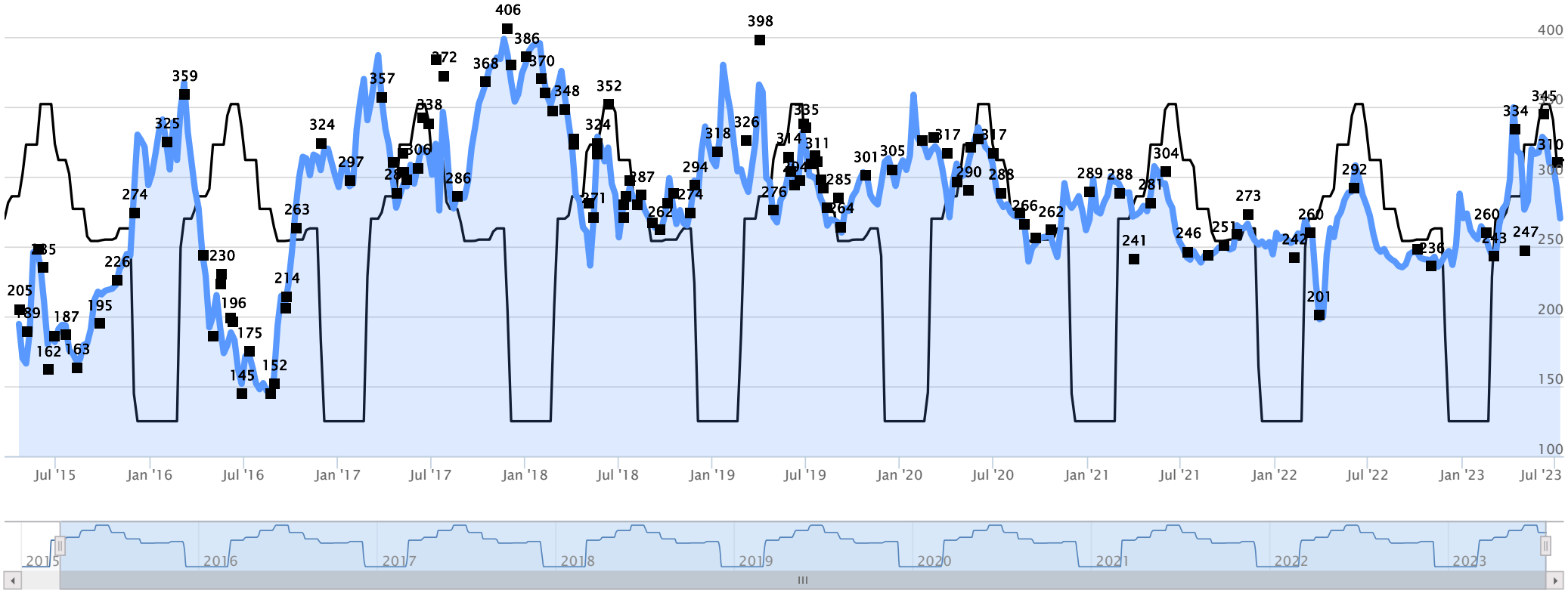
Search Records

Claim Char: KA Claim Nbr: 668 - Wood River Start Date: 1/1/2015 End Date: 07/17/2023 Chart

Tool Tips Off:

Wood River (KA-668, Gaging Station: 11504103)

Zoom 1m 3m 6m YTD 1y All From Mar 22, 2015 To Jul 17, 2023



Instream Claim | Habitat High Flows | Mean Daily Flow | Measurement

Source: Oregon Water Resources

REPPLINGER Linda * OWEB

From: oregon-gov-web-services@egov.com
Sent: Friday, July 21, 2023 10:12 AM
To: BETTINARDI Nicole * OWEB
Cc: REPPLINGER Linda * OWEB
Subject: Public Comment

I want to leave a public comment on...	Land and Water Acquisitions,Land and Water Acquisitions
Topic / Item Letter	Item K. Wood River Transfer
Date of Meeting	07/26/2023
First and Last Name	Karl Wenner
Phone Number	541 281 5885
Organization	private citizen
Your Email Address	kcwenner@gmail.com
Type Comment Here (comments may also be uploaded below):	I would like to express my strong support for funding of the water transfer from Agency Ranch in the Wood River Valley to the Lower Klamath National Wildlife Refuge, I reviewed the staff summary and applaud them for their thoroughness and insight. They do point out the benefits to flow in Crooked Creek and the Wood River as well as water levels in Upper Klamath Lake. However, I do not think the summary entirely captures to dire situation that this transfer is meant to help address. The nation's first migratory bird refuge, the Klamath Basin National Wildlife Refuge Complex, is undergoing actual desertification. The premier wildlife refuge on the west coast of the United States has received essentially no water in the past 3 years, including this year when we received 150% of normal precipitation. This is a result of a combination of misguided polices colliding with mother nature, the story of which goes beyond this public comment. Suffice it to say that this has led to a catastrophe for the Klamath Basin as well as the entire Pacific Flyway, Wetlands are the life blood of the Klamath and the loss of the vital wetlands on the refuge is decimating fish and wildlife populations, disrupting hydrologic processes like ground water recharge and river flow, and deleteriously impacting the water quality of what we have left. The Wood River Valley acquisition is a very important step in addressing this environmental calamity and should be funded. This is the only ongoing, concrete effort I know of to provide meaningful water to the refuges and sets a precedent for future transfers that could provide longterm solutions to the water right issues for the refuge complex. Staff brought up the issue of cost in their excellent review. In my past role an OWEB board member, I was always a bit skeptical of the prices paid for water. However, the situation is critical and is getting worse every minute there is no water on the refuge. I believe the prices quoted are quite acceptable in this unique and dire scenario.

I would like to give verbal comment at the meeting in person	Yes
I would like to give verbal comment at the meeting virtually	No

Submission ID: 9d0852cc-faae-46d8-9449-53d282c33ef5

Record ID:

BETTINARDI Nicole * OWEB

From: oregon-gov-web-services@egov.com
Sent: Friday, July 21, 2023 12:01 PM
To: BETTINARDI Nicole * OWEB
Cc: REPPLINGER Linda * OWEB
Subject: Public Comment

I want to leave a public comment on...	OWEB Board Meeting Topic,OWEB Board Meeting Topic
Topic / Item Letter	Water Acquisition and Ecological Use of Wood River Valley 1864 Priority Water Right (app. # 224-9902-22741)
Date of Meeting	07/26/2023
First and Last Name	Michael Hoppe
Phone Number	925.963.5389
Organization	California Waterfowl Association
Your Email Address	mmchoppe@gmail.com
Type Comment Here (comments may also be uploaded below):	I support the Water Acquisition and Ecological Use of Wood River Valley 1864 Priority Water Right (app. # 224-9902-22741) This project provides not only a solution to the long-term effort to save the fish and wildlife at the Lower Klamath National Wildlife Refuge. As the water will pass through Agency Lake and Upper Klamath Lake will improve the quality of habitat and enhance the water quality to support the endangered species in this system. This project will provide benefits with no negative impacts for fish and wildlife. And supports the many interests to protect all the organisms in this ecosystem.
I would like to give verbal comment at the meeting in person	No
I would like to give verbal comment at the meeting virtually	No

Submission ID: b8d65819-30d7-43a2-a8f2-da890ae795dc

Record ID:

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item H

Council Capacity Grant Awards

Board Meeting July 25-26, 2023

Oregon
Tina Kotek, Governor

OREGON WATERSHED ENHANCEMENT BOARD

775 Summer Street NE, Suite 360
Salem OR 97301-1290
www.oregon.gov/oweb
(503) 986-0178

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

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Courtney Shaff, Monitoring and Reporting Program Manager
Brian Wolcott, Water Acquisition Coordinator

SUBJECT: Agenda Item H – Council Capacity Grant Awards
July 25-26, 2023 Board Meeting

I. Introduction

This staff report provides an overview of the 2023-2025 Council Capacity grant cycle process and outlines staff recommendations for grant awards. Staff recommend funding 56 watershed councils for $9,220,881. Fifty-four are recommended for full funding, two are recommended for reduced funding and one is not recommended for funding. Evaluations may be found in Attachment A.

II. Background

Council Capacity grants are within the Operating Capacity category of the Board's spending plan and help support the operating costs of effective watershed councils. OWEB has provided Council Capacity grants for more than 20 years. Watershed councils are located throughout the state (Attachment B). OWEB does not create or oversee councils; they are locally designated watershed restoration organizations, but OWEB may provide grants to councils in support of those actions described in Measure 76.

Council Capacity grants are awarded biennially and support engagement with local communities around voluntary restoration projects to protect and restore native fish or wildlife habitats and watershed functions to improve water quality or stream flows. The Board adopted administrative rules and guidance for council capacity grants in 2014. These grants are intended to help support the operating capacity of effective watershed councils. The Council Capacity grant process includes an eligibility determination as well as initial and secondary merit reviews.

III. Merit

Merit criteria evaluate watershed councils for performance and progress including how they addresses challenges.

A. Initial Merit Review. OWEB staff completed the initial review of all fifty-seven councils that applied for funding. Staff reviewed application materials and considered their

knowledge of each council's performance history over the last two years, progress towards meeting the merit criteria, and the council's ability to meet reporting and fiscal requirements of OWEB grants when making the initial merit determination. Five watershed councils did not meet all merit criteria and were referred to the secondary review and interview process.

B. Secondary Review and Interview. The secondary review panel consisted of OWEB staff and external reviewers with expertise in watershed council operations. Reviewers considered: 1) application materials and supplemental materials provided by the council; 2) reviewers' knowledge of the council; 3) OWEB staff input; and 4) an interview with council staff and board officers. Application materials for the councils that participated in the secondary review process are available online for review.

C. **Staff Funding Recommendations**

A. Staff funding recommendations are based on the results of the initial and secondary reviews and available funding. The evaluations for councils recommended for full funding are provided via link in Attachment A. Staff recommend full funding for 54 councils that meet all merit criteria, reduced funding with conditions for two councils that met some, but not all the merit criteria, and a do not fund recommendation for one council that demonstrated inadequate progress across all the merit criteria. In addition, staff recommend one council receives continued merger funding on top of the base award as approved in previous biennia.

B. Reduced Funding. Staff recommend two councils, Greater Yamhill and Umatilla Basin, receive reduced funding because they met some but not all of the merit criteria. In addition to reduced funding, staff also recommend both councils be funded only for one year and grant agreements would include specific benchmarks each council needs to meet in order to receive the second year of funding. The evaluation summaries describing the rationale for the staff recommendations and the grant agreement conditions are provided in Attachment A, pages 10-13.

C. Do Not Fund. Staff recommend Do Not Fund for one council, Lower Columbia River WC. The evaluation summaries describing the rationale for the staff recommendations is provided in Attachment A, page 5. Given the significance of the Do Not Fund recommendation for the council, their council capacity application is found in Attachment C. It is important to note that the Do Not Fund recommendation is not permanent, and the council may submit a council capacity grant application in future cycles.

D. **Recommendation**

Staff recommend the board award council capacity grants as described in Attachment D with an award date of July 1, 2023.

Attachments

A. Council Capacity Evaluations
B. Map of Locally Recognized Watershed Councils
C. Lower Columbia River Watershed Council 2023-25 Council Capacity Application
D. Staff Funding Recommendations

2023-2024 Council Capacity Evaluations

Councils Referred to Secondary Review Process

Page	5	224-002	Lower Columbia River SWCD
Page	7	224-007	WC Tillamook Bay WC
Page	8	224-021	Elk Creek WC
Page	10	224-039	Greater Yamhill WC
Page	12	224-053	Umatilla Basin WC

Link to all Watershed Council evaluations

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-002

Project Name: LCRWC Council Capacity and Support

Applicant: Columbia SWCD

Application Description

This project seeks to fund a Watershed Council Coordinator for the Lower Columbia River Watershed Council. Council-identified watershed limiting factors include habitat access – impaired access to habitat, hydrograph/water quantity – altered hydrology, knowledge gaps – lack of information, physical habitat quality – altered quality of physical habitat, water quality - altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council to ***demonstrate some progress in planning*** through the recent submittal of a monitoring application for a Rapid Bioassessment in the watershed. Besides the pending application, the council uses no other documents to plan or prioritize the work of the council. If the monitoring application is funded the council would convene a technical advisory team; however, members of the team have not yet been identified or contacted to see if they would be willing to participate.

Concerns

OWEB staff found the council ***does not demonstrate effective governance and management***. The council is currently operating with the fewest number of board members in the history of the organization. The vice chair recently resigned over the decision to submit a monitoring application and there are no candidates for chair or vice chair in the upcoming October council officer election. The council board has not demonstrated effective management of staff and it is not clear how the board participates in management and oversight of the coordinator, in collaboration with the SWCD, who is the employer.

OWEB staff found the council ***does not demonstrate effective progress in on-the-ground watershed restoration***. The council has implemented no restoration projects in the last two years and the two projects it was working on in the last biennium were transferred to the SWCD for implementation. The council has no clear vision for its restoration niche in the watershed.

OWEB staff found the council ***does not demonstrate effective progress in stakeholder engagement for watershed restoration purposes***. The council did not complete any stakeholder engagement activities during the 2021-2023 biennium and has no activities planned for the 2023-2025 biennium. The current board members have created an isolated environment that does not appear to be welcoming to the general public and is not effective at recruiting new engagement or interest in the council's activities.

Concluding Analysis

The watershed council does not demonstrate it is engaging with its local community to plan and develop restoration projects to support local, state, and federal restoration goals. The council membership does not include a diverse range of community interests and does not appear to be open and welcoming to the broader community. The review team did recognize the council

is showing some limited progress toward future planning with the recent submittal of a monitoring application for a rapid bioassessment, but the council did not meet any of the other merit criteria required by OWEB to receive funding.

Recommendations

Staff Recommendation to the Board: Do Not Fund

Staff Recommended Award: $0

Staff Conditions: N/A

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-007

Project Name: TBWC Capacity Grant 2023-25

Applicant: Tillamook Bay WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Tillamook Bay Watershed Council. Council-identified watershed limiting factors include habitat access – impaired access to habitat, physical habitat quality – altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council has addressed most of the concerns that were raised previously during the council capacity review process. The council was re-recognized by the Tillamook County commissioners, has engaged a new board of directors that is representative of the community, regularly holds meetings, and recently updated its bylaws and policies.

OWEB staff found the council demonstrates ***effective progress in planning***. The council has continued to plan and engage with the community despite having no council capacity funding. The council recognizes the need to engage with the local community and update the strategic plan before restarting the council's restoration program.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council continued to make progress on some restoration projects, led by volunteer board members, despite having no council capacity funding. The council is working with local partners to determine future restoration priorities.

OWEB staff found the council demonstrates ***effective progress in stakeholder engagement*** for watershed restoration purposes. Council board members have worked to rebuild relationships throughout the watershed and demonstrated the council has broad support from the watershed community.

Concerns

None

Concluding Analysis

The council was without funding for two biennia and has demonstrated it has addressed OWEB's previous concerns and is making progress in all of OWEB's merit criteria. The council should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-021

Project Name: Elk Creek Watershed Council Support 2023

Applicant: Elk Creek WC

Application Description

Project will provide funding for the Coordinator/Executive Director, and operations of the Elk Creek Watershed Council in the northern part of Douglas County. The Council will work with local landowners and state and federal agencies to plan, develop, and implement on-the-ground projects to benefit fish and wildlife, and water quality in the Elk Creek Watershed, and in the Umpqua basin. Key partners are local landowners, Douglas and Umpqua SWCD, ODFW, Roseburg District BLM, and others.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board is engaged and supportive of the council and has recently recruited a new board member. The council recently reviewed its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council recently completed bioassessment surveys, which were used to inform the newly adopted restoration action plan, which will guide future restoration actions.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council focuses its restoration efforts on private lands and is making progress on existing restoration projects.

OWEB staff found the council demonstrates some ***progress in community engagement*** for watershed restoration purposes. The council has struggled to restart its usual stakeholder engagement approaches post-COVID and is reaching out to landowners to discuss restoration opportunities as its primary outreach tool.

Concerns

The council continues to struggle to recruit a board member from the industrial timber industry, which should be an organizational priority during the next biennium.

The council is using limited approaches to outreach and engage the broader watershed community. Broader stakeholder engagement may lead to increased council participation and help with future board recruitment.

Concluding Analysis

The council has demonstrated progress in all merit criteria and is recommended for full funding. However, the council needs to focus on improving both organization governance and management and stakeholder engagement in the 2023-2025 biennium to ensure it continues to demonstrate process in those two merit criteria areas. The council should consider reviewing its approach to board meetings, including location and time, to make the meetings more accessible to all community members and working to engage with a broader aspect of the watershed.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: 1) The council must submit a progress report by July 1, 2024 reporting on the following:

- Progress toward engaging an industrial timber industry member on the board, including a description of what outreach efforts were taken and the result of those efforts.

- Progress in current stakeholder engagement activities and the development of new approaches and efforts to make the council meetings more available to the community at large.

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-039

Project Name: Greater Yamhill Watershed Council Capacity 2023-2025

Applicant: Greater Yamhill Watershed Council

Application Description

This project seeks to fund a Watershed Council Coordinator for the Greater Yamhill Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***some governance and management***. The council board provided oversight of the council during a period of staff transition and is working to improve governance and management. The council has contracted with a CPA to improve its fiscal management. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***some progress in planning***. The council has identified the need for a new strategic plan to guide its work and is working to secure funding and support to complete the plan early in the next biennium.

OWEB staff found the council demonstrated ***some progress in on-the-ground watershed restoration***. The council has worked with BLM to implement restoration in the watershed.

OWEB staff found the council demonstrates ***some progress in community engagement*** for watershed restoration purposes. The council worked to build connections with private landowners and industrial timber companies.

Concerns

The council struggled with meeting OWEB reporting requirements throughout the biennium. The board recently hired a new coordinator and needs to develop a governance and management structure that provides adequate staff oversight.

The council has not pursued any of its own restoration work and it is not clear what the council's restoration niche is in the watershed.

The council has no clear strategy for stakeholder engagement and completed limited activities during the biennium.

Concluding Analysis

The council did not demonstrate through the application materials and the secondary interview that it meets all the merit criteria. The council has struggled for multiple biennia to demonstrate effective governance and management. The council did demonstrate some progress in all merit criteria, but needs to work on governance and management, identifying a clear restoration and stakeholder engagement niche for the council in the watershed, and being strategic in its future actions.

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Recommendations

Staff Recommendation to the Board: Reduced funding for 1 year. The second year of funding is contingent on the council meeting the conditions described below. Staff will come to the board in July 2024 with a funding recommendation.

Staff Recommended Award: $66,467

Staff Conditions

- All watershed council approved meeting minutes must be posted on the council's website within 30 days of the meeting at which they were approved.
- All council meeting agendas must be posted on the council's website at least 24 hours before the scheduled council meeting.

Progress Report Requirements

Quarterly Progress reports are required to be submitted to the OWEB Project Manager. Reports must address the progress the council is making to meet OWEB's five merit criteria. The council must demonstrate it is making progress in merit criteria by May 2024 or OWEB staff will not recommend a second year of funding to the OWEB Board. The progress reports must include the following information:

Merit Criteria #1: Effective governance and management:

Actions the council is taking to ensure effective governance and management of the council, including: 1) management of the council coordinator, and 2) sound fiscal and project management reporting.

Merit Criteria #2: Progress in planning:

A description of progress the council is making on updating its strategic plan, including how the council is engaging with the community during the strategic plan development process.

Merit Criteria #3: Progress in on-the-ground restoration:

Actions the council is taking to plan and implement on-the-ground restoration including the number of applications submitted.

Merit Criteria #4: Progress in community engagement for watershed restoration purposes:

Actions the council is taking to engage with the watershed community. Including events held and attendance at the events and attendance at board meetings.

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-053

Project Name: Council Capacity 2023-2025

Applicant: Umatilla Basin WS Foundation

Application Description

This project seeks to fund a Watershed Council Coordinator for the Umatilla Basin Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

OWEB staff found the council demonstrates ***some progress in planning***. The council is working with landowners to identify and prioritize barriers for future removal and is planning on reengaging the Umatilla Basin Technical Team.

The council demonstrates ***some progress in on-the ground watershed restoration*****,** the council completed 100% designs for two future restoration projects.

OWEB staff found the council demonstrates ***some progress in community engagement*** for watershed restoration purposes. The council completed two river clean-up events during the biennium.

Concerns

The council continues to struggle with ***effective governance and management.*** Despite many reminders and grant agreement conditions, the council coordinator continues to miss OWEB grant fiscal and project reporting deadlines. The council is struggling to have a quorum at board meetings and is not consistently taking and approving minutes. The council does not have a plan for recruiting new board members or addressing the current organizational challenges.

The council is relying on planning documents completed by local partners, the council would benefit from completing its own strategic plan in the 2023-2025 biennium that could be used to guide the council in its restoration and outreach efforts.

The council completed no restoration projects in the 2021-2023 biennium, and it is not clear what the restoration niche is for the council or how it is identifying and prioritizing its restoration work.

Concluding Analysis

The council has not met all of OWEB's merit criteria. The council does not demonstrate effective governance and management and has not addressed the concerns identified in the 2021-2023 council capacity evaluation. In addition, the council has made limited progress toward on-the ground restoration.

Recommendations

Staff Recommendation to the Board: Reduced funding for 1 year. The second year of funding is contingent on the council meeting the conditions described below. Staff would come to the board in July 2024 with a funding recommendation.
Staff Recommended Award: $66,457

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Staff Conditions

- All watershed council approved meeting minutes must be posted on the council's website within 30 days of the meeting at which they were approved.
- All council meeting agendas must be posted on the council's website at least 24 hours before the scheduled council meeting.
- The OWEB Project Manager must receive, via email, agendas and minutes of all meetings.

Progress Report Requirements

Quarterly Progress reports are required to be submitted to the OWEB Project Manager. Reports must address the progress the council is making to meet OWEB's five merit criteria. The council must demonstrate it is making progress in merit criteria by May 2024 or OWEB staff will not recommend a second year of funding to the OWEB Board. The progress reports must include the following information:

Merit Criteria #1: Effective Governance and Management
Actions the council is taking to ensure effective governance and management of the council, including 1) management of the council coordinator, 2) sound fiscal and project management reporting, 3) copies of all meeting minutes and agendas from the previous quarter.
Merit Criteria #2: Progress in planning:
An update on the status of reconvening the Umatilla Basin Tech Team, including membership, meeting notes, and meeting agendas.
An updated council work plan.
Merit Criteria #3: Progress in on-the-ground restoration:
Actions the council is taking to plan and implement on-the-ground restoration, including number of applications submitted.
Merit Criteria #4: Progress in community engagement for watershed restoration purposes:
Actions the council is taking to engage with the watershed community. Including events held and attendance at the events and attendance at board meetings.

Oregon Watershed Councils

Updated December 2022

North Coast Watershed Association

NCWA Coastal Council
*a. Ecola Creek WC

NCWA River Council
*b. Nicolai-Wichiup WC
*c. Skipanon WC
*d. Youngs Bay WC

e. Columbia Slough WC
f. Greater Oregon City WC
g. Johnson Creek WC
*h. Oswego Lake WC
*i. N. Clackamas WC
*j. Tryon Creek WC

Salem Keizer Area Watershed Councils

*k. Claggett Creek WC
*l. Pringle Creek WC
*m. Mill Creek WC

*n. Spring Valley WC
*o. Rickreall WC
*p. Glenn-Gibson WC

†The North Santiam Watershed Council is also locally recognized in the Mill Creek watershed.

Wasco County Watershed Councils

*Bakeoven WC
*Fifteenmile WC
*Mosier WC
*The Dalles WC
*White River WC

Necanicum WC
*a
*b
*c
*d
Lower Columbia WC
Upper Nehalem WC
Lower Nehalem WC
Scappoose Bay WC
Tillamook Bay WC
Tualatin River WC
e
f
g
*h
*i
*j
Sandy River WC
Hood River WG
Nestucca/ Neskowin WC
Greater Yamhill WC
Pudding River WC
Molalla River Watch
Clackamas River WC
Wasco County WCs
Sherman County WC
Gilliam-East John Day WC
Walla Walla WC
Umatilla Basin WC
Grande Ronde Model Watershed
*k
*l
*m
*n
MidCoast WC
Luckiamute WC
†North Santiam WC
Middle Deschutes WC
Mid John Day / Bridge Creek WC
North Fork John Day WC
Powder Basin WC
Marys River WC
Calapooia WC
South Santiam WC
Siuslaw WC
Long Tom WC
McKenzie River WC
Upper Deschutes WC
Crooked River WC
South Fork John Day WC
*Lower Willow Creek Working Group
*Bully Creek Watershed Coalition
Malheur WC
Smith River WC
Elk Creek WC
Coast Fork Willamette WC
Middle Fork Willamette WC
Tenmile Lakes Basin Partnership
Coos Watershed Assoc.
Coquille Watershed Association
Partnership for the Umpqua Rivers
Harney County WC
Owyhee WC
Lake County WCs
*Silver Lake WC
*Upper Sycan WC
*Upper Chewaucan WC
Klamath Watershed Partnership
Lower Rogue WC
Rogue River WC
Illinois Valley WC
Applegate River WC
*Williams Creek WC

South Coast Watersheds Council

The South Coast Watersheds Council is also locally recognized for the Chetco Basin.

*** Indicates locally recognized watershed councils that have never received their own individual Council Support Grant and are not eligible for a Council Capacity Grant.**

For Purposes of OAR 695-040-0030(2)(a) Geographic Eligibility Criteria: Boundaries of Councils which received a Watershed Council Support Grant Before July 1, 2013.

Area with no watershed council

Oregon Watershed Enhancement Board
775 Summer St. NE Suite 360
Salem, OR 97301-1290
www.oregon.gov/OWEB

Updated by Troy Wirth January 2015 using ESRI ArcMap 10.2.2 Oregon Lambert Projection, NAD 83 SRID 2992

C:\Users\PAULA\GIS C Drive\GIS_Files_on_Z_Drive\Projects\WatershedCouncil\Projects\Watershed_Council_Boundaries_WebsiteMap_2019.mxd

Application Name: LCRWC Council Capacity and Support

Application Number: 224-002-22857

By: Columbia SWCD

Offering Type: Council Capacity Grants

Application Type: Council Capacity

OWEB Region: North Coast
County: Columbia
Coordinates: 45.8069396068955,-123.058408981136

Applicant:
Malyssa Legg
35285 Millard Road
St Helens OR 97051-3224
503.433.3205
malyssa.legg@columbiaswcd.com

Payee:
Malyssa Legg
35285 Millard Road
St Helens OR 97051
503.433.3205
malyssa.legg@columbiaswcd.com

Project Manager:
Henry Franzoni
335 Spruce Creek Rd
Longview WA 98632
3603530937
hjfranzoni3@gmail.com

Budget Summary:
OWEB Amount Requested: $131,738
Total Project Amount: $133,938

Administrative Information

Abstract

Provide an abstract statement for the project. Include the following information: 1) Identify the project location; 2) Briefly state the project need; 3) Describe the proposed work; 4) Identify project partners.

LCRWC is located in Columbia and Clatsop Counties, Oregon.
The project need is capacity funding for the council, to continue watershed restoration activities within the basin and to continue stakeholder and local landowner outreach activities.

Capacity funds will dedicate resources to strengthen ongoing organizational efforts to develop new partnerships, recruit new watershed council members and continue internal board development activities. Capacity grant addresses need to expound on ongoing strategic planning efforts and expand current project portfolio. The results of an intended Rapid Biologic Assessment will guide the council going forward. component of the plan includes outreach to broaden community involvement in the watershed council mission to stakeholders and community groups. Capacity grant will also provide resources to develop technical proposals that address data gaps and existing uncertainties about watershed processes and function. Examples of these investigations include anchor habitat identification, flood profiles, rapid bio-assessments, water quality data analysis, and groundwater studies.

Capacity grant will be used to leverage additional funding authorities and expertise to maximize restoration effort needed to manage project complexities. This will contribute to shaping project concepts in collaboration with stakeholders and community groups for future feasibility inquiries and preliminary design.

CSWCD, ODFW, OWEB, Columbia County, and the City of Clatskanie are key project partners.

Location Information

Current Location:

What is the ownership of the project site(s)?

✓ *Public land (any lands owned by the Federal government, the State of Oregon, a city, county, district or municipal or public corporation in Oregon)*

What agency(ies) are involved?

City of Clatskanie, Columbia County, Evenson Logging Company, Oregon State Extension, Clastkanie Public Utilities District, City of Rainier, Oregon Department of Fish and Wildlife, Soil and Water Conservation District, Rainier High School, Clatskanie High School, North Coast Watershed Council, Scappoose Bay Watershed Council, Scappoose Sand and Gravel, Oregon Department of Environmental Quality.

❑ *Tribal lands (any lands owned/managed by a Tribal government)*

✓ *Private (land owned by non-governmental entities)*

Please select one of the following Landowner Contact Certification statements:

❍ I certify that I have informed all participating private landowners involved in the project of the existence of the application, and I have advised all of them that all monitoring information obtained on their property is public record.

● I certify that contact with all participating private landowners was not possible at the time of application for the following reasons: Furthermore, I understand that should this project be awarded, I will be required by the terms of the OWEB grant agreement to secure cooperative landowner agreements with all participating private landowners prior to expending Board funds on a property.

Please List your reasons

Scope of grant proposal is not project specific and does not involve contact with specific landownerships other than through project development and outreach activities described in work plan.

❑*Not applicable to this project*

✓*This grant will take place in more than one county.*

List the counties affected:

Columbia and Clatsop County

Permits

Other than the land-use form, do you need a permit, license or other regulatory approval of any of the proposed project activities?

❍ Yes

● No

Racial and Ethnic Impact Statement

Racial and Ethnic Impact Statement

❍ The proposed grant project policies or programs could have a disproportionate or unique POSITIVE impact on the following minority persons. (indicate all that apply)

❍ The proposed grant project policies or programs could have a disproportionate or unique NEGATIVE impact on the following minority persons. (indicate all that apply)

● The proposed grant project policies or programs WILL HAVE NO disproportionate or unique impact on minority persons.

Insurance Information

If applicable, select all the activities that are part of your project - These require a risk assessment tool unless otherwise noted (check all that apply).

❑*Working with hazardous materials (not including materials used in the normal operation of equipment such as hydraulic fluid)*

❑*Earth moving work around the footprint of a drinking water well*

❑*Removal or alteration of structures that hold back water on land or instream including dams, levees, dikes, tidegates and other water control devices (this does not include temporary diversion dams used solely to divert water for irrigation)*

❑*Applicant's staff or volunteers are working with kids related to this project (DAS Risk assessment tool not required, additional insurance is required)*

❑*Applicant's staff are applying herbicides or pesticides (DAS Risk assessment tool not required, additional insurance is required)*

✓*Insurance not applicable to this project*

Additional Information

❑*This project affects Sage-Grouse.*

Problem Statement

Does the watershed council have a fiscal sponsor?

● Yes
❍ No

For Details If yes, upload your fiscal sponsorship agreement.

Is the council a membership organization?

● Yes
❍ No

Date of last annual membership meeting.
11/12/2019

The council is a group of councils operating collectively.

❍ Yes
● No

Is the applicant a group of councils operating independently?

❍ Yes
● No

For Details Upload the council's most recent bylaws.

Councils are required to review their council's bylaws once every three years, provide the date of the last time the council's governing body reviewed the council's bylaws?

03/20/2023

Councils are required to review their policies and procedures once every three years, provide the date of the last time the council's governing body reviewed the council's policies and procedures?
03/20/2023

For Details Upload the council's most recent policies and procedures.

For Details Upload the council's local government designation

For Details Upload the council's policies and procedures.

Date of the council's 2021-2023 self assessment?
03/31/2021

Date of last council officer elections.
11/12/2019

For Details Upload the minutes from the board meeting documenting the results of the officer election.

Does the council have written position descriptions for council board officers?

● Yes
❍ No

Does the council have written roles and responsibilities for council governing body members?

● Yes
❍ No

How many times did/will the council governing body meet between July 1, 2021-June 30, 2023?

22

How many times will the council governing body meet between July 1,-June 30, of the upcoming biennium for which you are seeking funding?

4

Describe how the council advertises its general council meetings.

Regular postings are made through local newspapers, council website, e-mail lists, and through one on one outreach with council partners when guest speakers are on the agenda.

Do council governing body meetings have agendas, sign-in sheets, and minutes?

● Yes
❍ No

Describe how your board membership includes a diverse range of geographic areas and community interests in the watershed.

Current board membership is at a nadir. The current council consists of:

Four landowners along the Clatskanie River, one of whom is a county commissioner, one who does habitat restoration projects, and two timber land owners...

Three others... the county road dept manager, the city manager of Clatskanie, and the OSU extension Service person for the county.

The council currently has these seven members.

However a new person came to the monthly meeting on March 13th, 2023, a new landowner along Carcus Creek. We hope this continues.

The council passed a motion on March 13th, 2023 to review and revise the policies and procedures at the next monthly meeting scheduled for April 10th, 2023. It is hoped this revision might lead to larger membership.

Describe any board membership and recruitment challenges and actions being taken to address those challenges.

The council has been named by locals as "K.C.'s playhouse".
Locally the council is perceived as having lost its way and become ineffective and a waste of time and money. This presents recruitment challenges.
The council is addressing this challenge by attempting to renew it's direction and get some projects done on the ground.
The council is addressing this challenge by the resignation of the Vice Chairman, Gary Soderstrom.

Are projects of the council, including those identified in the work plan, identified in a council action plan or strategic plan?

● Yes
❍ No

Provide the name and date of the most recent action plan or strategic plan.

Lower Columbia River Watershed Strategic Action Plan (Review Draft) 2012

Is the work of the council specifically designed to benefit salmon or steelhead?

● Yes
❍ No

✓Columbia River - Chum Salmon
✓Lower Columbia River - Coho Salmon
✓Lower Columbia River - Chinook Salmon

Describe how the resulting council capacity grant will benefit salmon or steelhead or their habitat?

The Lower Columbia River watershed contains 36 square miles of watershed area supportive of coho, chinook, steelhead, and chum salmon populations. Watershed landscape is unique in its large expanse of private ownership which includes industrial timberlands, legacy local logging companies, small woodlots, and agricultural interests.

The council's emerging strategic action plan (SAP) is intended to capture demographics shifts in landownership from expanding exurban area and increase in visitors from tourism. SAP will select limiting factors that can be managed at local level. This includes impaired habitat complexity, access to off channel habitats, excessive fine sediment deposition, and seasonal water quality degradation. The coordinator will utilize watershed assessments, stream surveys, spatial datasets, water quality data information, and recovery plans updates to inform a prioritized list of key uncertainties and range of restoration strategies. This will be reflected in action plan drafts for council meeting discussion and engagement with council partners. SAP intends to expand diversity of project types to support broader expression of life history strategies needed for salmon recovery. This includes floodplain reconnection to side channel wetland, estuary rearing areas, and identification of anchor habitats .

Regional Assessments or Recovery Plans
ESA Recovery Plan for Lower Columbia River Coho Salmon, Lower Columbia River Chinook Salmon, Columbia River Chum Salmon, and Lower Columbia River Steelhead
Northwest Power and Conservation Council Lower Columbia Province Plan

Council Capacity Metrics:
https://www.oregon.gov/oweb/Forms/OC-Application-Watershed-Council-Metrics-23-25.xlsx

Input the total acres encompassed by this watershed.
23040

Input the Federal Recovery plan applicable to your watershed council.
ESA Recovery Plan for Lower Columbia River Coho Salmon, Lower Columbia River Chinook Salmon, Columbia River Chum Salmon, and Lower Columbia River Steelhead

Input the description of the plan implemented that outlines the need for this activity
ESA Recovery Plan for Lower Columbia River Coho Salmon, Lower Columbia River Chinook Salmon, Columbia River Chum Salmon, and Lower Columbia River Steelhead

Proposed Solution

Community Engagement

Briefly describe the council's stakeholder engagement accomplishments from the 2021-2023 biennium.

This coordinator has not been able to identify any stakeholder engagement accomplishments that occurred during this period.

Briefly describe the council's stakeholder engagement challenges from the 2021-2023 biennium

The stakeholder engagement challenges from this period resulted in the previous coordinator and council chairman resigning, as well as the previous SWCD director..

Briefly describe the council's stakeholder engagement plans for the 2023-2025 biennium.

Three landowners who own property on the banks of the Clatskanie River are Council members. They can provide introductions to other landowners along the Clatskanie River.

The Council is in the process of assembling an OWEB monitoring grant application for a rapid biological assessment which engages Bio Surveys Northwest to perform an outreach function with each property holder along the Clatskanie River and its tributaries in the survey area as part of the Rapid Biological Assessment (RBA).

As part of the RBA every landowner along the Clatskanie River and ten of it's key tributaries will be contacted.

Describe the council's efforts to engage with local tribes present in the council's geography.

The current coordinator has reached out to Lamprey Coordinator - Lori Porter of the Columbia River Inter Tribal Fish Commission and obtained a white paper describing lamprey passage criteria involved in evaluating lamprey passage barriers.

The current Chairman and coordinator attended the Connect+ conference and heard the Chairman of the Chinook Tribe give his keynote address.

Describe the council's efforts to engage with non-traditional partners.

None that I am aware of.

Restoration

Provide a brief summary of the council's 2021-2023 restoration accomplishments.

There are no restoration accomplishments by the council per say during this period. Two project were initiated by the council during this period,
1) A lamprey barrier survey project, and 2) a large wood placement in Carcus Creek.
The project management of both these projects were turned over to CSWCD before the current coordinator was engaged. Initiating the projects was accomplished. Management for finishing the projects was turned over to CSWCD.

Briefly describe the council's restoration challenges from the 2021-2023 biennium

Loss of morale, changed coordinators 3x in 3 years, chairman resigned, SWCD director resigned, COVID.

Three 60% design choices were completed for a channel widening and riparian restoration project on Conyer's Creek. As funding was sought, it became obvious that there was no justification for prioritizing funding for this project within the Clatskanie basin. There was no strategic plan for the basin, no action plan, no current prioritization of what needs to be done across the council's area of responsibility.

Provide a brief summary of the council's restoration plans for 2023-2025.

The coordinator is preparing a monitoring grant application for the OWEB spring funding cycle in hopes of success. Project staff will meet with Ken Fetcho (OWEB) on March 24th, 2023 to coordinate monitoring activities.

This project would fund a Rapid Biological Assessment (RBA) of the Clatskanie River Basin, including 20 of its tributaries, which would include a landowner outreach component.
This project would allow the council to prioritize restoration activities across the basin, and understand where the remaining habitat is fixable and where the remaining species of concern are located.

After over two decades of previous restoration activities, the council can identify what remains to be done in the watershed and how to prioritize the work.

The council has no current strategic plan nor a current work plan. The Rapid Biological Assessment would provide the data to create a sound scientific basis for restoration plans going forward.

Planning

Describe how the council uses planning documents to identify and implement on-the-ground watershed restoration and stakeholder engagement projects.

At this time, the council's planning documents need to be re-created and/or reviewed and revised from a 2012 plan.

The current coordinator is expecting to use the results of the Rapid Biologic Assessment (RBA) to create new planning documents and start planning, prioritizing, and providing a plan to fix the degraded habitat.

Enclosed is a draft action plan plan from 2012 found in the Council's files which has been uploaded. This plan was approved on 3/12/2012 but revisions since then have not been approved. It was under review in 2014 and 2019 during the last funding cycle, at that time submitted as a pending strategic plan/action plan.

It was pointed out at the monthly meeting last by the current chairman, who wasn't chairman at the time, that the lack of a vote recorded in the minutes could mean the current strategic plan was left unchanged by the 2014 and 2019 review cycles. Nevertheless, the plan needs drastic review and likely complete replacement.

Are projects of the council identified in a council action plan or strategic plan?

❍ Yes
● No

Wrap-Up

List the watershed council staff (or contractors), their roles, affiliation (staff or contractor), length of time in position (use the Qualifications space), and contact information.

Role	Name	Affiliation	Qualifications	Email	Phone
Coordinator	Henry Franzoni	Lower Columbia River Watershed Council	10 yrs Data Center Manager of the Fish Passage Center of the Pacific States Marine Fisheries Commission. 10 yrs project lead of the Inter-Tribal Monitoring Project of the Columbia River Inter Tribal Fish Commission. 3yrs Consulting USFWS Col. Riv.	hjfranzoni3@gmail.com	(360) 425-7140

For Details Upload a list, including contact information, for the current board officers.

Budget

Item	Unit Type	Unit Number	Unit Cost	OWEB Funds	External Cash	External In-Kind	Total Costs
Salaries, Wages and Benefits							
Coordinator Salary	Hours	2835	$39.00	$110,565	$0	$0	$110,565
			Category Sub-total	**$110,565**	$0	$0	$110,565
Contracted Services							
Marketing and outreach - newspaper, website, social media, mailings, etc	Each	1	$2,800.00	$2,800	$0	$0	$2,800
IT Maintenance	Each	1	$1,000.00	$0	$0	$1,000	$1,000
Administration Services	Each	1	$10,000.00	$10,000 *	$0	$0	$10,000
			Category Sub-total	**$12,800**	$0	$1,000	$13,800
Travel and Training							
Conference/meeting registration	Each	2	$600.00	$1,200	$0	$0	$1,200
Board Training	Each	1	$1,000.00	$1,000	$0	$0	$1,000
mileage	Miles	3035	$0.65	$1,973	$0	$0	$1,973
lodging for conferences and meetings	Days	6	$100.00	$600	$0	$0	$600
			Category Sub-total	**$4,773**	$0	$0	$4,773
Materials and Supplies							
Office Supplies	Each	1	$1,200.00	$1,200	$0	$0	$1,200
Computer Upgrades	Each	1	$1,800.00	$1,800	$0	$0	$1,800
			Category Sub-total	**$3,000**	$0	$0	$3,000
Equipment							
			$0	$0	$0	$0	$0
			Category Sub-total	**$0**	$0	$0	$0
Other							
Use of office space	Months	24	$50.00	$0	$0	$1,200	$1,200
Board Meeting Refreshments	Each	6	$100.00	$600	$0	$0	$600
			Category Sub-total	**$600**	$0	$1,200	$1,800

* = OWEB funds excluded from indirect.

			Modified Total Direct Cost Amounts	**$131,738**	$0	$2,200	$133,938
Indirect Costs							
	0%			$0	$0		$0
Post Grant							
			Total	**$131,738**	$0	$2,200	$133,938

Provide context and justification for how your budget was developed. Explain how project costs and/or rates were determined.

Budget was developed based on existing compensation amounts negotiated between Council board and Council staff. Comparables with other watershed council organization were used as a guide to inform amounts in these categories along with anticipated funding support from existing project budgets.

Does the budget identify a contingency amount for specific line item(s) within the Contracted Services and/or Material and Supplies budget category?

❍Yes

●No

Funding and Match

Fund Sources and Amounts

Organization Type	Name	Source Note	Contribution Type	Amount	Description	Status
Non-Governmental Organization	Columbia Soil and Water Conservation District		In-Kind - Materials	$2,200	Office support in the form of desk space, network maintenance, equipment and meeting room.	Secured
Fund Source Cash Total	$0		**Fund Source In-Kind Total**	$2,200		

Match

Contribution Source-Type: Description	Amount
Columbia Soil and Water Conservation District-In-Kind - Materials: Office support in the form of desk space, network maintenance, equipment and meeting room.	$2,200
Match Total	$2,200

Do match funding sources have any restrictions on how funds are used, timelines or other limitations that would impact the portion of the project proposed for OWEB funding?

❍ Yes

● No

Do you need state OWEB dollars (not Federal) to match the requirements of any other federal funding you will be using to complete this project?

❍ Yes

● No

Does the non-OWEB cash funding include Pacific Coast Salmon Recovery Funds?

❍ Yes

● No

Uploads

Policies and Procedures: LCRWC Policies and Ground Rules 9.14.16.pdf **- Amended in 2016 to describe decision making process of governing body.**

Fiscal Sponsorship Agreement: Fiscal Sponsorship and Employment agreement 2-28-2018.pdf **- Details that clarifies roles and responsibilities of LCRWC and its fiscal administrator.**

Bylaws: LCRWC Charter and Bylaws 9.14.16.pdf -

Secured Match Forms: SWCD_Match.pdf **- Cost Share Form, in-kind office support SWCD**

Local Recognition: County Charter.pdf -

Action Plan: LCRWC Action PLan CS Submission 11.14.pdf **- Draft stategic action plan has been developed and now being reviewed by TAC members.**

Policies and Procedures: officerlist.pdf -

Policies and Procedures: LCRWC draft minutes 110921.pdf -

Bylaws: LCRWC Charter and Bylaws 3_20_2023.pdf -

Policies and Procedures: LCRWC Policies and Ground Rules 3_20_2023.pdf -

Permit Page

No Permits have been identified for this application.

Lower Columbia River Watershed Council
Policies and Ground Rules

Adopted 9/7/97
Amended 7/11/00
Amended 6/12/12
Amended 9/9/14
Amended 9/13/16

LCRWC Members agree to the following policies and ground rules:

Council Decision-Making

- Robert's Rules of Order, Second Edition, will be used as a guide for conducting business.

- Before a decision is adopted by the council, sufficient time (30 days) will be provided for the members to seek advice from organizations they represent, agencies, or other experts.

- When a decision is reached, council members will advocate to their respective bodies support for the adoption or implementation of the decision.

- The watershed council may select a person to serve as facilitator.

Participation

- The Council will hold regular meetings and follow provisions of the Open Meetings Law. At least 10 minutes will be set aside at each meeting for public comment.
- Business may be conducted by council members present. In the absence of a majority of the council members or their alternates, a simple majority is required for approval of actions with a minimum of four members present.
- Council members will keep their respective agencies, organizations, or interests informed about the work of the council and bring concerns of their groups to the council.
- Council members may designate a representative of their group to serve as an alternate. Designated alternates will be listed on the membership list of the council.
- Each member will brief his/her alternate on all issues, proceedings, and notifications, prior to the alternate's attendance at council meetings.
- The public is invited to all council meetings and, upon request, provide meeting agendas and records of decisions other than personnel discussions and actions.

Organization and Procedures

Robert's Rules of Order shall be followed (see: Decision-Making/Ground Rules)

The Council will elect a chairperson and vice-chairperson to serve as spokespersons, prepare council agendas, call and manage council meetings, enforce ground rules, and perform other tasks as assigned by the council. The council may select other officers and fill vacancies as needed. The periodic election of officers shall take place at the regularly-scheduled meeting in October of odd-numbered years.

The Council may form subcommittees of its own members and task groups that include individuals not on the council to perform certain functions or focus on specific issues. The council will also identify technical advisors who can provide technical data and assistance and call on these experts as needed.

All Council members are eligible to serve as officers or committee members.

There are no term limits for officers.

The Council will hold monthly meetings on the second Tuesday of every month unless otherwise announced.

Council will seek funding for the ongoing operations.

The Columbia SWCD will act as the Council's fiscal agent and follow Generally Accepted Accounting Principles (GAAP).

The Council will not use litigation as a method to implement the Council's mission.

Amendments
A council member may propose an amendment to these Ground Rules at any regularly-scheduled meeting. A vote on the amendment shall take place at the next regularly-scheduled meeting. An affirmative vote by 10 members, or two-thirds of those members present, whichever is greater, will ratify the amendment.

FISCAL SPONSORSHIP and EMPLOYMENT AGREEMENT
Between the Columbia Soil and Water Conservation District And the Lower Columbia River Watershed Council

PARTIES. The parties to this agreement are:

A. Columbia Soil and Water Conservation District, hereafter referred to as "Columbia SWCD."

B. Lower Columbia River Watershed Council hereafter referred to as "LCRWC."

PURPOSE AND RECITALS.

The Columbia SWCD is a political subdivision of the state of Oregon organized and chartered in January of 1947, and considered a municipal corporation, a form of local government under ORS 190.003. It is governed by a host of statutes in Oregon Revised Statutes, chapter 568 and all corresponding Oregon State Laws. The Internal Revenue Service considers SWCDs as instrumentalities of state or municipal government, thus qualifying as tax-exempt under Section 115 of the Internal Revenue Code. The mission of the Columbia Soil & Water Conservation District is to provide educational, technical and financial assistance to our community for the protection, conservation and restoration of natural resources.

A. The LCRWC is an affiliation of stakeholders formed into a Watershed Council under ORS 541.910 to reflect the interests of the Lower Columbia Watershed. It was organized in July, 1997. It is one of three Watershed Councils in Columbia County. The mission of the Lower Columbia River Watershed Council is to improve watershed functionality across the watershed through education, cooperation, stewardship, and restoration/mitigation projects.

B. The parties listed above have entered into this Fiscal and Employment Sponsorship Agreement in order to: 1) formalize their existing relationship, 2) expand their respective capacities, 3) capitalize on their organizational and membership strengths, and 4) extend their missions to all members of the community and stakeholders in the natural resource arena.

AGREEMENT: The parties listed above agree to be legally bound by the following:

COLUMBIA SWCD'S RESPONSIBILITIES. The Columbia SWCD agrees to serve as the employer of staff working on behalf of the LCRWC. Employees, such as the LCRWC Coordinator, work primarily on LCRWC activities. Other employees of the Columbia SWCD may also work on LCRWC activities as part of their assigned tasks. The Columbia SWCD also agrees to act as Fiscal Sponsor for the LCRWC, to receive donations, grants and sign contracts intended to provide financial support to the LCRWC, to treat all funds intended for the LCRWC as restricted funds, and to use such grants and donations to provide funds and staff for the LCRWC so long as the LCRWC is operating in compliance with this agreement. Specifically, the Columbia SWCD agrees to:

A. Employment Management

1. Consider all employees and volunteers of the LCRWC as employees, and/or volunteers of the Columbia SWCD and require that they abide by the Personnel Policies of the Columbia SWCD and the laws governing SWCDs.
2. Provide staff sufficient to conduct the work of the LCRWC, as delineated in the LCRWC Annual Plan of Work, and as LCRWC financial support allows.
3. Provide workers compensation insurance for staff and volunteers of the LCRWC.
4. Pay all employment taxes and file all employment reports for LCRWC staff, per federal and state laws.
5. SWCD procedures and policies will be followed when recruiting and hiring watershed council staff however the hiring committee will consist of two watershed council representatives plus the SWCD District Manager.

B. Work Plan and Budget Development

1. Assist with development of the annual LCRWC Plan of Work (POW), and incorporate LCRWC POW tasks into the Columbia SWCD annual Plan of Work. Assign SWCD responsibilities to assist on LCRWC projects as SWCD staffing and financial capacities allow. All staff activities paid for by LCRWC funds, such as grants and local match, will be included in the LCRWC Plan of Work.
2. Develop an annual budget that accounts for estimated revenues and expenditures for the LCRWC, as part of the overall annual budget for the Columbia SWCD.

C. Fiscal Management

1. Manage money and assets of the LCRWC as a part of the overall money and assets of the Columbia SWCD. As such, the Board of Directors for the Columbia SWCD will approve an annual budget for the expenditures of the LCRWC and manage the funds of the LCRWC in accordance with the Columbia SWCD's Financial Policies and Procedures.
   Assume liability for any debts, obligations or liabilities of the LCRWC created by the actions or inactions of the LCRWC.
2. Clear and accurate records will be maintained by the Columbia SWCD that distinguish between the money and assets earmarked forthe LCRWC and other money and assets owned or controlled by the Columbia SWCD.

3. Contracts
   a. Assist LCRWC by writing contracts or agreements as needed to implement and continue the LCRWC's operation and projects.
   b. Manage the contracts of the LCRWC in accordance with the Columbia SWCD's Contracting Rules.
   c. Consider all contractors of the LCRWC as contractors of the Columbia SWCD.

4. Reporting and Accounting
   a. Provide funders with documentation of LCRWC expenditures in the format prescribed by the funding source.
   b. Provide to the LCRWC regular (monthly) financial reports that detail income received by the Columbia SWCD to support LCRWC staffing and activities and expenditures made by the Columbia SWCD for LCRWC expenses.
   c. Maintain accounting and other financial records for the LCRWC in accordance with generally accepted accounting principles (GAAP).

d. Conduct annual audit by a municipal auditor to meet funding and legal requirements.
e. Facilitate internal controls and authorization protocols to assure a smooth flow of funds and accurate financial tracking as described in the Columbia SWCD's Financial Policies and Procedures.
f. Request, receive, and track funds from funding sources to support LCRWC activities.
g. Account for LCRWC funds used for fiscal and employer services through monthly and yearly Columbia SWCD staff time-tracking and report annually to the LCRWC membership after the conclusion of the Columbia SWCD's fiscal year.
h. Keep all financial and grant records for at least three years or longer, if required by the Columbia SWCD's Records Retention Policy or grant requirements.
i. Provide archiving in accordance with Columbia SWCD's Records Retention Policy or grant requirements.

5. Invoices and Payments
   a. Make timely payments as authorized by the LCRWC Coordinator.
   b. Make timely payments according to the Columbia SWCD's Financial Policies and Procedures.

LCRWC'S RESPONSIBILITIES. Specifically, the LCRWC agrees to:

A. General

1. Establish an Operations Committee to provide guidance and oversight for the LCRWC Coordinator, review proposed LCRWC annual budgets, and communicate to the Board of Directors of the Columbia SWCD.
2. A member of the Operations Committee who is not a staff member of the Columbia SWCD will be designated as a liaison to the Columbia SWCD. This person will be responsible for oversight and review of LCRWC revenues and expenditures reported in the Columbia SWCD's annual financial reports.
3. Task the LCRWC Coordinator with helping to secure funds through donations, contracts, and grants in order to accomplish tasks and projects described in the annual LCRWC POW and support LCRWC operational costs. LCRWC operational costs include but are not limited to fiscal administration of grants, personnel management, rent, phones/internet, website hosting, computers/software, insurance, audits, meeting costs, travel, printing/copying, and postage.
4. The LCRWC president shall designate a special committee of at least two other individuals to participate in the hiring (ranking of applicants, interview, and final selection) and annual performance review of LCRWC staff.
5. Consider LCRWC staff, as employees of the Columbia SWCD, as "public officials" as defined in ORS 244.020(14). As such, employees must comply with the Oregon Government Ethics law regarding conflicts of interest and other matters relating to financial gain.
6. Consider its staff, as employees of the Columbia SWCD, as "public employees" according to ORS 260.432, and require that they not engage in political activity while on the job.
7. Council will abide by any and all liability requirements of the SWCD relating to LCRWC activities.
8. Abide by the following policies and rules of the Columbia SWCD:
   ✓ Personnel Policies

- ✓ Contracting Resolutions and Rules
- ✓ Records Retention Policy
- ✓ Conflict of Interest Policy
- ✓ Note: any future policies adopted by the Columbia SWCD's Board of Directors that pertain to the LCRWC will be provided to the LCRWC for similar adoption.

B. Grants and Local Match

1. Responsible for fulfilling requirements and funding specifications of all grants for LCRWC activities..
2. Provide grant applications made by the LCRWC to the Columbia SWCD for submission to third-party grantor.
3. Secure, document and report required match funds as needed.
4. Provide documentation required by the grantor for funding releases (including, but not limited to, permits, land use forms and landowner agreements).
5. Notify the Columbia SWCD of all requests for grant changes (including budget changes and time extension requests) prior to submission to a grantor.

C. Reporting and Accounting

1. Provide documentation of expenses in the format agreed upon with the Columbia SWCD and funding sources.
2. Document all "in-kind" work (e.g., match of donated materials, services, and volunteer time) as required by the Columbia SWCD and funding sources.
3. Write and submit to Columbia SWCD all all reports not related to fiscal matters to fulfill the requirements of funders

DONATIONS. All donations intended to support the LCRWC that are made by check should be made out to the Columbia SWCD with a notation about its intended purpose. Donations such as equipment may be given directly to the LCRWC and should be accounted for by the LCRWC Coordinator by labeling with permanent marker and entry onto the Columbia SWCD's non-capitol and asset list.

The parties agree that the Columbia SWCD will assist the LCRWC by receiving donations and gifts from individual donors and businesses wishing to support the activities of the LCRWC, and providing the receipts that such donors need to take tax deductions for their donations.

OTHER DUTIES OF THE COLUMBIA SWCD. In addition to the other duties imposed by this agreement, the Columbia SWCD agrees to properly maintain its legal status as a local governmental unit, and as a tax exempt organization under Section 155 of the Internal Revenue Code; to properly prepare and file its own annual reports required by the State and Federal governments; comply with all applicable laws and regulations governing SWCDs; to operate and make decisions properly as a local governmental unit; to keep the required records of its Board meetings and decisions; and to keep adequate financial records and maintain proper oversight and control over its financial activities. The Columbia SWCD shall be responsible for its own employment taxes, insurance, debts, liabilities and other legal obligations. The Columbia SWCD shall notify the LCRWC immediately of any change in its legal status or tax exempt status.

LCRWC'S ENTITY STATUS. The LCRWC is not a legally incorporated separate entity; its programs and activities are considered a project of the Columbia SWCD. However, the LCRWC directs the work of the LCRWC coordinator through the adoption of the LCRWC annual plan of work and through regular reports from the coordinator to the council at each monthly meeting. The LCRWC will notify the Columbia SWCD immediately of any change in its legal status or tax exempt status. The LCRWC agrees to not incorporate or otherwise create a legal entity without written notice to the Columbia SWCD.

All employees, independent contractors and volunteers who perform services or work for the LCRWC are and shall be the employees, independent contractors and volunteers of the Columbia SWCD. The Columbia SWCD shall be responsible for payment of all compensation to LCRWC staff and independent contractors, paying all payroll withholding taxes and payroll taxes for LCRWC employees, filing all required reports to the IRS regarding payroll taxes, and preparing and filing all W-2 forms and 1099 forms reporting the payment of compensation to LCRWC employees and independent contractors.

The Columbia SWCD shall have the sole responsibility to select, employ, supervise, evaluate, discipline and if necessary terminate the employment or services of all employees, independent contractors or volunteers associated with the LCRWC, with the exception of the hiring, supervision and evaluation of the LCRWC Coordinator, which will be done in conjunction with the LCRWC, as described under LCRWC's Responsibilities, section A.2. Discipline and/or termination of the LCRWC Coordinator shall be done by the Columbia SWCD with input from the LCRWC..

Any tangible or intangible property, including intellectual property such as copyrights, obtained or created by the LCRWC shall be the property of the Columbia SWCD. All equipment and supplies purchased with LCRWC funds are the sole property of the Columbia SWCD.

AGREEMENT TO INDEMNIFY. Because the Columbia SWCD is liable for any acts or omissions of the LCRWC, LCRWC funds may be used to defend the Columbia SWCD and its officers, directors, employees and volunteers from any liability, demands or lawsuits for any claim of loss, damage or injury that arises from any of the activities, programs, decisions or omissions of LCRWC or employees, volunteers, members or agents associated with the LCRWC.

TERMINATION OF THIS AGREEMENT. Either party may terminate this agreement at any time, with cause, by delivering a written statement of termination to the other party at least thirty (30) days in advance of the effective date of the termination. This agreement shall automatically terminate if the LCRWC incorporates as a separate legal entity. If this agreement terminates due to the LCRWC's separate incorporation as an organization qualified to receive IRS recognition of its 501(c)(3) status for purposes and activities significantly related to the activities of the LCRWC under this agreement, then the Columbia SWCD shall:

- ✓ Transfer the remaining funds to the LCRWC minus any accrued payment owed to the Columbia SWCD for its services and expenses related to the LCRWC;
- ✓ Transfer ownership of all LCRWC assets, including its name and any intellectual property developed or created by the LCRWC under this agreement, to the LCRWC.

If this agreement is terminated for any reason other than the LCRWC's separate incorporation, then the Columbia SWCD shall retain the funds held in the account for the LCRWC to be used in

accordance with the mission of the LCRWC and in accordance with any restrictions on the use of those funds.

MEDIATION AND ARBITRATION. In the event of a conflict regarding the terms of this agreement, or if the parties cannot agree to terminate this agreement without serious conflict, they will enter into a mediated conflict resolution process with a third-party mediator chosen by both parties. If resolution cannot be achieved through mediation, the parties agree to submit to binding arbitration of their differences before a single arbitrator in accordance with the arbitration rules of the American Arbitration Association. This agreement shall be governed by and construed in accordance with the laws of the State of Oregon, and any decision or award by an arbitrator shall be made in accordance with such laws.

ENTIRE, INTEGRATED AGREEMENT. This agreement, and any attached and properly executed exhibits, contains and constitutes the entire agreement of the parties with respect to the subject matter it addresses, and it supersedes any prior oral or written understandings or communications between the parties.

AMENDMENTS. This agreement may not be amended or modified, except in writing and signed by both parties.

EXECUTION OF THIS AGREEMENT HAS BEEN PROPERLY AUTHORIZED BY BOTH DECISION-MAKING BODIES. Each of the parties to this agreement certify that its own decision-making body (Columbia SWCD Board of Directors and membership of the LCRWC) has formally approved entering into this Fiscal and Employment Sponsorship Agreement, by passage and adoption of a resolution at a properly called Columbia SWCD meeting at which a quorum was present and for which proper minutes were recorded, or by consensus approval of the LCRWC membership at two properly noticed LCRWC membership meetings.

EFFECTIVE DATE AND TERM. This Agreement is effective on the date of its execution by both parties, as shown below. It shall continue in effect until either party terminates the Agreement in accordance with the provisions for termination stated above.

IN WITNESS WHEREOF, the parties have executed this Fiscal and Employment Sponsorship Agreement:

Signed on behalf of the Columbia SWCD, by:

LONA PIERCE Date: Feb. 28 '18
Print Name and Title

Signature: Lona Pierce

Signed on behalf of the Lower Columbia River Watershed Council, by:

Ian Bledsoe, President Date: 3-1-18
Print Name and Title

Signature:

LOWER COLUMBIA RIVER WATERSHED COUNCIL CHARTER and BYLAWS

*Adopted October 14, 1997
*Amended November 13, 2002
*Amended September 9, 2014
*Amended September 13, 2016

Purpose:

The Lower Columbia River Watershed Council was formed to gather and share information, to reduce duplication of activities, and to help address watershed management issues in the Lower Columbia River Watershed and in Columbia County, and to provide a framework for coordination and cooperation among key interests.

Mission:

To foster better stewardship and understanding of the Lower Columbia River Watershed resources in Columbia County, coordinate, cooperate and try to deal with issues in advance of resource degradation, encourage restoration of natural processes and functions where feasible, and help ensure sustainable watershed health, functions, and uses.

The council will work collaboratively with communities and landowners to develop and carry out voluntary watershed protection, restoration, enhancement and community engagement activities.

Vision:

A balanced ecosystem approach that supports a healthy watershed and provides for sustainable natural resources and for an economic base and viable communities.

Relationship to Decision-Making Bodies and Communities of Interest:

The Lower Columbia River Watershed Council is an advisory group to established decision-making bodies and communities of interest in Columbia County. As such, the council gathers information, facilitates stakeholder dialogue, hopefully gains consensus, and makes recommendations concerning the protection, restoration, and enhancement of the quality of the Lower Columbia River Watershed.
The council shall be non-partisan, non-political, and non-regulatory and shall not have the authority to appeal land use or other decisions of elected or appointed public bodies.

The Council will not use litigation as a method to implement the Council's mission.

The stakeholders, agencies, organizations, and public interests represented on the council are not obligated to adopt or carry out the recommendations of the council, but will give due consideration to the recommendations and take actions they consider appropriate.

These stakeholders, agencies, organizations, and interests will report back to the council on any actions taken in response to council recommendations.

The council welcomes and will respond to the requests for advice on actions affecting the watershed that are proposed by local, state, and federal agencies; organizations; and stakeholder and public interests.

Council members will keep their respective agencies, organizations, and interests informed about the work of the council and will bring their concerns to the council.

The Lower Columbia River Watershed Council shall support other watershed councils' efforts to secure funding for watershed projects and activities.

Goals and Objectives:

- Encourage coordinated efforts to increase natural resource education programs
- Improve communication among affected stakeholders, private individuals, interested citizens, business/industry, and representatives of local, state, and federal agencies
- Gather and evaluate environmental information
- Establish a framework for coordination, cooperation, and citizen involvement
- Provide a forum for resolving problems and conflicts related to the Council's mission when all parties to the problem or conflict agree to refer the matter to the council
- Formulate recommendations
- Facilitate enactment of recommendations
- Provide ongoing program evaluation during implementation
- Promote ongoing monitoring of the health of the Lower Columbia River Watershed

Specific Tasks/Responsibilities:

- Establish a public involvement program to ensure an appropriate level of citizen participation in the council's work
- Use available resource information to determine the current condition and uses of the watershed
- Identify critical information gaps
- Gather new critical information
- Identify the desired condition and uses of the watershed
- Identify high value fish and wildlife areas
- Encourage ongoing monitoring of the conditions of the watershed
- Help resolve issues among diverse interests in the watershed
- Seek funding to support program development and implementation, including funding from agencies represented on the council
- Address the needs and concerns of the respective agencies, organizations, and interests represented on the council
- Adopt and implement a work program
- Monitor work program progress and budget

- Identify ongoing education programs in the watershed

Council Members:

The Lower Columbia River Watershed Council shall at all times include representatives from the following interests: Agricultural Community; Business & Industry Community; Education Community; Public Interest Groups; Forestry Community; Sub-Basins and/or Local Watershed Councils; Countywide Organizations; Local Governments; Fishing Interests; and Mining Industry. A majority of the members shall reside in those portions of Columbia County that drain into the Columbia River.

The members shall serve at the pleasure of their respective stakeholder groups, agencies and organizations. Council members may designate an alternate who will participate on the council in their absence.

The council will act to replace members who resign or are unable to continue to serve on the council. The council will strive to maintain continuity and the balance of interests by giving preference to representation from the same agencies and organizations at a similar or higher level position. The council will request the group, agency or organization to nominate a replacement representative. If the group, agency or organization is unable or unwilling to do so, the council will seek representation from other groups, agencies, and organizations of the same community of interest. In this event the council will consult with the County Commissioners to ensure that the replacement agency or organization does represent the same community of interest. In the event the council is unable to find a replacement representative from the same community of interest, the County Commissioners shall be asked to make a replacement appointment to reflect that community of interest.

All Council members are eligible to serve as officers or committee members. There are no term limits.

MATCH FUNDING FORM

Document here the match funding shown on the budget page of your grant application

OWEB accepts all non-OWEB funds as match. An applicant may not use *another OWEB grant* to match an OWEB grant; this includes ODA Weed Board projects because they are funded through OWEB grants. However, an applicant who benefits from a pass-through OWEB agreement with another state agency, by receiving either staff expertise or a grant from that state agency, may use those benefits as match for an OWEB grant. (Example: A grantee may use as match the effort provided by ODFW restoration biologists because OWEB funding for those positions is the result of a pass-through agreement).

At the time of application, match funding for OWEB funds requested does not have to be *secured*, but you must show that at least 25% of match funding has been *sought*. On this form, you do not necessarily need to show authorized signatures ("secured match"), but the more match that is secured, the stronger the application. Identify the type of match (cash or in-kind), the status of the match (secured or pending), and either a dollar amount or a dollar value (based on local market rates) of the in-kind contribution.

If you have questions about whether your proposed match is eligible or not, see Allowable Match document in OGMS http://apps.wrd.state.or.us/apps/oweb/fiscal/nologin.aspx under Technical Assistance application or contact your local OWEB regional program representative (contact information available in the instructions to this application).

Project Name: LCRWC Coordinator and Project Management Support Applicant: LCRWC

Match Funding Source	Type (√ one)	Status (√ one)*	Dollar Value	Match Funding Source Signature/Date*
Columbia Soil and Water Conservation District	☐ cash ☒ in kind	☒ secured ☐ pending	$2200	03-07-19
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		

BEFORE THE BOARD OF COUNTY COMMISSIONERS

FOR COLUMBIA COUNTY, OREGON

In the Matter of Establishing the Lower Columbia River Watershed Council	)	ORDER NO. 222-97

WHEREAS, the State of Oregon has enacted ORS 541.345 to 541.400 dealing with watershed management and enhancement; and

WHEREAS, the State has created the Governor's Watershed Enhancement Board (GWEB) to initiate a watershed management program that relies on the establishment of voluntary local watershed councils and that provides for the development of local plans that may include, but are not limited to, the assessment of the watershed condition, the creation of a watershed action plan and a strategy for implementing the action plan; and

WHEREAS, local watershed councils shall consist of a majority of local residents, including local officials, shall represent a balance of interested and affected persons within the watershed and assure a high level of citizen involvement in the development and implementation of a watershed action program, and may include representatives of local government, representatives of nongovernment organizations and private citizens, including but not limited to:

(a) Representatives of local and regional boards, commissions, districts and agencies;
(b) Representatives of federally recognized Indian tribes;
(c) Public interest group representatives;
(d) Private landowners;
(e) Industry representatives;
(f) Members of academic, scientific and professional communities; and
(g) Representatives of state and federal agencies; and

WHEREAS, local watershed councils may submit requests to GWEB or other sources for funding or advice and assistance in developing a watershed enhancement project under the program established by

GWEB, however, the local watershed council needs to be sponsored by a local governing body to be eligible for such funding; and

WHEREAS, the proposed Lower Columbia River Watershed Council has drafted a charter with statements of purpose, mission and vision, goals and objectives, tasks and responsibilities; organization and procedures, and has proposed that the membership on the Council be composed of individuals which include, but are not limited to the following interests:

Agriculture Community
Business and Industry Community
Education Community
Public Interest Groups
Forestry Community
Sub-Basins and/or Local Watershed Councils
Countywide Organizations
Local Governments
Fishing Interests
Mining Industry

NOW, THEREFORE, IT HEREBY ORDERED as follows:

1. The Lower Columbia River Watershed Council is established as a local watershed council under ORS 541.345 to 541.400.

2. The Council shall be composed of individuals representing the following interests. The list is intended to be illustrative, and not exhaustive:

Agriculture Community
Business and Industry Community
Education Community
Public Interest Groups
Forestry Community
Sub-Basins and/or Local Watershed Councils
Countywide Organizations
Local Governments
Mining Industry

3. The Council shall have all of the powers provided by ORS 541.345 to 541.400 for watershed councils and in addition shall be

subject to the following:

a. The Council shall be subject to the public records and meetings laws of ORS Chapter 192;

b. The Council may adopt its own charter and bylaws for the conduct of meetings, voting, appointment of officers, and similar matters. However, representatives of state and federal government agencies and research and technical organizations shall only have voting rights if they are responsible for land management; and

c. The Council shall report to the Board of County Commissioners at least once annually as to its activities and proposed future activities, and the status of the Lower Columbia River Watershed.

4. The Council shall endeavor to include representatives from the interests listed above. The members shall serve at the pleasure of their respective agencies and organizations. The Council shall act to replace members who resign or are unable to continue serving on the Council. The Council will strive to maintain continuity and the balance of interests by giving preference to representation from the same agencies and organizations at a similar or higher level position. The Council will request the agency or organization to nominate a replacement representative. If the agency or organization is unable or unwilling to do so, the Council will seek representation from another agency or organization of the same community of interest. In this event the Council will consult with the County Commissioners to ensure that the replacement agency or organization does represent the same community of interest. In the event the Council is unable to find a replacement representative that represents the same community of interest, the County Commissioners will be asked to make a replacement appointment to reflect that community of interest.

5. The Lower Columbia River Watershed Council shall work with other watershed councils and share information pertinent to the County's interests. The Lower Columbia River Watershed Council's jurisdiction over local watersheds which have their own watershed council, e.g., the Scappoose Bay Watershed Council, shall

be limited to providing assistance and coordination to the local watershed council. The Lower Columbia River Watershed Council shall support other watershed council's efforts to secure funding for watershed projects and activities.

6. The Council shall be non-partisan, non-political and non-regulatory and shall not have the authority to appeal land use or other decisions of appointed or elected public bodies.

7. The Board of County Commissioners reserves the authority to withdraw approval of the Council or its charter whenever, in its sole discretion, it deems it to be in the public interest to do so.

DATED this 15th day of October, 1997.

BOARD OF COUNTY COMMISSIONERS
FOR COLUMBIA COUNTY, OREGON

By: _____
Chairman

By: _____
Commissioner

By: _____
Commissioner

Approved as to form

By: _____
Office of County Counsel

LOWER COLUMBIA RIVER WATERSHED COUNCIL

ACTION PLAN

Revised and Approved 3/12/02

Lower Columbia River Watershed Action Plan
Contents

1.0 Introduction
- 1.1 Purpose
- 1.2 Background
- 1.3 Watershed Council Membership

2.0 Development of the Action Plan
- 2.1 Action Items to Meet Council Goals and Objectives
- 2.2 Action Item Tasks

3.0 Monitoring and Evaluation

4.0 Plan Evaluation and Review

Appendix I

Lower Columbia River Watershed Council
Action Plan

1.0 Introduction

1.1 Purpose

This document is the Action Plan of the Lower Columbia River Watershed Council (LCRWC). The LCRWC is a voluntary, non-regulatory group that unites the diverse interests to improve and preserve watershed health. The Action Plan is based on the Council's goals and mission statement (Charter). The Action Plan takes a watershed-wide approach and strives to integrate existing plans and efforts. This Plan is a working document that will be updated and reevaluated, as information becomes available.

The LCRWC depends on voluntary efforts. The Council is not a regulatory or enforcement agency, nor does the Council adopt plans or rules in a legal sense. The Council makes recommendations to decision-makers, landowners, and managers on ways to protect and enhance the watershed resources of the Lower Columbia. Implementation of the recommendations in the Action Plan will be completely voluntary. The Council provides a framework for communication, collaboration, and cooperation among its member organizations and others.

The LCRWC Action Plan is a resource guide to better understand the nature of the Lower Columbia watershed.

1.2 Background

The Lower Columbia Watershed is located in northwestern Columbia County and northeastern Clatsop County. It is approximately 215,000 acres, which drain into the Lower Columbia River. Its uses are, and historically have been, timber and agriculture. 90.9% of the land is under private ownership. There is a growing rural residential population. The beneficial uses of the watershed include timber, agriculture, recreation, fish and wildlife populations. Beneficial uses are defined by Oregon Water Quality Rules OAR 340.41 for the North Coast Basin as: domestic water supply, industrial water supply, irrigation, livestock watering, anadromous fish passage, salmonid fish rearing, salmonid fish spawning, resident fish and aquatic life, wildlife and hunting, fishing, boating, water contact recreation, and aesthetic quality. The most sensitive of these uses are fish, wildlife, domestic, and recreational use.

1.3 Watershed Council Membership

The Lower Columbia River Watershed Council includes representatives from the following interests:

- Agriculture Community
- Business/Industry Community

- Education Community
- Public Interest Groups
- Forestry Community
- Sub-Basins or Local Watershed Councils
- Countywide Organizations
- Local Governments
- Fishing Community
- Mining Industry

2.0 Development of the Action Plan

Development of the Action Plan began with the adoption of the Charter October 14, 1997. The goals of the Council are:

- Promote sustainable watershed health
- Provide a forum for watershed issues
- Provide education and outreach on watershed issues

To achieve these goals the Council developed preliminary Action Items.

2.1 Action Items to Meet Council Goals and Objectives

The preliminary Action Items identified by the LCRWC (not prioritized):

Action #1: Develop history of watershed

Action #2: Assess watershed conditions

Action #3: Develop and Implement a Water Quality Monitoring Plan, initial focus on 303d listed streams

Action #4: Identify restoration and enhancement sites

Action #5: Implement restoration projects

Action #6: Develop, support and implement a broad-based education/outreach program

Action #7: Develop demonstration projects in priority areas to encourage restoration on Private lands

Action #8: Secure funding for Council support and projects

2.2 Action Item Tasks

Action #1: Develop history of watershed, Watershed Assessment 8/2001, completed

- Personal interviews
- Collect historical data

Action #2: Assess watershed conditions, Watershed Assessment 8/2001, completed
- Secure funding for assessment
- Secure personnel to conduct assessment using OWEB Assessment Manual
- Develop and maintain GIS database for LCRWC

Action #3: Develop and implement WQMP, initial focus on 303d listed streams, Ongoing
- Secure funding for monitoring
- Develop Water Quality Monitoring Plan with Quality Assurance/Quality Control
- Secure equipment for monitoring
- Obtain procedural training
- Identify sites
- Implement monitoring

Action #4: Identify restoration and enhancement sites, Ongoing
- Identify priority restoration issues based on Assessment
- Identify priority sites based on landowner willingness

- Action #5: Implement restoration projects, Ongoing
- Develop implementation strategy based on Action #4
- Develop plans
- Secure funding
- Undertake project and monitor outcome

Action #6: Develop, support and implement a broad-based education/outreach program
- Work with landowners and interest groups on watershed issues
- Work with local schools to enhance stewardship and science education on watershed and natural resource issues
- Conduct workshops on riparian area management
- Submit news articles to local newspapers
- Presentations at local groups
- Maintain a webpage

Action #7: Develop demonstration projects in priority areas to encourage restoration on Private lands
- Work with local groups to identify and recruit landowners
- Assist landowners with implementation
- Monitor effectiveness of demonstration projects
- Provide information on costshare programs

Action #8: Secure funding for Council support and projects

- Identify funding sources
- Match sources to projects
- Submit grants
- Develop partnerships

3.0 Monitoring and Evaluation

The LCRWC is committed to meaningful and successful restoration activities and to promoting sound management practices in the watershed. Monitoring is an important component in determining the success of a restoration project or management practice and whether the desired results are being achieved.

Monitoring requires a long-term commitment of time and resources. The Council will work with project sponsors to develop a monitoring plan for each action item where appropriate.

4.0 Plan Evaluation and Review

This Action Plan will be periodically reviewed.

- Reviewed at completion of the Watershed Assessment
- Reviewed at the request of the Council

Appendix I
Identified Projects

Revised November 9, 2004

- Monitoring of 303d listed streams: *Completed*
- Westport Slough/Clatskanie River Reconnection Project, Completed
- Temperature monitoring of riprap areas, Completed
- Clatskanie River Riparian Planting, Completed
- Beaver Creek Riparian Planting
- Shallow Water Habitat Restoration
- Flume Creek restoration: *Completed*
- Invasive species
    - Purple loosestrife
    - Japanese Knotweed
- Long term monitoring and evaluation, watershed
- Fox Creek, further restoration: *Completed, lg wood*
- Nice Creek, restoration
- Artificial Barrier Assessment; *Habitat Assessment completed*
- Artificial Barrier Removal: Ongoing
- Merrill Creek Culvert, Completed
- Concrete Bridge Removal/Clatskanie River, Completed
- Page Creek Fish Barriers, Completed
- Miller Creek Fish Barrier: *Completed*
- Clatskanie River Culvert Replacements; 5 sites; *2 Completed*
- Kloppman Large Wood; *Completed*
- Louisiana Swamp Wetland Restoration; *Completed*
- Batwater Station Wetland Restoration
- Clatskanie Flood Plain Restoration; 2 sites

Italicized notations added post 11/9/04

These projects will be prioritized as additional information becomes available to the Council.

LCRWC Current Officer's List

Chairman – K.C. Van Natta – kcvn35@gmail.com – 503-313-7298

Secretary – Marilyn Baker – marilynviola@gmail.com – 503-313-7298

Gary Soderstrom officially resigned as Vice Chairman on March 13th, 2023.

Lower Columbia River Watershed Council

Working toward balanced ecosystems that support healthy watersheds and sustainable natural resources
To support an economic base and viable communities

Draft
Meeting minutes
November 9th, 2021
7:00 pm by Zoom

Attendance by Zoom: Ian Bledsoe, Marilyn Van Natta, K.C. Van Natta, Allan Whiting, Margaret Magruder, Harpiar Gandhi, Mike Russell, Pat Welle, Sephe Fox, and Chip Bubl.

All introduced themselves.

Public Comment: None

Pat Welle Presentation: Pat has a long history with restoration projects in the Lower Columbia River landscape. She described the challenges and opportunities that remain to bring some semblance of the biology and the beauty to the Lower Columbia River estuary. She described the positive level of commitment needed to learn and adapt projects for the best outcomes for the fish. Pat is also a fine writer and excellent photographer and showed many slides of her favorite places in the region and some successful projects. Her "Nature's View" web page is https://www.patwelle.com/ . The site is well worth exploring.

Mike Russell moved and Harpiar Gandhi seconded to approve the September, 9, 2021 minutes. Motion carried.

The financial report was in the packet and reviewed by the Board.

The Council Coordinator's report was also in the packet. Allan noted some of the highlights:

- Technical Assistant Grant submitted to OWEB for a flood plain targeted restoration plans. 60-70% of the ownership is interested. However, there are 7 other TAGs in the same pool. There is a lot of concern about why so few Chinook are in the Clatskanie system. These floodplain locations are crucial to their success.

President's message: Nothing to report.

New Board appointments: None

Officer Elections: Margaret Magruder guided the process with the following that agreed to serve:

President:	Ian Bledsoe
Vice President:	K.C. Van Natta

Secretary: Chip Bubl

President Bledsoe asked if there were any further nominations. Hearing none, President Bledsoe closed the nominations and they were all elected to serve another term.

Reports from partner organizations:

Friends of Fox Creek: Having an abridged Zoom meeting on 11/15 at 6:30 to meeting on future governance and plan for next year's Annual Meeting in February.

Scappoose Bay W.C.: No report.

Columbia County: Mike Russell noted that his crews were getting into winter planning and preparation mode. Most road work done for the year.

City of Clatskanie: Harpiar Gandhi discussed the waterline blowout which lost ~200,000 gallons of water and almost led to a road washout. Both the pipe and the road damage has been repaired.

Next meeting: January 11th, 2022 at 7:00pm by Zoom once again

Meeting adjourned by President Bledsoe.

Respectfully submitted by
Chip Bubl
Secretary

LOWER COLUMBIA RIVER WATERSHED COUNCIL CHARTER and BYLAWS

*Adopted October 14, 1997
*Amended November 13, 2002
*Amended September 9, 2014
*Amended September 13, 2016
*Amended March 20, 2023

Purpose:

The Lower Columbia River Watershed Council was formed to gather and share information, to reduce duplication of activities, and to help address watershed management issues in the Lower Columbia River Watershed and in Columbia County, and to provide a framework for coordination and cooperation among key interests.

Mission:

To foster better stewardship and understanding of the Lower Columbia River Watershed resources in Columbia County, coordinate, cooperate and try to deal with issues in advance of resource degradation, encourage restoration of natural processes and functions where feasible, and help ensure sustainable watershed health, functions, and uses.

The council will work collaboratively with communities and landowners to develop and carry out voluntary watershed protection, restoration, enhancement and community engagement activities.

Vision:

A balanced ecosystem approach that supports a healthy watershed and provides for sustainable natural resources and for an economic base and viable communities.

Relationship to Decision-Making Bodies and Communities of Interest:

The Lower Columbia River Watershed Council is an advisory group to established decision-making bodies and communities of interest in Columbia County. As such, the council gathers information, facilitates stakeholder dialogue, hopefully gains consensus, and makes recommendations concerning the protection, restoration, and enhancement of the quality of the Lower Columbia River Watershed.
The council shall be non-partisan, non-political, and non-regulatory and shall not have the authority to appeal land use or other decisions of elected or appointed public bodies.

The Council will not use litigation as a method to implement the Council's mission.

The stakeholders, agencies, organizations, and public interests represented on the council are not obligated to adopt or carry out the recommendations of the council, but will give due consideration to the recommendations and take actions they consider appropriate.

These stakeholders, agencies, organizations, and interests will report back to the council on any actions taken in response to council recommendations.

The council welcomes and will respond to the requests for advice on actions affecting the watershed that are proposed by local, state, and federal agencies; organizations; and stakeholder and public interests.

Council members will keep their respective agencies, organizations, and interests informed about the work of the council and will bring their concerns to the council.

The Lower Columbia River Watershed Council shall support other watershed councils' efforts to secure funding for watershed projects and activities.

Goals and Objectives:

- Encourage coordinated efforts to increase natural resource education programs
- Improve communication among affected stakeholders, private individuals, interested citizens, business/industry, and representatives of local, state, and federal agencies
- Gather and evaluate environmental information
- Establish a framework for coordination, cooperation, and citizen involvement
- Provide a forum for resolving problems and conflicts related to the Council's mission when all parties to the problem or conflict agree to refer the matter to the council
- Formulate recommendations
- Facilitate enactment of recommendations
- Provide ongoing program evaluation during implementation
- Promote ongoing monitoring of the health of the Lower Columbia River Watershed

Specific Tasks/Responsibilities:

- Establish a public involvement program to ensure an appropriate level of citizen participation in the council's work
- Use available resource information to determine the current condition and uses of the watershed
- Identify critical information gaps
- Gather new critical information
- Identify the desired condition and uses of the watershed
- Identify high value fish and wildlife areas
- Encourage ongoing monitoring of the conditions of the watershed
- Help resolve issues among diverse interests in the watershed
- Seek funding to support program development and implementation, including funding from agencies represented on the council
- Address the needs and concerns of the respective agencies, organizations, and interests represented on the council
- Adopt and implement a work program
- Monitor work program progress and budget

- Identify ongoing education programs in the watershed

Council Members:

The Lower Columbia River Watershed Council shall at all times include representatives from the following interests: Agricultural Community; Business & Industry Community; Education Community; Public Interest Groups; Forestry Community; Sub-Basins and/or Local Watershed Councils; Countywide Organizations; Local Governments; Fishing Interests; and Mining Industry. A majority of the members shall reside in those portions of Columbia County that drain into the Columbia River.

The members shall serve at the pleasure of their respective stakeholder groups, agencies and organizations. Council members may designate an alternate who will participate on the council in their absence.

The council will act to replace members who resign or are unable to continue to serve on the council. The council will strive to maintain continuity and the balance of interests by giving preference to representation from the same agencies and organizations at a similar or higher level position. The council will request the group, agency or organization to nominate a replacement representative. If the group, agency or organization is unable or unwilling to do so, the council will seek representation from other groups, agencies, and organizations of the same community of interest. In this event the council will consult with the County Commissioners to ensure that the replacement agency or organization does represent the same community of interest. In the event the council is unable to find a replacement representative from the same community of interest, the County Commissioners shall be asked to make a replacement appointment to reflect that community of interest.

Titles of Officers, How officers are selected, Length of service for officers, Powers of officers, Minimum number/frequency of meetings of governing body

The Council will elect a chairperson and vice-chairperson to serve as spokespersons, prepare council agendas, call and manage council meetings, enforce ground rules, and perform other tasks as assigned by the council. The council may select other officers and fill vacancies as needed. The periodic election of officers shall take place at the regularly-scheduled meeting in October of odd-numbered years.

The Council may form subcommittees of its own members and task groups that include individuals not on the council to perform certain functions or focus on specific issues. The council will also identify technical advisors who can provide technical data and assistance and call on these experts as needed.

All Council members are eligible to serve as officers or committee members. There are no term limits.

Lower Columbia River Watershed Council
Policies and Ground Rules

Adopted 9/7/97
Amended 7/11/00
Amended 6/12/12
Amended 9/9/14
Amended 9/13/16
Amended 3/20/23

LCRWC Members agree to the following policies and ground rules:

Council Decision-Making

- Robert's Rules of Order, Second Edition, will be used as a guide for conducting business.
- Before a decision is adopted by the council, sufficient time (30 days) will be provided for the members to seek advice from organizations they represent, agencies, or other experts.
- When a decision is reached, council members will advocate to their respective bodies support for the adoption or implementation of the decision.
- The watershed council may select a person to serve as facilitator.

Participation

- The Council will hold regular meetings and follow provisions of the Open Meetings Law. At least 10 minutes will be set aside at each meeting for public comment.
- Business may be conducted by council members present. In the absence of a majority of the council members or their alternates, a simple majority is required for approval of actions with a minimum of four members present.
- Council members will keep their respective agencies, organizations, or interests informed about the work of the council and bring concerns of their groups to the council.
- Council members may designate a representative of their group to serve as an alternate. Designated alternates will be listed on the membership list of the council.
- Each member will brief his/her alternate on all issues, proceedings, and notifications, prior to the alternate's attendance at council meetings.
- The public is invited to all council meetings and, upon request, provide meeting agendas and records of decisions other than personnel discussions and actions.

Organization and Procedures

- Robert's Rules of Order shall be followed (see: Decision-Making/Ground Rules)
- The Council will hold monthly meetings on the second Monday of every month unless otherwise announced.
- Council will seek funding for the ongoing operations.
- The Columbia SWCD will act as the Council's fiscal agent and follow Generally Accepted Accounting Principles (GAAP).
- The Council will not use litigation as a method to implement the Council's mission.

Amendments

A council member may propose an amendment to these Ground Rules at any regularly-scheduled meeting. A vote on the amendment shall take place at the next regularly-scheduled meeting. An affirmative vote by 10 members, or two-thirds of those members present, whichever is greater, will ratify the amendment.

OWEB STAFF FUNDING RECOMMENDATION
2023-2025 COUNCIL CAPACITY GRANTS

Staff Recommended Funding Level	Part of Secondary Review	App#	Watershed Council	21-23 Award	23-25 Staff Funding Recommendation
Full Funding		222-001	North Coast WS Assn	$ 131,465	$166,142
Full Funding		222-003	MidCoast WC	$ 131,465	$ 166,142
Full Funding		222-004	Upper Nehalem WC	$ 131,465	$166,142
Full Funding		222-005	Nestucca-Neskowin Watersheds Council	$ 131,465	$166,142
Full Funding		222-006	Siuslaw WC	$ 131,465	$166,142
Full Funding	Y	222-00\7	Tillamook Bay Watershed Council	$ -	$166,142
Full Funding		222-008	Applegate Partnership & WC	$ 131,465	$166,142
Full Funding		222-010	Coos Watershed Association	$ 131,465	$166,142
Full Funding		222-011	Coquille Watershed Association	$ 131,465	$166,142
Full Funding		222-012	Illinois Valley WC	$ 131,465	$166,142
Full Funding		222-014	Lower Rogue WC	$ 131,465	$166,142
Full Funding		222-016	South Coast WC	$ 131,465	$166,142
Full Funding		222-017	Tenmile Lakes Partnership	$ 131,465	$166,142
Full Funding		222-018	Partnership for the Umpqua Rivers	$ 131,465	$166,142
Full Funding		**222-019**	**Rogue River WC**	**$ 395,185**	**$415,355**
Full Funding	Y	222-021	Elk Creek WC	$ 131,465	$166,142
Full Funding		222-022	Calapooia WC	$ 131,465	$166,142
Full Funding		222-023	Clackamas River Basin Council	$ 131,465	$166,142
Full Funding		222-024	Coast Fork Willamette WC	$ 131,465	$166,142
Full Funding		222-025	Columbia Slough WC	$ 131,465	$166,142
Full Funding		222-026	Johnson Creek WC	$ 131,465	$166,142
Full Funding		222-027	Long Tom WC	$ 131,465	$166,142
Full Funding		222-028	Marys River WC	$ 131,465	$166,142
Full Funding		222-029	Middle Fork Willamette WC	$ 131,465	$166,142
Full Funding		222-030	North Santiam Watershed Council	$ 131,465	$166,142
Full Funding		222-031	Pudding River WC	$ 131,465	$166,142
Full Funding		222-035	Scappoose Bay WC	$ 131,465	$166,142
Full Funding		222-036	South Santiam WC	$ 131,465	$166,142
Full Funding		222-037	Tualatin River WC	$ 131,465	$166,142
Full Funding		222-038	McKenzie WC	$ 131,465	$166,142
Full Funding		222-040	Klamath Watershed Partnership	$ 131,465	$166,142
Full Funding		222-041	Crooked River WC	$ 131,465	$166,142
Full Funding		222-042	Gilliam East John Day WC	$ 131,465	$166,142
Full Funding		222-043	Hood River Working Group	$ 131,465	$166,142
Full Funding		222-044	Middle Deschutes WC	$ 131,465	$166,142
Full Funding		222-045	Lake County Umbrella Watershed Council	$ 131,465	$166,142
Full Funding		222-046	Sherman Area WC	$ 131,465	$166,142
Full Funding		222-047	Upper Deschutes WC	$ 131,465	$166,142
Full Funding		222-048	Wasco Area WC	$ 131,465	$166,142
Full Funding		222-049	Grande Ronde Model WS Program	$ 131,465	$166,142
Full Funding		222-050	Harney Watershed Council	$ 131,465	$166,142
Full Funding		222-051	Malheur WC	$ 131,465	$166,142
Full Funding		222-052	North Fork John Day WC	$ 131,465	$166,142
Full Funding		222-054	Walla Walla Basin WC	$ 131,465	$166,142
Full Funding		222-055	Mid John Day-Bridge Creek WC	$ 131,465	$166,142
Full Funding		222-056	Owyhee WC	$ 131,465	$166,142
Full Funding		222-057	Powder Basin WC	$ 131,465	$166,142
Full Funding		222-058	Luckiamute WC	$ 131,465	$166,142
Full Funding		222-059	Greater Oregon City WC	$ 131,465	$166,142
Full Funding		222-060	Smith River WC	$ 131,465	$166,142
Full Funding		222-061	Lower Nehalem WC	$ 131,465	$166,142
Full Funding		222-062	Necanicum WC	$ 131,465	$166,142
Full Funding		222-063	Upper South Fork John Day Watershed Council	$ 131,465	$166,142
Full Funding		222-064	Molalla River Watch Inc	$ 131,465	$166,142
Reduced Funding	Y	224-039	Greater Yamhill Watershed Council	$ 131,465	$66,457
Reduced Funding	Y	224-053	Umatilla Basin WC	$ 131,465	$66,457
Do Not Fund	Y	220-002	Lower Columbia River WC	$ 131,465.00	$0
Total			**Staff Recommended Amount**	**$ 7,625,760**	**$9,220,881**

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item H

Council Capacity Applications

#224-007 - Tillamook Bay WC

Board Meeting July 25-26, 2023

Application Name: TBWC Capacity Grant 2023-25

Application Number: 224-007-22887

By: Tillamook Bay WC

Offering Type: Council Capacity Grants

Application Type: Council Capacity

OWEB Region: North Coast
County: Tillamook
Coordinates: 45.52681172,-123.92085455

Applicant:
Haakon Smith
PO Box 509
Garibaldi OR 97118
(503) 354-7275
tillamookbaywatershedcouncil@gmail.com

Payee:
Haakon Smith
PO Box 509
Garibaldi OR 97118-0509
(503) 354-7275
tillamookbaywatershedcouncil@gmail.com

Project Manager:
Haakon Smith
PO Box 518
Garibaldi OR 97118
503-354-7275
tillamookbaywatershedcouncil@gmail.com

Budget Summary:
OWEB Amount Requested: $159,143
Total Project Amount: $159,144

Administrative Information

Abstract

Provide an abstract statement for the project. Include the following information: 1) Identify the project location; 2) Briefly state the project need; 3) Describe the proposed work; 4) Identify project partners.

The goal and purpose of this OWEB Council Capacity grant is to provide operating capacity support for the Tillamook Bay Watershed Council (TBWC), located in Tillamook County. The Tillamook Bay watershed contains over 300 stream miles across five river systems; the Tillamook, Trask, Wilson, Kilchis, and Miami, that provide habitat for Coastal Coho, spring and fall Chinook, Chum salmon, Coastal Cutthroat trout, winter steelhead and Pacific lamprey. Limiting factors in these systems include lack of summer and winter refuge for juvenile salmonids, reduced habitat complexity, limited riparian vegetation, increasing summer stream temperatures, over-appropriation of summer instream flow, diminished tidal wetland habitat, decreased floodplain connectivity, and high levels of nutrients and bacteria, particularly in the floodplain and upper estuary. The support provided in this Capacity Grant will allow the Council to hire a coordinator and provide the needed support to continue to work with area partners to address these limiting factors. The coordinator will also be able to address organizational capacity and lead the council in community engagement, with a goal of broadening council membership and building and maintaining relationships with partners including Tillamook County and the many municipalities located within, Oregon Department of Forestry, Oregon Department of Fish & Wildlife, Bureau of Land Management, US Fish and Wildlife Service, Tillamook County Creamery Association, Tillamook Estuaries Partnership and other non-profit partners, local private timber companies and other landowners, and public and private partners.

Location Information

Current Location:

What is the ownership of the project site(s)?

❑*Public land (any lands owned by the Federal government, the State of Oregon, a city, county, district or municipal or public corporation in Oregon)*

❑*Tribal lands (any lands owned/managed by a Tribal government)*

❑*Private (land owned by non-governmental entities)*

✓*Not applicable to this project*

❑*This grant will take place in more than one county.*

Permits

Other than the land-use form, do you need a permit, license or other regulatory approval of any of the proposed project activities?

❍ Yes
● No

Racial and Ethnic Impact Statement

Racial and Ethnic Impact Statement

❍ The proposed grant project policies or programs could have a disproportionate or unique POSITIVE impact on the following minority persons. (indicate all that apply)

❍ The proposed grant project policies or programs could have a disproportionate or unique NEGATIVE impact on the following minority persons. (indicate all that apply)

● The proposed grant project policies or programs WILL HAVE NO disproportionate or unique impact on minority persons.

Insurance Information

If applicable, select all the activities that are part of your project - These require a risk assessment tool unless otherwise noted (check all that apply).

❑*Working with hazardous materials (not including materials used in the normal operation of equipment such as hydraulic fluid)*

❑*Earth moving work around the footprint of a drinking water well*

❑*Removal or alteration of structures that hold back water on land or instream including dams, levees, dikes, tidegates and other water control devices (this does not include temporary diversion dams used solely to divert water for irrigation)*

❑*Applicant's staff or volunteers are working with kids related to this project (DAS Risk assessment tool not required, additional insurance is required)*

❑*Applicant's staff are applying herbicides or pesticides (DAS Risk assessment tool not required, additional insurance is required)*

✓*Insurance not applicable to this project*

Additional Information

❑ *This project affects Sage-Grouse.*

Problem Statement

Does the watershed council have a fiscal sponsor?

❍ Yes
● No

Is the council a membership organization?

❍ Yes
● No

The council is a group of councils operating collectively.

❍ Yes
● No

Is the applicant a group of councils operating independently?

❍ Yes
● No

For Details Upload the council's most recent bylaws.

Councils are required to review their council's bylaws once every three years, provide the date of the last time the council's governing body reviewed the council's bylaws?

12/20/2022

Councils are required to review their policies and procedures once every three years, provide the date of the last time the council's governing body reviewed the council's policies and procedures?

12/20/2022

For Details Upload the council's most recent policies and procedures.

For Details Upload the council's local government designation

For Details Upload the council's policies and procedures.

Date of the council's 2021-2023 self assessment?

02/28/2023

Date of last council officer elections.

11/28/2022

For Details Upload the minutes from the board meeting documenting the results of the officer election.

Does the council have written position descriptions for council board officers?

● Yes
❍ No

Does the council have written roles and responsibilities for council governing body members?

● Yes
❍ No

How many times did/will the council governing body meet between July 1, 2021-June 30, 2023?
20

How many times will the council governing body meet between July 1,-June 30, of the upcoming biennium for which you are seeking funding?
20

Describe how the council advertises its general council meetings.
Over the past year, as the council is restructuring, meetings have been advertised by word of mouth, email, and by postings at the Bay City Arts Center. The council realizes that more effective advertising is necessary to grow and diversify the membership and is prepared to utilize multiple platforms to reach a broader audience. Posts on the council's website and social media pages will be used along with other public forums such as local newspaper calendars and radio spots.

Do council governing body meetings have agendas, sign-in sheets, and minutes?
● Yes
❍ No

Describe how your board membership includes a diverse range of geographic areas and community interests in the watershed.
The TBWC Board includes diverse community interests including forestry, fish and wildlife, farming and agriculture, recreation, education, and community arts. Members of the board live in, and represent, the Kilchis, Wilson, Trask, and Tillamook River basins, a majority of the waters that enter Tillamook Bay. The TBWC Board includes members who have grown up in Tillamook County and have witnessed the benefits and effects of watershed restoration first-hand, as well as members who have moved to the area and bring additional insights to the board, and both are heavily invested in what the watershed provides. Board members participate in a range of watershed-related activities ranging from stream enhancement projects on their own land, to working on stream enhancement, large woody debris, and fish passage projects in their line of work, to educating the public about the functions of watershed ecosystems and to enjoying fishing and other recreational opportunities the area provides. TBWC is committed to expanding the diversity of its board in order to represent as many community interests as possible and has plans for a robust recruiting campaign when the council is operating at full capacity again.

Describe any board membership and recruitment challenges and actions being taken to address those challenges.
TBWC has had unique challenges in board recruitment over the last biennium, stemming from a loss of support due to past actions of the council. In response, the board has had an almost complete turnover of members and officers and has spent the last two years reorganizing by reviewing bylaws and policies and revamping the operating structure of the council. This type of focused organizational work is not appealing to many who would otherwise be interested in joining a watershed council, and in fact have driven some prospective members away. We believe that with a solid plan for community partner engagement with a focus on getting back to the task of watershed restoration, there will be a much greater interest in board membership. The council has been working to repair relationships throughout the community and identify the unique niche we can occupy in the restoration community, and is confident that with the added capacity of a council coordinator this will once again be an organization that people will want to be a part of.

During board meetings over the past year the council has put a strong emphasis on identifying community interests that lack representation on the board, and creating strategies to address these shortcomings and increase engagement. These workshopping sessions included outside technical support from the Tillamook County Commissioners, TEP, DEQ, and ODF. The result of these sessions is a clear picture of where the board needs to work on diversification and a strategy for outreach and recruitment based on the current board member's broad

network of connections within the community.

The council has heard overwhelming support for its importance in the community from county commissioners, the business community, the education community, state and federal agencies, local cities, and the community at large. With the council coordinator position filled the council is prepared to engage a diverse spectrum of interests in order for the council to do maximum good for the watershed and the community.

Are projects of the council, including those identified in the work plan, identified in a council action plan or strategic plan?

● Yes
❍ No

Provide the name and date of the most recent action plan or strategic plan.

Tillamook Bay Watershed Council Strategic Action Plan, 2015-2025. May 22, 2015.

Is the work of the council specifically designed to benefit salmon or steelhead?

● Yes
❍ No

✓Oregon Coast - Steelhead
✓Pacific Coast - Chum Salmon
✓Oregon Coast - Coho Salmon
✓Oregon Coast - Chinook Salmon

Describe how the resulting council capacity grant will benefit salmon or steelhead or their habitat?

The Tillamook Bay watershed contains over 300 miles of stream habitat for Coastal Coho, spring and fall Chinook, Chum salmon, Coastal Cutthroat trout, winter steelhead. Limiting factors in these systems include lack of summer and winter refuge for juvenile salmonids, reduced habitat complexity, limited riparian vegetation, increasing summer stream temperatures, over-appropriation of summer instream flow, diminished tidal wetland habitat, decreased floodplain connectivity, and high levels of nutrients and bacteria, particularly in the floodplain and upper estuary. The council's 10-year Strategic Action Plan (2015-2025) focuses largely on fish recovery action. In the past 2 years the council has assisted with the development of 2 restoration projects that address salmon and/or steelhead and their habitats. The coordinator will utilize watershed assessments, action plans and relevant Recovery Plans to develop a prioritized list of future restoration and monitoring projects.

Regional Assessments or Recovery Plans
Recovery Plan for Oregon Coast Coho Salmon Evolutionarily Significant Unit
Comprehensive Conservation and Management Plan for Tillamook Bay, Oregon
Oregon's Native Fish Conservation Policy
Oregon Conservation Strategy
The Oregon Plan for Salmon and Watersheds
Oregon Coast Coho Conservation Plan for the State of Oregon

Council Capacity Metrics:
https://www.oregon.gov/oweb/Forms/OC-Application-Watershed-Council-Metrics-23-25.xlsx

Input the total acres encompassed by this watershed.

359601

Input the Federal Recovery plan applicable to your watershed council.

Recovery Plan for Oregon Coast Coho Salmon Evolutionarily Significant Unit, National Marine Fisheries Service Northwest Region, 2016.

Input the description of the plan implemented that outlines the need for this activity

The Oregon Plan for Salmon and Watersheds (1997) provides the governance structure for implementing restoration in Oregon and specifically charges these watershed councils with the task of developing and implementing watershed improvement projects. Additionally, the Oregon Plan indicates that, in order to complete these tasks, watershed councils require funding to provide for stable infrastructure and support for council activities.

Proposed Solution

Community Engagement

Briefly describe the council's stakeholder engagement accomplishments from the 2021-2023 biennium.

During the 2021-2023 biennium TBWC was able to repair trust with important stakeholders and develop new relationships within the community. This ultimately led to the TBWC receiving letters of support from the Tillamook County Commissioners, Tillamook County Creamery Association, Tillamook County Farm Bureau, Stimson Lumber, Hampton Tree Farms, the cities of Tillamook and Bay City, and got renewed support from ODF, ODFW, the BLM, as well as non-profits such as the Tillamook Estuaries Partnership, Wild Salmon Center, Salmon Super Highway, and Trout Unlimited. These organizations, along with others, are committed to working with the council to identify our unique niche in the local conservation community, which will help TBWC achieve our mission of maintaining and improving the health of the watershed.

The board has also put a lot of emphasis on exploring community engagement challenges during board meetings over the past year. These meetings identified several interested parties in the community in which relationships still need to be repaired or increased, and focused on strategies to accomplish this task in order for the council to be more effective. The board also identified non-traditional or underrepresented community interests which are also very important to the mission of the council, and explored opportunities to engage these groups.

Briefly describe the council's stakeholder engagement challenges from the 2021-2023 biennium

Stakeholder engagement challenges in the 2021-2023 biennium stemmed from mistrust caused by previous actions of the council. Former productive working relationships were negatively impacted by a lack of communication during this period and required outreach by the council to renew the conversation about what the council can provide to the community and how we plan to implement those benefits. The council contacted many prominent stakeholders in the community to renew this conversation and results have been promising. The vast majority of former partners showed a willingness to rebuild relationships and work with the council in achieving its goals. Some organizations requested revised bylaws in order to understand what the council has done to prevent future actions that would hinder working relationships and were satisfied with the changes that have been made. Fortunately, many stakeholders expressed a need for the council and the willingness to work together in the future.

Briefly describe the council's stakeholder engagement plans for the 2023-2025 biennium.

Stakeholder engagement plans for the 2023-2025 biennium will focus on broadening the reach of engagement to a more diverse group of stakeholders and community interest groups as well as strengthening engagement with traditional stakeholders. Over the past year the council has reached out to many community partners in order to better understand the unique niche we hold in the local restoration community, renew the conversation on watershed enhancement, and inform potential partners about the council’s plans. A primary objective of the council coordinator will be to establish lasting relationships with community partners in order to identify opportunities for collaboration on projects. The Board’s initial plan is to have members use their connections within the community to inform interested parties about what the watershed has to offer and assist the coordinator in finding opportunities for collaboration.

The council recognizes the benefits of increased engagement with traditional partners associated with fishing and shellfish, forestry, our agricultural and farming community and other industries in the area, as well as tribal interests and other underrepresented and non-traditional groups as being very important to the success of the council. TBWC plans to increase outreach and engagement to these groups throughout the biennium.

Describe the council's efforts to engage with local tribes present in the council's geography.

Although the current presence of local tribes is limited within the Tillamook Bay watershed, the council

nonetheless feels that the indigenous voice is very important and plans to solicit their input on tribal priorities for watershed enhancement and involvement. The council reached out to the Confederated Tribes of Grand Ronde and was unable to establish lasting contact with a representative. Despite the lack of success, the TBWC is committed to engaging with local tribes present in the council's geography and will continue to develop these important relationships over time.

Describe the council's efforts to engage with non-traditional partners.

Planning sessions during TBWC board meetings over the last biennium have made it clear to the council that engaging non-traditional partners is an essential and effective way to create the most impact within the community. Bringing these under-utilized and under-represented partners into the conversation about watershed activities will increase the network of groups that are working towards the same goal, ultimately improving opportunities for collaboration and better efficiency. The council has identified several opportunities and methods to engage with a variety of potential partners including the Spanish and non-English speaking communities, education and scouting groups, the arts and birdwatching communities, hunting, fishing, forest, and river recreation groups, private businesses, and others. The council plans to engage with these non-traditional groups throughout the next biennium and will continue to identify and seek out new opportunities for collaboration.

Restoration

Provide a brief summary of the council's 2021-2023 restoration accomplishments.

Although the 2021-2023 biennium did not hold any large-scale projects for the council due to lack of capacity, the council did continue to participate in activities that implement and advance our mission. TBWC volunteer board members worked to complete monitoring of past council projects and produced reports on the Mill Creek habitat enhancement project, the Skookum Reservoir dam breach project, and the South Fork Trask road obliteration and large wood project. The council also participated in restoration and planting activities after the Pike Road fire of 2020, as well as invertebrate sampling with the City of Bay City and education projects with Tillamook School District.

Briefly describe the council's restoration challenges from the 2021-2023 biennium

The council's restoration challenges from the 2021-2023 biennium were the result of lack of capacity and funding. Without a council coordinator and operating funds, the council was severely limited in what it was able to accomplish on a restoration scale. Many of the restoration actions listed in the 10-year strategic plan have been accomplished, and instead of focusing on developing new restoration projects the council focused on reorganization and planning for the future in order to be effective when resources are again available to pursue watershed enhancement projects.

Provide a brief summary of the council's restoration plans for 2023-2025.

TBWC plans to work with local restoration partners in the basin by providing support, where appropriate, as well as identifying and working within our own unique restoration niche. With a coordinator or restoration professional, the council will consult regional assessments, recovery plans, and relevant planning documents to identify and address priority restoration actions during the 2023-2025 biennium and work with community partners to implement projects with a planned approach. The current board has strong ties with the Oregon Department of Forestry and plans to work closely with ODF to identify opportunities for partnership on watershed enhancement projects, including large woody debris projects and fish passage. TBWC will continue to participate in conversations with the city of Bay City about their culvert removal and stream planting project to identify ways to be involved with this important work. The council has been approached by private landowners and small businesses that are interested in stream enhancement projects on their property and have already identified several potential projects. Additionally, the council is an important vector for federal grants and other funding sources unique to watersheds and plans to work closely with other nonprofit partners such as the Salmon SuperHwy, Tillamook Estuaries Partnership, and the Wild Salmon Center, among others, to leverage and secure funding for important restoration

projects within the basin.

Planning

Describe how the council uses planning documents to identify and implement on-the-ground watershed restoration and stakeholder engagement projects.

TBWC uses the council's Tillamook Bay Watershed Council Strategic Action Plan, 2015-2025, as a guide to identifying, prioritizing and implementing on-the-ground watershed restoration and stakeholder engagement projects. The council has made good progress on achieving the goals of the plan over the past 8 years. A priority of the council for the 2023-2025 biennium will be to create a new strategic action plan that consults regional assessments, recovery plans, and relevant planning documents to identify and address priority watershed restoration actions and community engagement efforts that reflect on the improvements that have been made in the basin and guide the council into the future. Funding of this grant would also allow a staff person to represent the watershed council and participate in the Coho Strategic Action Planning process.

Are projects of the council identified in a council action plan or strategic plan?

● Yes
❍ No

Provide the name and date of the most recent action plan or strategic plan.

Tillamook Bay Watershed Council Strategic Action Plan, 2015-2025. May 22, 2015.

Wrap-Up

List the watershed council staff (or contractors), their roles, affiliation (staff or contractor), length of time in position (use the Qualifications space), and contact information.

Role	Name	Affiliation	Qualifications	Email	Phone
Board Chair	Haakon Smith	Volunteer		tillamookbaywatershed@gmail.com	(503) 354-7275

For Details Upload a list, including contact information, for the current board officers.

Budget

Item	Unit Type	Unit Number	Unit Cost	OWEB Funds	External Cash	External In-Kind	Total Costs
Salaries, Wages and Benefits							
Council Coordinator	Hours	3328	$37.00	$123,136	$0	$0	$123,136
			Category Sub-total	$123,136	$0	$0	$123,136
Contracted Services							
Fiscal Admin. Services	Years	2	$5,400.00	$10,800	$0	$0	$10,800
CPA Services	Years	2	$1,500.00	$3,000	$0	$0	$3,000
			Category Sub-total	$13,800	$0	$0	$13,800
Travel and Training							
Mileage, per diem, lodging, etc.	Each	1	$1,895.00	$1,895	$0	$0	$1,895
			Category Sub-total	$1,895	$0	$0	$1,895
Materials and Supplies							
Office supplies, printing, postage, meeting supplies	Each	1	$1,000.00	$999	$1	$0	$1,000
Printer	Each	1	$250.00	$250	$0	$0	$250
Coordinator personal protective equipment (waders, rain gear, hard hat, safety vest, first aid kit)	Each	1	$1,175.00	$1,175	$0	$0	$1,175
			Category Sub-total	$2,424	$1	$0	$2,425
Equipment							
			$0	$0	$0	$0	$0
			Category Sub-total	$0	$0	$0	$0
Other							
Office Rental	Months	24	$300.00	$7,200	$0	$0	$7,200
Telephone	Months	24	$80.00	$1,920	$0	$0	$1,920
Insurance (Liability, Directors, Officers)	Years	2	$3,000.00	$6,000	$0	$0	$6,000
Event Rental Space	Each	2	$300.00	$600	$0	$0	$600
NOWC Annual Membership	Years	2	$200.00	$400	$0	$0	$400
PO Box Annual Fee	Years	2	$134.00	$268	$0	$0	$268
Fiscal Annual Fees (C-12, Annual Report)	Years	2	$300.00	$600	$0	$0	$600
Software	Months	24	$12.50	$300	$0	$0	$300
Internet	Months	24	$25.00	$600	$0	$0	$600
			Category Sub-total	$17,888	$0	$0	$17,888

* = OWEB funds excluded from indirect.

			Modified Total Direct Cost Amounts	$159,143	$1	$0	$159,144
Indirect Costs							
	0%			$0	$0		$0
Post Grant							
			Total	$159,143	$1	$0	$159,144

Provide context and justification for how your budget was developed. Explain how project costs and/or rates were

determined.

TBWC's budget for the 2023-2025 biennium was developed using information from previous years in which the council was operating at full capacity and updated to reflect current prices and council needs. This budget will allow the council the capacity to pursue projects, engage the community, and to seek out alternate sources of additional funding.

Rates for staffing use comparable rates to similar positions in other organizations and were calculated at ¾ time with the expectation that the coordinator will pursue projects and secure the other ¼ of a full-time salary through other grant-funded monies. The hourly wage reflects current cost of living in the area and a competitive salary that will incentivise a coordinator to stay in the position for an extended period of time. The unit cost includes taxes and workers comp.

Payroll expenses, payroll admin. services, CPA services, insurance premiums, and other fiscal fees were all calculated using actual costs from previous years, updated as necessary, and should reflect very closely what the actual costs will be over the biennium.

TBWC has secured office space and the price of rent is reflected in the budget. Other expenses related to office productivity are also included and prices reflect actual researched amounts for things such as a telephone line, internet, printer, computer software, and other office supplies.

Safety of employees is of utmost importance to the council and a budget item is included for personal protective equipment (PPE) for the council coordinator. This cost reflects actual researched prices for a quality set of PPE that will keep a coordinator safe in the field during council-related duties.

Does the budget identify a contingency amount for specific line item(s) within the Contracted Services and/or Material and Supplies budget category?

❍Yes

●No

Funding and Match

Fund Sources and Amounts

Organization Type	Name	Source Note	Contribution Type	Amount	Description	Status
Non-Governmental Organization	Tillamook Bay Watershed Council	Cash match for grant	Cash	$1	Match provided by applicant	Secured
Fund Source Cash Total		**$1**	**Fund Source In-Kind Total**			**$0**

Match

Contribution Source-Type: Description	Amount
Tillamook Bay Watershed Council-Cash: Match provided by applicant	$1
Match Total	**$1**

Do match funding sources have any restrictions on how funds are used, timelines or other limitations that would impact the portion of the project proposed for OWEB funding?

❍ Yes

● No

Do you need state OWEB dollars (not Federal) to match the requirements of any other federal funding you will be using to complete this project?

❍ Yes

● No

Does the non-OWEB cash funding include Pacific Coast Salmon Recovery Funds?

❍ Yes

● No

Uploads

Bylaws: TBWC Bylaws amended 12.20.22.pdf **- Bylaws, amended 12.20.22**

Strategic Plan: TBWC Strategic Action Plan - 2015-2025.pdf **- TBWC Strategic Action Plan**

Policies and Procedures: TBWC Personnel Guidlines + preamble.pdf **- TBWC Personnel Guidelines reviewed 12/20/22**

Local Recognition: Local Govt Designation.pdf **- TillCo Order 21-031 and LOS**

Fiscal Policies: TBWC Fiscal Policies & Procedures.pdf **- Fiscal Policies reviewed 12/20/22**

Policies and Procedures: TBWC Minutes Signed - 11-28-2022.pdf **- Officer election minutes and board roster**

Secured Match Forms: Secured Match_signed.PDF **- Secured Match from TBWC**

Permit Page

No Permits have been identified for this application.

TILLAMOOK BAY WATERSHED COUNCIL

BYLAWS

Adopted November 5, 2014
Amended December 20, 2022



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Article I - Name & Purpose

The Tillamook Bay Watershed Council ("Council"), a 50l (c)3 non-profit corporation, exists in order to help communities within the Tillamook Bay Watershed address watershed management issues, improve and enhance watershed health, and provide a framework for coordination and cooperation among all of its stakeholders. The Council is established under The Governor's Coastal Salmon Restoration Initiative and House Bill 3441 (Oregon Legislative Assembly, 1995 Regular Session) as codified at ORS 541.890-541.935.

Article II - Mission & Vision

The Council's mission is to build collaborative, voluntary partnerships with communities and landowners, to protect, maintain and improve the health of the Tillamook Bay Watershed through on-the-ground restoration projects, educational outreach programs, and other community engagement activities.

Our vision is for a healthy watershed that supports natural, functioning ecosystems while also providing for a thriving economic base that supports viable communities.

Article III - Council Coordinator

The Board shall hire a Council Coordinator to be the administrative head of the Council, provided that funding is available for such position. The Board Chair shall be responsible for overseeing the duties of such Council Coordinator. The Council Coordinator shall conduct the day-to-day business operations and affairs of the Council. The Council Coordinator shall attend meetings of the Board and shall report to the Board on the business operations and affairs of the Council. The Board shall have the power to delegate to the Council Coordinator such executive power and authority as the Board may deem necessary to facilitate the handling and management of the Council's authority and interests.

Article IV - Board of Directors

Section 1 - Duties & Responsibilities
The Board of Directors is legally responsible for all matters of the Council unless the Board of Directors delegates such responsibility to an officer or officers, the Executive Committee or other authorized representative. The Council membership shall reflect a balance of interests in the community, including a diverse range of geographic areas and community interests in order to engage a balance of interested and affected persons within the watershed as required by ORS 541.910(2). Specific duties and responsibilities of board members include:

- When acting on behalf of the Council, Board members shall put the interests of the Council above personal or professional concerns and avoid potential conflicts of interest.
- Ensuring that the Council complies with all applicable federal, state and local laws and regulations, as well as ethical norms.
- Approving annual budgets, approval of projects and contracts, and reviewing periodic financial reports or appointing a fiscal agent to ensure accountability to donors and the general public.

- Ensuring that the Council has adequate financial resources to fulfill its purpose and mission.
- Reviewing and developing documents that establish policies and guidelines necessary to achieve the Council's purpose and mission.
- Participating in the selection, support, and performance reviews of the Council Coordinator.
- Reviewing and developing plans and projects consistent with the Oregon Plan for Salmon and Watersheds and other conservation plans recognized by the state and federal government.
- Identifying one or more committees to deal with personnel issues, governance or special projects as needed.

A Board member with three (3) consecutive unexcused absences from meetings at which a quorum is required may be removed by a vote of the Board. Board members shall serve without compensation but may be reimbursed for reasonable travel and expenses while conducting authorized and pre-approved business of the Board.

Board members wishing to resign from the Council should notify the Chair in writing. The Board of directors can remove a member from a Board position by a vote of two-thirds (2/3) of all Board members in office.

Section 2 – Membership, Nomination, Election & Removal

- The Board of Directors shall consist of five (5) to twenty (20) members. The Board of Directors shall also be known as the Council.
- The Council will strive for an inclusive, active Board membership that reflects the broadest practicable representation of local citizenry; local, state, and federal agencies; and organizations with vested interests within the watershed in order to engage a balance of interested and affected persons within the watershed as required by ORS 541.910(2). Such representation may include, but is not limited to agricultural, business, commercial & sport fishing, education, environmental, forestry, citizens at large including a representative from each of the five rivers in the watershed, local government and special service districts, federal agencies, and state government.
- A majority of Council membership shall reside in the Tillamook Bay watershed.
- Any individual seeking membership on the Board will notify the Chair of their interest in serving on the Board. The Chair will recommend to the Board approval for membership if the individual seeking membership agrees to active participation on the Council, has attended two meetings of the Council during the preceding six months, and agrees to adhere to the Bylaws. The Board will vote on acceptance of this individual onto the Board of directors.
- Board members shall be elected by a majority vote of the quorum.
- A Board member shall serve a term of three (3) years and may be re-elected without limit. The Board, by resolution, shall stagger the terms of the members so that approximately one-third of the members shall have terms that expire each year.
- A member can be removed from their position with or without cause by a two-thirds (2/3) majority vote of all members in office.

Article V - Council Officers

Section 1- Eligibility, Election, Terms of Office, Resignation & Removal
Any Board member may seek Executive Office and shall notify the Chair of their interest in serving. Officers are held to a higher standard of participation than other Board members, and any Officer with two (2) consecutive unexcused absences from meetings may be removed by a vote of the Board.

Officers will be elected by a majority vote of the quorum. Terms of office for elected Officers will be for a length of one (1) year. There will be no term limits set. Voting of officers shall take place in November and terms will run from January 1 through December 31 of the following year.

An Officer wishing to resign his position shall inform the Council in writing. An Officer may be removed from their position by a majority vote of all members in office. An interim appointment for the remainder of the term of office will be elected, except that a vacancy in the position of Chair will be filled by the Vice-Chair.

Section 2- Powers & Duties
The officers shall have the powers and perform the duties customarily belonging to their respective offices, including the powers and duties listed below (and as prescribed in the TBWC Board Position Descriptions, which see):

A) The Chair will preside at meetings of the Council. The Chair will be responsible for conducting the business of the Council under the provisions of Articles XI and XII (Decision Making & Participation and Meetings). The Chair will provide direction to the staff and coordinate activities with the staff. The Chair and the Administrative Committee will conduct regular performance reviews of the staff. Except as otherwise provided by the Council or these by-laws, the Chair shall sign all agreements and other formal instruments for the Council. The Chair may be a member of all committees as determined by the Chair. In the Chair's absence, The Vice-Chair will perform the duties of the Chair. If the Chair and Vice-Chair are both absent, the Chair may appoint a facilitator to preside at a meeting. If no facilitator is appointed, the meeting will be cancelled or postponed.

B) The Vice Chair shall preside in the absence of the Chair. In instances where the Chair is inaccessible, the Vice Chair shall sign for the Council all agreements and other formal instruments. The Vice Chair may act in such other capacity as the Council or Chair may designate.

C) The Secretary shall be responsible for assuring that all the proceedings of the meetings of the Council are recorded, maintaining a current roster of all board members, seeing that all records are properly stored, seeing that all notices are duly given in accordance with any provisions of these Bylaws and, in general, perform all duties incident to the Office of Secretary and such other duties as may be prescribed by the board.

D) The Treasurer shall be the chief financial officer of the Council. They shall render to the Council at the monthly meetings and whenever else it so requests an accurate account of all

sums received and disbursed during the preceding month. The treasurer shall maintain oversight of the Council's finances and financial policies, and ensure the Council follow Generally Accepted Accounting Principles (GAAP). The Treasurer shall also provide an annual report of all sums received and disbursed during the preceding fiscal year and of all sums and funds which are not expended. The Treasurer shall be responsible for all fiscal aspects of grants that the Council receives.

Article VI - Council Membership and Officer List

The Council Coordinator shall maintain a list of members, including the officers, and this list will include names, complete contact information, the interest each represents, any offices held, and any committees upon which they serve.

Article VII - Committees

The Executive Committee shall consist of the four officers, the chair of any subcommittee, members at large, and the Council Coordinator. Members at large shall be based on nominations by the Chair and elected by the Board. The Executive Committee shall be responsible for the duties as defined by and delegated by the Board.

The Executive Committee will actively recruit new Board membership and prepare a slate of candidates for the Board positions annually.

The Restoration Committee shall consist of Council members and representatives of local communities and agencies to provide guidance to the Council Coordinator in the planning, development and execution of restoration projects.

Other committees may be formed at the direction of the Chair to address topics or projects relevant to the Council's mission, goals, or objectives. Committees may be temporary (for particular tasks or projects) or on-going. A committee will be comprised of at least two members and any other persons as appointed by the Board.

When a committee is formed, the Council must charge it with clear duties. This includes the committee's purpose, terms of existence, decision-making role, reporting expectations, and authority. The role of each committee as it is formed should be documented in writing and made a part of the official record of the Council.

Article VIII - Decision Making & Participation

Section 1 - Quorum
A quorum at any Board or Council meeting shall consist of a majority of the number of the Board members who hold office immediately before any Board meeting (or 3 if there are 5 Board Members). Council decisions will be made only if a quorum is present.

Section 2 - Requirements
Council members shall strive for consensus when making decisions. When the Council cannot achieve consensus on a given decision, decisions will be made using a two-thirds majority vote.

Section 3 - Voting definitions
"Yes"= support, advocate
"Abstain" vote= neutral; not thrilled but could live with it; not informed enough on the matter
"No"= no; can't count on me; need more discussion; may need more information

Section 4 - Decision-making procedure

1. Open discussion. Motions shall be made and seconded by a voting member in order to carry forward.
2. A Board member ("director") shall call for a vote.
3. If consensus is not reached (one or more "no"), the Chair shall set a time limit for further discussion.
4. The Council shall listen to the concerns of the "no". The Council will then listen to those that support an alternative. The goal of this discussion is to seek a solution that can be supported. Each person will have one minute to speak.
5. At the end of the discussion, the Chair shall call for a re-vote.
6. A two-thirds majority of the voting members will carry the motion.
7. If the motion does not carry after the second vote, the item will be tabled. A member may bring the issue forward at a future meeting for another vote.
8. A member who is present at a meeting when corporate action is taken is deemed to have assented to the action unless the member's objection or abstention to the vote is entered into the minutes of the meeting, or the member delivers written notice of such objection or abstention to the Secretary immediately after adjournment of the meeting.

Article IX - Meetings (Frequency, Purpose, and Rules)

- The Council shall strive to meet a minimum of 9 times per year.
- Regular meetings shall be set at times and places determined by the Council.
- All regular meetings are open to the public.
- Meeting conduct shall be in accordance with the "Simplified Rules of Order and administered under the direction of the Chair.
- The Chair may recognize public input at any point during a Council meeting. A public comment period shall be provided at each regular meeting.
- Special meetings may be called by the Chair or by 20% of the members on the Board. Special meetings may be closed to the public for discussion of confidential matters.
- The Board may act without a meeting provided that the action is in writing and consented to by all members and filed with the Council as a Board resolution.
- Council Officers may authorize an emergency vote by the Board via electronic media. The decision will stand as a Board decision if the decision is in writing and all Board members sign their consent to such decision.
- The Chair may permit any or all members to participate in a meeting through use of telephonic

communication where all members participating may simultaneously hear each other during the meeting.

Article X - Policies & Guidelines

The Watershed Council will adopt policies and guidelines to direct Council business.

Article XI - Miscellaneous Provisions

Section 1 - Conflict of Interest
A conflict of interest is a transaction with the Council in which a member has a direct or indirect interest. For the purposes of this article, a coordinator/member has an indirect interest in a transaction if:

1. Another entity in which the member has a material interest or in which the member is a general partner is a party to the transaction; or
2. Another entity of which the member is a member, officer or trustee is a party to the transaction, and the transaction is or should be considered by the Board.

In the event of a conflict of interest between a member or members and the Council, the Board shall follow the Conflict of Interest Policy, described within the Council's Fiscal Policies & Procedures, Section XII, Paragraph E, adopted by the Board.

Section 2 - Public Participation & Transparency
Public understanding and support for the Council is fundamental to its success. The Council operates as an inclusive body, and as stated in Article XI, all regular meetings are open to the public. Additionally, the Council shall, upon request, provide the public with records of its meetings and decisions.

Section 3 - Media Interaction
Council members may not represent the Council without Council authorization. Specific media inquiries will be directed to the Chair. Staff is authorized to represent the Council with authorization by the Chair.

Section 4 - Liability Disclaimer/Indemnification
The personal liability of each member of the Board and each officer of the Council, for monetary or other damages, for conduct as a member or officer shall be eliminated to the fullest extent permitted by current or future law.

The Council shall indemnify its officers and Board members to the fullest extent allowed by Oregon law as defined under ORS Sections 65.387 to 65.414.

The Board may adopt a resolution authorizing the purchase and maintenance of insurance on behalf of an individual against liabilities asserted against or incurred by the individual who is or was a member, officer employee or agent of the Council.

Section 5 - Litigation
The Council does not rely on litigation to compel regulatory enforcement as a means to implement the Council's mission.

Section 6 - Regulatory Activity
The Council does not participate in regulatory activity, and does not report issues to regulatory agencies. When Council staff or members are confronted with potential water or land use violations they will refer those issues to the landowner.

Article XII - Adoption & Amendment

These Bylaws of the Council are effective and adopted by the Board on December 20, 2022.

These bylaws may be amended. Amendments shall be proposed in writing and circulated at least two weeks in advance of any regular meeting or special meeting called for that purpose. The proposals for change must be included on the agenda and distributed in written form with the agenda materials. The amendments must be approved in accordance with the decision-making process identified in these bylaws.

Tillamook Bay
WATERSHED COUNCIL

2015-2025

Strategic Action Plan







Tillamook Bay Watershed Council Action Plan
May 22, 2015

Ken Bierly, Bierly & Associates
Paul Hoobyar, Watershed Initiatives, LLC
May 22, 2015

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Introduction and History

This document expresses the goals and strategies of the Tillamook Bay Watershed Council (TBWC) from 2015 through 2025. Bierly & Associates and Watershed Initiatives, LLC were contracted to develop this document with the help of the Council's Board, staff, and committees. Organizational and ecological priorities were refined during two facilitated meetings of the Council's Expanded Restoration Committee in March and April of 2015. The resulting action plan was reviewed and adopted by the TBWC Board during its regular meeting on April 28th, 2015.

This Action Plan includes a description of the topical areas covered in each chapter, the tracking and analysis methodology that has been used, a statement of the status of that chapter's topic, and where appropriate, "actions for improvement" that the Council has identified and agreed to incorporate as a method for adaptive management within the basin.

Geographic Scope

The TBWC's geographic scope includes all the of approximately 582 square miles of the Tillamook Basin, including the five tributaries that feed into Tillamook Bay (Wilson River, Trask River, Tillamook River, the Kilchis River and the Miami River), as well as the estuary and tidal lands of the bay (Figure 1).



Figure 1: Tillamook Bay Catchment

The Tillamook Bay Setting

Tillamook Bay is a drowned river mouth estuary that lies at the terminus of five distinct tributary drainages. The name, "Tillamook", means "land of many waters." The Miami, Trask, Wilson, Tillamook and Kilchis Rivers all drain the Coast Range to Tillamook Bay. The catchment is nearly square with the Miami and Kilchis Rivers flowing into the Bay from the north and northeast. The Wilson and Trask Rivers have the largest catchments and drain from the northeast and east. The Tillamook River flows into the Bay from the southeast.

Large-scale forest fires have affected the Coast Mountain portion of the catchment in 1933, 1939, 1945 and 1951. The lowlands of the catchment have been protected from tidal and river flooding to some extent and converted to dairy pasture to support agriculture. The dairy industry flourished and formed the Tillamook

County Creamery Association (TCCA). Tillamook Bay and the rivers that enter the bay are some of the most productive salmon streams along the Oregon coast. Tillamook Bay produces shellfish in its broad, shallow intertidal flats. Tillamook Bay also supports commercial oyster production. The Bay has a popular recreational fishery that is important to the community, the state and the greater fishing world.

Tillamook Bay Watershed Council

The TBWC was formed in 1998 and in 2006 became a 501(c)(3) corporation. Its mission and vision statements follow.

Vision

The TBWC's vision is for a healthy watershed that supports natural, functioning ecosystems while also providing for a thriving economic base that supports viable communities.

Mission

The Council's mission is to build collaborative, voluntary partnership with communities and landowners, to protect, maintain and improve the health of the Tillamook Bay Watershed through on-the-ground restoration projects, educational outreach programs, and other community-engagement activities.

Goals & Objectives

The Council's goals include:

1. Develop long-range and annual work plans that support the mission and vision of the Council
2. Assess conditions throughout the watershed and identify opportunities to protect or improve those conditions
3. Promote ongoing monitoring of the health of the Tillamook Bay Watershed
4. Provide ongoing project and program management and evaluation for all Council projects
5. Coordinate with and support other organizations in conservation efforts throughout the Tillamook Bay Watershed
6. Encourage coordinated efforts to increase education programs
7. Encourage collaboration and cooperation with other partners in the basin
8. Improve communication among affected private individuals, interested citizens, business/industry, and representatives of local, state, and federal agencies
9. Provide a framework for resolving community problems and conflicts related to the Council's mission, when all parties to the problem or conflict agree to refer the matter to the Council
10. Actively seek the involvement of youth in Council membership and activities
11. Maintain financial transparency and follow Generally Accepted Accounting Principles in all financial matters
12. Increase council capacity to improve management of projects and mission

Council Capacity and Organization

Participation and Accountability

Description
The Board of Directors consists of between seven (7) and twenty (20) members. The Board is legally responsible for all matters of the Council unless it delegates such responsibility to an officer or officers, the Executive Committee or other authorized personnel. Board responsibilities include making judgments that support the Council's purpose and mission; ensuring that the Council complies with all federal, state and local laws and regulations; ensuring the Council acts in an ethical manner in all dealings; providing oversight of finances and fiscal policies; ensuring adequate resources for the Council to fulfill its purpose and mission; hiring and oversight of the Coordinator/Executive Director; reviewing and approving plans consistent with the Oregon Plan and other conservation plans; reviewing and approving grant proposals; creating committees to address personnel, governance or special projects; and adhering to the Council's By-laws.

Metrics
The Council conducts a biennial self-evaluation process. The purpose of the evaluation is to identify how well the council reflects the Tillamook Bay community and to seek additional representation to assure the balance and representativeness required by state statutes that govern watershed councils.

State statute ORS 541.910 provides guidance for selecting representation and interests:

"*Local watershed councils formed under subsection (1) of this section shall consist of a majority of local residents, including local officials. A watershed council may be a new or existing organization as long as the council represents a balance of interested and affected persons within the watershed and assures a high level of citizen involvement in the development and implementation of a watershed action program. A local watershed council may include representatives of local government, representatives of nongovernment organizations and private citizens, including but not limited to:*

(a) Representatives of local and regional boards, commissions, districts and agencies;

(b) Representatives of federally recognized Indian tribes;

(c) Public interest group representatives;

(d) Private landowners;

(e) Industry representatives;

(f) Members of academic, scientific and professional communities; and

(g) Representatives of state and federal agencies.

Status
The Council has experienced attrition of Board members over the past two years, as well as a decrease in public outreach and involvement. With the hiring of a new Coordinator in 2014 and subsequent outreach, the Board is growing its membership. A plan is in place for more public outreach through its "Speakers Series," and an active engagement of diverse constituencies by the Coordinator to increase public awareness about the Council, and to recruit more landowner and citizen involvement in the Council and its Board.

Actions for Improvement

- The Council will review prospective membership against the statutory guidance (above) when recruiting new members.
- The Council will actively recruit new members, with emphasis on representatives of the shellfish industry, sport and commercial fishing industries, and the dairy industry.

Decision-Making

Description
The Council uses a consensus model for decision-making, with a two-thirds "super-majority" fallback vote when consensus cannot be reached. The following steps describe the Council's decision-making process:

1. The Chair opens discussion. Motions shall be made and seconded by a voting member in order to carry forward.
2. A Board member ("director") shall call for a vote.
3. If consensus in not reached (one or more "no" votes), the Chair shall set a time limit for further discussion.
4. The Council shall listen to the concerns of the "no" voting directors. The Council will then listen to those that support an alternative. The goal of this discussion is to seek a solution that can be supported for the entire Board. Each person shall have one minute to speak.
5. At the end f the discussion, the Chair shall call for a re-vote.
6. A two-thirds majority of the voting members will carry the motion.
    a. Voting definitions: "Yes" = support, advocate for the proposal
    b. "Abstain" = neutral: not thrilled by could live with it; not informed enough on the matter.
    c. "No" = no; can't count on me; need more discussion; may need more information
7. If the motion does not carry after the second vote, the item will be tabled. A directory may bring the issue forward at a future meeting for another vote.
8. A director who is present at a meeting when corporate action is taken is deemed to have assented to the action unless the directory's objection or abstention to the vote is entered into the minutes of the meeting, or the

directory delivers written notice of such objection or abstention to the Secretary immediately after adjournment of the meeting.

Meeting Management

Description
The Council strives to meet at least nine (9) times per year, and regularly scheduled meetings are set at times and places determined by the Council, with all regular meetings open to the public.

Meeting conduct is in accordance with the "Simplified Rules of Order" and administered under the direction of the Chair. The Chair may recognize public input at any point during a Council meeting. In addition, a public comment period is provided at each regular meeting.

Special meetings may be called by the Chair or by 20% of the directors on the Board. Special meetings may be closed to the public for discussion of confidential matters.

The Board may act without a meeting provided that the action is in writing and consented to by all directors and filed with the Corporation as a Board resolution. Council Officers may authorize an emergency vote by the Board via electronic media. The decision will stand as a Board decision if the decision is in writing and all Board members sign their consent to such decision(s).

The Chair may permit any or all directors to participate in a meeting through the use of telephonic communication where all directors participating may simultaneously hear each other during the meeting.

Metrics
- Review of attendance records of Board members annually and evaluate what steps necessary to improve attendance

Status
The Council Board has been meeting at least nine times a year since its inception in 1998. A Public Comment time is reserved on each Council Board meeting agenda.

Actions for the Council
- Conduct a review of the number of meetings failing to achieve a quorum over the last year and identify ways to improve attendance.
- Assess the capacity needs of the Council to effectively manage existing projects, and assess the ability to manage new projects.

Staff Management

Description
The Board of directors has authority to hire a Council Coordinator or Executive Director as the administrative head of the Corporation. The Board is responsible for overseeing the Coordinator/Executive Director. The Coordinator/ED is responsible for the day-to-day management and duties necessary to conduct the Council's business, operations and affairs. The Board may delegate to the Coordinator/ED executive powers necessary to facilitate handling and management of the Council's authority and interests, including hiring of additional staff, developing Request for Proposals for soliciting contractors to assist in Council activities, and other tasks.

Metrics
- Annual review of Coordinator's performance over the previous 12-month work period.
- Feedback to Coordinator on areas of competency and areas needing improvement.

Status
A new Coordinator was hired in October of 2014 after a number of short-term tenures of previous Coordinators. The newly hired Coordinator is actively engaged in community outreach efforts, project management—including the development of new on-the-ground restoration projects, as well as pursuing funding and grant opportunities. While it is too early to discern the efficacy of the new Coordinator's actions, early indications of success include the recent addition of new members to the Board, new programs including the "Speakers' Series," outreach to schools and educational institutions, and an increase in programs designed to attract more interest from the larger community, including presentations by ODFW biologists and others on issues that are important to the local community such as the status of salmon population trends in the Tillamook Basin watershed.

Actions for the Council

- The Executive Committee will review staff performance annually.

Fiscal Management

Description
The Council has a "Fiscal Policies and Procedures" manual that articulates the fiscal management policies for the Council, how purchases and disbursements are made, accounts receivables, billings, payroll procedures, financial statements, budgeting and procurement policies.

Metrics

- Review and reconciliation of the Council's funds and bank statements by its fiscal administrator (TEP Accounting Manager)
- Completion of required tax forms and financial reviews
- Biennial audit by a contracted CPA

Status

The Tillamook Estuaries Partnership (TEP) currently manages payroll support, as well as fiscal management of all grants, for the Council. The Fiscal Policies and Procedures manual has not been updated or reviewed since May of 2007. The Coordinator is scheduling a review of the manual for September of 2015.

Actions for the Council

- Complete the scheduled review and provide the Council an updated manual.

Project Management

Description

Oregon Department of Fish and Wildlife (ODFW) staff has provided significant project management assistance since the departure of Denise Lofman in 2012. With the hiring of a new coordinator, project management is now being organized through the software Basecamp, with each project given an identification number in order to provide tracking and other monitoring oversight by members of the Council's Executive Committee and Restoration Committee.

In addition, the Council has developed a two-year work plan for all projects and uses an Excel spreadsheet that provides a description of the project, key partners involved, limiting factors that affect the targeted resource/spatial area, challenges and opportunities associated with the project, and planned deliverables.

Metrics

- Development of a comprehensive database on Basecamp to allow monitoring and tracking of all restoration projects

Status

The new project management processes that have recently been put in place are designed to improve project management for the Council. However, it is too early to determine how effective these new processes will be in assisting and improving project management at this time. With the real potential loss of state-supported technical assistance, additional capacity will undoubtedly be needed.

Actions for the Council

- Build technical expertise either through contracting or hiring, to allow the Council to take on more complex projects

- As the Council manages more projects, it will need to budget for contracted or partner project managers
- Consider each grant application as an opportunity to provide project management capacity

Citizen Involvement and Support

Description
The Council has been challenged in garnering more citizen involvement and support over the past few years. As noted in previous self-evaluations, the broader community has a limited understanding of the Council's work or mission. Consequently, the Council has developed a plan for increasing citizen awareness of the Council's work, as well as greater citizen involvement. Such plans include developing a more robust online presence, including a website and Facebook page, increasing the number of presentations by staff, agency or educational professionals on topics that are of interest to local landowners and citizens, and a more concerted outreach effort by the coordinator to targeted stakeholders and groups. The Council has plans to attend local events such as the Farmers' Market, County Fair and Garibaldi Days, as well as community volunteer activities such as bay/river clean ups, riparian planting parties, and invasive plant removal efforts. Partnering with local schools, the community college and other educational or recreational partners will enhance the Council's presence in the community and increase public awareness and involvement in Council activities.

Metrics
- The number of students helping with citizen monitoring of projects and habitat.
- Attendance at local events such as the Farmer's Market and Garibaldi Days to increase public awareness of the Council

Status
The council has not had a robust outreach and citizen involvement program due to the high level of staff turnover during the past two years. However, the coordinator is working with partners to develop student monitoring opportunities and other outreach activities in order to increase citizen involvement and awareness of council activities. In addition, the council is working with the City of Tillamook on a restoration project on Holden Creek in downtown Tillamook, which will provide new opportunities to engage with the public.

Actions for Improvement

- Encourage board members to engage citizens and community groups to foster broader community awareness of the council and support greater citizen involvement in council activities.

Collaboration with Partners

Description
Maintaining the many relationships developed through time and building additional relationships are core functions of any watershed council. The TBWC has a long track record of collaborating with public and private partners in the catchment. The Council relies on public agencies for technical assistance, especially ODFW staff. Some of that capacity is threatened by budget cuts at the state level. The Council also has a strong partnership with Tillamook Estuaries Partnership (TEP) on projects and planning and for fiscal management. The Council conducts restoration projects on private industrial forestlands, state forest lands, Tillamook County and City of Tillamook lands, as well as lands belonging to other private and governmental entities.

Metrics
- Implementation of projects that maintain and enhance partnerships and collaboration
- Involvement with all appropriate agencies and parties to assure cooperative development and implementation

Status
The Council has recently been approached by partners (City of Tillamook, US Fish & Wildlife Service, and others) to assist in the development of projects that solve liability and ecological problems for the region. These opportunities will be enhanced by successful relationships and effective implementation. Assuring the Council has the capacity to build and maintain relationships while completing projects is an important challenge and links to adding capacity to assure effective project development and implementation.

In addition, the council is working in concert with the Tillamook Estuaries Partnership's Comprehensive Conservation and Management Plan to advance common restoration goals.

Actions for Improvement
- The Council will actively recruit agency and land management interests to its meetings to share information and explore cooperative efforts and opportunities.

Membership and Recruitment

Description
The Council has had poor recruitment of new members as a result of staff turnover and poor outreach and education programs in the recent past. The new coordinator

is actively recruiting new members from the broader community with an emphasis on user groups and stakeholders that are currently under-represented. These include landowners in the forested areas of the basin, and in the floodplain, and local business owners. Local recreationists are also being considered, including anglers, paddlers, hunters and birders.

Metrics

- Diversity of Board members
- Number of Board Members
- Representation from the broadest range of local citizenry

Status

One new board member has been recruited since October 2014, when the new coordinator was hired. Additionally, the Council has revived its "Speaker Series" and corresponding community outreach.

Actions for Improvement

- Recruit representative(s) from the dairy farming community to the Board by December 31, 2015
- Provide one (1) annual training to Board members to increase capacity and relationships
- Provide one (1) annual board social event to support board member morale and acknowledge their contributions to the Council
- Develop and distribute a Board Member Manual and review the contents with new members

Resource & Capital Development

Description

The Council's funding falls into three main categories; 1) Council Capacity Grants; 2) Regular Grants; 3) Non-specific/Miscellaneous funding.

1) Council Capacity Grants (formerly known as Council Support) are awarded biennially by OWEB based on an evolving set of criteria and requirements. TBWC has made every effort to meet these requirements, and anticipates that it will receive funding for the upcoming 2015-2017 biennium. OWEB's decision is due in the summer of 2015. The dollar amount for these awards is tied to OWEB's annual budget, and has not yet been determined for the 2015-2017 biennium.

2) Regular Grants encompass the majority of funding opportunities for Council projects, and include those offered by OWEB, US Fish & Wildlife Service, NRCS, BLM, US Forest Service, ODFW and ODEQ. They include, but are not limited to, grants for restoration, technical assistance, monitoring, education/outreach, land protection

and water protection.

3) Non-specific or Miscellaneous funding is a catch-all for all the other funding opportunities that are not tied to a specific project or outcome, but are intended to support the Council's operations and activities. The TBWC has so far sought very few of these opportunities.

Metrics

- Budget forecasting to measure whether general funding is adequate to support staff and office administration
- Successful development and execution of budgets and funding to support ongoing projects

Status

The Council is awaiting a decision from OWEB regarding ongoing Council Capacity funding, due in the summer of 2015. Currently all of the Council's planned projects are fully funded. Additionally, every prospective project includes a detailed funding plan and budget.

Priority Actions

- Initiate one or more education/outreach projects per year
- Initiate one or more restoration projects per year
- Develop and execute a fundraising plan
- Diversify funding channels
- Expand organizational capacity to add another employee within the next year
- Develop a fundraising strategy (as part of increasing staff capacity) that identifies and solicits funding from a diversified portfolio of funders

Ecological Priorities

Use of Watershed Analyses & Other Resource Inventory and Analysis Information

Description

There is an abundance of natural resource information for the tributaries to Tillamook Bay. The documents identify significant issues associated with the unique history of the catchment. The Coast Range tributaries are dominated by a relatively uniform, young (80 years ±) forest following a series of fires in the 1933-1951 period that covered nearly the entire catchment. The steep and deeply divided topography of the Coast Range grades rapidly to the alluvial fans that fringe Tillamook Bay and its broad intertidal expanse. Much of the lowlands in the bay

front has been diked and drained for conversion to dairy pasture and protected from river flooding by levees and tide gates.

The dominant issues associated with the Tillamook catchment are degraded water quality (temperature and bacteria), chronic flooding, and degraded or lost salmon habitat. While the issues are well known, the causes, and remedies are the subject of significant debate and controversy in the local community. There is abundant documentation of the priority areas for salmon production, tidal marsh restoration, riparian enhancement and stream complexity improvement. While additional work to prioritize or further analyze information about the Bay and its tributary streams is not well justified at this time, there will be a continual debate about approaches and desired outcomes.

Status

Given the abundance of information and differences of opinions on solutions and desired outcomes, it is important to identify a restoration strategy that draws on common goals within the TBWC's partnerships. Ecological priorities have been identified by the Tillamook Bay Watershed Data Synthesis & Computational Ecological Restoration Prioritization (CERP) Tool. The information and priorities identified in this document should be used to help guide both outreach and selection among opportunities.

The strategy proposed at this time is to take actions appropriate to the land uses in the catchment and address the factors that adversely affect aquatic habitat forming processes with an emphasis on the connectivity from Tillamook Bay to the areas of high intrinsic productivity in the upper watershed. The other element of the strategy is to take actions that would create and or maintain habitat complexity to allow for a diversity of life history expressions for the focal streams (the reach from high intrinsic potential areas to the Bay).

Priority Actions

- The following "rules of thumb" will be applied when considering future opportunities for the Council when addressing salmon habitats:

    - Streams with upstream "strongholds" should be prioritized over others.
    - Streams with high intrinsic potential should be protected and restored to the extent possible.
    - Connectivity to upper watershed high intrinsic potential areas should be a priority.
    - Addressing upslope (primarily road related) impacts to high intrinsic potential stream segments should be a priority.
    - Look for ways to address habitat complexity from headwaters to the Bay.

- Develop working relationships with land management groups to build a common understanding of goals and effects. This could mean using opinion surveys, targeted applied research to evaluate potential tradeoffs, conducting demonstration projects, and other methods to build understanding.

- The Council will explore additional operating rules for selecting projects that would address water quality and flooding concerns.
-

Project Selection and Planning

Description
The Council is a member of the North Coast Watershed Councils Restoration Assistance Project. A group of four watershed councils (the Nestucca-Neskowin, Tillamook Bay, Lower Nehalem and Necanicum Councils) hires a contractor each biennium to develop eight grant applications for high priority projects on the ground, with each council securing two projects in 2014-2015. Having this high-level of assistance in developing project and grant applications results in better project selection, and provides more time for public outreach and education, operations management and other duties. The contractor's plans include aligning funding requests with available opportunities and project partners to ensure readiness and timely implementation.

New geographic information tools have been developed that evaluate watershed processes and are being applied to the neighboring area (Nehalem basin) as a part of the planning tool to identify projects for a coho salmon implementation plan. These tools (NetMap and associated tools) use information about physical processes rather than area (hydrological units) conditions to identify limitations to the processes that provide habitat for aquatic species. The council could cooperate with Tillamook Estuaries Partnership to apply the NetMap evaluation to the tributaries to Tillamook Bay.

In addition, the Council is using TEP's Culvert Prioritization Plan for guidance in addressing needed culvert replacements in the basin. The Council is also working with the City of Tillamook on a water quality and restoration planning process for Holden Creek, the most impacted urban stream in the Tillamook Basin.

Metrics
- Percentage of grants awarded
- Percentage of partners who return to participate in future projects
- Number of new partners and prospective projects approaching the Council

Status
Project selection and planning has been stymied by staff turnover and poor grant application management recently. However, with the hiring of the new

Coordinator, along with identification of the Ecological Priorities (see page 12), project selection and planning is expected to improve—both in the frequency of projects selected and implemented, and in their ecological contributions to the Basin.

Priority Actions

- Cooperate with Tillamook Estuaries Partnership in providing fish passage using the prioritization tools they have developed.
- The Council should collaborate with Tillamook Estuaries Partnership to apply for funding to conduct an analysis of process-based conditions in the tributary watersheds using a tool such as NetMap that NOAA Fisheries and others are using to develop salmon recovery plans. NetMap can be used to specifically target restoration actions and priorities. The analysis should include an estuarine habitat evaluation as well as stream analyses.
- Continue to look for projects that address habitat priorities and provide the greatest benefit for the community

Tillamook River Conservation Priorities

The Tillamook River supports significant populations of cutthroat trout, steelhead, coho, and Chinook salmon, as well as a remnant population of chum salmon. It has a long history of disturbance including an extensive history of splash-damming and log drives. These abuses have left a legacy of scoured channels that would benefit from restoration and enhancement. The lowlands make up a significant percentage of Tillamook County's highest value dairy lands. Consequently, they have long been diked and leveed to prevent flooding and salt intrusion. These structures have disconnected the river from its floodplain.

The *Tillamook River Coho Restoration Strategy: Habitat Assessment and Limiting Factor Assessment* provides a careful summary of conditions and specific recommendations for habitat enhancement that would benefit coho salmon. The analysis and recommendations provide guidance for project development with the appropriate landowners. The document also provides reach-by-reach recommendations for conservation activities.

Tillamook River Coho Implementation 1

Description

The Council has developed the *Tillamook River Coho Restoration Strategy: Habitat Assessment and Limiting Factors* that identifies twenty-five priority actions.

Metrics

- Number of projects that address identified limiting factors

Status
The council has begun developing projects identified under the habitat and limiting factors assessment, including riparian planting for improved shade.

Priority Actions
- Strive to instigate a priority project each year that addresses a limiting factor identified in *Tillamook River Coho Restoration Strategy: Habitat Assessment and Limiting Factors*

Tillamook River Coho Implementation 2

Description
Don Averill, TEP and the TBWC are partnering to conduct a riparian restoration project on the Averill property along the Tillamook River. The Averill property is agricultural land used to produce feed for livestock. The riparian zone within the property is dominated by invasive plant species (Himalayan blackberry and reed canary grass) and includes areas of active bank erosion. The riparian areas will be planted with a mix of native trees and shrubs. Cuttings of willow, dogwood and/or twinberry will be planted in and around areas of bank sloughing and erosion. Site preparation will include the clearing of all non-native blackberry. 3-4' diameter holes will be scalped in areas of reed canary grass for individual plantings.

Metrics
- Site preparation and planting of approximately .5 miles of Tillamook River riparian area with trees free to grow in 5 years.

Status
The project has been designed and an OWEB small grant has been acquired to complete the work.

Priority Actions
- Complete funded projects and document work in council materials (webpage and/or Facebook page)

Tillamook River Coho Implementation 3

Description
The TBWC is currently working with the City of Tillamook to design fish passage at Skookum Dam, an earthen dam on Upper Fawcett Creek. The dam was used for water supply for the City of Tillamook but is no longer necessary and poses a liability for the City if the dam fails. The U.S. Fish & Wildlife Service has offered to assist in more complete breaching of the dam.

Metrics

- Success of the project and successful fish passage in the future

Status

This is a new project that is in the development stages. Additional development and funding for design and implementation will be required before the project can become realized.

Priority Actions

- Develop a grant application and pursue funding for the design and implementation of dam removal.

Trask River Conservation Priorities

The Trask River is the second largest drainage in the Tillamook Bay Watershed. It supports significant populations of cutthroat trout, steelhead, coho, and chinook salmon, as well as a remnant population of chum salmon. Water quality in the Trask River is considered impaired by excessive summer temperatures. The Trask River is unique in that the mouth of the mainstem was moved and constricted, resulting in increased flooding. The upper watershed has fish passage barriers, and lacks large wood that creates overwintering habitat. In addition, there is a lack of conifers in riparian areas. The lowlands lack riparian cover and have been extensively altered to expand agriculture. Most lowlands are managed for pasture production. Lower river tributaries such as Holden Creek, Gold Creek, and Mill Creek have extensive water quality problems and have barriers that prevent significant fish use.

Trask River Habitat Restoration Implementation 1

Description

The Council has identified Holden Creek as a priority. Holden Creek is the most impacted urban stream in Tillamook County, and contributes significantly to water quality problems in the Trask River and the Tillamook Bay. Much of the land along Holden Creek is city-owned. The creek has many issues including flooding, fish passage, and riparian health. The Holden Creek Working Group partnership meets approximately every 3 months. TBWC staff and Board members sit on this committee and often lead projects to improve Holden Creek's habitat and water quality.

Metrics

- Water quality in Holden Creek
- Riparian health along Holden Creek
- Fish passage and use of Holden Creek

Status

A recent opportunity to develop a project for Holden Creek has been identified. The project would retrofit three 5' tidegates that currently block fish passage with a more fish friendly alternative. The watershed counsel will initiate the process of developing partners and design funding as well as applying for grants to pay the $120,000 estimated to upgrade those tide gates for the water quality and fish passage benefits.

Priority Actions

- Work with the Holden Creek partners to obtain designs and cost estimates for fish-friendly tide gates. Facilitate conversations with NOAA Fisheries and ODFW on the design.

Trask River Habitat Restoration Implementation 2

Description

Mill Creek is a low gradient, roughly five-mile long tributary to the Trask River--one of the lowest tributaries in the Trask system, joining well within the tidal zone, just upstream of RM 5. The Mill Creek watershed includes several significant tributaries and supports populations of cutthroat trout, steelhead, coho, and chinook salmon. Historically the creek is presumed to have supported chum salmon as well, but none have been documented in the basin in several years. State and industrial forestland are the dominant land uses in the headwater reaches while the majority of the stream flows through rural residential areas. It passes through a short section of agricultural land prior to entering the Trask.

This project site begins roughly 1.1 miles upstream of the confluence of Mill Creek and the Trask River and continues for roughly 0.9 miles to the confluence with Bear Creek. The Trask River Watershed Analysis rated in-stream large wood conditions as "100% undesirable" in the lower Trask watershed. It further specified that management actions to improve salmonid habitat should focus on enhancing large wood conditions, improving future large wood recruitment, and reducing mainstem temperatures.

Metrics

- Successful placement of 22 large wood structures
- Enhancement of riparian areas
- Planting of native trees and shrubs in all areas affected by the project, as well as an expanded area on the north side of the creek

Status

The project is funded and is being implemented in 2015.

Priority Actions

- Manage the project for effective completion.

- Develop descriptive material and report on progress and outcomes to the community.

Trask River Habitat Restoration Implementation 3

Description
The Upper South Fork Trask Habitat Restoration Project will involve in-stream habitat enhancement through addition of large wood and decommissioning of an abandoned road. Project may also include fish passage improvements at three nearby road crossings.

Metrics
- The project could address 20 acres of riparian habitat treated, and approximately 2 miles of riparian habitat treated (both sides). Maintenance would include brush cutting and tube maintenance.

Status
Current task is to seek funding for technical assistance with the initial project scoping and planning. In addition, a larger restoration effort is being assessed to address the alder-dominated riparian areas in the East for of the North Fork of the Trask.

Priority Actions
- Obtain technical assistance funding for project design.

Wilson River Conservation Priorities

The Wilson River is the largest drainage in the Tillamook Bay Watershed and supports the watershed's largest runs of anadromous fish. The upper reaches of the Wilson River are relatively high gradient, confined stream channels with local areas of low gradient, broad floodplain channels. The lower portion of the mainstem forms an interconnected network of sloughs and tidal wetlands in conjunction with the Tillamook, Trask, and Kilchis Rivers. The Wilson has a broad alluvial floodplain that is used primarily for dairying. The lower mainstem is extensively diked and is prone to flooding. Red Alder and riparian shrub species such as Salmonberry dominate the majority of the riparian corridor.

Issues associated with the lack of overwintering habitat, elevated summer temperatures, deciduous riparian corridors and altered low gradient portions of the flood plain are common with the Trask.

Wilson River Habitat Restoration Implementation

Description

TBWC is working with ODF and ODFW to place up to 12 large wood structures in the bed of Ben Smith Creek. Ben Smith has been identified as a high priority stream for coastal coho, but it has very little in-stream wood. ODF and ODFW own significant land along the creek, and both are eager to engage in a restoration partnership with the Council to restore fish habitat. An upcoming timber harvest on ODF land bordering Ben Smith Creek will create an opportunity to contribute wood to the creek, spurring the initiation of this project.

Metrics

- Effective placement of large wood.

Status

Planning and design has been completed. A grant application is in preparation.

Priority Actions

- Prepare for OWEB Review Team site visit with explanatory materials and partners.

Miami River Conservation Priorities

The Miami River is the northernmost and smallest of the five rivers within the Tillamook Bay Watershed. The Miami is unique among the five rivers in that it has few dikes and levees. Cutthroat trout, steelhead, chum, chinook, and coho salmon are present throughout the basin. The lower river has excellent potential for chum production. The upper mainstem has an abundance of off-channel habitat. Large wood remains low in the upper mainstem and may be a limiting factor for salmonid production. The Miami exceeds water quality standards for temperature. The lower mainstem is particularly prone to high summer temperatures, making it unsuitable for summer rearing by juvenile coho.\

Priority Actions

- Maintain contact with Oregon Department of Forestry on potential cooperative efforts to address water quality standards for temperature exceedance.
- Explore cooperative funding for a NetMap evaluation of the Miami watershed.

Kilchis River Conservation Priorities

The majority of the Kilchis watershed burned during the series of fires in the first half of the 20th century collectively known as the Tillamook Burn. As a result, the majority of the watershed is composed of relatively young conifers and dominated by Red Alder and riparian shrub species such as Salmonberry. The Kilchis River

supports populations of Coho, Steelhead, Chinook, Cutthroat, as well as Chum in the lower basin.

Priority Actions

- Maintain contact with Oregon Department of Forestry on potential cooperative efforts for fish passage, road treatments and large wood placement. Explore cooperative funding for a NetMap evaluation of the Kilchis watershed.

Tillamook Bay Lowlands Habitat Restoration 1

Description

To raise awareness of habitat forming processes in the Tillamook Bay lowlands, the council will sponsor a science panel discussion on the conditions and processes that form and impacts to the lowlands of Tillamook Bay with other partners in the basin. The forum will be developed with partners that have an interest in the lowlands. Critical partners will be Tillamook Estuaries Partnership, NOAA Fisheries, US Fish & Wildlife Service, Tillamook County Creamery, Oregon Department of Fish and Wildlife and others. The initial idea is to have a panel discussion focusing on the science of lowland habitats and habitat dynamics. The panel will discuss restoration alternatives and concepts as they relate to aquatic habitats important to salmon and other estuarine biota.

Metrics

- Constructive dialog that results from the presentations and leads to greater public awareness and the recruitment of potential landowners for inclusion in future habitat projects

Status

The Council is in the planning stages to sponsor the panel in the fall of 2015.

Priority Actions

- Identify a date and venue, invite and confirm speakers, and develop and deliver outreach for the program (scheduled for 2016)

Tillamook Bay Lowlands Habitat Restoration 2

Description

Explore with the Tillamook Creamery Cooperative, OSU Extension and other partners what opportunities exist to build understanding about the tradeoffs between full utilization of pastures and habitat restoration and enhancement activities. Explore approaches from other areas and develop a communications and research plan for the Tillamook Bay lowlands.

Metrics

- Clear and effective communications with the dairy industry that results in a mutual commitment to explore tradeoffs for utilization of lowlands for ecological habitat values and agricultural values

Status

The Council needs to develop a clear plan of action and initiate discussions with the Tillamook County Creamery.

Priority Actions

- Develop a plan of action and identification of models from other areas
- Engage discussions with TCC and OSU Extension
- Solicit recruitment of willing landowner(s) to develop and test voluntary pilot conservation projects that improve lowland habitats and ecological functions and document the effects of these voluntary practices on pasture utilization.

Ensuring Effectiveness

Council Effectiveness

Description

The TBWC is implementing three main measures to help ensure effectiveness. These measures include more effectively evaluating its restoration programs, monitoring its spending and budgeting, and tracking the level of public involvement from the broader community.

The biennial Self-Evaluations are one of the tools that the TBWC is using to gauge the level of support and involvement of Board members and other volunteers. These evaluations also provide the Council with opportunities to assess which programs and projects it should continue to support, and which programs and projects should be curtailed or modified.

The recent addition of Basecamp, a robust project-management software, is allowing the Council's staff and technical team members to more closely monitor the Council's restoration projects.

In addition, the Council maintains a two-year work plan in Excel that also provides tracking and assessment of the Councils' restoration projects, as well as the

Council's organizational development, staffing, volunteer capacity, and Board status. The work plan also tracks the Council's public outreach efforts and activities.

Metrics

- Do the Self-Evaluations result in meaningful discussions on progress toward Council goals?
- Does the work plan result in actionable items to help improve the Council's capacity and public outreach activities?

Status

The latest Self-Evaluation was conducted during the March 24th meeting of the Council Board.
Base Camp was initiated as the Council and Coordinator's project management program February 1, 2015.
The Council's "Fiscal Policies and Procedures" manual guides fiscal management. In addition, the Council's funds and bank statements are reviewed and reconciled monthly by the Tillamook Estuaries Partnership Accounting Manager (see the "Fiscal Management" section on page 7.).

Priority Actions

- Use the results of the self-evaluation and the Action Plan to identify a work program for the year. Evaluate resources needed to accomplish the work plan and explore means to obtain the necessary resources.
- Review self-evaluation process with Council officers to identify better utilization of this tool to improve council and board effectiveness.

Project Effectiveness

Description

The Council has completed a significant number of projects over the last 15+ years. There has been limited evaluation of the differences made from the implementation of the projects. The council should look towards both evaluating the effectiveness of any collection of projects in a tributary or reach of stream and evaluate the effectiveness of selected individual projects that may be instructive for future efforts.

At the current time the Council reports on the completion and condition of projects as required under grant funding requirements. While this reporting is important, a more robust evaluation of selected projects, perhaps in cooperation with others such as the Tillamook Estuaries Partnership, would help to build information that could be used for public information purposes or in revisiting project designs for the future.

Metrics

- The number of projects that meet priorities for salmon recovery.
- The number of projects that address water quality and flooding issues.

Status
This is a new approach for the Council and will need to be developed. The considerations that need to be made will require additional capacity for the Council either through contracting or employment.

Priority Action
- Apply a NetMap-type of evaluation for the tributary streams of the basin and compare the completed projects with the locations identified and adjust the council's outreach accordingly.

Ten-Year Project and Planning Matrix

The matrix on the following page identifies priority actions for both improving council capacity, and for pursuing restoration activities. The matrix also suggests a time frame for when the actions could begin, and how long these actions will be engaged by the council.

Actions	2015-2017	2017-2019	2019-2021	2021-2023	2023-2025
Council Capacity					
Review Membership composition					
Recruit new members					
Review Attendance					
Access Capacity for Projects					
Build technical expertise					
Add Project Management capacity					
Build capacity in grant applications					
Recruit interest and involvement					
Provide Board Training					
Conduct social and community event					
Develop and distribute Board Manual					
Build Outreach capacity					
Add outreach capacity as developed					
Restoration Activities					
Apply "Rules of thumb" to opportunities as presented					
Cooperate on process evaluation of tributaries					
Complete current projects effectively					
Develop public information materials on projects completed and in progress					
Add project management capacity					
Work with landholders to identify and develop projects identified in process evaluation					
Develop a cooperative evaluation of opportunities to address lowlands					
Develop a basin scale action plan for long-term funding					

MEMORANDUM

April 13, 2015

To: **Tillamook Bay Watershed Council**

From: **Ken Bierly**

Subject: **Tillamook Bay Watershed Assessment Issues and TBWC Action Recommendations**

Introduction

The Tillamook Bay Watershed Council (TBWC) has conducted watershed assessments from 1998 until 2001 covering each of the tributaries to Tillamook Bay (Wilson River, Trask River, Tillamook River, Miami River and Kilchis River). Each of the 5 tributaries (Figure 1) is addressed in a watershed assessment. The assessments conducted for TBWC are primarily summaries of existing information with limited analysis or issue clarification. The Miami and Trask watersheds were subsequently assessed for management purposes by the Department of Forestry in cooperation with the Bureau of Land Management in 2003 and 2005. The assessments provide a useful compilation of information and provide information that can be used for the development of an action plan for the council.

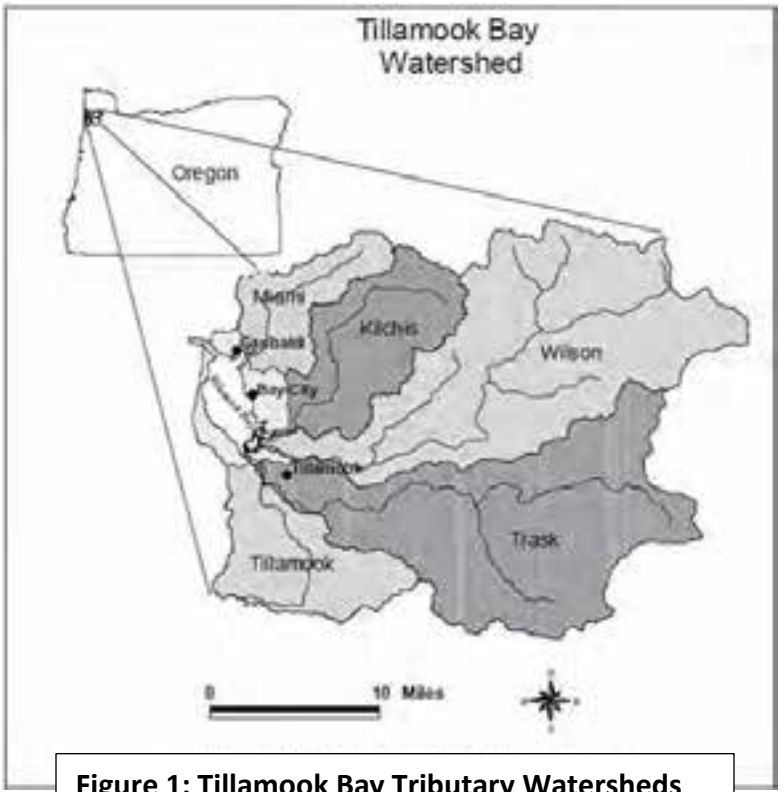


Figure 1: Tillamook Bay Tributary Watersheds

The Tillamook Bay Watersheds also have a great deal of information because of the presence of a National Estuary Program (NEP) that has invested significant financial resources in the evaluation of natural resource conditions and development a resource management program (TBNEP, 1998c.; TBNEP, 1999). The resource inventory and evaluation efforts of the NEP are valuable and usable for selecting appropriate conservation actions.

Fish habitat has been evaluated and prioritized for a number of purposes. Thom and Moore (1997) identified habitat conditions and developed priorities for industrial forest landowners to apply riparian and in-stream restoration practices. Oregon Department of Fish and Wildlife, Oregon Department of

Forestry, and the Wild Salmon Center provided input into prioritization for establishment of salmon "anchor habitats" in the Tillamook Bay watersheds that involve state forest lands. There has been significant evaluation of juvenile fish distribution (biological surveys) and is well summarized in 2007 by Bio-Surveys, LLC (2008). This information has been used to prioritize coho habitat restoration (Demeter Design, 2009) and to provide tools for evaluating priorities (Demeter Design, 2008)

Others have evaluated the lowlands of the bay (Coulton et. al. 1996) evaluating dike breach opportunities (Simenstad et. al. 1999) and tidal marsh restoration priorities (Ewald and Brophy 2012). The specific issues associated with road crossings and tidegates has been evaluated and prioritized (Bailey, 2012 and Charland, 1997).

Water quality of Tillamook Bay has been sampled and found that temperature and bacteria exceed state standards. In response, a Water Quality Management plan for agriculture (North Coast Basin Local Advisory Committee, 2011) and a water quality management plan for the entire basin has been developed by the Department of Environmental Quality (2001) to address temperature and bacterial contamination.

The following information is a summary from each major document that provides resource priorities with notes from the review of the documents. Direct text taken from the documents is presented in *italics*. The brief summaries from the documents is followed by a summary for the catchment and proposed rules of thumb for the TBWC to use in prioritizing outreach, monitoring, and restoration efforts.

Document Summaries

Kilchis Watershed Analysis (1998)

The Kilchis Watershed Analysis identified lack of large wood, lack of riparian forest vegetation, sediment from roads and elevated temperatures affecting habitat for salmon and steelhead. The report suggests reconnection of Hathaway Slough to the Kilchis River to relieve flood flows. The assessment has identified priorities for large wood placement. Recommendations include interplanting conifers in the riparian of the upper watershed and systematically addressing barriers to fish passage.

Trask Watershed Analysis (1998)

Tidal Mainstem RM 0–2: The only area for immediate protection is Hoquarten Slough, which has intact riparian stands and relatively high habitat values, but some problems with water quality. Areas for restoration are: mainstem from RM 0–2 both branches (riparian planting and addition of LWD), and Dougherty Slough (riparian planting and addition of LWD).

Mainstem RM 2–10: There are no areas for immediate protection. Areas for restoration are: mainstem RM 2–10 (riparian planting and fencing, addition of LWD, other habitat enhancement

projects), Mill Creek and Holden creek (reduce contaminant inputs, riparian planting), an unnamed creek that enters the mainstem at Trask River Rd. Bridge (riparian planting), and Hanenkrat Creek (riparian planting). Areas that could be restored, but the cost is high are: Gold Creek (restore fish passage at the hatchery, interplant conifers in riparian), and Green Ck. (replace culvert for fish passage, plant riparian on floodplain reach).

Mainstem RM 10–confluence: The only area for immediate protection is on the mainstem

(approximately RM 10.7–11.7), which has high quality riparian and high quality instream habitat. Areas for restoration are: mainstem RM 11.7–confluence (interplant conifers in riparian, other habitat enhancement projects), and small, perennial streams (interplant conifers in riparian). Areas that could be restored, but the cost is high are: the streams between Cedar and Burton Creeks (replace culverts for fish passage under Trask River Rd.).

North Fork: There are no exceptional areas for immediate protection. Areas for restoration are: entire mainstem of North Fork (interplant conifers in riparian), lower Bark Shanty Ck. (instream habitat enhancement projects, if possible remove natural barrier at RM ~1.5), and small, perennial streams (interplant conifers in riparian).

North Fork of North Fork: The only area for immediate protection is the first two miles of the mainstem above the confluence, which has high quality riparian but needs LWD additions to help retain spawning gravels and increase the number of pools. Areas for restoration are: mainstem from RM 2–headwaters (interplant conifers in riparian, addition of LWD), and small, perennial streams (interplant conifers in riparian, addition of LWD).

Middle Fork of North Fork: The only area for protection is the mainstem from RM 3 to Barney Dam, which has both high quality instream and riparian habitat. Areas for restoration are: Elkhorn, Cruiser Creeks and small, perennial streams (interplant conifers in riparian, and addition of LWD). Areas that could be restored but the cost is high are: Barney Reservoir (add fish ladder to allow fish passage to extensive habitat in upper watershed).

South Fork: The only area for immediate protection is the first seven miles of the mainstem above the confluence, which has both high quality instream and riparian habitat. Areas for restoration are: Edwards (RM 0–2.5), Joyce (RM 0–2), and Bill (RM 0–1.5) Creeks and small, perennial streams (interplant conifers in riparian, and addition of LWD).

The assessment recommends protection of Hoquarten Slough and riparian enhancement of Dougherty Slough. The report identifies riparian restoration along the lower main stem of the Trask as a priority. The report emphasizes the interplanting of conifers into deciduous riparian stands throughout the watershed. Addition of large wood in the upper portions of the watershed is consistently mentioned.

Wilson River Watershed Assessment (2001)

The watershed lacks large wood and has low large wood recruitment. The stream system lacks off-channel habitats and the streams have persistent sources of fine sediment. Sediment sources were identified as road instability, rural roads, and slope instability. Nearly 25% of the culverts assessed pose fish passage limitations. The Wilson River is temperature limited and in the lower river has bacterial contamination. The report has 6 pages of recommendations for additional data gathering, analysis and actions.

Miami River Watershed Assessment (2001)

There is a general lack of large wood in small and medium sized streams. Like the Wilson, the stream system lacks off-channel habitats and has chronic sources of fine sediment. More than 40% of the surveyed culverts limited free fish passage. The lower river is temperature limited and has elevated bacterial content. The assessment has similar recommendations to the Wilson River Watershed Assessment (E&S Environmental Chemistry, 2001b)

Trask River Watershed Assessment (2003)

Priority for conifer establishment should be given to areas in and around core salmonid spawning and rearing habitat, such as the East Fork of the South Fork and Elkhorn Creek subwatersheds. Priority consideration should also be given to tributary systems with low in-stream structural complexity, high stream temperature, high streambank erosion, and those that are important salmonid migration corridors.

Investigate causes of streambank erosion within the Elkhorn and East Fork of the South Fork Trask subwatersheds.

These recommendations should be emphasized in subwatersheds with a high incidence of roads on steep slopes and known road washouts. These include the North Fork Trask subwatershed, which has the highest proportion of road slippage problems. The South Fork and Upper Trask subwatersheds were identified in section 4.1.3.4 as priority areas to address erosion issues (sec 4.1.3.4). The North Fork North Fork subwatershed is also a priority because it has a high incidence of near-stream roads on steep slopes.

Pursue cooperative efforts to improve channel structure on stream segments that have multiple ownerships.

However, Elkhorn Creek and the East Fork South Fork subwatersheds should receive priority because of their status as Salmon Anchor Habitat. Areas that might be considered for emphasis because they are most deficient in LWD include the North Fork of North Fork, Middle Fork of the North Fork, South Fork, and Upper Trask subwatersheds.

Measures to improve salmon anchor habitat on Elkhorn Creek should focus on improving density of key LWD pieces, pool depth, and gravel area. Long-term solutions designed to increase conifers in the inner

riparian zone should be emphasized. For the short term, placement of key pieces of LWD should also be considered.

Measures to improve salmon anchor habitat on the East Fork of the South Fork should focus on improving density of key LWD pieces and increasing the area and frequency of pools. Depending upon site-specific conditions, improvements in LWD may result in improved pool characteristics. Long-term solutions designed to increase conifers in the inner riparian zone should be emphasized. For the short term, placement of key pieces of LWD should also be considered.

Identify opportunities to restore and reconnect off-channel wetlands and other high- flow refugia.

Implement the BLM road and culvert survey recommendations in the Elkhorn and the Middle Fork of the North Fork of the Trask River subwatersheds. Complete a similar type of survey for the rest of the BLM land in the Trask River watershed.

Elkhorn Creek subwatershed is the highest priority BLM area in the Trask River watershed for in-stream and riparian restoration work. Recommended projects in this area include releasing conifers and, where appropriate, planting riparian species in the riparian zone. Another priority project is to remove the section of road 2-5-10 that is directly adjacent to, and adversely affecting Cruiser Creek. This would be accomplished by redistributing the rip-rap, using an excavator, or by using other methods to restore connections with the flood plain and increase sinuosity.

he North Fork of the Trask subwatershed is the second highest priority for in-stream and riparian restoration work. In-stream work could include:

- *Increasing habitat complexity by installing instream structures where LWD is lacking. Mimic natural stream patterns as much as possible. Place key LWD pieces in natural deposition points, such as often occur at tributary junctions and below frequent debris flow sites in medium- to low-gradient streams.*
- *Creating woody debris jams to mimic windthrow in intermittent and small perennial streams.*
- *Planting native tree or shrub species in riparian areas to increase shading and/or long term LWD recruitment; this may require fencing to exclude beavers and other large herbivores.*

Work with the Tillamook Watershed Council and ODEQ to further quantify non-point sources of pollution. Expand the temperature monitoring network and locate stream segments where rapid heating occurs, especially in areas used by salmonids.

Pursue a coordinated effort to inventory culverts for fish passage across the watershed, and then prioritize projects across all land ownerships.

Coordinate with ODF to explore the feasibility of establishing a corridor of late-seral forest habitat that would connect the Nestucca Block LSR with the Trask/Little North Fork of the Wilson/Kilchis Late-Successional block. (See pg. 67 Nestucca Watershed Analysis October 1994).

East Fork of South Fork: The only area for immediate protection is the first seven miles of the mainstem above the confluence, which has both high quality instream and riparian habitat. Areas for restoration are: small, perennial streams (interplant conifers in riparian, and addition of LWD). Areas that could be restored but the probability of success is low are: Bales (RM 0–2), Blue Bus (RM 0–1.5), Scotch (RM 0–1), Pigeon (RM 0–2), Steampot (RM 0–1.5), Miller (RM 0–1.5), Boundary (RM 0–1.5), Headquarters (RM 0–1.5), Stretch (RM 0–0.5), and Rock (RM 0–0.1) Creeks (addition of LWD, and other instream habitat enhancement projects).

Miami Watershed Analysis (2005)

Minich Creek: Potential LWD sites in 0.4 miles of stream from downstream property boundary to the first bridge. This site has good access for ground-based machinery.

SF Miami: Potential LWD sites from mouth approximately 1.1 miles upstream to where the stream becomes constrained by hill slope. Only the lowest 0.25 miles is accessible for ground-based equipment. Evaluate with Engineers to determine access needs and potential problems. Identify whether to accomplish by attaching to a future sale, a service contract, or by district personnel.

Diamond Creek: Potential LWD sites from mouth to the forks approximately 0.35 miles. This site has poor access for most ground-based machinery. A "spider" may be suitable for this site as there are conifers fairly close to the stream.

Stuart Creek: Potential LWD sites in 0.6 miles of stream from downstream property boundary to the first bridge. This site needs additional examination for access options.

Stuart Creek is close to the road but has a steep hillslope between the road and the creek. Wood could still be placed in any of these streams using a cable yarder if they were hanging over the stream or by helicopter. Another option might be to use a "spider".

NF Miami: In most locations, wood placement cannot be performed under the current RGP due to size and slope of stream. Future revisions in the RGP may create additional opportunities. Alternatively, a special permit could be sought for wood placement along this stream.

Miami River mainstem. Wood placement cannot be performed under the current RGP because of stream width. Future revisions in the RGP may create additional opportunities. Alternatively, a special permit could be sought for wood placement along this stream.

Moss Creek: Limited ODF ownership and potential impacts to chum salmon. (Restoration projects could result in gravel scour from chum spawning areas. These projects could also create barriers to chum passage.)

Explore partnering with watershed councils, ODFW, and OWRD to address conditions downstream of ODF lands. Potential conditions to be addressed under this recommendation included the following:

- *Improving habitat complexity*

- *Restoring wetlands at mouth of Miami, Doty, and Vaughn*
- *Hardwood "conversion" to conifer or mixed.*
- *Restoration of low flows*

Water quality monitoring at Moss Creek Bridge for fecal coliform, total suspended solids, and nutrients.

Continue efforts to institute the Watershed Scale Effectiveness Study

A temperature monitoring program that stratifies ODF lands at confluences with major tributaries as well as ownership boundaries.

ODF should consider resurveying those ODFW habitat survey reaches that have not been surveyed since 1996. Additionally, ODF should consider expanding the surveys to include other fish bearing streams not yet surveyed.

Oregon North Coast Salmon Conservation Assessment (2008)

Four emphasis zones are described that deserve the highest conservation focus for salmon at the catchment level: the Miami and Kilchis Rivers, the Little North Fork of the Wilson River.

In the Tillamook System, key areas for coho salmon are:

- *The Little North Fork of the Wilson*
- *The Upper Miami*
- *The Upper Kilchis*
- *Devils Lake Fork of the Wilson*
- *Elkhorn Creek*
- *Ben Smith Creek*

In the Tillamook, key areas for steelhead are:

- *Upper Miami*
- *Little North Fork of the Wilson*
- *Ben Smith Creek*

Key areas for Chinook in the Tillamook system are:

- *Middle Kilchis*
- *Little North Fork of the Wilson*
- *Large reaches of the mainstem Wilson*
- *Large reaches of the mainstem Trask*

Miami and Kilchis systems are the most productive chum producers in the North Coast

Areas that had consistently low support for watershed condition are the Tillamook lowlands

A clustered group of watersheds that includes the Miami, Kilchis, and Little North Fork of the Wilson are consistently strong for several species.

Areas with timber that are more difficult to access due to steep topography (Upper Kilchis) tend to have higher watershed condition scores. These are also strong areas for salmonids.

Summary for Anchor Habitats

North Fork of Kilchis River	*Consistently high coho densities (RBA, 2005-07; ODFW 2000 - 07), consistently high coho spawner counts (ODFW, 2000-07), provides cold water to lower watershed, difficult terrain for timber harvest, part of whole watershed strategy for Kilchis, good water*
Miami River	*Unique area for multiple species. One of the highest chum producers in Oregon (ODFW); steelhead, cutthroat, coho juveniles (ODFW); cutthroat and coho abundance, consistently high (RBA, 2005-07)*
Middle Kilchis River	*Part of whole Kilchis watershed. High coho abundance and densities (RBA, 2005-07); steelhead abundance (RBA, 2005-07); high IP for steelhead; hotspot for Chum (ODFW) and Chinook (ODFW).*
Little North Fork Wilson River	*Highest producer of coho in the Tillamook watershed (RBA, 2005-07). This is a hotspot of abundance and diversity for multiple species. Several datasets back this up.*
Kilchis River	*Opportunity for whole watershed protection. High IP for chum, coho, Chinook. High Chinook spawner counts (ODFW, 1998, 2001); chum spawner counts (ODFW, multiple years), high coho densities and steelhead abundant (RBA, 2005-07), above average cutthroat (RBA)*
East Fork of the South Fork Trask River	*IP for steelhead; above average steelhead juvenile counts (2002 and 2004, ODFW); consistently high coho densities and abundance (RBA, 2005-07); above average steelhead abundance and densities (RBA, 2005-07); above average cutthroat (RBA, 2005-07)*
Ben Smith	*Consistently strong coho juvenile densities (RBA, 2005-07; ODFW, 2000-07), consistently strong coho abundance (RBA, 2005-07); consistently strong steelhead abundance (RBA, 2005-07); moderate support for good watershed condition*
Devils Lake Fork Wilson River	*High IP for coho, high coho juvenile (ODFW (1 year), 2000); consistently above average coho abundance and density (RBA, 2005-07); moderate cutthroat (RBA, 2005-07)*

Lower Devils Lake Fork Wilson River	*High IP for coho, high coho juvenile (ODFW (1 year), 2000); consistently above average coho abundance and density (RBA, 2005-07); moderate cutthroat (RBA, 2005-07)*

Dike Breach Report (1999)

Site Number	*Site Name*	*Tillamook Bay Tributary Regions*	*Contiguous Site(s)*
1	*Garibaldi-Miami River*	*Miami River*	
2	*Vaughn Creek*	*Pacific Ocean*	
3	*Kilchis River*	*Wilson & Pacific Ocean*	
4	*Hall Slough*	*Wilson & Pacific Ocean*	*#5*
5	*Wilson River*	*Wilson & Pacific Ocean*	*#4*
6	*Hall Slough East*	*Wilson*	
7	*Memaloose Point North*	*Pacific Ocean*	*#8*
8	*Memaloose Point South*	*Pacific Ocean & Trask*	*#7,#9*
9	*Nolan Slough*	*Pacific Ocean & Trask*	*#8*
10	*Tomilinson Slough*	*Pacific Ocean & Tillamook*	
11	*Tillamook North*	*Tillamook & Trask*	*#12*
12	*Trask North*	*Trask*	*#11*
13	*Tillamook Central 1*	*Tillamook & Trask*	*#16*
14	*Trask South*	*Tillamook & Trask*	
15	*Tillamook Central 2*	*Tillamook*	
16	*Tillamook Iowa*	*Tillamook & Trask*	*#13*
17	*Tillamook South*	*Tillamook*	

Nine sites are also associated in four contiguous blocks, usually separated by cross dikes, minor roads and/or channels. Because we cannot identify the integrity of the separation between these sites, we cannot preclude that returning tidal inundation to one will not result in flooding of a contiguous site. Combined, they may represent the following, potentially larger and more complex, sites:

- *#4-Hall Slough and #5-Wilson River = 198.2 ha combined*
- *#7-Memaloose Point North, #8-Memaloose Point South, and #9-Nolan Slough =158.9 ha combined*
- *#11-Tillamook North and #12-Trask North = 90.8 ha combined*
- *#13-Tillamook Central 1 and #16-Tillamook Iowa = 52.8 ha*

Tidal Wetland Prioritization (2012)

The largest high-priority sites were along the eastern bay fringe; other high-priority sites were identified along Hathaway, Squeedunk, Hall and Hoquarten Sloughs; and in the upper tidal reaches of the Tillamook River. Twenty-one sites (1809A, about 30% of the wetland area) were ranked "medium-high;" the largest of these were located in the Trask and Tillamook sub-basins. Most of the remaining sites (55 sites, totaling 2911A) were in the medium and medium-low

groups. Only 10 sites (430A) were ranked "low;" these lower-ranked sites should not be considered substantially different from the "medium-low" sites due to the factors listed above.

Many of the prioritized sites were located in sub-basins and other geographic areas prioritized in previous studies of the Tillamook Bay estuary and watershed. For example, the USACE Feasibility Study (USACE 2005) and Project Exodus (NHC and HBH Consulting Engineers 2010) recommended wetland acquisition, restoration and flow management covering several high and medium-high priority sites (Sites 38, 39, 40, 44, 52, and 53, plus parts of several other sites). The large, high-priority tidal marsh sites on the eastern bay fringe were ranked high for juvenile salmonid production potential by Simenstad et al. (1999). The high and medium-high priority sites along the Tillamook River were within sub-basins prioritized for coho intrinsic potential and landowner outreach in the Tillamook Bay Computational Ecological Restoration Prioritization (CERP) tool. Most of the prioritized wetlands were within the lowland floodplain area identified in the Integrated River Management System (Philip Williams and Associates 2002); levee and dike modifications (such as wetland restoration via dike breaching or dike setbacks) were recommended in this area.

This prioritization is a first step in strategic planning for conservation and restoration in the Tillamook Bay estuary. ***In general, the next step in action planning involves outreach to find those landowners interested in restoring or conserving the identified sites.***

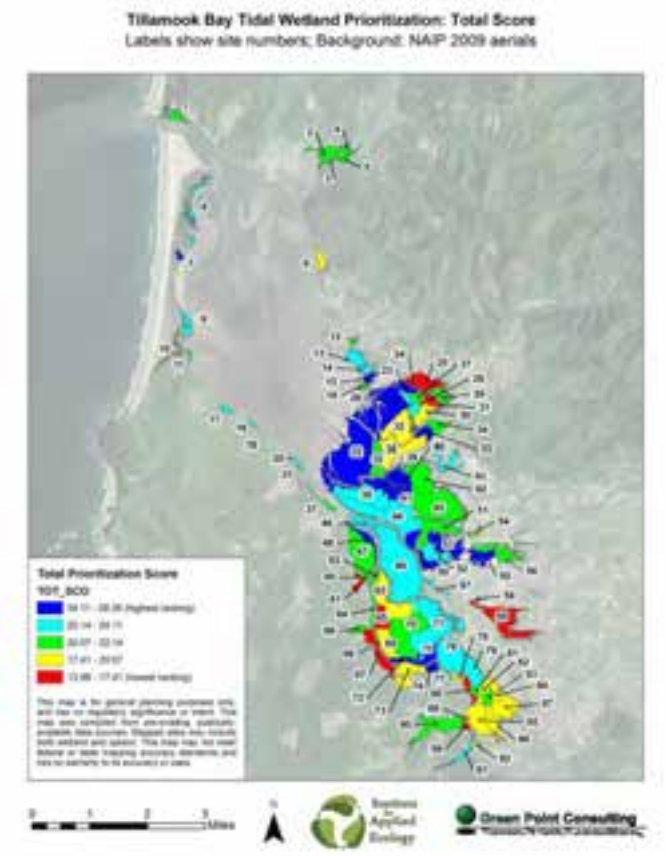


Figure 2: Prioritized Tidal Marsh Restoration Sites from Ewald and Brophy (2012)

Culvert Assessment and Prioritization Plan for Fish Passage in the Tillamook Bay Watershed (2012)

We identified 1,526 potential crossings through the initial GIS-based identification effort discussed above. We did not receive permission to access 362 of the GIS-identified crossing locations that occurred on private lands or required travel on private roadways.

We visited 853 of the 1,526 GIS-identified crossings during field work for this report. In addition, we collected information on 20 crossings not identified by GIS, but which appeared notable to field crews when observed in the field. Therefore, we surveyed a total of 873 crossings for this report. We identified 658 NFC crossings (465 culverts, 190 bridges, two fords, and one hatchery diversion structure) and 215 Fish Culverts: 21 (10 percent) were not barriers to juvenile fish passage (Green), 36 (17 percent) were partial barriers to juvenile fish passage (Gray) and 156 (73 percent) were complete barriers to juvenile fish passage (Red). We lacked sufficient information for two culverts to determine a barrier rating (2 unknown – 1 percent).

Kilchis River Basin - We surveyed 24 fish culverts in the Kilchis River Basin (Table 3). These crossings affected a total of approximately 12.4 miles of upstream habitats (Table 9). There were 10 High Priority culverts in this basin. We rated four culverts in the Kilchis Basin as Medium Priority. Six culverts in this basin received scores that placed them in the Low Priority range. In addition, four culverts in this basin received scores that would have placed them in the Low Priority range, but these did not appear to be barriers to fish passage at the time of our survey.

Miami River Basin - We surveyed 21 fish culverts in the Miami River Basin (Table 4). These crossings affected a t otal of approximately 13.8 miles of upstream habitats (Table 9). There were seven High Priority culverts in this basin. We rated six culverts in the Miami Basin as Medium Priority. Six culverts in this basin received scores that placed them in the Low Priority range. In addition, two culverts in this basin received scores that would have placed them in the Low Priority range, but these did not appear barriers to fish passage at the time of our survey.

Tillamook Bay Tributaries - We surveyed 35 fish culverts on streams that outlet directly into Tillamook Bay or Cape Meares Lake (Table 5). These crossings affected a total of approximately 13.8 miles of upstream habitats (Table 9). There were 13 High Priority culverts on these streams. Notably, 10 of these 13 crossings occur on two streams in the Bay City area: Patterson Creek and Doty Creek. We rated 13 culverts on Tillamook Bay tributaries as Medium Priority. Nine culverts in this basin received scores that placed them in the Low Priority range.

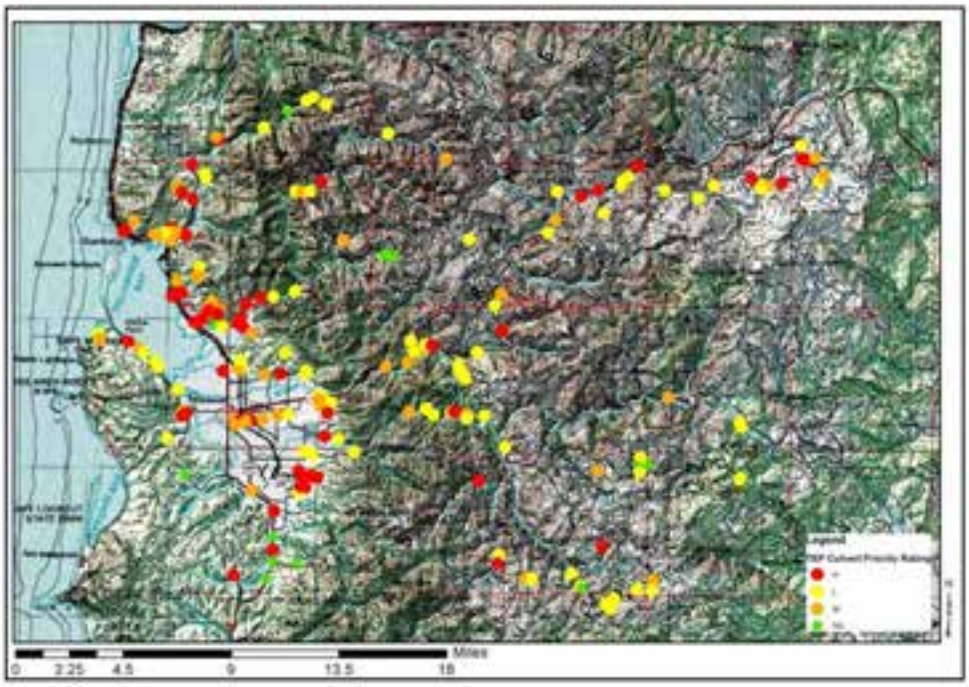
Tillamook River Basin - We surveyed 15 fish culverts in the Tillamook River Basin (Table 6). These crossings affected a total of approximately 35.6 miles of upstream habitats (Table 9). There were five High Priority culverts in this basin. We rated three culverts in the Tillamook Basin as Medium Priority. Two culverts in this basin received Low Priority ratings. Additionally, we surveyed two culverts in this basin that did not appear to be barriers to fish passage at the time of our survey, but received scores that would have placed them in the High Priority range (due

primarily to the quality and quantity of upstream habitats). There were three similar culverts that received scores that would have placed them in the Medium Priority range.

Trask River Basin - We surveyed 64 fish culverts in the Trask River Basin (Table 7). These crossings affected a total of approximately 35.8 miles of upstream habitats (Table 9). There were 17 High Priority culverts in this basin. We rated 11 culverts in the Trask Basin as Medium Priority. Thirty (30) culverts in this basin received Low Priority ratings. Additionally, we surveyed one culvert in this basin that did not appear to be a barrier to fish passage at the time of our survey, but received a score that would have placed it in the High Priority range (due primarily to the quality and quantity of upstream habitats). There were three similar culverts that received scores that would have placed them in the Medium Priority range and two that scored in the Low Priority range.

Wilson River Basin - We surveyed 56 fish culverts in the Wilson River Basin (Table 8). These crossings affected a total of approximately 30.9 miles of upstream habitats (Table 9). There were 12 High Priority culverts in this basin. We rated 10 culverts in the Wilson Basin as Medium Priority. Twenty-eight (28) culverts in this basin received Low Priority ratings. Additionally, we surveyed one culvert in this basin that did not appear to be a barrier to fish passage at the time of our survey, but received a score that would have placed it in the Medium Priority range (due primarily to the quality and quantity of upstream habitats). There are three similar culverts that received scores that would have placed them in the Low Priority range. Finally, two culverts in this basin were on public roads, but we were unable to collect any data on them because we did not have access to the adjacent private property. As a result, we were unable to calculate a prioritization score for these culverts.

Figure 3: Culvert Priority Locations



Tillamook County Nutrient Management (2014)

The Tillamook office of the Natural Resources Conservation Service has adopted a nutrient management program as a Conservation Implementation Strategy for Tillamook County. This effort is to direct federal Environmental Quality Incentive Program (EQUIP) funds to address the issues associated with manure spreading from dairy operations. The program goal is to "*Improve water quality through proper application rates and timing to reduce or eliminate loss of fecal coli forms to surface water adjacent to Tillamook County Pasture and Hay land*." The program is targeted to the lowland portions of the Tillamook Bay basin.



Figure 4: Tillamook County Nutrient Management Conservation Implementation Strategy Area

Tillamook Channel Stability (2012)

This report summarizes a preliminary study of bed-material transport, vertical and lateral channel changes, and existing datasets for the Tillamook (drainage area 156 square kilometers [km2]), Trask (451 km2), Wilson (500 km2), Kilchis (169 km2), Miami (94 km2), and Nehalem (2,207 km2) Rivers along the northwestern Oregon coast. This study, conducted in cooperation with the U.S. Army Corps of Engineers and Oregon Department of State Lands to inform permitting decisions regarding instream gravel mining, revealed that:

Study areas along the six rivers can be divided into reaches based on tidal influence and topography. The fluvial (nontidal or dominated by riverine processes) reaches vary in length (2.4–9.3 kilometer [km]), gradient (0.0011–0.0075 meter of elevation change per meter of channel length [m/m]), and bed-material composition (a mixture of alluvium and intermittent bedrock outcrops to predominately alluvium). In fluvial reaches, unit bar area (square meter of bar area per meter of channel length [m2/m]) as mapped from 2009 photographs ranged from 7.1 m2/m on the Tillamook River to 27.9 m2/m on the Miami River.

In tidal reaches, all six rivers flow over alluvial deposits, but have varying gradients (0.0001–0.0013 m/m) and lengths affected by tide (1.3–24.6 km). The Miami River has the steepest and shortest tidal reach and the Nehalem River has the flattest and longest tidal reach. Bars in the tidal reaches are generally composed of sand and mud. Unit bar area was greatest in the Tidal Nehalem Reach, where extensive mud flats flank the lower channel.

Background factors such as valley and channel confinement, basin geology, channel slope, and tidal extent control the spatial variation in the accumulation and texture of bed material. Presently, the Upper Fluvial Wilson and Miami Reaches and Fluvial Nehalem Reach have the greatest abundance of gravel bars, likely owing to local bed-material sources in combination with decreasing channel gradient and valley confinement.

Natural and human-caused disturbances such as mass movements, logging, fire, channel modifications for navigation and flood control, and gravel mining also have varying effects on channel condition, bed-material transport, and distribution and area of bars throughout the study areas and over time.

Existing datasets include at least 16 and 18 sets of aerial and orthophotographs that were taken of the study areas in the Tillamook Bay tributary basins and Nehalem River basin, respectively, from 1939 to 2011. These photographs are available for future assessments of long-term changes in channel condition, bar area, and vegetation establishment patterns. High resolution Light Detection And Ranging (LiDAR) surveys acquired in 2007–2009 could support future quantitative analyses of channel morphology and bed-material transport in all study areas.
A review of deposited and mined gravel volumes reported for instream gravel mining sites shows that bed-material deposition tends to rebuild mined bar surfaces in most years. Mean annual deposition volumes on individual bars exceeded 3,000 cubic meters (m3) on Donaldson Bar on the Wilson River, Dill Bar on the Kilchis River, and Plant and Winslow Bars on the Nehalem River. Cumulative reported volumes of bed-material deposition were greatest at Donaldson and Dill Bars, totaling over 25,000 m3 per site from 2004 to 2011. Within this period, reported cumulative mined volumes were greatest for the Donaldson, Plant, and Winslow Bars, ranging from 24,470 to 33,940 m3.

Analysis of historical stage-streamflow data collected by the U.S. Geological Survey on the Wilson River near Tillamook (14301500) and Nehalem River near Foss (14301000) shows that these rivers have episodically aggraded and incised, mostly following high flow events, but they do not exhibit systematic, long-term trends in bed elevation.

Multiple cross sections show that channels near bridge crossings in all six study areas are dynamic with many subject to incision and aggradation as well as lateral shifts in thalweg position and bank deposition and erosion.

In fluvial reaches, unit bar area declined a net 5.3–83.6 percent from 1939 to 2009. The documented reduction in bar area may be attributable to several factors, including vegetation establishment and stabilization of formerly active bar surfaces, lateral channel changes and resulting alterations in sediment deposition and erosion patterns, and streamflow and/or tide differences between photographs. Other factors that may be associated with the observed reduction in bar area but not assessed in this reconnaissance level study include changes in the sediment and hydrology regimes of these rivers over the analysis period.

In tidal reaches, unit bar area increased on the Tillamook and Nehalem Rivers (98.0 and 14.7 percent, respectively), but declined a net 24.2 to 83.1 percent in the other four tidal reaches. Net increases in bar area in the Tidal Tillamook and Nehalem Reaches were possibly attributable to tidal differences between the photographs as well as sediment deposition behind log booms and pile structures on the Tillamook River between 1939 and 1967.

The armoring ratio (ratio of the median grain sizes of a bar's surface and subsurface layers) was 1.6 at Lower Waldron Bar on the Miami River, tentatively indicating a relative balance between transport capacity and sediment supply at this location. Armoring ratios, however, ranged from 2.4 to 5.5 at sites on the Trask, Wilson, Kilchis, and Nehalem Rivers; these coarse armor layers probably reflect limited bed-material supply at these sites.

On the basis of mapping results, measured armoring ratios, and channel cross section surveys, preliminary conclusions are that the fluvial reaches on the Tillamook, Trask, Kilchis, and Nehalem Rivers are currently sediment supply-limited in terms of bed material—that is, the transport capacity of the channel generally exceeds the supply of bed material. The relation between transport capacity and sediment is more ambiguous for the fluvial reaches on the Wilson and Miami Rivers, but transport-limited conditions are likely for at least parts of these reaches. Some of these reaches have possibly evolved from sediment supply-limited to transport-limited over the last several decades in response to changing basin and climate conditions.

Because of exceedingly low gradients, all the tidal reaches are transport-limited. Bed material in these reaches, however, is primarily sand and finer grain-size material and probably transported as suspended load from upstream reaches. These reaches will be most susceptible to watershed conditions affecting the supply and transport of fine sediment.

Compared to basins on the southwestern Oregon coast, such as the Chetco and Rogue River basins, these six basins likely transport overall less gravel bed material. Although tentative in the absence of actual transport measurements, this conclusion is supported by the much lower

area and frequency of bars and longer tidal reaches along all the northcoast rivers examined in this study.
Previous studies suggest that the expansive and largely unvegetated bars visible in the 1939 photographs are primarily associated with voluminous sedimentation starting soon after the first Tillamook Burn fire in 1933. However, USGS studies of temporal bar trends in other Oregon coastal rivers unaffected by the Tillamook Burn show similar declines in bar area over approximately the same analysis period. In the Umpqua and Chetco River basins, historical declines in bar area are associated with long-term decreases in flood magnitude. Other factors may include changes in the type and volume of large wood and riparian vegetation (emphasis added)*. Further characterization of hydrology patterns in these basins and possible linkages with climate factors related to flood peaks, such as the Pacific Decadal Oscillation, could support inferences of expected future changes in vegetation establishment and channel planform and profile.*
More detailed investigations of bed-material transport rates and channel morphology would support assessments of lateral and vertical channel condition and longitudinal trends in bed material. Such assessments would be most practical for the fluvial study areas on the Wilson, Kilchis, Miami, and Nehalem Rivers and relevant to several ongoing management and ecological issues pertaining to sand and gravel transport. Tidal reaches may also be logical subjects for indepth analysis where studies would be more relevant to the deposition and transport of fine sediment (and associated channel and riparian conditions and processes) rather than coarse bed material.

Summary

The Importance of the Tillamook Watersheds for Salmon

Five rivers pour into Tillamook Bay, and together they are among Oregon's most important coastal rivers for salmon and steelhead. This is one of a few places where six different fish stocks return each year from the sea. The Tillamook Bay tributaries are known for wild runs of Chum, Coho, Spring and Fall Chinook, Winter Steelhead and Sea-Run Cutthroat Trout. Within these basins are eight crucial Salmon Anchor Habitats, these are identified as critically important areas for spawning and rearing of various anadromous species. Tillamook Bay hosts an average of 30,000 wild fall Chinook alone. Wild Spring Chinook populations, on the other hand have plummeted to extremely low levels.

There has been significant analysis of salmon use, production and habitat conditions of the tributaries to Tillamook Bay. The information points to the fact that the portions of the catchment that are dominated by igneous geology provide the gravel for spawning and low gradient, unconfined portions of the streams are the areas critical for abundant salmon and steelhead production. Anchor habitats have been identified in the Wilson, Trask, Kilchis and Miami Rivers. While the Tillamook does not have habitats that qualified as "anchor habitats, Low gradient streams are important for coho salmon. The underlying geology and geomorphic structure that provides the building blocks for habitat to support strong populations of

salmonids is illustrated in Figure 5. Assuring there is a complexity of tributary and river floodplain habitats and intertidal marshes will allow for multiple life history expressions of each salmon species.



Figure 5: Structural elements that support habitat forming processes for salmon in the Tillamook catchment.

Tillamook as an Altered Landscape

The Tillamook catchment reflects both a result of large-scale natural events (forest fire) and significant human intervention (forest planting, flood control, road building, etc.). Historical changes in the catchment include large scale fires some eight decades ago, increased sedimentation of the estuary, loss of tidal reach through diking and tidegating, reduction of floodplain access by flood control dikes and reduction of stream dynamics by loss of large wood and bank hardening. The historic lowlands were a complex of tidal and non-tidal wetlands

(Figure 6).The catchment has been traversed by roads which present impacts from fine sediment, impedance of fish passage and other effects. Along with over-harvest of anadromous fish, the result is a loss of productivity from the tributary streams. Figure 7 shows the geographic extent of historic fires, human alteration of forest vegetation for agriculture, urban and rural residential development, flood control and conversion of tidelands to pasture and road development. Reversing some of the loss of habitat connectivity and habitat simplification can help to increase aquatic productivity.

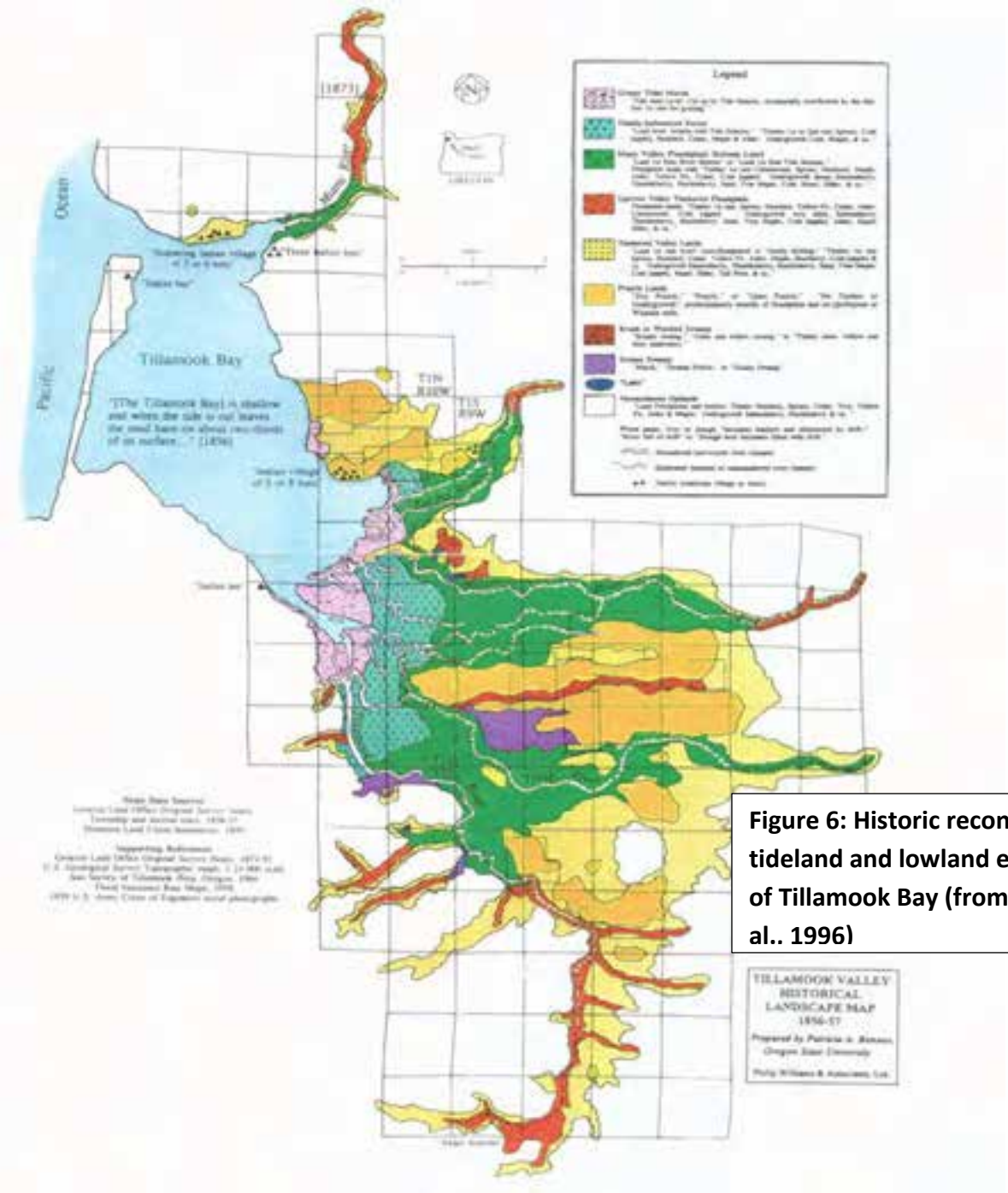


Figure 6: Historic reconstruction of tideland and lowland environments of Tillamook Bay (from Coulton et. al.. 1996)

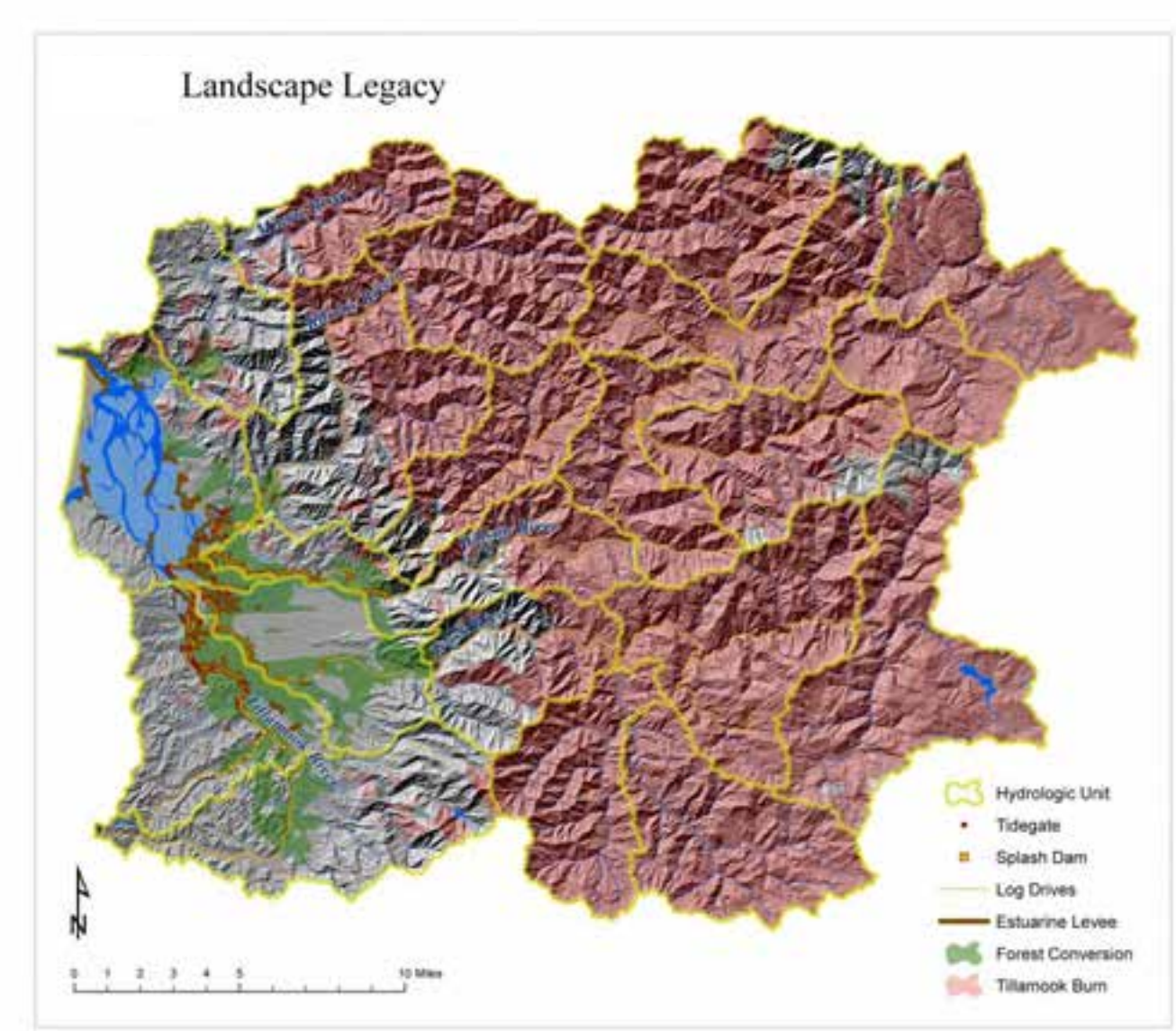


Figure 7: Dominant landscape alterations in the Tillamook catchment.

Current Land Use and Management Emphasis

The history of the Tillamook catchment has a significant effect on current management and land uses. The two dominant forces have been the Tillamook Burn fires and replanting of the forest and subsequent state management of the Tillamook State Forest and the flood control and conversion of tidelands and other wetlands to agricultural uses, especially dairy use.

Forest Lands: The Tillamook basin is unique in the recovery following large-scale fires in the catchment. As the Tillamook State Forest approaches commercial harvest age according to industry standards, there will be significant pressure for reentry and harvest. Management of the Tillamook State Forest will have a significant effect on the catchment that drains to

Tillamook Bay. The Tillamook State Forest is manages using a "structure based management" concept that is intended to provide older stand characteristics on the landscape through time. Structure-based management is designed to emulate many aspects of natural stand development patterns and to produce structural components found in natural stands, but in fewer years. By anticipating future patterns of forest development, foresters predict the potential for individual stands to produce specific characteristics such as a multi-layered canopy. The management also includes terrestrial and aquatic "anchor habitats" that emphasize current high diversity and productivity areas for terrestrial and aquatic species. Oregon Department of Forestry is currently updating their forest management plan.

"The Oregon Board of Forestry concluded in 2012 that the current approach for managing state-managed forestlands was not financially viable. A Board of Forestry subcommittee was formed to address these financial viability issues. Outcomes included directing the State Forests Division to examine alternatives to the current Forest Management Plan (FMP) for Northwest Oregon" (from ODF Staff report of November 5, 2014).

Both the U.S. Forest Service and Bureau of Land Management operate under the Northwest Forest Plan developed in 1995. While neither federal agency has extensive holdings in the Tillamook Bay watersheds, their lands are managed with an emphasis on either Adaptive Management or Late Seral management emphasis. U. S. Forest Service ownership (limited to a small area of the Trask watershed) is managed dominantly for late seral characteristics. The Bureau of Land Management parcels are relatively small and scattered in the lower Trask, Wilson and Kilchis drainages.

Private industrial forests are managed as tree plantations with a relatively short harvest rotation (typically 40 years).

The Garibaldi Forest managed by Ecotrust Forest Management (EFM) is managed for conservation and timber values. Ecotrust is a 501(c) nonprofit organization. Ecotrust Forest Management is a for profit affiliate of Ecotrust that does manage for conservation values but also does harvest timber on Garibaldi Forest under FSC certified practices using variable retention harvest, small openings, longer harvest rotations, no herbicide use in forest production, retention of older trees and forest structure, and other ecological forestry concepts.

Each entity that owns and manages forest resources in the Tillamook Bay catchment will have a different interest and need for assistance in identifying and implementing restoration projects. Care should be taken to recognize the various interests and limitations and challenges they pose. The council will need to build strong relationships with the private forest landowning community and have an understanding of the management directions for each of the different public owners. Forest land ownership patterns and management directions will change with changes in the economy and political changes at the state and federal levels of government.

Evaluating whether broadcast herbicide spraying is entering the aquatic environment could be a monitoring effort if done in conjunction with both industry and state forest landowners.

Agricultural Lands: The lowlands of the Tillamook Bay catchment have been significantly altered historically. An estimated 85-90% of the tidal freshwater and salt marshes in the Tillamook Bay catchment have been converted to other uses. While most of that conversion was done in the past, often with federal assistance there has been little cumulative effects analysis.

Farming produces almost 20 percent of the County's income on only 5 percent (approximately 35,000 acres) of its land. The North Coast Basin Agricultural Water Quality Management Area Plan characterizes the Tillamook catchment as: *"Of the five rivers in the Tillamook watershed, the Tillamook River flows through the most agricultural acres of the five Tillamook coastal plain rivers. It is also the slowest with the most meanders, making its way through the area's poorest drained soils. The other four major rivers emanate from steeper watersheds and move much faster through the system to the bay. Most dairies are in the Tillamook Basin… There are nine drainage districts in Tillamook County, incorporating several hundred acres in tidal lands. It is estimated that at least one-quarter of Tillamook agricultural lands are in these drainage districts."*

There has been a long-term dialog about the effects of habitat restoration on the viability of Tillamook Bay agriculture. Recognition of this perception and consideration of the economic viability of the agricultural industry will be an important factor in the evaluation of potential habitat restoration projects. The concern about loss of productive lands to conservation is not unique to Tillamook. Research in Australia (Aarons, 2011; Aarons & Gourley, 2012; Aarons et.al., 2013) show that the concern over lost productivity has complex considerations.

Managing nutrients from dairy waste has been a long term and chronic issue in Tillamook County. The listing of Tillamook Bay for exceedance of bacterial criteria and the frequent closure of shellfish harvest has resulted in conflict and the development of a TMDL for bacteria. NRCS has dedicated both evaluation (NRCS, 2001) and funding (NRCS and Tillamook SWCD, 2014) to reduce bacterial contamination in Tillamook Bay. While some progress has been made, it has been incremental.

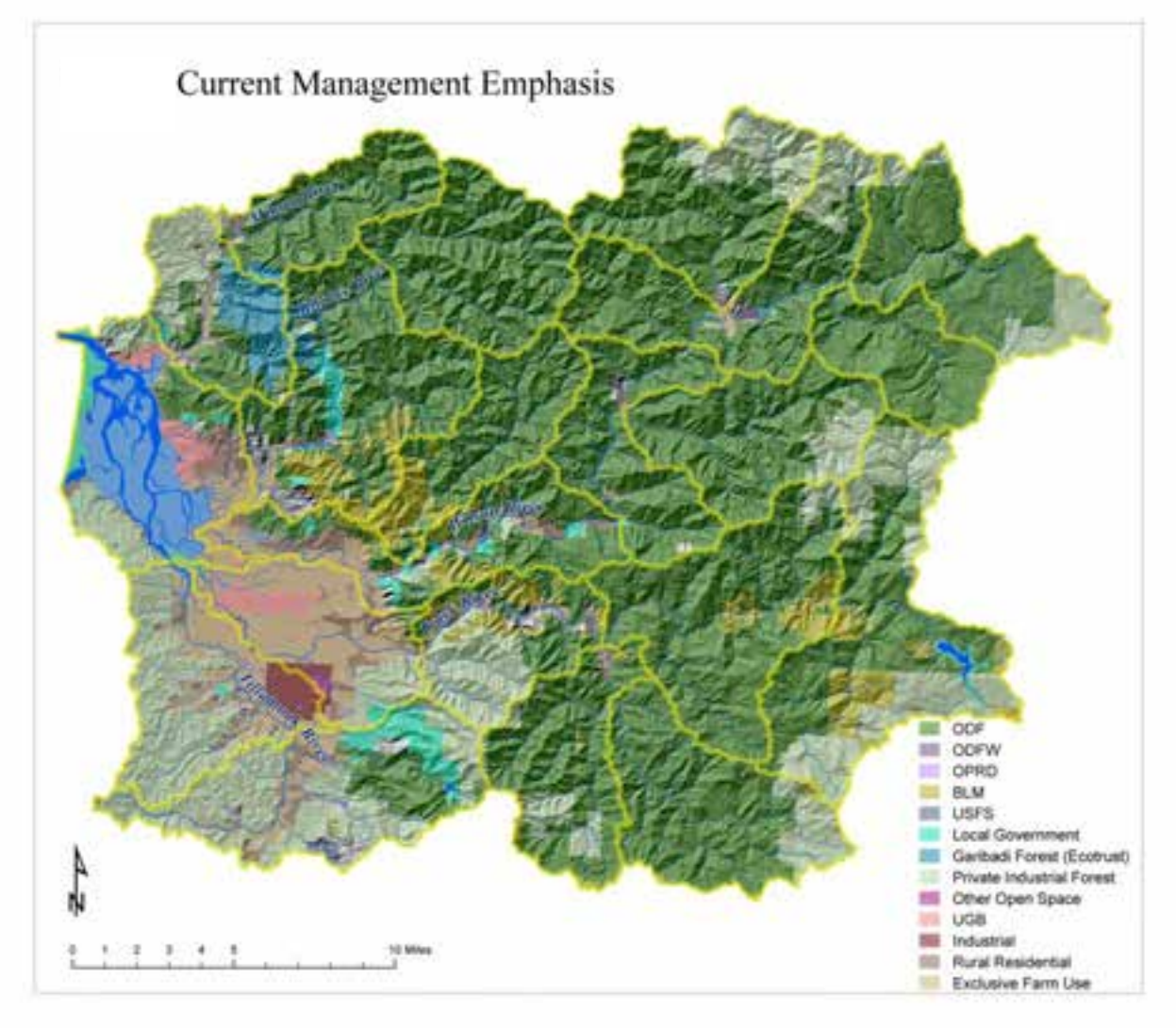


Figure 8: Current Land Ownership and Uses in the Tillamook Bay catchment

Tributary Summaries

From the information in the reports reviewed, the following is a brief summary of the conditions, challenges and opportunities for each tributary to Tillamook Bay (Figure 9). The Watershed summaries are taken mostly from the CERP document (Demeter Design, 2009).

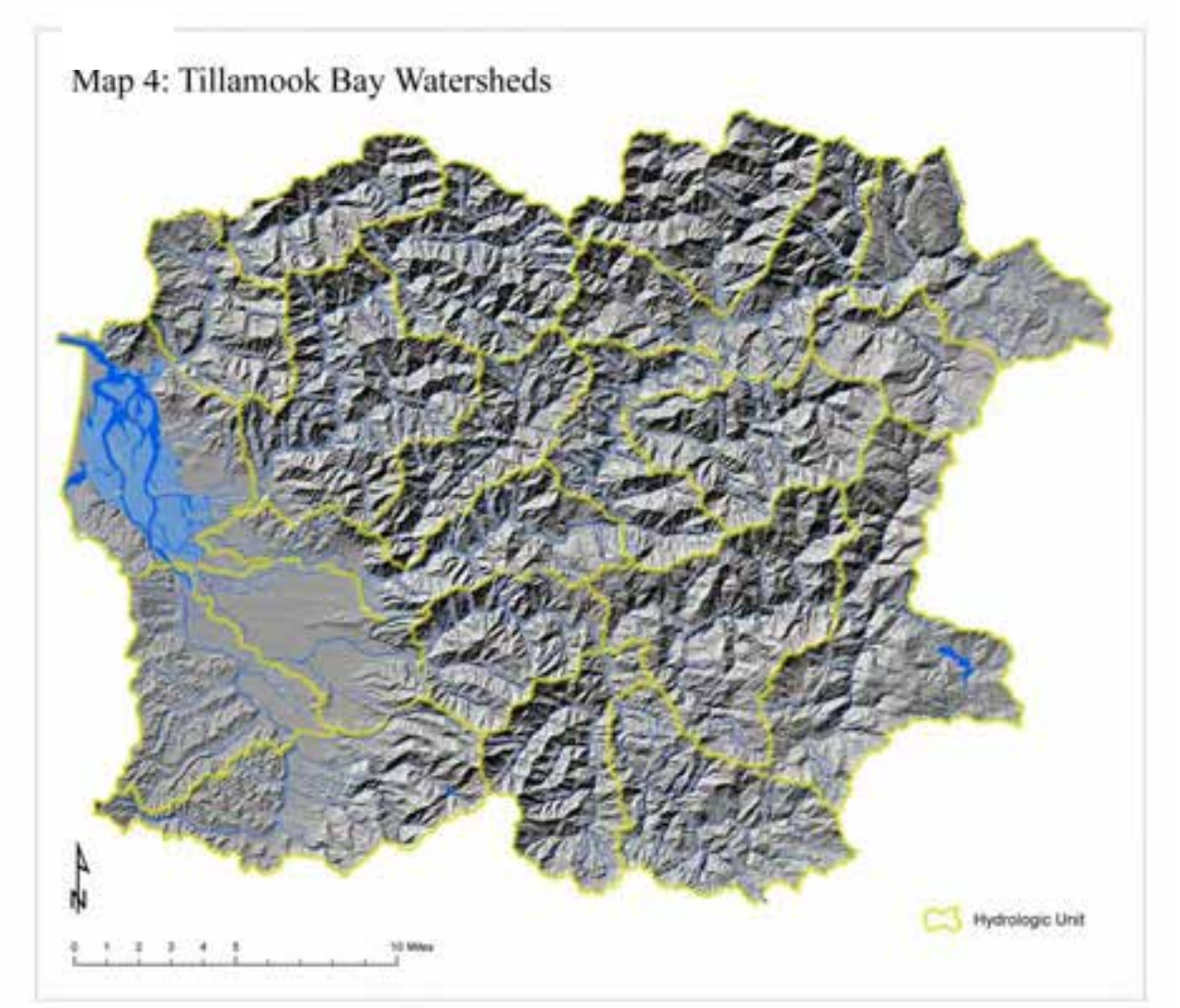


Figure 9: Tillamook Bay Catchment and Tributary Watersheds

Tillamook River

The Tillamook River is the southernmost basin in the TBW. The Western portion of the watershed is underlain by sandstone geology, resulting in low gradient streams with broad floodplains. The eastern portion of the watershed is dominated by a volcanic geology, resulting in higher gradient streams, with larger substrate size and narrower floodplains. Historically the lower portion of the mainstem formed the same interconnected network of sloughs and tidal wetlands as the other four rivers although diking reduces much of this historical network. The

basin is ~60 square miles. The Tillamook River watershed is a heavily altered, relatively low gradient stream with sandstone geology. The Tillamook historically produced coho salmon because of the low gradient and complex channel network. The history of log drives and splash damming has left the Tillamook scoured and simplified. The conversion of the lower river to pasture has left a legacy of altered stream courses and reduced aquatic productivity.

Coho, Steelhead, Cutthroat, Sturgeon, and Chum utilize portions of the Tillamook River Basin. Steelhead populations are largest within the higher gradient, volcanic streams of the Eastern Basin (Killam, Fawcett, Munson, and Simmons). Coho populations are largest in the upper Mainstem and Bewley Creek. The 2008 ***Tillamook River Coho Restoration Strategy; Habitat Assessment and Limiting Factors Analysis*** (Demeter Design, 2008) completed for the TBWC provides significant detail on the historical impacts and factors limiting coho and chum salmon and steelhead production from the Tillamook watershed.

Legacy Impacts: While the Tillamook drainage was generally spared from the Tillamook burn fires, it has been heavily logged, and the lowlands have been extensively altered by dikes and levees. The highly erodible sediments in the bulk of the watershed limit the inherent capacity of the Tillamook River to support a diversity of salmon. The low gradient stream sections are, however, important historical producers of coho and chum salmon.

Current Management Emphasis: The uplands are nearly all in private industrial forest ownership and managed as tree plantations. The lowlands are pastured for dairy and have a significant number of the dairy cows in the Tillamook Bay catchment (Strittholt et.al., undated).

Restoration Challenges/Priorities: Summer temperature is the consistent limiting factor for the Tillamook River. Water quality in the major streams of the Miami River watershed would be considered impaired because of the frequency of exceedence of the evaluation criteria for temperature, nitrogen, and bacteria. A primary issue is the lack of undisturbed stream reaches on mainstem channels. The Tillamook River watershed is not meeting potential conditions and many improvements can be made to increase Coho smolt survival, specifically riparian planting along the mainstem and log placement in the eastern tributaries. There are 5 high priority fish passage barriers identified for the Tillamook River. The 2008 report identifies twenty five high priority restoration projects and four conservation priorities. These projects and priorities remain important for TBWC.

Miami River

The Miami River drains approximately 36.7 sq. mi. of land and is the smallest watershed of the Tillamook Bay drainage. The watershed is characterized by steep forested uplands and flat alluvial lowlands. Much of the higher elevations have been harvested for timber or were burned as a part of the Tillamook Burns and are now second growth forests. The lower Miami River drains agricultural and rural residential areas and enters Tillamook Bay adjacent to the City of Garibaldi. There is a marked contrast between conditions in the uplands where forest and natural resource uses are dominant and the lowlands and valley bottoms where

agricultural, rural residential, and urban uses prevail. In general, aquatic and riparian resources are the most heavily impacted in the lowlands, while conditions are the best in the uplands. Many of the stream reaches in the Miami watershed are low gradient channel types sensitive to disturbance and important habitat for anadromous salmonids.

Cutthroat, Chum, Steelhead, Chinook, and Coho Salmon are present throughout the basin. The Miami was the least productive basin for Coho of the five rivers tributary to Tillamook Bay. The mainstem produces the vast majority of the Coho, with Moss, Illingsworth, Peterson, and Prouty Creeks producing significant numbers of juveniles as well. The lower river has excellent potential for Chum production.

Legacy Impacts: The Tillamook Burn, road building, salvage logging, and timber harvest, conditions has resulted in sediment in the rivers and streams of the Miami River watershed. Roads are the primary source of sediment related to human activity. Levels of in-stream LWD and current and future recruitment from upslope and streamside forests are the primary factor limiting aquatic habitat conditions. Based on aquatic habitat survey data, only two stream reaches are considered to have adequate pieces or volume of large wood on ODF lands.

Current Management Emphasis: The upper watershed is managed by Oregon Department of Forestry. The Garibaldi Forest managed by Ecotrust Forestry is lower in the watershed from Tillamook State Forest lands and is managed for conservation values and timber production.

Restoration Challenges/Priorities: The Oregon Department of Forestry has identified the following restoration activities for the Upper Miami watershed: alternative vegetation management to improve large wood recruitment potential; in-stream enhancement to improve habitat complexity; enhance conditions on lands downstream from ODF lands; and upgrades to further minimize potential road related risks to aquatic and riparian resources. Restoration of riparian vegetation and prevention of livestock grazing near streambanks will lessen sediment contribution from streambank erosion. There are 7 high priority fish passage barriers identified for the Miami. The Miami Watershed Assessment has identified specific stream reaches and priorities for these actions.

Kilchis River

The Kilchis River is the third largest drainage in the TBW. The Kilchis River is dominated by a highly resistant volcanic lithology that forms the high-gradient, confined stream channels found throughout much of the stream network. The lowest reaches of the mainstem consist of an interconnected network of sloughs and tidal wetlands. The watershed encompasses ~65 sq miles and has a peak elevation of 3,294 ft.

The Kilchis River from the Little South Fork to Sharp Creek has high intrinsic potential for coho salmon. The Kilchis river supports populations of Coho, Steelhead, Chinook, Cutthroat, as well as Chum in the lower basin. It is the third largest producer of Coho among the five rivers.

Legacy Impacts: The Cedar Butte fire burned portions of the Kilchis Watershed in 1918. The Tillamook Burn profoundly affected the use of forest lands in the Kilchis watershed. The majority of the uplands of the Kilchis are in the Tillamook State Forest. There is a small acreage of Bureau of Land Management lands and private forest lands. The Kilchis County Park lies along a portion of the mainstem Kilchis River. The Kilchis Park contains a rare remnant pocket of old growth forest and undisturbed river corridor.

Early settlers came to Tillamook beginning in 1851 primarily to farm and they recognized the rich agricultural potential of the lowlands. Within 30 years of the initial settlement, much of the lowland forest was cleared, diked, and drained to increase the amount of land available for agriculture. A significant portion of the lower intertidal and freshwater wetland areas was converted to pasture by the early 1900s (Coulton et al. 1996).

Current Management Emphasis: The upper Kilchis is dominantly State Forest land managed by the Department of Forestry. The lowlands are dominantly dairy pasture.

Restoration Challenges/Priorities: Much like the Miami, Wilson and Trask, the Kilchis uplands have been altered by fire and salvage logging that nearly eliminated large wood from channels and have hardwood dominated riparian areas. There are 10 high priority fish passage barriers identified for the Kilchis.

Wilson River

The Wilson River is the largest drainage in the TBW. The Wilson River is dominated by a resistant, volcanic lithology. This results in relatively high gradient, confined stream channels throughout much of the upper stream network. However, local areas of low gradient, broad floodplain channels are found throughout the upper basins. Devil's Lake Fork is an example of such a segment. The lower portion of the mainstem forms an interconnected network of sloughs and tidal wetlands in conjunction with the Tillamook, Trask, and Kilchis Rivers. The watershed encompasses ~194 sq miles and has a peak elevation of 3,691 ft.

The Wilson is the single largest producer of Coho in the TBW. Additionally, the Wilson supports Steelhead, Chinook, and a small Chum population. The Little North Fork, Devil's Lake Fork, Jordan Creek, and the North Fork Wilson represent the most important destinations for Coho spawning and rearing.

Legacy Impacts: The majority of the Wilson watershed burned during the Tillamook Burn. As a result, the majority of the watershed is composed of relatively young conifers. Douglas Fir is dominant in the upper watershed, although the Swiss Needle Cast virus has motivated conversion of many forestry lands to Western Hemlock. Large portions of the lower watershed are dominated by grasses as a result of dairying. The majority of the riparian corridor

is dominated by Red Alder and riparian shrub species such as Salmonberry. Historically much of the riparian corridor was dominated by large conifers. Knotweed is present up to Idiot Creek.

Current Management Emphasis: The upper portion of the Wilson is predominantly managed for forestry with ODF as the majority landowner. Private Timber companies own industrial timberland in the upper watershed and BLM owns a relatively small portion of the watershed. The Wilson has a broad alluvial floodplain that is used primarily for dairying. The lower mainstem is extensively diked and is prone to flooding. The Wilson river floodplain contains the lowest portion of State Highway 101 that is lined by commercial development.

Restoration Challenges/Priorities: Like most of the Tillamook Burn, large wood was actively removed during the 1970s and naturally occurring logjams are still actively removed to allow for boat passage. The net result is a simplified stream channel throughout much of the stream network resulting in low quality habitat fos salmon and steelhead. The lower river has elevated summer water temperatures that adversely affect juvenile salmonids. There are 7 high priority fish passage barriers on the Miami and tributaries.

Trask River

The Trask River is the second largest drainage in the TBW. The Trask has a mixed volcanic/sedimentary lithology. This results in a complex mix of stream channel types in the upper watershed ranging from high gradient, confined to broad, low gradient reaches. Upon leaving the Coast Range, the Trask enters a broad, alluvial floodplain. The lower portion of the mainstem forms an interconnected network of sloughs and tidal wetlands. The watershed encompasses ~175 sq miles and has a peak elevation of 3442 ft.

The Trask Watershed supports large populations of Coho, Steelhead, and Chinook. The Trask is second to the Wilson in Coho abundance. The primary spawning destinations of Coho are Elkhorn Creek and the East Fork Trask. The mainstem Trask provides important habitat for summer and fall Chinook.

Legacy Impacts: Large wood was actively removed during the 1970s in an effort to improve fish passage and address concerns about low dissolved oxygen. The Tillamook Burn and subsequent salvage logging operations decreased the quantity of wood available for future recruitment to the stream channel. The net result is a simplified stream channel throughout much of the stream network. The lower portion of the watershed has been heavily diked for flood control and conversion to pasture. The mouth of the Trask River as it drains to Tillamook Bay has been relocated.

Current Management Emphasis: The upper Trask is primarily managed for forestry. ODF is the major landowner in the basin with private, and BLM also managing land within the

watershed. The lower Trask River is extensively used for dairying. Holden Creek, one the few urban streams within the watershed, drains into the lower Trask river.

Restoration Challenges/Priorities:

The majority of the watershed is composed of relatively young conifers. Douglas Fir is dominant in the upper watershed, although the Swiss Needle Cast virus has motivated conversion of many lower lying forestry lands to Western Hemlock. Large portions of the lower watershed are dominated by grasses as a result of dairying. Major sub-basins in the lower watershed such as Holden Creek, Gold Creek, and Mill Creek support minimal salmonid populations due to water quality issues and barriers to passage. Water quality in the Trask River is also considered impaired by excess summer temperatures. The Trask River is unique in that the mouth of the mainstem was moved. The artificial mainstem channel is subject to flooding. There are 17 high priority fish passage barriers on the Trask River and its tributaries.

Setting Priorities and Considering Opportunity

There is a growing literature on the role of opportunity and willingness to participate in conservation activities. The consideration of the social and economic factors that limit the application of biological or ecologically identified priorities need to be specifically considered (Smith et. al., 2009; Knight et. al. , 2011; Cowling, et. al., 204; Nuno, et. al. , 2014; Knight and Cowling, 2007; Guerrero et. al. , 2012). This literature suggests the identification of social and economic limitations is as important as identifying biological/ecological priorities. When applied to the Tillamook Bay Watershed it means that specific consideration must be given to the different forest landowner types (federal, state, private), agricultural land uses (primarily dairy) and urban commitment. In Oregon the limits of urban development have been relatively well confined and described (urban growth boundary). The land allocation to agricultural and forest lands have also been relatively clearly proscribed.

These considerations can best be summed up by a quote from Aldo Leopold (1935) "*One of the anomalies of modern ecology is that it is the creation of two groups, each of which seems barely aware of the existence of the other. The one studies the human community as if it were a separate entity, and calls its findings sociology, economics and history. The other studies the plant and animal community and comfortably relegates the hodge-podge of politics to the liberal arts. The inevitable fusion of the two lines of thought will, perhaps, constitute the outstanding advance of the present century."*

It is important to engage the "hodge-podge" to identify effective restoration and conservation opportunities (Knight et.al., 2011). In the Tillamook Bay watershed that means working with the different land users, understanding their limitations and opportunities and building a shared understanding of the social and economic relationships that affect each community. Building the understanding and communication among the different ownership interests and building a better understanding of the benefits and risks of habitat restoration will be a significant challenge for the council. One of the priorities of the council could be to build a

stronger understanding of the social and economic dynamics of the land management stakeholders and explore with greater nuance how they might relate to habitat restoration actions. The work of Knight et.al., (2010) provides one approach to building understanding of the human and social dimensions of conservation opportunities on private lands.

Restoration Rules of Thumb

The extensive biological information available for the Tillamook Bay catchment and the previous prioritization work remains quite valid. The biological priorities as identified for salmon species (Demeter Design, 2008; Bio-Surveys, 2008; Meiwald et.al., 2008) and estuarine habitat restoration (Simenstad et.al., 1999; Ewald and Brophy, 2012) remain appropriate as guides for outreach and exploration of restoration opportunities. Using an approach that recognizes the limitations posed by human institutional factors makes the job of pursuing priorities more complex.

The TBWC was developed to represent the entire catchment and has the mission to "***…build collaborative, voluntary partnership with communities and landowners, to protect, maintain and improve the health of the Tillamook Bay Watershed…***" One of the ways to accomplish this mission is to be open to opportunities that fit within a larger conceptual strategy. To accomplish the mission, the following "rules of thumb" for prioritizing the work of the council are suggested.

Rule of Thumb #1: Work from Strength: Recognize the Inherent Productive Capacity of the Watershed

There are watersheds in the basin that have inherent features that provide better habitat for anadromous fish than others. Watersheds dominated by igneous rock are typically more productive that watersheds dominated by marine sandstones. Reaches of low gradient, unconfined stream conditions have more productive capacity for salmon and steelhead than confined higher gradient stream segments. These areas provide the "skeleton" for salmon habitat in the basin. While salmon and steelhead use nearly all the watershed that they can reach, the areas with more abundant spawning gravel (igneous watersheds) and complex habitats (low gradient, unconfined segments) are the areas that have the greatest capacity to produce healthy runs.

The high production watersheds are those areas identified for potential "anchor habitats. Focal basins should be the Kilchis and Miami Rivers in their entirety. The East Fork of the South Fork of the Trask and the North Fork of the North Fork of the Trask (Elkhorn Creek) and the Devils Lake Fork and Ben Smith Creek watersheds of the Wilson River are important production areas.

Rule of Thumb #2: Create, Maintain, or Enhance a Full Range of Habitats from the Headwaters to the Bay

As you work from the areas of high productivity ensure there is continuity throughout the basin to Tillamook Bay. A number of recent studies have shown that a number of species of salmon have complex life history expressions that reflect the habitats available throughout the basin. As you work in the upper watershed, conduct outreach lower in the basin to landowners providing them with information about the work and explaining how their reach can help to benefit the desired species. Connectivity through elimination of barriers and ensuring a sequence of complex habitats is necessary to maintain resilient populations of salmon and steelhead.

Continuing efforts throughout the Kilchis and Wilson Rivers from forested uplands to the agricultural lowlands will be important. Looking for opportunities along the corridor from the headwaters to the Bay in these basins will be important. Priority lowland marsh habitats in the Hall Slough area should be evaluated.

Rule of Thumb #3: Take Actions Relevant to the Dominant Land Uses in the Basin

There is a pronounced distinction of land uses in the Tillamook Bay catchment. The uplands are dominated by forest management, which varies by ownership. The lowlands are dominated by agriculture and the historical investment in conversion of floodplain and tidal surge plain into dairy pastures. Each land use presents challenges for aquatic habitat restoration and will require different strategies and opportunities for developing both relationships and restoration projects.

Rule of Thumb #4: Encourage the Development of Life History Diversity

Salmon are adapted to diverse habitats that vary both spatially and temporally by life history adaptations. The location of rearing, movement patterns and ocean entrance may vary significantly depending on the availability of different habitats within a river system. Recent research on the Oregon coast has demonstrated at least five life history expressions when a broad range of habitats became available (Jones et.al., 2014). What this guidance suggests is that as projects are evaluated look for the opportunities to create a diversity of habitats throughout a tributary system. Do not focus only on mainstem habitats: look for opportunities to expand the types of habitats throughout the tributary watershed that would allow for diverse life history expression.

Applying the Rules of Thumb

The rules of thumb cannot all be applied to the same project or opportunity. They are suggested as an approach to be used when opportunities are presented to the Council or when the Council wishes to create the opportunity for projects. For example, as the Tillamook-Nestucca Fish Passage Partnership implements their first few projects, the TBWC could follow

up with projects that provide habitat diversity to the tributary systems made accessible by adding large wood, reconnecting off-channel habitats, restoring conifer dominance to riparian habitats, etc. This applies Rule of thumb #4 and #2. Since you would be working in the tributaries affected by barrier removal you likely would not address Rule of Thumb #1 or #2. The primary purpose of the Rules of Thumb is to be intentional about how the opportunities fit into a larger view of how the watershed functions.

Using Existing Priorities

The CERP project (Demeter Design, 2009) developed the following priorities: "• ***Bewley*** *– Listed as outreach priority #1, long-term Coho priority #10.* A Limiting Factors Analysis is taking place within Tillamook River Basin. Coho abundance, intrinsic potential, and land-use data were the primary factors in the outreach determination. Additionally, disturbance scores drove the long-term priority score. Outreach within this basin might focus on long-term actions aimed at restoring Coho populations such as increasing channel complexity and shade. This basin should be part of a broader Tillamook River outreach effort including the mainstem.*

• ***Upper and Lower Tillamook Mainstem*** *– Upper Tillamook Mainstem is #8 on the outreach priorities. Lower Tillamook mainstem is outreach priority # 11, long-term Coho priority #4, long-term Chum priority #3. A Limiting Factors Analysis is taking place within Tillamook River Basin. Outreach activities within this basin might focus on long-term restorative actions aimed at increasing Coho populations such as increasing channel complexity and shade. Additionally, Chum usage in the lower watershed should be evaluated. Immediate actions could include riparian plantings, wood placement, and wetland reconnection.*

• ***Coal Murphy*** *– Listed as outreach priority #2, immediate Chinook restoration #4, immediate Steelhead #3, and Immediate Chinook Conservation #5. There has been one known dam removal within basin. Outreach efforts might focus on large wood placement in mainstem channels and set-asides in large wood supply basins. Discussions of natural wood migration might be important within this basin. Riparian set asides and property purchase should also be considered in minimally disturbed areas. Restoration of tidal wetlands will benefit existing Chinook and Chum populations.*

• ***Lower Trask Mainstem Holden*** *– Outreach priority #5, long-term Coho priority #1, long-term Chinook priority #2, long-term Chum priority #2. There is ongoing water quality testing within the basin. This basin has been severely modified. With the high urban and rural residential development that occurs on the banks of Holden Creek and the significant entrenchment of other tributaries within the basin, any restoration efforts within the basin will take many years to complete. Outreach within this basin might be more effective if conducted in multiple stages with the assumption that properties may change hands within the time it takes to complete restoration projects. Additionally, outreach may be most effective by addressing high and low density areas separately. This basin should be addressed as part of the broader Trask outreach efforts which includes the Middle Trask Mainstem.*

• ***Middle Mainstem Trask*** *– Outreach priority #6, immediate Chinook restoration #6, immediate Chinook conservation #10, long-term Coho priority #8, long-term Chinook priorities #7, long-term Chum restoration #5. Outreach efforts should be consistent with restoring habitat function for all Salmonid species. Additionally, mainstem riparian easements or acquisition should be discussed in Chinook spawning areas.*"

These are appropriate starting points for the Council. The individual efforts should be looked at through the lens of the Rules of Thumb and consider the roles and opportunities of the Council in relation to other restoration partners (Dept. of Forestry, Tillamook Estuaries Partnership, etc.).

Priority Considerations

The following are recommendations that flow from the efforts previously conducted to identify ecological priorities and from experience from successful locally led conservation efforts from across Oregon.

1. Select the high value watersheds (Upper Kilchis, Trask, and Wilson) for emphasis.
2. Consider working with the Tillamook Estuaries Partnership to conduct a process based evaluation of restoration opportunities similar to the work in the Nehalem basin.
3. Become familiar with the landownership and land use patterns of these watersheds.
4. Identify and document where projects have been implemented in these watersheds.
5. Use the Restoration Committee to identify landowners and projects that would have the greatest benefit to aquatic habitats.
6. Develop a consistent approach for outreach and landowner contact so there is a consistent and available approach to address landowner interests when expressed. (Consider the model used by the Mid-Willamette watersheds or North Coast Watershed Council Assistance grant (OWEB #214-1015).
7. Have in mind priority restoration actions by land use that can be a sieve for both outreach and for responding to landowner interest. For example, agricultural lowlands should be looked at in terms of restoring floodplain connectivity, reducing potential bacterial contamination, restoring riparian forest conditions, etc. while forested lands should be looked at to restore stream complexity for overwintering habitat, restoring connectivity by eliminating barriers, restoring stream complexity and reducing road impacts.
8. Explore the utility and value of monitoring temperature in the lower rivers.
9. Use the council to reinforce the priorities and ask them to contact the interests they represent with a specific list of opportunities keyed to land use dominance.

Upper Watershed Emphasis

The bulk of the habitat restoration work in the uplands is similar across the five watersheds, replacement of large wood and restoring a conifer component to the riparian vegetation to promote future large wood delivery.

Lower Watershed/Estuary Emphasis

The lower watershed of the tributaries to Tillamook Bay have been significantly altered by flood control efforts such as diking, tidegating and other actions designed to reduce flood impacts and to expand usable dairy lands. Working with the dairy industry to identify opportunities to remove or relocate dikes and to open blocked channels would improve juvenile salmon rearing

habitat. Assuring riparian forest vegetation is available to provide shade and future large wood is also important in the Tillamook Bay lowlands.

Evaluating Progress

Monitoring the outcomes of the combined actions of the conservation partners in the Tillamook Bay watersheds is important to both learn what it takes to get a "signal" from the actions and to document whether or not the restoration efforts are having a measurable effect. A cooperative monitoring effort among NRCS, OWEB, DEQ, and ODA evaluated the effectiveness of restoration actions in the Wilson River drainage in reducing bacteria.

A unique and important feature of all the streams that enter Tillamook Bay is the relatively high level of juvenile salmon fish usage of the lower rivers for rearing. These areas of the basin could be sentinels of the conditions of each watershed. Consistent temperature measurements over a long period of time at the head of tide, and the main stem above the head of tide, could provide a useful indicator of the cumulative effects of land management and restoration actions throughout the catchment above.

Close cooperation and communication with the agencies monitoring conditions in the catchment could identify a specific role for the TBWC in monitoring effectiveness of restoration and land management actions.

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"***Conservation will ultimately boil down to rewarding the private landowner who conserves the public interest.***"
Aldo Leopold from Conservation Economics (1934) in River of the Mother of God

The following Personnel Guidelines were amened December 14, 2020 and reviewed by the TBWC board again on 12/20/2022. The Board is currently working to update the Personnel Guidelines in preparation for hiring a Coordinator should the Capacity Support grant application be approved.

Personnel Guidelines

Tillamook Bay Watershed Council

Adopted: January 30, 2007
Amended: December 14, 2020

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1. INTRODUCTION

The Tillamook Bay Watershed Council (TBWC) is committed to fair, clearly stated, and supportive relationships between the TBWC Board and its staff. The personnel guidelines of the TBWC have been established in order to provide a guide to the personnel practices of the TBWC and to ensure consistency of personnel decisions. It is the intention of the TBWC to administer the personnel programs in a manner which complies with all applicable federal, state and local regulations. This document is designed to provide guidance to employees at the TBWC. It is not a part of any contract between the TBWC and its employees. It is only a set of guidelines for personnel practices. These guidelines may be revised at any time by the Board of Directors of TBWC.

At-Will Employment

All employees of TBWC are "at will employees". There is nothing in these guidelines that should cause an employee to believe otherwise. An "at will employee" means that an employee may be terminated at any time with or without cause and with or without notice without subjecting the TBWC to a claim for breach of an employment contract or any other wrongful termination claim.

Employee Classification

All employees are classified as either regular or temporary. Regular employees are employees hired without a specific termination date. Temporary employees are employees whose position at the time of hire is for a short-term period. Terms of employment will depend on organizational needs, and in no case will a temporary position be construed as being a contract for a definite time. Employees also are classified as either exempt or non-exempt according to provisions of chapter 652 of the Oregon Revised Statutes.

- Regular Full-time Employees are those employees who work 40 hours per week.
- Regular Part-time Employees (without Benefits) are those employees working less than 40 hours per week.
- Temporary Employees are those employees who are paid hourly under a Letter of Agreement for a specified period of time.
- Exempt or Non-Exempt Status: Oregon law provides that certain salaried employees are exempt from overtime and minimum wage requirements. These employees are known as "Exempt" employees. All other employees are considered "Non-Exempt" and are subject to overtime and minimum wage requirements. TBWC carefully analyzes each position to determine the correct classification for the job and employees are notified as to their classification.

2. NONDISCRIMINATION

The policy and intent of the TBWC is to not discriminate in its employment practices against any individual or any other person with whom the individual associates because of an individual's or person's race, color, religion, national origin, marital status, sex (including pregnancy and, childbirth) or age or because of a juvenile record that has been expunged according to law.

Further, TBWC will not discriminate against an individual solely because another member of an individual's family works or worked for TBWC unless that individual would be required to be in a supervisory position or being supervised by such family member.
This policy of nondiscrimination applies to all aspects of employment practices including, but not limited to, recruiting, hiring, placement, promotion, demotion, transfer, training, compensation, benefits, and termination.

3. RECRUITMENT PROCEDURES

The TBWC intends to recruit, hire, and place applicants on the basis of the applicant's relative knowledge, skills, and abilities. The decision to employ an applicant will be based solely on the individual's qualification for the particular position along with other requisite job skills. Minimum qualifications shall be specified in the job description.
Unless otherwise determined by the Administrative Committee, when a new position is established, the Executive Director will prepare a job announcement identifying the position's responsibilities and overall relationship to the TBWC for posting or circulation within the TBWC and for public notification. Posted positions will be open for a minimum application period of 7 days.

4. COMPENSATION

Persons employed by the TBWC will receive a salary or wage as determined at the time of hire. At the time of hire, new employees will receive a letter of hire, a job description, salary and benefits detail and a copy of the personnel policies. The magnitude of the work assignments and the full scope of responsibility for the position will be fully discussed at time of hire. In setting compensation, the TBWC may consider, among other things, external labor market rates, equitable relationship with other jobs within the TBWC and the TBWC's ability to pay. The Board of Directors will determine the Executive Director's salary and the Executive Director will determine the salary of other employees.
TBWC utilizes a monthly pay period, with paychecks issued on the first day of every month for the last month's work completed. If the first day of the month is on a weekend or holiday, the check will be issued the last business day prior to the first.
Each employee is responsible for recording their daily hours worked on a monthly timesheet. Exempt employees are requested to track estimated hours for purposes of grant requirements and governance practices and not for calculating actual hours worked. Days taken off for sick, holiday, or vacation leave must be recorded on the monthly timesheet and given to their supervisor for approval on the last working day of the month. Employees are required to record out of office work hours on their timesheets for Workers Compensation reporting requirements. The supervisor reviews the timesheet for correct recording of hours worked and hours taken as sick, holiday, and vacation leave and initials the completed timesheet to indicate approval. Timesheet addendum must be attached and indicate the number of hours worked by project and grant. The supervisor turns in all approved timesheets to the Bookkeeper in accordance with the procedures established by the fiscal policies of TBWC.
Once the timesheets have been reviewed and corrected, the Bookkeeper fills out a monthly payroll distribution spreadsheet according to the pay rate and hours charged per funding source on the timesheet. Once the paychecks are signed by two appointed signatories, they are given to the Executive Director for distribution to the employees. Employees of TBWC may have the

option of direct deposit of their paychecks if available.
For purposes of this section, the "supervisor" for the Executive Director is the Council Chair or Chair's designee and the "supervisor" for all other employees is the Executive Director.

5. WORK SCHEDULE AND FLEX TIME

The standard full-time work week is comprised of forty (40) hours of work on five days of eight hours each day. The standard week is the seven day period beginning Monday and ending on Sunday. The TBWC is generally open for business during the customary business hours from Monday through Friday. Non-exempt employees will work only 40 hours in a standard week except in the situation where the Executive Director authorizes overtime. The Executive Director may, in his or her discretion, permit an employee to take compensatory time for hours worked during the same week. Exempt employees are permitted to determine the hours they work during each standard week provided that the needs of TBWC are met and in accordance with guidance from the Chair.

6. HOLIDAY SCHEDULE

Official holidays are as follows:

- New Year's Day - January 1
- Martin Luther King Holiday – January
- President's Day - February
- Memorial Day - May
- Independence Day - July 4
- Labor Day - First Monday in September
- Veteran's Day - November
- Thanksgiving Day - Fourth Thursday in November
- Day after Thanksgiving Day - Fourth Friday in November
- Christmas Eve – December 24
- Christmas Day - December 25
- One flex holiday

When New Year's Day, Independence Day, or Christmas Day falls on a Sunday, the following day shall be considered the official holiday. When these holidays fall on a Saturday, the preceding Friday shall be considered the official holiday.

7. PARENTING LEAVE

Although the TBWC is exempt from compliance with any federal and state family or parental leave laws, the TBWC, as a policy, desires to assist new parents in balancing the demands of working and caring for children. The TBWC will provide up to 12 weeks of unpaid family leave to any regular full time employee for the birth or adoption of a child. Leave must be initiated within six weeks of the birth or adoption of the child, unless otherwise approved by the Executive Director, or in the case of the Executive Director, the Chair. The use of the 12 weeks shall be at the discretion of the employee and shall be discussed with the Executive Director, or in the case of the Executive Director, the Chair, as to its impact on ongoing work responsibilities and other employees. Although a maximum of 12 weeks is available, an employee may utilize

accumulated sick leave as well as annual leave to enable either partial payment for or extension of the basic 12 week period. Special circumstances shall be reviewed by the Executive Director, or in the case of the Executive Director, the Chair. Accrual of leave benefits cease during an approved leave. Upon completion of leave, the employee will be allowed to return to the same or a substantially similar position at the same salary as the employee earned prior to the leave.

8. ANNUAL LEAVE (Vacation Time)

Regular employees who work at least 40 hours per week are eligible to accrue vacation days. After six months of continuous employment, an employee's vacation accrual begins retroactively from date of hire. For full time employees the accrual rate per year is as follows:

- 10 hours per month 15 days per year

To be eligible to access vacation credits, an employee must have been employed by the TBWC for six full consecutive months. No vacation credits can be carried into the TBWC's next fiscal year without Administrative Committee approval. Upon termination of employment with the TBWC or retirement, unused, accrued vacation time for the year of termination is paid to the employee.

Employees may use their annual leave as earned if absence from assignment does not unduly provide an impediment for completion of an assigned task or prevent other staff from completion of their work assignments. The Executive Director, or for the Executive Director, the Chair, must approve scheduled absences and the employee should request such leave as soon as possible, with a minimum of two weeks in advance.

Special Leave

Special leaves of absence without pay may be granted an employee at the discretion of the Executive Director, or for the Executive Director, at the discretion of the Administrative Committee.

9. SICK LEAVE

The TBWC will provide up to twelve working days each employment year to each staff person to be utilized for purposes of addressing health needs. Compensation will be based upon the employee's salary rate at the time sick leave is taken. Sick leave may be utilized at the discretion of the employee and is granted for sickness of the individual employee, his or her spouse/partner, children, or other immediate family members. Sick leave can also be used for health needs, e.g. dental or medical appointments. Each staff person of the TBWC should notify the supervisor each day they will be absent from work due to illness, if at all possible.

Accrual of sick leave is at a rate of 8 hours per month for each full month of service. Sick leave may be accumulated up to a maximum of 12 days and may be carried over from one employment year to the next. At no time will compensation for any unused sick leave be made to an employee who is leaving employment.

If requested by the Executive Director, or for the Executive Director, the Chair, the employee will provide documentation from their treating physician explaining their absence.

10. COMPASSIONATE LEAVE

Employees of the TBWC shall be granted up to three working days with pay due to a death in their immediate family (mother, father, sister, brother, spouse/partner, children, in-laws,

grandparent, and grandchildren). The Executive Director, or for the Executive Director, the Chair, will consider special cases on an individual basis.

11. JURY DUTY

Employees should notify the Executive Director, or in the case of the Executive Director, the Chair, when summoned for Jury Duty. The supervisor and the employee will discuss the potential time commitment of jury duty and the needs of TBWC to determine the manner in which to handle the summons. In no event, however, will TBWC discharge an employee or threaten to discharge an employee because of jury duty service.

12. MILITARY LEAVE

TBWC intends to fully comply with Oregon and Federal laws as it relates to service by an employee in the uniformed services or National Guard. Any Employee who is absent on their annual two week reserve or National Guard Duty or called up to active duty in the military should consult with the Executive Director, or in the case of the Executive Director should consult with the Chair to discuss the leave policies applicable to such absence.

13. TRAVEL EXPENSES

TBWC covers reasonable costs of travel (transportation and hotels) related to TBWC business. In order to reduce the cost of travel, staff is urged to book travel sufficiently in advance of the travel dates to get the best rates. Employees may request a travel advance by submitting an approved request in the regular weekly check-writing cycle. The least expensive flight that does not unreasonably delay the traveler must be chosen. Only the cost of coach airfare will be reimbursed.

Costs deemed to be excessive upon review by Executive Director, or for the Executive Director, the Chair will not be fully reimbursed. This applies to all travel costs. TBWC will reimburse employees for expenses they have actually incurred. Generally speaking, expenses for all meals and associated reasonable out-of-pocket costs when traveling on business for TBWC are reimbursable. If a trip begins after breakfast or ends before dinner, the cost of the meal will not be reimbursed. Receipts from restaurants must indicate the total cost of the meal, the date, and the names of the diners. Tips are not reimbursable. Receipts must be provided for hotel costs in order to receive reimbursement.

Once a trip has been completed, an employee must complete an Expense Report that includes all travel related expenses including any travel advances received by the employee. TBWC reimburses for mileage at the IRS rate. Authorization of each Expense Report must be obtained by the Executive Director before payment will be made. The Executive Director must get the Chair to approve his or her Expense Report.

14. HARASSMENT POLICY

It is the TBWC's belief that the employees of the TBWC are the primary means by which the goals and objectives of the TBWC will be met. To that end, the rights of all employees must be respected. All employees of the TBWC must understand its position on harassment. By definition, harassment is any unwanted attention or action prohibited by law by someone in the workplace that creates an intimidating, hostile, or offensive work environment, including sexual harassment. The procedure for reporting and dealing with this very sensitive issue is as follows:

- If a person's behavior makes an employee uncomfortable, the employee should feel free to immediately advise the person that, in the employee's opinion, the behavior is inappropriate and that the employee would like it stopped.

- If the employee is not comfortable discussing the issue with the person, or if the person fails to respect an employee's request, the employee should report the incident to the Executive Director or if the situation involves the Executive Director, to the Chair.

- In all instances, a prompt, thorough, and fair investigation will take place, giving careful consideration to protect the rights and dignity of all people involved. The TBWC will take those steps necessary to resolve the problem, which may include verbal or written reprimand, suspension or termination.

No retaliation of any kind will occur because an employee has reported an incident of suspected harassment. The Executive Director, or if the situation involves the Executive Director, the Chair, to whom the complaint was made, will work to establish mutually agreed upon safeguards against retaliation while attempting to mediate any sexual harassment complaint.

15. SUBSTANCE ABUSE

The TBWC is a drug-free workplace. Employees needing help with a substance abuse problem are encouraged to contact the Executive Director, Chair or a treatment facility. Early recognition and treatment are critical to any program to curb abuse and to enhance the employee's ability to perform satisfactorily. The TBWC finds that both the employee and the TBWC will benefit greatly from early substance abuse recognition and treatment. No person will be penalized for seeking or accepting counseling or treatment for a substance abuse problem.

16. BENEFITS

The TBWC is unable to provide fringe benefits, other than holiday and leave days as provided specifically in these guidelines, and cannot guarantee salary increases for merit or inflation.

17. COORDINATOR/DIRECTOR OVERSIGHT

The Council Chair will be responsible for Coordinator/Director oversight, including holding a weekly meeting to discuss pending deadlines for grants, monitoring reports, permits, accounts payable, and Council taxes. The Chair will also provide the Board with a monthly report on Coordinator progress related to Council projects and deadlines.

18. PERFORMANCE REVIEWS

Evaluations are used as a communications tool to discuss an employee's strengths and areas needing improvement as well as matters related to the operations of TBWC. A performance evaluation does not necessarily generate a change in compensation.
An employee's job performance will be reviewed and evaluated on a regular basis. Interim evaluations may occur at the initiation of the Executive Director, or for the Executive Director, the Chair, or initiated by the employee.

19. EMPLOYMENT REFERENCES

When the TBWC receives a request for information from another person or entity about an

employee, either during employment or after the employee's employment has ended, it is the TBWC's policy to provide only the following:

- dates of employment
- last job title

In general, TBWC policy is not to furnish any other information about work performance or employment, unless the employee specifically directs it to do so. If an employee does not authorize the TBWC to furnish any additional information, it will advise the requesting person or entity that TBWC's policy is to provide only the information above.

20. TERMINATION

Resignation

Any employee of the TBWC may resign by submitting a letter of resignation to the Executive Director or in the case of the Executive Director, the Board of Directors, at least ten working days prior to the effective date of the resignation.

At the time of the effective date of the resignation, the employee shall be able to use any accrued annual leave or the employee shall be paid for all unused accrued annual leave. If the employee has used all annual leave due prior to resignation, all hours used in excess of those earned shall be deducted from the employee's final paycheck at the rate of salary paid at the time of resignation. No employee shall be compensated for any unused sick leave at the time of resignation.

Other Discharges

TBWC has the right, according to its "employee at will" practices described in these guidelines to terminate the employment relationship with or without cause and with or without notice just as an employee can resign in the same way notwithstanding the request of TBWC for notice. TBWC, however, may choose to discipline and/or discharge an employee for many reasons. Unsatisfactory performance means failure of an employee to meet performance standards, to complete tasks in a timely, competent way, or to maintain an adequate attendance record. Uncooperative behavior or negative attitudes that affect the work or morale of others may result in termination.

21. CONFLICT RESOLUTION PROCEDURES

It is a fundamental policy of the TBWC to have a workable system for employees to get questions answered and work-related problems resolved. Many conflicts can be resolved using the following approach:

1. First an employee could try to work out the problem directly with the person involved.

2. If an employee cannot resolve the problem or is uncomfortable dealing directly with the other person, an employee should inform the Executive Director, or for the Executive Director, inform the Chair.

3. If the employee and the Executive Director are unable to resolve the problem after a serious attempt, or the issue directly involves the Executive Director, or for the Executive Director, the Chair, the employee should make an appointment with the Administrative

Committee, who after hearing all sides, conducting any necessary investigations, will make a recommendation for the employee's consideration.

4. If the problem remains unresolved, an employee or the Administrative Committee may present the issue to the full board of directors for consideration. The board of directors will have final decision-making authority for employment related conflicts.

5. Employees are not required or expected to tolerate any form of unlawful conduct, such a sexual harassment. All such conduct should be reported as provided in Section 14 and this section of these guidelines.

22. REGULATORY ACTIVITY

The Council does not participate in regulatory activity, and does not report issues to regulatory agencies. When Council staff is confronted with potential water or land use violations they will refer those issues to the Board and/or the Tillamook County Soil and Water Conservation Service.

23. WORK PRODUCTS AND FILES

All supplies, materials, and work products of an employee if compensated for or purchased by TBWC shall remain the property of the TBWC during an employee's employment and after resignation or termination of that employee. The employee may retain any personal files, but work files and other papers shall remain with the TBWC.

24. COMPUTERS AND ELECTRONIC MAIL

Computers and electronic mail are provided to employees to assist them in the performance of their job duties. Computers and electronic mail are the property of TBWC and may be accessed by the TBWC in the ordinary course of business. Employees should have no expectation of privacy in the information contained in their computers or electronic mail. Computers and electronic mail are to be used for TBWC business. Personal use must be limited and not abused. No commercial, discriminatory, offensive, harassing or disruptive messages may be sent by electronic mail. Computers must not be used for any purpose that is illegal, against policy, or causes discredit to the TBWC.

25. CONSULTANT FEES, HONORARIA AND GIFTS

All employees are encouraged to participate in a variety of community and professional activities. In those instances where an employee's activities are part of their regular duties and responsibilities, any payment will be turned over to the TBWC. All fees derived from TBWC reports, activities, events, or speaking engagements while employed by the TBWC shall also be turned over to the TBWC. Employees shall not accept any gratuity or favor from any commercial firm or individual doing or seeking to do business with TBWC.
In some instances, an individual may do work that is based on activities or experiences prior to or separate from their regular duties and responsibilities at the TBWC. To avoid actual or appearance of conflict of interest, any employee who engages in any remuneration activity in any field directly related to TBWC programs must have prior approval by the Executive Director. The Board will review these issues for the Executive Director. No employee may formally

represent himself/herself as a spokesperson for TBWC without prior approval of the Executive Director.

26. CONFLICT OF INTEREST

The Executive Director is the only employee of TBWC in a position to award and/or administer contracts, hire sub-contractors, or engage in procurement activities and must disclose to the Chair if there is a personal or familial relationship, the disclosure or non-disclosure, of which, might call into question the impartiality of the Executive Director. If such a relationship exists, the Administrative Committee must review and approve, in writing, the transaction or contract before it is executed. Violation of this policy will at a minimum result in a written performance warning and, notwithstanding all other provisions of the TBWC Personnel Guidelines, could constitute grounds for termination.

Employee Acknowledgement

I acknowledge that I have read, understood, and will operate within the guidelines outlined in this copy of the TBWC Personnel Guidelines. I understand that these guidelines provide only a general reference and are not a full statement of TBWC's procedure nor are they a contract. I will update these policies as I am provided with new materials from the Executive Director or the Chair of the Council. I further understand that I am an "employee at will" as describe in these guidelines.

Employee Signature: _____ Date: _____

Received by TBWC: _____

BEFORE THE BOARD OF COUNTY COMMISSIONERS

FOR TILLAMOOK COUNTY, OREGON

[redacted]) [redacted]
[redacted])
[redacted])

This matter came before the Tillamook County Board of Commissioners on June 23, 2021, at the request of the Rachel Hagerty, Chief of Staff. The Board of Commissioners, being fully apprised, finds as follows:

1. ORS 541.890(14) defines a watershed council as a voluntary local organization, 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.

2. Tillamook Bay Watershed Council (TBWC) members should represent a balance of interested and affected people in the watershed.

3. The work of the TBWC is to foster partnerships and prepare and implement a watershed action plan that identifies issues and sets goals and priorities for actions to protect and enhance the watershed.

NOW, THEREFORE, IT IS HEREBY ORDERED THAT:

4. The Tillamook County Board of Commissioners designates the TBWC as a watershed council, as defined in ORS 541.890(14), for two years.

5. The TBWC shall demonstrate continual progress in meeting OWEB's Council Capacity Eligibility and Merit Criteria. The Board of Commissioners' designation is contingent upon this progress and OWEB's evaluation of such progress.

6. The Board of Commissioners support the TBWC's commitment and effort to collaborate with watershed stakeholders to establish sound governance, bylaws, procedures, partnerships, and a strategic plan.

7. The Board of Commissioners shall review this designation no later than May 2022.

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DATED THIS 23rd day of June 2021.

THE BOARD OF COMMISSIONERS
FOR TILLAMOOK COUNTY, OREGON

	Aye	Nay	Abstain/Absent
[illegible] Bell, Chair	✓	___	____/____
David [illegible]	___	✓	____/____
[illegible] Commissioner	___	___	____/____

[illegible]

APPROVED AS TO FORM:

Joel W. Stevens, County [illegible]

[redacted]

[redacted]

To Whom it May Concern:

The Tillamook County Board of Commissioners (BOC) is pleased to write this letter of support for the Tillamook Bay Watershed Council (TBWC) application for Council Capacity. The BOC formally recognized TBWC in June of 2021 for a two-year period as it worked toward meeting OWEB's Council Capacity Eligibility and Merit Criteria. The Commissioners are pleased with the progress of TBWC toward this goal and hope that OWEB will agree and provide much needed funding for them to continue this work.

[redacted]

[redacted]

[redacted]

[redacted]

BOARD OF COMMISSIONERS FOR TILLAMOOK COUNTY, OREGON

[redacted] Mary Faith Bell, Vice-Chair [redacted] David Yamamoto, Commissioner

United States Department of the Interior

BUREAU OF LAND MANAGEMENT
Tillamook Field Office
4610 Third Street, Tillamook, Oregon 97141
http://www.blm.gov/office/tillamook-field-office

Tillamook County Commissioners
201 Laurel Ave.
Tillamook, OR 97141

Commissioners:

The Bureau of Land Management (BLM), Tillamook Field Office has worked with the Tillamook Bay Watershed Council (TBWC) on past restoration actions including fish passage, riparian planting, fish habitat enhancement and active monitoring. The BLM supports TBWC and its partners in working towards the enhancement of stream form and function, habitat access, and riparian planting to better provide for the habitat for the federally threatened Oregon Coast Coho salmon, as well as populations of chum, chinook, steelhead, and cutthroat trout.

The TBWC in coordination with multiple partners (i.e., Oregon Department of Fish and Wildlife, Tillamook Estuaries Partnership, Oregon Department of Forestry, BLM, and private landowners) and funding from Oregon Watershed Enhancement Board has been a great contributor to past restoration projects. Due to the BLM's checkerboard ownership, collaboration with private landowners, watershed councils, and local government is essential to completing the whole-watershed restoration work necessary to recover populations of native fishes. The BLM is pleased to support the TBWC in their efforts to improve fish habitat in the five rivers that make up the Tillamook Bay Watershed.

Access to cold-water refugia, spawning and overwintering habitat can be limiting factors for rearing salmonids. Future projects that address these habitat elements are anticipated. BLM staff are committed to provide technical support and believe that this partnership will be comprehensive and subsequently successful.

Please give the Tillamook Bay Watershed Council the opportunity to continue its good work and do not hesitate to contact Grace Stone, Hydrologist (glstone@blm.gov) or Karen Schank, Tillamook Field Manager (kschank@blm.gov) with any questions.

Sincerely,

Karen M. Schank
Field Manager
Tillamook Field Office

City of Bay City

PO Box 3309
5525 B Street
Bay City, OR 97107
Phone (503) 377-2288
Fax (503) 377-4044
www.ci.bay-city.or.us

January 20, 2023
Tillamook Board of County Commissioners
201 Laurel Avenue
Tillamook, OR 97141

Dear County Commissioners:

Bay City is writing this letter in support of the Tillamook Bay Watershed Council (TBWC) for your support in its efforts to get reestablished with the Oregon Watershed Enhancement Board.

I have personally worked along side the TBWC on some of its efforts and include several years leading cleanup of our waterways including at Hoquarton Park in downtown Tillamook. TBWC has removed invasive plants, removed garbage, and was instrumental in designing, constructing, and maintaining the viewing platforms at this wonderful park along the Hoquarton Slough. This park and the viewing platforms are jewels to our community.

Bay City is planning a Patterson Creek restoration project, which is partially funded by Tillamook County TLT funds. TBWC hosted planning sessions with restoration specialists and Bay City to kick off the Patterson Creek Restoration Project. TBWC led a macroinvertebrate study of Patterson Creek, that runs through the Al Griffin Memorial Park in Bay City. Working with TBWC on analysis and monitoring of the heath of the creek before the restoration project and after will help us understand the relationship between restoration and the health of our waterways.

TBWC adds significant value to our community in our quest for healthy watersheds, leading to restoration of our fisheries, and community values. TBWC partners with on-going efforts with the Salmon Superhighway and the Tillamook Estuaries Partnership. TBWC has been very effective at reaching out to Bay City and other landowners to help in restoration projects.

Bay City strongly supports the Tillamook Bay Watershed Council's efforts to reestablish their funding from the Oregon Watershed Enhancement Board through the County's support.

Sincerely,

Liane Welch

Liane Welch, P.E.
City Manager

OREGON
COASTAL FLOWERS LLC

9455 Kilchis River Rd., Tillamook, OR 97141 * www.OregonCoastalFlowers.com

503.815.3762 phone * 503.815.9326 fax * sales@oregoncoastalflowers.com

1.23.23

My name is Patrick Zweifel and my wife and I own Oregon Coastal Flowers and the Hydrangea Ranch, and we recently purchased Alderbrook Golf Course with some partners. Because our farm is on the Kilchis River, we're always looking to balance making a living and being good stewards of the environment.

Over the years I've heard of and worked with the Watershed Council on several projects. They do good work and are an important part of helping with special water related projects in Tillamook County. They make a difference.

There are some projects on Alderbrook Golf Course that we need help with and I look forward to working with the TBWC to balance our needs with the needs of the environment.

TBWC needs help with funding to continue doing good work in Tillamook County. Thank you for your consideration and full support.

Sincerely,

Patrick Zweifel

Oregon Coastal Flowers LLC

We are the Tillamook County Farm Bureau.

Here is a description of what the Farm Bureau does from the website “ Farm Bureau gives our members a strong, united, respected voice in the political and regulatory arenas. We help farm and ranch families stay in business and keep doing the job they love.”.
Mark Harvey is one of our members.

We want to express our support for the Tillamook Bay Watershed Council as they seek funding from the Oregon Watershed Enhancement Board and their desire to receive local designation by Tillamook County.
As farmers we would love to work together with the Watershed Council in educating from a farming perspective.

Signed by,
Dan Leuthold, President; Delegate, Gov’t Affairs, Wildlife, Water
Karl Zweifel, 1st V.P.; Ag Production
Max Sherman, 2nd V.P.; Gov’t Affairs
Sheryl Kuipers, Secretary
Pam Zweifel, Treasurer, Delegate
Carol Marie Leuthold, Region 8 OFBF Board, Land Use, Membership, Tax
Garritt Kuipers, Dairy Committee, Livestock/Public Lands, Wildlife
Cory Kuipers, Land Use
Charlene Kuipers
Case Anker, Labor, Dairy Committee
Mena Anker
Tom Anker
McKenzye Anker
Ryan Killgore, Labor
Brad Cowan, Delegate
Mark Harvey, Membership
Richard Obrist, Labor, Water
Larry Zweifel, OSU Ag Committee

HAMPTON FAMILY FORESTS

3111 East Third Street
Tillamook, Oregon 97141
Telephone 503.815.6321
Fax 503.815.2201
www.HamptonAffiliates.com

Tillamook County Commissioners'
Erin Skaar - Chair
201 Laurel Avenue
Tillamook, Oregon 97141

RE: Tillamook Bay Watershed Council

January 18, 2023

Dear Chair Skaar,

Hampton has operated a sawmill in Tillamook since 1986 and managed timberlands in northwest Oregon for nearly 80 years. As you can imagine, we appreciate the value of a well-functioning watershed. Although our forest ownership in the county is small, we operate in a manner that protects the environment and human health while remaining committed to the enhancement of environmental conservation, safety, public awareness and quality of life in our communities.

Throughout our history, Hampton has worked with a number of watershed councils to improve habitat and water quality and provided advice, materials, donations and volunteer hours. The success of these past efforts was due to a shared sense of stewardship and strong, collaborative relationships among all those involved.

Tillamook County would greatly benefit from a watershed council that embodied the cooperative and practical spirit that has made other councils in our region so effective. We believe that the Tillamook Bay Watershed Council, under new leadership that embraces the values of cooperation and community, could be a valuable resource in maintaining and enhancing the health of local watersheds. Large scale projects can and should be implemented across multiple ownerships in order to meet goals for watershed health and aquatic species protection in our area. The Tillamook Bay Watershed Council could fill a critical role in coordinating such efforts through partnerships with landowners, community members and other organizations.

Hampton supports seeking recognition and funding for the Tillamook Bay Watershed Council and looks forward to working with its leadership and other community members to advance our shared goals.

Sincerely,
HAMPTON TREE FARMS
David Kunert

David Kunert
Procurement Manager

Mr. Hayden Bush

Address: 2605 12th St., Tillamook, OR 97141
Phone: (503) 842-2566
Facebook: Tillamook FFA Chapter
Instagram: @tillamookffa

January 3, 2023

To Whom it May Concern,

I am writing to show support for the Tillamook Bay Watershed Council. As the Agriculture Teacher at Tillamook High School, I understand the importance of collaboration and community engagement, which is a function of said council. I have personally been engaged as a student, community member, and a teacher in the previous work of the watershed council and think that it is a worthy investment of resources.

The Council's mission is to build collaborative, voluntary partnerships with communities and landowners, to protect, maintain and improve the health of the Tillamook Bay Watershed through on-the-ground restoration projects, educational outreach programs, and other community engagement activities. Such programs and outreach are vital in continuing the collaborative tradition of Tillamook stakeholders.

A watershed council would bring essential tools to Tillamook County to be used for implementing large projects across multiple ownerships. Examples of this would include working with the Oregon Coast Coho Conservation Plan and the Coho Strategic Action Plan. It would also provide a means of local private and public landowner collaboration.

The new energy this council would bring in terms of leadership will prove to be incredibly important in this endeavor. Recognizing this effort and re-recognizing this group as a watershed council would be of utmost benefit to Tillamook County and the Oregon Watershed Enhancement Board. Work still needs to be done in terms of updating policies and procedures, but any healthy group should revise those from time-to-time.

Please consider this request to re-recognize the Tillamook Bay Watershed Council, allowing them to do the important collaborative work that needs to be done.

Sincerely,

Hayden Bush

Hayden Bush
Tillamook High School Ag Instructor
Tillamook FFA Advisor

Oregon
Kate Brown, Governor

Department of Forestry
Tillamook District
5005 Third Street
Tillamook, OR 97141
503-842-2545
FAX 503-842-3143

January 3, 2023

Tillamook County Board of Commissioners
201 Laurel Avenue
Tillamook, OR 97141

RE: Letter of Support for Tillamook Bay Watershed Council

Commissioners,

The purpose of this letter is to offer our support for the Tillamook Bay Watershed Council (TBWC) to receive local designation. Oregon Department of Forestry (ODF) manages the Tillamook State Forest and is the largest landowner in the Tillamook Bay basin. In addition, we implement the Forest Practices Act on private forest land.

Tillamook Bay Watershed Council has gone through extensive reorganization and re-establishment of their board and governance over the last two years. ODF has participated in some of the processes and provided input to assist in the re-establishment of the watershed council framework. ODF has enjoyed a long history of working collaboratively with TBWC.

State Forest management is currently guided by the 2010 Forest Management Plan. At this time, we are drafting a new Management Plan that is compatible with the draft Western Oregon Habitat Conservation Plan. In addition, the Forest Practices Act recently went through significant rule revisions to reflect the work known as the Private Forest Accord. All of these efforts and documents are focused on the protection and improvement of aquatic species habitat. There is no better time than now to recognize the work TBWC can do to help accomplish our common goals through outreach to small landowners, leverage future dollars, and building more effective work on-the-ground.

ODF will continue to support Tillamook Bay Watershed Council through in-kind contributions by participating in public meetings and will participate on a technical team as it develops. In addition, ODF will actively assist TBWC in connecting with possible partners, landowners and working on high priority State Forest projects to accomplish all of our goals in a shorter timeframe.

Sincerely,

Kate J. Skinner

Tillamook District Forester

Oregon
Tina Kotek, Governor

Department of Fish and Wildlife
North Coast Watershed District
4907 3rd Street
Tillamook, OR 97141
(503) 842-2741
Fax (503) 842-8385
www.myodfw.com

January 17, 2023

Re: Support for formation on Tillamook Bay Watershed Council

To Whom it May Concern:

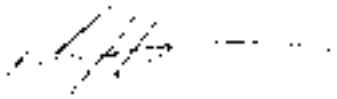
The Oregon Department of Fish and Wildlife supports the reestablishment of the Tillamook Bay Watershed Council. Watershed Councils play a crucial role in engaging local communities to prioritize and implement restoration actions to address impaired and degraded habitat. These efforts are critical in the conservation and recovery of numerous fish and wildlife species, some of which, such as coho salmon, are listed as Threatened under the Endangered Species Act.

ODFW continues to provide technical support and guidance for planning and implementation of restoration projects on the north Oregon coast. For many of these projects, ODFW partners with watershed councils to get this critical work planned, funded, and ultimately completed. However, much-needed efforts in the Tillamook Bay basin are notably lacking due to the absence of the Tillamook Bay Watershed Council. This not only limits the amount of restoration occurring in the Tillamook Bay Watershed, but also has the potential to significantly impact future efforts that will be identified through planning processes such as the Tillamook Coho Strategic Action Plan.

ODFW asks that local government representatives support reestablishment of the Tillamook Bay Watershed Council to fulfill the critical and important need stated above. Additionally, we ask that OWEB consider providing the Tillamook Bay Watershed Council capacity funding when all necessary requirements are met.

Thank you for your consideration.

Sincerely,



Chris Knutsen
District Manager
ODFW – North Coast Watershed District

STIMSON LUMBER COMPANY
6115 Hangar Rd , Tillamook, OR 97141
(503) 842-4007

Tillamook Board of Commissioners
201 Laurel Avenue
Tillamook, OR 97141

January 26, 2023

Dear Commissioners,

My name is Jon Wehage, and I am the Coast unit Manager for Stimson Lumber Company. I manage 75,000 acres of commercial timberland in Tillamook County of which 50,000 acres is within the Tillamook Bay Watershed. Additionally, I am a board member on the Nestucca, Neskowin, Sand Lake Watershed Council and sit on the Tillamook Bay Coho Strategic Action Plan Committee.

I am writing this letter in support of the Tillamook Bay Watershed Council (TBWC) to receive local designation by Tillamook County to facilitate funding opportunities from the Oregon Watershed Enhancement Board.

Stimson has a long history of working with the TBWC and others to improve stream habitat in Tillamook County. The Bewley Creek, Coast Range Road and the Killam Creek projects are great examples of collaboration between private industry and Watershed Councils. These projects executed by the TBWC were partnerships that placed large wood debris, removed legacy road hazards and restored channel width to Core Salmon Streams. Additionally, the Killam Creek project has been used by Clair Thomas as a student laboratory to study log placement movement and many other watershed topics. There has also been many culvert and bridge replacements on private and public roads which are typically lower in the watersheds. All of these projects facilitate fish passage from the bays up to forest lands where Stimson and other landowners have been updating fish passage structures and doing restoration projects for over 20 years.

Looking to the future there are many projects on and around Stimson property that we would be willing to work with the TBWC to accomplish. Tillamook county has a long rich history of using collaborative relationships to accomplish its goals. I believe recognizing TBWC is a win for Tillamook County.

Sincerely,

Jon Wehage
Coast Unit Manager
Stimson Lumber Company

Dear Tillamook County Board of Commissioners,

The Tillamook County Creamery Association (TCCA) is proud to hold six stewardship commitments, one of which is *enduring ecosystems*. We strive to execute common sense sustainability strategies, advance our stewardship commitments, and support our local community in economic, natural resource enhancement and protection endeavors. We work directly with local non-profits and government organizations because we know that a robust network of effective partners is vital to maximizing investment in and protection of the natural environment. In this unprecedented time of government investment in natural resource protection through grants and other funding initiatives, it is imperative to have community organizations ready to take advantage of these opportunities and execute them impactfully.

TCCA supports the efforts of the Tillamook Bay Watershed Council (the Council) to become relevant in our community and to receive formal designation as a watershed council. We support the Council's mission to build a collaborative organization that supports landowners and the community at large in protecting, maintaining, and improving the health of the Tillamook Bay watershed through on-the-ground restoration projects, outreach programs and community engagement.

TCCA also supports the Council's expressed commitment to community relationship building. TCCA is engaged with the Coho Strategic Action Plan and would welcome the Council's engagement and participation in this and other regional conservation and restoration partnerships.

We encourage the Council to maintain its newfound energy and passion to win grants from the Oregon Watershed Enhancement Board (OWEB), the Oregon Department of Fish and Wildlife (ODFW), and other funding sources to make a difference in our region's waterways and ecosystems. We are optimistic about the Council's efforts to re-engage with the community to build trust and mutual respect. Still, we understand this process is ongoing and appreciate that this will continue to take significant effort on the Council's part.

We look forward to working with the Council on stewardship efforts, community outreach, and capacity building. We appreciate the Commissioners' time in considering our recommendation to recognize the Council to help them reach relevancy in our community.

Sincerely,

Paul Snyder

Paul Snyder, EVP of Stewardship, Tillamook County Creamery Association

TILLAMOOK COUNTY CREAMERY ASSOCIATION
4185 Highway 101 North, Tillamook, Oregon 97141
TILLAMOOK.COM

503-322-2222
P.O. Box 493
613 Commercial Street
Garibaldi, Oregon 97118
www.tbnep.org

TILLAMOOK ESTUARIES PARTNERSHIP

Healthy watersheds for a thriving community

02 January 3, 2023

To the OWEB Grant Review Committee,

Tillamook Estuaries Partnership (TEP) has been a long-time partner of the Tillamook Bay Watershed Council (TBWC). This letter is to express our support of the Tillamook Bay Watershed Council's application for council capacity funding through OWEB.

TEP has worked with TBWC on numerous restoration projects, environmental education programs, outreach events, as its fiscal administrator, and much more. TEP's Executive Committee has met with TBWC's Board of Directors to offer our support during their restructuring efforts and I participated in several of their monthly meetings in 2022. TBWC has put forth significant and meaningful effort in its revitalizing its governance policies, Board composition, and stakeholder relationships. I believe they have reached the stage where they ready and deserving of regaining recognition by the Tillamook County Commissioners and receiving funding from OWEB to hire a Watershed Council Coordinator for Tillamook. TEP and our other partners lack the capacity to fill the gap that exists without that role.

TEP utilizes its 10-year action agenda, the Comprehensive Conservation and Management Plan (CCMP), to guide our water quality, habitat restoration, and community engagement efforts. Built into the CCMP is the need for involvement by partners, such as TBWC, to serve the five estuaries and six watersheds that comprise our focus area. With OWEB's support, TBWC could once again be involved in many of TEP's efforts:

- **Landowner Contacts** essential to the BackYard Planting Program;
- **Native Plant Propagation** (TBWC staff and Board members volunteer for seed collection, sowing, transplanting, and many other activities in exchange for discounted costs of native plants for their restoration projects);
- **Water Quality Monitoring** (TBWC staff and Board members have collected samples for bacteria analysis to monitor the health of waterways within Tillamook); and
- **Community Engagement** through leading tours in the Explore Nature program to connect the restoration work we do with the recreation that residents and visitors enjoy.

TEP would similarly partner with TBWC by participating on technical teams, sharing monitoring protocols, attending strategic planning sessions, making equipment and technology available (e.g. drones, GIS), etc.

TEP strongly supports TBWC and looks forward to seeing them add a Watershed Council Coordinator to their organization. Please consider funding their application; it will benefit the entire community.

Sincerely,

Kristi Foster, Executive Director

Oregon Council

January 26, 2023

Tillamook County Commissioners
201 Laurel Ave
Tillamook, OR 97141

Dear County Commission:

The Oregon Council of Trout Unlimited would like to add our voice in strongly supporting the re-certification of the Tillamook Bay Watershed Council.

The Tillamook Bay Watersheds are the cornerstone of the North Oregon Coast Salmon and Steelhead habitat. These watersheds also provide critical drinking water resources to the citizens of Tillamook County. A fully functioning watershed council will help build collaborative voluntary partnerships with communities and landowners. This is accomplished through on the ground restoration projects, educational outreach and other community engagement activities

Over 300 miles of stream habitat across five rivers pour into Tillamook Bay, and together they are among Oregon's most important coastal rivers for salmon and steelhead. This is one of a few places where six different fish stocks return each year from the sea. The Tillamook Bay tributaries are known for wild runs of Chum, Coho, Spring and Fall Chinook, Winter Steelhead, Sea-Run Cutthroat Trout, as well as lamprey.

The added capacity a watershed council would bring to Tillamook County is essential for implementing large projects across multiple ownerships and filling the unique niche only a watershed council can in the restoration community, and community-at-large.

Please support the recertification process for the Tillamook Bay Watershed Council.

Terry Turner

Terry Turner
Oregon Council Vice Chair
Trout Unlimited
PO Box 740
Gladstone, Oregon 97027
503-804-9868
terry@clackamasrivertu.org

Trout Unlimited
Salmon SuperHwy

Tillamook County Commissioners
201 Laurel Ave
Tillamook, OR 97141

January 30th, 2023

Dear County Commission,

I am writing to express the support of Trout Unlimited and the Salmon SuperHwy partnership for the re-certification of the Tillamook Bay Watershed Council.

The Salmon Superhighway (SSH) is a collaborative partnership of fifteen local, state, and federal agencies, NGOs and watershed councils with the goal of reconnecting 180 miles of blocked habitat in six major salmon and steelhead rivers of the Tillamook Nestucca sub-basin on Oregon's North Coast. To accomplish this impressive portfolio of work, the SSH partnership relies heavily on Oregon's network of watershed councils to develop private landowner and community support for the fish passage projects, to coordinate design of the passage projects, to help secure project funding, and to implement the projects on the ground.

I am aware of the challenges faced in recent years by the TBWC in implementing its mission. We would like to emphasize the importance of a strong watershed council that enjoys broad community support and confidence for serving the Tillamook Bay watershed. This added compacity would greatly help us in achieving our goal.

I recognize you, our County Commissioners, play a critical role in our mission by providing oversite, and expertise to assure the strength and capacity of our watershed council partners. I encourage you to support the TBWC. A strong watershed council in the Tillamook Bay geography would enhance the SSH's ability to promote the recovery of fisheries in this region and achieve the communities' flood resiliency goals.

I thank you for your continued support of SSH projects and our fish passage objectives.

Sincerely,

Liz Ransom
Salmon Super Highway Director
Trout Unlimited

February 2, 2023

Tillamook County Commissioners
201 Laurel Ave
Tillamook, OR 97141

Dear Commissioners,

I am writing on behalf of The Wild Salmon Center (WSC) to express our support for the Tillamook Bay Watershed Council (TBWC) to be re-recognized by Tillamook County and the Oregon Watershed Enhancement Board (OWEB). The mission of WSC is to promote the conservation and sustainable use of wild salmon ecosystems across the Pacific Rim. WSC has dedicated significant resources (including recently adding my full-time staff position) to supporting local communities on the northern Oregon coast. The Tillamook Bay watershed encompasses over 300 miles of stream habitat across the five rivers that pour into Tillamook Bay, and collectively they are among Oregon's most important coastal rivers for salmon and steelhead.

WSC is working closely with local stakeholders in the Tillamook Bay watershed to complete a Strategic Action Plan (SAP) that prioritizes the protection and restoration of critical Coho salmon habitats. The SAP will lay out a long-term (multi-decadal) plan for the watershed processes that must be restored to ensure the viability of the Tillamook Bay Coho population. In addition, the plan lays out a list of site-specific, near-term (<5 years) projects that advance these long-term priorities. The process to develop the SAP is science-driven and collaborative, and local partners are enthusiastic to put the plan on the ground. Similar SAPs have been completed in the Siuslaw and the Coos Bay watersheds, resulting in OWEB's recent commitment of $23M to their implementation.

The ongoing restoration and recovery effort underway in the Tillamook Bay watershed would benefit greatly from the added capacity to engage landowners in SAP implementation and leverage the extraordinary federal funding opportunity that now exists. Support for the TBWC will ensure a greater opportunity for more resources to be captured for Tillamook County and for the community that lives and works in the watershed.

The TBWC has new leadership that is working towards their goal of being re-recognized by Tillamook County and OWEB. To that end, the Council has been actively working to update policies and procedures, engage and collaborate with the broader community, and rebuild existing relationships. The WSC believes the TBWC has tremendous potential to work cooperatively with both landowners and key stakeholders to advance high priority conservation activities which enhance watershed and community health. We are dedicated

INTERNATIONAL HEADQUARTERS
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info@wildsalmoncenter.org • www.wildsalmoncenter.org

to being a committed partner to this new organization and to providing technical support for it, including the production of the Tillamook Bay Watershed SAP for Coho Recovery and by leveraging federal funding to accelerate project implementation.

Thank you for your serious consideration of the TBWC's request to be re-recognized by Tillamook County and OWEB. If I can provide further information on WSC's long-term commitment to the Council, please don't hesitate to contact me.

Best Regards,

Cyndi Curtis

Cyndi Curtis
North Coast Manager

FISCAL POLICIES & PROCEDURES

Tillamook Bay Watershed Council

Adopted: January 31, 2006

Amended: June 27, 2006

Amended: May 29, 2007

I. PURPOSE OF THE MANUAL

This manual has been designed as a reference for the staff and members of the Tillamook Bay Watershed Council (TBWC). TBWC was incorporated in 2005 in the state of Oregon as a non-profit corporation. The organization received its 501(c)(3) status with the Internal Revenue Service in September 2006.

The manual includes fiscal policies established by the members and Coordinator and fiscal procedures designed to implement those policies and provide simple methods to transact the organization's business affairs. The manual will be updated periodically to reflect changes and clarifications in policies and procedures. Upon full review of the Council, the Coordinator will ensure that copies of the manual in use are updated and outdated policies and procedures are removed.

II. FISCAL MANAGEMENT POLICIES

A. GAAP: Except when noted, TBWC follows Generally Accepted Accounting Principles for nonprofit organizations.

B. Adherence to Federal Standards: By reference, the TBWC incorporates all provisions of OMB Circular A-122, "Cost Principles for Non-Profit Organizations" as pertains to federal funds.

C. Accrual Accounting: TBWC utilizes the accrual basis of accounting in which revenues are recorded in the period in which they are earned and expenses are recorded in the period in which they are incurred regardless of when cash is received or disbursed. Income from restricted grants and contracts is recorded in the period in which the restrictions have been met through proper expenditure of the funds and/or the required services have been provided.

D. Deferred Revenue: TBWC records Deferred Revenue when restricted funds are received in advance of the provision of the services or incurring of expenses for which the funds are provided. Deferred revenues may be reclassified as Temporarily Restricted Revenues on the audited financial statements, which are presented in accordance with FASB 116 and FASB 117.

E. Equipment, Furnishings, and Real Property: TBWC records equipment with a useful life of more than one year and cost of more than $5000 as an asset. Equipment with useful life under one year or cost of $5000 or less is recorded as a supply expense.

Equipment purchased with restricted grant funding is coded to the expense account Equipment in the fund providing the money during the fiscal year, so that

the purchase may be easily tracked for reporting to the funder. At fiscal year end, a journal entry is made which records the purchase as an asset in the equipment account in the Unrestricted fund and credits it out of the equipment purchases account and debits it out of the fund balance account in the restricted fund.

Depreciation expense and an allowance for depreciation is recorded for all equipment, furnishings, and real property owned by TBWC.

F. Donated Materials, Equipment, and Services: TBWC records in-kind gifts of equipment as in-kind contributions, a revenue account, and as equipment, an asset account. Donated equipment is recorded at the fair market value on the date of donation. Fair market value is the price at which the item would be sold by a willing buyer to a willing seller.

Donated material which does not meet the definition of equipment is not recorded as "in-kind supplies expense" and "in-kind contribution" in accordance with FASB 116. Volunteer time of professionals in their professional capacity is recorded as "in-kind revenue" and "in-kind expense." Other volunteer time is not recorded in accordance with FASB 116. There is no net effect of recording in-kind labor and its associated in-kind contribution income. The recording of in-kind contribution income for the value of donated equipment results in an increase in net income because the value of the donated equipment is recorded as an asset not as an expense.

G. Inventory: The TBWC maintains an inventory of fixed assets valued at $5000 and above and inventory of supplies and equipment valued at $1000 or above. The inventory shall be updated biennially and shall include a description or name of the item, model or serial number, date purchased, value or cost at purchase, current appraised value if known, and location within the TBWC office. Security inventory numbers shall be affixed to all supplies that cost more than $1000 at the time of purchase on all furniture and equipment. The Coordinator will review and confirm the inventory biennially.

Equipment procured with federal funds shall be disposed of in accordance with 40 CFR 30.34 (f).

H. Cost Allocation: TBWC will develop an annual written cost allocation plan to fairly allocate shared costs among the various functions performed by the organization. The written cost allocation plan will be utilized as the basis of negotiation of costs with funding sources. The cost allocation plan will be applied consistently to all programs.

I. Restricted Funds: Grants and contracts from grantors who restrict the use of funds are recorded in separate funds during the year. The use of restricted gifts is

linked to the purpose specified by the donor/grantor. A separate fund is established for each restricted funding source which utilizes line item budgets. Expenses which fulfill the restrictions of the donor/grantor are recorded in that donor/grantor's fund. Separate bank accounts are not required for each restricted funding source. Internal financial statements are presented using a fund accounting format; year end audited financial statements are presented on a Net Assets basis, using Unrestricted, Temporarily Restricted, and Permanently Restricted classes of Net Assets in accordance with FASB 117.

J. Functional Expense: TBWC will utilize distinct cost centers to record costs of its distinct program and management functions as its operations diversify. When implemented, each cost center will contain the specific expense account line items needed to record the specific expenses of performing its respective functions.

K. General Ledger: TBWC maintains a complete double-entry General Ledger reflecting the complete chart of accounts and segregating costs by function and by restricted funding source requirements.

L. Budget: The Council adopts a comprehensive organization-wide budget for each fiscal year. The budget reflects all anticipated revenues from all sources and all anticipated expenses. Board adoption of the budget constitutes authorization for staff to incur budgeted expenses as explained under Section 12: Procurement and Section 3: Purchases and Disbursements.

M. Financial Statements: The Council receives a balance sheet and statement of support revenue, and expense for each month during the month following the month for which the statements are prepared. The statements are presented to the Council by the Treasurer, who has reviewed them with the Bookkeeper. The financial statements facilitate identification of restricted and unrestricted funds and comparison of actual revenues and expenses to budget.

O. Audit: TBWC funds and bank statements are reviewed and reconciled quarterly by the Tillamook Estuaries Partnership Accounting Manager. Council support and other OWEB grants are strictly audited when requests for reimbursement are submitted.

The Council will select an independent CPA to conduct an audit of all TBWC funds every two years. The auditor is required to present the results of the audit to the Council or a designated Council committee. If more than $500,000 in federal funds is expended during the fiscal year then an audit in accordance with OMB Circular A-133 will be requested from the independent CPA firm hired to conduct an annual audit of TBWC funds.

P. Interest Bearing Accounts: TBWC places funds in interest bearing accounts

whenever practical and permissible by funding source agreements.

III. PURCHASES AND DISBURSEMENT PROCEDURES

A. Purchases: Authorization by the Administrative Committee is required prior to all purchases exceeding $100. Standing authorization for routine expenditures such as utilities, office supplies and copier maintenance is provided by Council approval of the annual budget. Employees desiring to make purchases outside the standing authorization items must submit the request in writing, describing the item briefly, its cost, and the project to which it is to be charged. The request will be coded to the appropriate fund and cost center, and given to the Administrative Committee for approval. Once the Administrative Committee approves the purchase, the Treasurer cuts the check. Alternatively, with prior and specific approval of the supervisor, an employee may purchase the item with her/his own funds and submit a written request for payment, complete with receipt, to the Treasurer who will prepare a reimbursement check.

The Coordinator is required to be familiar with the terms and conditions dictated by each grant and must determine, before giving approval that expenses are reasonable, allocable and allowable per the terms of the grant and the cost principles of the granting organization. Similarly, the Bookkeeper will be responsible for knowing these same rules and will determine the reasonableness, allocability and allowability of costs before the allocations are made. In the case of Federal grants, the Coordinator and Bookkeeper must specifically be familiar with the guidelines established in OMB Circular A-122.

B. Processing Invoices: All invoices/statements from outside vendors will be routed to the Bookkeeper who will review them to determine whether they are covered by a standing authorization or whether a written request has already been submitted for the item. The Bookkeeper supplies the account code. The Bookkeeper assembles invoices and bills and will process them in accordance with each invoice's due date or discount date. Payments will not be made from statements without corresponding receipts or invoices.

The Treasurer and one other Administrative Committee member will come to the Council's office to prepare and sign checks twice a month. The Treasurer will prepare checks for invoices which have an approved request or standing authorization available. The Treasurer will then sign checks and return the signed checks to the Bookkeeper. A second signature will be required for all payroll checks, checks to the US Treasury Department and Oregon Department of Revenue, and all checks over $2500. (See section III D) If the Treasurer is unavailable, the TBWC Chair has check signing authority. The Bookkeeper then mails the checks and records any backup information, such as an invoice, packing slip, etc., on to the account coding sheet and files the document by vendor in the

vendor files. A copy of check and back-up documentation also is filed in the appropriate grant file if applicable.

C. Check Preparation: A copy of the original check document will be attached to the invoice for filing. Void checks are marked VOID. The original check is retained in the VOID check file.

D. Check Signatures: The Council authorizes check signers. The Chair and Treasurer have check signing ability, as do two Executive Committee members. Council members responsible for signing checks will come by the Council's office at the beginning and middle of the month. Checks for under $2500 require one signature. A second signature will be required for all payroll checks, checks to the US Treasury Department and Oregon Department of Revenue, and all checks over $2500. It is preferred that the Treasurer be the primary check signer. All check signers must review the documentation attached to the checks prior to signing the checks.

E. Distribution of Checks: Once checks are signed, the Bookkeeper removes the attached documentation for filing and places the check in envelope for mailing. Checks for staff reimbursements or purchases are released to the approved staff member.

F. Filing Paid Invoices: Once checks have been separated from paid invoices, the invoice, written check request, account coding form check copy are then taped and/or stapled together by the Bookkeeper. These documents are filed by vendor chronologically, i.e. the most recent invoice placed at the top of the file. Reimbursements to employees are filed by employee in the vendor files, treating employees as vendors. When applicable, copies of invoices will also be placed in appropriate grant files.

G. Employee Travel Expense Procedures: Employees may submit their actual travel expenses with a travel voucher form for reimbursement after the travel. TBWC will not pay for personal items or services while traveling.

Staff mileage reimbursement, using the standard IRS rate, includes the cost of gasoline and wear/tear. Separate gasoline costs will not be reimbursed.

H. Reimbursement Policy for Council Members: Council members' participation in Council projects is voluntary and unpaid. However, when the Council uses Council member equipment on a project, the Council member may be reimbursed for equipment use. A written reimbursement estimate must be received by the Administrative Committee prior to project implementation for approval. After the project is complete, the Administrative Committee will review the equipment expenses and approve payment. If expenses are higher than anticipated, the

Administrative Committee will have discretion to approve reimbursement up to 50% above the original estimate.

IV. PROCEDURES FOR RECEIPT AND DEPOSITS FOR CASH AND CHECKS

A. Funds Received at the Office: The Coordinator sorts mail and logs all checks received in the mail prior to giving them to the Bookkeeper.

The information received with grant checks from funders, including any check stub or correspondence, is passed on to the Bookkeeper who files the information in the revenue section of the filing system, which is organized by General Ledger revenue account. When cash payments are received in the office, the employee assigned to maintain the receipts log records the cash receipt in the log.

B. Cash and Checks Received Outside the Office: Occasionally employees will be given cash and checks at meetings or events held outside the office. Any checks and cash received outside the office are brought back to the office and given to the Coordinator who logs them into the receipts log.

The receipts log is totaled monthly by the Coordinator, and proofed to the cash receipts/accounts receivable journal by the Bookkeeper.

C. Maintaining the Cash Receipts/Accounts Receivable Journal: The Bookkeeper maintains a manual cash receipts/accounts receivable journal. The journal lists the date received, payer, invoice number where applicable, amount of each receipt. Amounts received through out-of-office collections procedures are entered in the cash receipts/accounts receivable journal with appropriate receipt number references. Cash receipts which lack a receipt number are entered with the words, "Cash sale," or "Cash Donation." Each receipt entered in the cash receipt/accounts receivable journal is then spread to the appropriate column on the journal to indicate accounts receivable payment, direct mail donation, sale of curriculum, workshop registration, etc. The Bookkeeper adds and proofs the pages of the journal, and indicates deposits by skipping a line in the journal and writing the date and the deposit total in the journal.

D. Bank Deposits: The Bookkeeper will prepare all bank deposits with duplicate deposit slips. Each deposit ties out to the cash receipts/ accounts receivable journal.

The Bookkeeper lists the total cash deposited on the bank deposit slip and on the copy of the deposit slip. The Bookkeeper compares the bank deposit total to the cash receipts/accounts receivable journal total and reconciles any differences before deposit. The Bookkeeper writes the deposit total in the accounting system.

V. PROCEDURES FOR ACCOUNTS RECEIVABLE

Payments from grantors: Payments from grantors received in the mail are opened by the Coordinator, who routes them to the Bookkeeper. The Bookkeeper codes the receipt to the correct fund and account. If it is a cost reimbursement on a grant or contract, the payment is credited against the Grants receivable account in the appropriate fund. Grants and contracts which send an equal monthly payment are treated in the same way as cost reimbursable grants and contracts: payments are credited against Grants receivable, and revenue is recorded based on actual expenses incurred. Grant payments received in advance of the grant period are coded to a deferred revenue account in the appropriate fund. (These funds may be reclassified as Temporarily Restricted revenue by the auditor for the year end audited financial statements.)

VI. BILLINGS, REQUEST FOR PAYMENTS AND FISCAL REPORTS TO FUNDERS

All financial reports to funders are to be prepared directly from the General Ledger/receipts of TBWC by the Bookkeeper. Staff responsible for supervision of grant/contract funded activities will prepare all required narrative portions of funder reports and review all fiscal portions prepared by the Bookkeeper prior to submission.

Whenever feasible, the General Ledger amounts will be established to correspond to funder fiscal report categories. When this is not feasible, the Bookkeeper will prepare worksheets for each fiscal report documenting the source of all information reported by General Ledger account number and funder report line number or caption.

With the exception of OWEB advances for Council Support, Small Grants, Restoration Grants, and restricted monitoring funding, TBWC's standard procedure for receiving payment from federal and state agencies is to request payment after TBWC has incurred the expense. This minimizes the time elapsing between the transfer of funds to the recipient from the funder and the issuance or redemption of checks, warrants or payments by other means for the purposes of the program.

TBWC's general policy for advances will be to estimate costs that will be incurred for the next 90 days. A request for that amount will be made. At the end of that 90-day period, the requested amount will be compared to the actual amount and the request for the next 90 days will adjust for that amount. State or private foundation funds will adhere to the appropriate grant conditions in which they were awarded.

VII. PAYROLL PROCEDURES

A. Pay Periods: TBWC utilizes a monthly pay period, with paychecks issued on the first day of every month for the last month's hours. If the first day of the month is on a weekend or holiday, the check will be issued the last business day prior to the

first.

B. Processing of Monthly Timesheets: Each employee is responsible for recording their daily hours worked on a monthly timesheet. Days taken off for sick, holiday, or vacation leave must be recorded on the monthly timesheet and given to their supervisor (Council Chair) for approval on the last working day of the month. Employees are required to record out of office work hours on their timesheets for Workers Compensation reporting requirements. The supervisor reviews the timesheet for correct recording of hours worked and hours taken as sick, holiday, and vacation leave and initials the completed timesheet to indicate approval. Timesheet addendum must be attached and indicate the number of hours worked by project and grant. The supervisor turns in all approved timesheets to the Bookkeeper no later than two days prior to the first Friday of the month.

The Bookkeeper verifies the totals of hours worked and used as sick, vacation, or holiday leave on each timesheet. The Bookkeeper compares the sick and vacation leave to the employee's master record of sick and vacation leave available to verify that hours taken as paid leave were available. The Bookkeeper initials any lines on the timesheet she/he has changed as part of the review process, and adjusted timesheets must be re-signed by the employee and supervisor. The Bookkeeper then completes the vacation and sick worksheets for each employee for that month.

Once the timesheets have been reviewed and corrected, the Bookkeeper fills out a monthly payroll distribution spreadsheet according to the pay rate and hours charged per funding source on the timesheet.

C. Review and Distribution of Paychecks: The Bookkeeper reviews the payroll documents and initials the payroll journal indicating her/his review, she/he gives the journal to the Treasurer on the 1st of the month. The Treasurer spot checks the payroll, and satisfies her/himself that all employees being paid are bonafide employees and that no payroll amounts appear unreasonable. The Treasurer then prepares and signs the paychecks. A second signature is required on all paychecks.

Once the paychecks are signed by two appointed signatories, they are given to the Coordinator for distribution to the employees. Employees of TBWC may have the option of direct deposit of their paychecks if available.

D. Payroll Tax Deposits: The Bookkeeper computes all federal and state payroll tax deposit requirements and the quarterly unemployment amounts. The Bookkeeper prepares deposit coupons and checks, and gives them to the Treasurer and the second signatory for signature.

E. Recording the Payroll Checks in the Checkbook : The Bookkeeper records the total net amount of checks and directly deposited checks in the accounting system with the date, and the words "Net Payroll" or "Net Direct Deposit Payroll" for description. The checks prepared by the Bookkeeper for payroll tax deposits are recorded in the checkbook with all other checks issued by the TBWC that day.

F. Payroll Records: The TBWC maintains files for the payroll journals and payroll tax reports according to appropriate federal and state guidelines.

G. Benefit and Miscellaneous Payroll Payments: The Bookkeeper generates checks for health and investment benefits and for any wage garnishments.

H. Allocation of staff time: The Bookkeeper uses the timesheet records for the month to update the spreadsheet of staff time allocations so that it accurately reflects actual time spent.

I. Workers compensation reports: The Bookkeeper prepares annual Workers Compensation reports. S/he prepares a worksheet for breaking out hours worked into clerical (for in-office) and out of office classification, and for recording vacation hours. This worksheet is the basis for the final Workers Compensation report.

VIII. DAILY CASH BALANCE

The Bookkeeper maintains a checkbook for the checking account (Excel file). When processing receipts, disbursements, and payroll, the Bookkeeper enters all disbursements into the automated checkbook for the checking account by entering each check on a line including date of check, payee, check number, and amount. On days which include payroll, the automated checkbook will have an additional line for payroll, with the date and total net amount of the payroll.

The Bookkeeper also enters the amounts deposited by date into the checkbook. Deposit entries are made for totals only, showing date and amount. If no deposit is made on a day, no entry is made.

The Bookkeeper computes the daily cash balance in the automated checkbook by adding deposits made to the previous balance and subtracting checks written. The automated checkbook is reconciled to the monthly bank statements. Any bank charges or other bank entries must be recorded in the automated checkbook as soon as notification is received from the bank.

The checkbook is used to determine whether funds are available for disbursements. The Bookkeeper is responsible for projecting cash needs and evaluating whether sufficient cash will be available when needed.

When the Bookkeeper identifies potential cash flow problems, s/he notifies the Coordinator and Administrative Committee. The Coordinator is responsible for resolving cash flow problems.

IX. GENERAL LEDGER

A. Monthly General Ledger preparation: The Bookkeeper is responsible for preparing the General Ledger each month. S/he is also responsible for initial review of the computer processed General Ledger, and for maintaining files of the printed General Ledgers.

B. General Ledger entries: TBWC's General Ledger is maintained by the Bookkeeper.

The Bookkeeper enters all disbursements into the computerized General Ledger, maintaining one set of journals for cash disbursements and one set for payroll cash disbursements. S/he proofs the cash receipts/accounts receivable journal and verifies month end totals, and enters all deposits into the General Ledger using a revenue receipts journal. She prepares a set of General Journal entries from the information provided, recording:

- Accounts receivable sales
- Accounts payable
- Prepaid expenses
- Salary reduction plan adjustments to employee benefits (from the payroll journal)
- Payroll taxes (from a worksheet she prepares based on the payroll journal)
- Vacation time accrued by employees
- Vacation time used by employees
- Interest earned on bank accounts (from the bank statements)
- Any other bank account activity not recorded through cash receipts or cash disbursements (such as electronic drawdowns or bank charges)
- Any adjustments to accounts receivable (from the accounts receivable reconciliation)
- Any adjustments to prior months (these are coded into the current month)

After posting these entries, the bookkeeper reconciles the Cash in Checking account to the bank statement, verifies balances in the accounts payable, accounts receivable, prepaid expense, and payroll liability accounts, and prepares a second set of General Journal entries. These entries correct any errors in posting and record:

- Grants and contracts receivable and revenue earned for the month, based on

expenses incurred in the month for each reimbursable grant or contract (this procedure is followed even if the grantor sends equal monthly payments)

- Deferred revenue recognized/grant revenue earned, based on expenses incurred in the month for each grant which has advanced TBWC money

After posting these entries and proofing the financial statements, she prints out a full set of financial statements and the month's General Ledger in detail, and prepares an updated list of accounts payable.

C. Review of the General Ledger and Financial Statements: The Bookkeeper then makes photocopies of the statements for the Board, files the financial statements and the General Ledger printouts. If the Bookkeeper notes any questionable variances in comparing actual to budget, she meets with the appropriate program manager and/or project director to determine what happened and whether further action is needed to correct the problem.

X. FINANCIAL STATEMENTS

The monthly financial statements include both a Balance Sheet and a Statement of Support, Revenue, and Expenses. The revenue and expense statement includes both the current month and the year to date amounts and a comparison to budget. Separate revenue and expense statements by grant and contract (fund) are prepared to facilitate monitoring the various grants, and statements which break out costs by cost center (functional statements) are also provided.

The Bookkeeper has primary responsibility for monitoring the financial statements and alerting Council members to financial choices or issues. The Coordinator is responsible for assuring overall compliance with grant and contract agreements, and consequently must monitor the financial activity for each grant/contract and take corrective action if issues occur.

XI. BUDGET PREPARATION AND REVISION PROCEDURES

The Bookkeeper and Administrative Committee will prepare TBWC's organizational budget for each fiscal year, by fund, cost center, and line item. The budget is reviewed with the Coordinator and the Treasurer, who present it to the full Council for discussion and approval.

Revisions to the annual budget are necessary when new funding sources are received mid-year. The Bookkeeper prepares budget revisions, including both the new funding source budget and any changes to other budgets caused by changes in cost allocations. The revisions are reviewed by the Coordinator and the Treasurer, who then present the

revisions to the full Council for approval.

XII. PROCUREMENT POLICY AND PROCEDURES

A. Policy. It is TBWC's policy to consistently seek contractors, consultants, and suppliers whereby all factors including cost; technical competence; ability to make timely deliveries; and the quality and performance of their products and services are evaluated and approved by staff and/or the TBWC Administrative Committee. If any contractors, consultants and suppliers are members of the Council or are considered "disqualified persons" as defined by Internal Revenue Code section 4958 and described in paragraph E, the conflict of interest provisions of paragraph E shall be followed.

Notwithstanding any provision of this policy, applicable federal and state laws, rules, and regulations shall govern in any case where federal or state funds are involved and conflict with any of the provisions of this policy and/or require conditions not authorized by this policy.

B. Procurement of Goods. For the purchase of an item costing more than $500, staff documents in writing that two other comparable items were evaluated in addition to the one purchased. For the purchase of an item valued at over $2,000, TBWC staff will receive approval from the Administrative Committee prior to making the purchase.

C. Contracts for Services. A TBWC "contract" is defined as a written agreement drafted on a Council-approved template authorizing in-kind or cash payment for services. TBWC negotiates and executes contracts subject to the following procedures:

1. Competitive Bidding. Competitive bidding is not required for the procurement of services valued at less than $3,500. However, for services valued at greater than $500, staff documents in writing that two other service providers were evaluated in addition to the one selected.

   Services estimated at a value between $3,500 and $40,000 require a minimum of three *formal or informal* quotations or bids* from potential contractors.

   A minimum of three *formal* bids* shall be obtained for all contracts valued at $40,000 or more.

   * Note: Formal bids are those which contain a detailed scope of work, budget, timeline, and statement of qualifications/competence. Informal bids may be written in any form (email, fax, memo

etc) and may or may not contain a detailed scope of work and budget. In the event that the TBWC is unable to obtain three bids despite reasonable efforts to do so, the selection and hiring of contractors will proceed according to the rules established in Section C3 - "Review and Execution" below.

2. Direct Appointment of a Single Contractor. The TBWC will enter in contracts without competitive bidding only if the contractor is not a member of the Council or considered a disqualified person as defined by Internal Revenue Code section 4958 and described in paragraph D and one of the following conditions is met:

   - The contractor has a specialized background or expertise that cannot reasonably be expected to be found elsewhere in the marketplace.

   - A condition exists in which the project cannot be undertaken if competitive bidding requirements are met.

   - The TBWC acts as project sponsor or fiscal agent for a contractor in accordance with the TBWC Grant Sponsorship Policy.

3. Bid Selection and Contract Execution. TBWC staff execute contracts only after consultation with and approval from the Administrative Committee. Contracts valued at more than $ 20,000 require prior approval from the Council before execution.

D. Salary rate limits for Contractors: Contractors and subcontractors will not be paid a maximum daily rate (excluding overhead) exceeding rates outlined in 40 CFR 30.27 (b). This limitation applies to individuals with specialized skills who are paid at a daily or hourly rate. This rate does not include normal travel reimbursements.

E. Conflict of Interest: Awards of funds in any amount may be made to Council members, member organizations of the Council or disqualified persons as defined in Internal Revenue Code section 4958 and described below that have a financial or non-financial interest in the award or project only if the award was made through a "competitive process", described below, and the member recused him/herself from all deliberations and decisions relevant to the award. No sole source contracts in any amount shall be let to any employee of TBWC, Council member, other persons related to those parties, or disqualified persons as defined in Internal Revenue Code section 4958 and described below . Awards of federal funds shall adhere to OMB Circular A-122. No vendor may be employed or used by the TBWC for which there exists a conflict of interest, real or perceived, between any member of the staff or the Council and the contractor except as provided herein. All members of the staff and Board shall declare such conflict if

it exists.

"Competitive process" means that the procedures for procurement of goods in Subsection B and contracts for services in Subsection C are followed. All conflict of interest transactions shall be approved by a majority of all the members of the board who have no direct or indirect interest in the transaction. If a majority of directors vote to approve the transaction or arrangement, a quorum is present for the purpose of taking action, except that such transaction or arrangement cannot be approved by a single director. All conflict of interest transactions shall be documented to include the names of the persons who had a conflict of interest, the nature of the financial interest, a summary of the discussion to determine whether a conflict was present, the names of the directors present for the discussion and vote related to the transaction or arrangement, a summary of the discussion, and a record of the vote taken.

"Disqualifed persons" are defined by Internal Revenue Code (IRC) section 4958 and generally include directors, past board members, Executive Director substantial contributors and those related to these individuals. A "disqualified person" is generally any person who exercises substantial influence over the corporation within a five year period ending on the date of the transaction in question and this person's family members or others connected to this person through business and/or investment (certain 35% controlled entities). Related parties are defined by the IRC to include spouse, siblings, spouses of siblings, ancestors, children, grandchildren and great-grandchildren and spouses of all such children.

Tillamook Bay Watershed Council Monthly Meeting
Bay City Arts Center
November 28, 2022, 6PM

- Call to Order 1806

- Roll Call
  a. Harold Stevens-Chair
  b. Haakon Smith-Vice Chair
  c. Nathan Atchison-Secretary
  d. Charlie Wooldridge-Treasures
  e. Joe Travers- ODF Liaison
  f. Mark Harvey
  g. Erin Skaar
  h. Melyssa Grasper- Technical Advisor

- Approval of previous minutes
  a. September minutes, Wooldridge motioned for approval of August minutes, Smith seconds - none opposed

- Treasurer's Report-Wooldridge
  a. Budget Outlook- Current Balance $8517.66

- Old Business
  a. Reviewed updated bylaws from Subcommittee
     - Policies and procedures will be reviewed later
     - **OWEB has reviewed the updated bylaws and didn't have any issues.**
     - **Vote on Bylaws at the next meeting in December?**
       - **Also create a board member packet/contract?**
  b. **COMPLETED** South Fork Trask PISR Photos
  c. **SUBMITTED Tomlinson Creek Fish Passage –due October 19, 2022 (Zavissler)**
  d. OWEB at Tillamook Bay Community College October 25, 26
  e. Zach Rolfe added to the TBWC board, Atchison motioned for approval, Smith seconds, all in favor, none opposed
- New Business/Discussion
  a. **Harold Stevens is stepping down as council chair with a written statement. Vice Chair Haakon Smith will be stepping in as interim Chair for the rest of 2022.**
  b. **Officer elections 2023 year**
     - **Stevens motioned for approval of Smith as Chair, Harvey as Vice Chair, Atchison as Secretary, Wooldrige as Treasure, Haakon seconds - none opposed**
  c. **Smith motioned for approval to remove all persons from the bank account authorization except Wooldridge and Smith, Wooldridge seconds - none opposed**
  d. Mill Creek Habitat - due December 30, 2022 address at next meeting.
     - Smith will take on the task to get photos maybe after Dec 15th.
  e. Letters of Support from partners
     - Talking points needed for letters, outreach, due January 24th from partners for February 8th commissioners meeting.
     - Commissioners meet every wednesday and will need to submit friday before the meeting to approach the board for the second meeting of February 8th?
  f. Computer replacement, pricing
     - Possibly replace for: $500-$1000
     - **Atchison mentioned approval for new computer purchase below $1000 dollars Second Stevens - no opposed**
  g. OWEB Council Support Application
     - Apps in December, due in March 2023
- Action Items

a. **UO Not providing support this year.** Complete application for The University of Oregon's non-profit review program before November
b. Mill Creek Monitoring Report due December 30, 2022 – complete end of October, mid-November
c. Adopt new by-laws before end of year
d. Request Letters of Support from partners, stakeholders during January due January 24th 2023.
e. Approach Tillamook County Commissioners in February 2023 to receive recognition
f. Complete OWEB Council Capacity Application in March
g. Bank Account Authorizations
h. **Bay city arts center fundraiser December 10th 6PM**

- Calendar
  a. ***Next Meeting – December 28th @ 6PM, BCAC, Bay City***
  b. Meeting Adjournment 19:07

Signed (Chair) _____ Date 12/22/2022

Signed (Secretary) _____ Date 12/22/2022

Match Funding Form

Document the match funding shown on the budget page of your grant application.

OWEB accepts all non-OWEB funds as match. An applicant may NOT use another OWEB grant to match an OWEB grant; this includes ODA Weed Board projects because they are funded through OWEB grants. However, an applicant who benefits from a pass-through OWEB agreement with another state agency, by receiving either staff expertise or a grant from that state agency, may use those benefits as match for an OWEB grant. (Example: A grantee **MAY** use as match the effort provided by ODFW restoration biologists because OWEB funding for those positions is the result of a pass-through agreement).

At the time of application, match funding for OWEB funds requested does not have to be secured, but you must show that **at least 25% of match funding has been sought**. On this form, you do not necessarily need to show authorized signatures ("secured match"), but the more match that is secured, the stronger the application. Identify the type of match (cash or in-kind), the status of the match (secured or pending), and either a dollar amount or a dollar value (based on local market rates) of the in-kind contribution.

If you have questions about whether your proposed match is eligible or not, see Allowable Match document in OGMS https://apps.wrd.state.or.us/apps/oweb/fiscal/nologin.aspx under Technical Assistance application or contact your local OWEB regional program representative (contact information available in the instructions to this application).

Project Name: TBWC Capacity Grant 2023-25

Applicant: Tillamook Bay Watershed Council

Match Funding Source	Type	Status*	Dollar Value	Match Funding Source Signature/Date*
TBWC	cash	secured	$1	3/15/23
	(select)	(select)		
	(select)	(select)		
	(select)	(select)		
	(select)	(select)		
	(select)	(select)		
	(select)	(select)		

*** IMPORTANT:** If you selected "secured" in the Status column for any match funding source, you must provide either the signature of an authorized representative of the match source in the Match Funding Source Signature/Date column, or attach a letter of support from the match funding source that specifically mentions the dollar amount you show in the Dollar Value column.

OREGON
WATERSHED
ENHANCEMENT BOARD

Agenda Item H

Council Capacity Applications

224-021 – Elk Creek WC

Board Meeting July 25-26, 2023

Application Name: Elk Creek Watershed Council Support 2023

Application Number: 224-021-22841

By: Elk Creek WC

Offering Type: Council Capacity Grants

Application Type: Council Capacity

OWEB Region: Southwest Oregon
County: Douglas
Coordinates: 43.662159315188,-123.407291997528

Applicant:
Lee Russell
PO Box 676
Yoncalla OR 97499-0676
(541) 836-7206
russell.leland@gmail.com

Payee:
Lee Russell
PO Box 676
Yoncalla OR 97499
(541) 836-7206
russell.leland@gmail.com

Project Manager:
Lee Russell
PO Box 676
Yoncalla OR 97499
(541) 836-7206
russell.leland@gmail.com

Budget Summary:
OWEB Amount Requested: $131,465
Total Project Amount: $168,505

Administrative Information

Abstract

Provide an abstract statement for the project. Include the following information: 1) Identify the project location; 2) Briefly state the project need; 3) Describe the proposed work; 4) Identify project partners.

Project will provide funding for the Coordinator/Executive Director, and operations of the Elk Creek Watershed Council in the northern part of Douglas County. The Council will work with local landowners and state and federal agencies to plan, develop, and implement on-the-ground projects to benefit fish and wildlife, and water quality in the Elk Creek Watershed, and in the Umpqua Basin. Key partners are local landowners, Douglas and Umpqua SWCD, ODFW, Roseburg District BLM, ODA, and others.

Location Information

Current Location:

What is the ownership of the project site(s)?

✓ *Public land (any lands owned by the Federal government, the State of Oregon, a city, county, district or municipal or public corporation in Oregon)*

What agency(ies) are involved?

Roseburg District BLM

✓ *Tribal lands (any lands owned/managed by a Tribal government)*

✓ *Private (land owned by non-governmental entities)*

Please select one of the following Landowner Contact Certification statements:

❍ I certify that I have informed all participating private landowners involved in the project of the existence of the application, and I have advised all of them that all monitoring information obtained on their property is public record.

● I certify that contact with all participating private landowners was not possible at the time of application for the following reasons: Furthermore, I understand that should this project be awarded, I will be required by the terms of the OWEB grant agreement to secure cooperative landowner agreements with all participating private landowners prior to expending Board funds on a property.

Please List your reasons

Landowner permissions will be obtained for any work done on private lands. Oregon Dept. of Agriculture will secure permissions for noxious weed control treatments on BLM or Cow Creek Tribal lands.

❑ *Not applicable to this project*

❑ *This grant will take place in more than one county.*

Permits

Other than the land-use form, do you need a permit, license or other regulatory approval of any of the proposed project activities?

❍ Yes
● No

Racial and Ethnic Impact Statement

Racial and Ethnic Impact Statement

❍ The proposed grant project policies or programs could have a disproportionate or unique POSITIVE impact on the following minority persons. (indicate all that apply)

❍ The proposed grant project policies or programs could have a disproportionate or unique NEGATIVE impact on the following minority persons. (indicate all that apply)

● The proposed grant project policies or programs WILL HAVE NO disproportionate or unique impact on minority persons.

Insurance Information

If applicable, select all the activities that are part of your project - These require a risk assessment tool unless otherwise noted (check all that apply).

❑ *Working with hazardous materials (not including materials used in the normal operation of equipment such as hydraulic fluid)*

❑ *Earth moving work around the footprint of a drinking water well*

❑ *Removal or alteration of structures that hold back water on land or instream including dams, levees, dikes, tidegates and other water control devices (this does not include temporary diversion dams used solely to divert water for irrigation)*

❑ *Applicant's staff or volunteers are working with kids related to this project (DAS Risk assessment tool not required, additional insurance is required)*

❑ *Applicant's staff are applying herbicides or pesticides (DAS Risk assessment tool not required, additional insurance is required)*

✓ *Insurance not applicable to this project*

Additional Information

❑ *This project affects Sage-Grouse.*

Problem Statement

Does the watershed council have a fiscal sponsor?
❍ Yes
● No

Is the council a membership organization?
❍ Yes
● No

The council is a group of councils operating collectively.
❍ Yes
● No

Is the applicant a group of councils operating independently?
❍ Yes
● No

For Details Upload the council's most recent bylaws.

Councils are required to review their council's bylaws once every three years, provide the date of the last time the council's governing body reviewed the council's bylaws?

01/17/2023

Councils are required to review their policies and procedures once every three years, provide the date of the last time the council's governing body reviewed the council's policies and procedures?

01/17/2023

For Details Upload the council's most recent policies and procedures.

For Details Upload the council's local government designation

For Details Upload the council's policies and procedures.

Date of the council's 2021-2023 self assessment?

02/16/2021

Date of last council officer elections.

02/21/2023

For Details Upload the minutes from the board meeting documenting the results of the officer election.

Does the council have written position descriptions for council board officers?
● Yes
❍ No

Does the council have written roles and responsibilities for council governing body members?

● Yes
❍ No

How many times did/will the council governing body meet between July 1, 2021-June 30, 2023?
22

How many times will the council governing body meet between July 1,-June 30, of the upcoming biennium for which you are seeking funding?
22

Describe how the council advertises its general council meetings.
Announcements on Website
Community Reader Board
Local Newspaper

Do council governing body meetings have agendas, sign-in sheets, and minutes?
● Yes
❍ No

Describe how your board membership includes a diverse range of geographic areas and community interests in the watershed.
The Elk Creek Watershed's geographic areas can best be defined as lowland valley bottoms, where land use is predominantly agricultural, with a small number of rural residential properties; and forested uplands which are manged for timber production on both public and private lands.

Several representatives on the Council Board include both agricultural and small woodland landowners that manage their properties to support themselves and their families economically. Rural residential landowners that value the quality of life in a rural environment are also represented. One member is also a member of Umpqua Watersheds, an active environmental organization in the Umpqua Basin.

Urban areas in the watershed are extremely small. The Cities of Drain and Yoncalla each have populations of about 1,000, and the City of Elkton has a population of about 200, and only a small part of the city is actually in the Elk Creek Watershed. Both the Cities of Drain and Yoncalla are represented on the Board.

A local contractor represents the business interests in the watershed, and another Board member supports the environmental community.

Describe any board membership and recruitment challenges and actions being taken to address those challenges.
The Elk Creek Watershed is very sparsely populated and recruiting members that clearly represent specific interest groups is difficult. Most members fall into several categories and can easily represent rural residential landowners, small agricultural producers, or small woodland operators. All these tend to support the economic interests of land management.

The Council's biggest challenge has been to represent the environmental community on the Council. The addition of Susan Applegate to the Board has brought a new level of diversity.

The other major interest is industrial timber. Though the Council has not been able to get an industrial timber landowner to commit to joining the Board, the Council has expanded its relationships with several industrial timber landowners, and has been working on developing restoration projects that include industrial timberland.

Are projects of the council, including those identified in the work plan, identified in a council action plan or strategic plan?

● Yes
❍ No

Provide the name and date of the most recent action plan or strategic plan.

Elk Creek Watershed Council Action Plan - May 2022
Strategic Restoration Action Plan - June 2019

Is the work of the council specifically designed to benefit salmon or steelhead?

● Yes
❍ No

✓Oregon Coast - Steelhead
✓Oregon Coast - Coho Salmon
✓Oregon Coast - Chinook Salmon

Describe how the resulting council capacity grant will benefit salmon or steelhead or their habitat?

Instream habitat restoration is the highest priority of the Elk Creek Watershed Council. The Elk Creek Watershed contains more than 300 miles of stream habitat for coho and Chinook salmon, steelhead, and lamprey within the Council boundaries. 172 miles are high intrinsic potential, more than any other 5th-field in the Umpqua Basin.

The council's 2022 Action Plan focuses largely on fish habitat improvement. The Council is finishing up the monitoring of the Jack and Hardscrabble Creeks Restoration project, which installed over 300 logs to more than 3 miles of coho habitat, replaced five (5) fish passage barriers , and installed more that 1.3 miles of livestock exclusion fencing. Work is underway to place nearly 300 logs in more than 2 miles of Parker Creek in 2023, and funding is being sought to implement the Ellenburg Creek Restoration Action Plan.

In the past 2 years the council has assisted with the development of eleven restoration projects that address salmon and/or steelhead and their habitats. The coordinator will utilize watershed assessments, action plans and relevant Recovery Plans to develop a prioritized list of future restoration and monitoring projects.

Regional Assessments or Recovery Plans
Recovery Plan for Oregon Coast Coho Salmon Evolutionarily Significant Unit
Oregon Conservation Strategy
The Oregon Plan for Salmon and Watersheds
Oregon Coast Coho Conservation Plan for the State of Oregon

Council Capacity Metrics:
https://www.oregon.gov/oweb/Forms/OC-Application-Watershed-Council-Metrics-23-25.xlsx

Input the total acres encompassed by this watershed.

187090

Input the Federal Recovery plan applicable to your watershed council.

Final ESA Recovery Plan for Oregon Coast Coho Salmon, National Marine Fisheries Service Northwest Region, 2016.

Input the description of the plan implemented that outlines the need for this activity

This project supports local watershed councils by providing capacity to engage in salmonid recovery planning and coordination. The Recovery Plan(s) indicate state and local collaboration and partnerships, especially in the form of watershed councils, are needed to successfully implement Recovery Plan actions and refer to the Oregon Plan. The Oregon Plan for Salmon and Watersheds (1997) provides the governance structure for implementing restoration in Oregon.

Proposed Solution

Community Engagement

Briefly describe the council's stakeholder engagement accomplishments from the 2021-2023 biennium.

The Council has contacted the landowners in the watersheds where instream restoration projects are currently being planned or implemented: Jack Creek, Johney Creek, Hardscrabble Creek, Ellenburg Creek. Two new projects are in development and the Council is working with two new landowners in Parker Creek, and two new landowners on Pheasant Creek.

Since 2018, the Council has partnered with ODA to administer the Distaff Thistle/Paterson's Curse eradication program in Douglas County. There are more than 50 landowners that are engaged in this program. Landowners are contacted to get landowner permissions to work on their lands, and are given technical assistance in treating noxious weeds on their properties.

In 2023, the Council began an effort to revitalize the Cox Creek Cooperative Weed Management Area. This will involve contacting and organizing all the landowners in the Cox Creek and Lees Creek Watersheds where there is an outbreak of Portuguese Broom.

The Council is working on a brochure/mailing that will be sent to all the landowners in the the Elk Creek Watershed. The goal is to identify landowners that would like to work with the Council to develop restoration projects, especially instream habitat improvements, on their lands.

The Council has provided technical assistance to private landowners throughout the Watershed, and to the cities of Drain, Elkton, and Yoncalla that are working on their DEQ TMDL implementation Plans.

Briefly describe the council's stakeholder engagement challenges from the 2021-2023 biennium

Due to the Covid pandemic, the Council's annual landowner "Free Lunch" was cancelled in 2020 and 2021, and there was still some hesitancy to resume the program in 2022. The Council is currently working with the Sunnydale Grange, who have provided the chicken dinners for the program, to see if they will be able to continue the program.

The Council has been trying to find a person to focus on contacting landowners and developing new projects in priority sub-basins the Watershed.

Briefly describe the council's stakeholder engagement plans for the 2023-2025 biennium.

The Council's informational brochure should be completed in early 2023. This will be mailed to all the landowners outside the city limits in the Elk Creek Watershed. The goal is to highlight the restoration projects the Council has completed, and to identify landowners that would like to work with the Council to develop restoration projects on their lands.

The most focused landowner engagement effort will the the re-organization of the Cox Creek Cooperative Weed Management Area. All the landowners within the area that is part of the Portuguese Broom outbreak will be contacted. Based on the response from these landowners, the Council will begin developing a treatment plan to control the spread of this noxious weed.

The Council is beginning talks with the Sunnydale Grange to see if they would like to restart the Council's annual "Free Lunch" program.

The Council is considering a contract with a local technical provider to update and maintain the Council's website.

Describe the council's efforts to engage with local tribes present in the council's geography.

There are no tribes actively involved in the geographic area of the Elk Creek Watershed, however the Council has engaged with the Cow Creek Band of the Umpqua Indians through the Council's administration of the Oregon Weed Board grant. That grant treats a Paterson's Curse infestation on tribal land in Douglas County. The Tribe has contributed matching funds for the grant.

The Confederated Tribes of the Coos, Lower Umpqua, and Siuslaw Indians are part of the Umpqua Basin Small Grant Team, which is administered by the Elk Creek Watershed Council.

Douglas County Natural Resources Dept. is currently reorganizing the Douglas County Weed Advisory Board to help combat the spread of noxious weeds in the County. The Tribe has been an active partner in this effort, and the Elk Creek Watershed Council will also be part of that effort.

Describe the council's efforts to engage with non-traditional partners.

There have been no specific efforts to engage with non-traditional partners. Non-traditional partners are not actively involved in the local community.

Restoration

Provide a brief summary of the council's 2021-2023 restoration accomplishments.

The Council continued work on the Jack and Hardscrabble Creeks Restoration project. While the instream habitat structures were placed in 2019, the riparian improvement parts of the project continued in the 2021-2023 biennium. The project installed more than 1.3 miles of fencing along both sides of Jack Creek to exclude livestock from more than 12.5 acres of riparian area. Planting of native trees and shrubs was completed in early 2020, and monitoring continues.

The replacement of two undersized culverts on Johney Creek, completed in late 2021, improved fish passage into the upper reaches of the creek, and prevented fine sediments from impacting fish habitat and water quality downstream.

The Council completed a two-year project to improve habitat for Western Pond Turtles in a 1.5-acre farm pond adjacent to Elk Creek.

The Council signed cooperative agreements with landowners on Parker Creek, and has secured funding to improve instream habitat on more than two (2) miles of high intrinsic potential coho habitat. The Council worked with ODFW to complete the designs for 29 instream structures, has started looking for a source of logs for the project, and hopes to implement in summer of 2023.

The 2-year monitoring reports for two livestock water improvement projects were completed.

OWEB did not fund the Oregon Weed Board projects in 2021. The Elk Creek Council was able to secure other funding so that this long-term, ongoing noxious weed eradication project was able to continue uninterrupted. OWEB funding resumed in 2022, and the Council administered this grant and provided matching funds for this project. The Council has matching funds secured for the 2023 season.

Briefly describe the council's restoration challenges from the 2021-2023 biennium

The effects of the Covid pandemic limited face-to-face interactions with local landowners, and these effects continued into the 2021-2023 biennium. Most of the restoration work that the Council does relies on personal relationships that have been built up over years, and are maintained with personal contact. These relationships

suffered in the 2021-2023 biennium.

Provide a brief summary of the council's restoration plans for 2023-2025.

The Council plans to continue its restoration program, especially instream habitat improvement projects, in the 2023-2025 biennium. Funding for a large project on Parker Creek has been secured, and implementation is scheduled for summer of 2023. Most, but not all, of the necessary funding for a habitat improvement project on Ellenburg Creek has been secured.

The Council has contracted with Cascade Environmental to develop a Restoration Action Plan for the Big Tom Folley Watershed based on the bioassessment survey that was conducted in the summer of 2019.

The completion of the the Council's landowner mailing should identify a new group of landowners that would like to begin planning for restoration work on their properties. These contacts should provide new opportunities to develop restoration projects in other sub-basins.

Control of noxious weeds has always been a Council priority, and the Council is developing a working partnership with the Douglas SWCD to revitalize the Cox Creek Cooperative Weed Management Area. The goal is to get all the landowners in the area to sign on to the CWMA, and to secure funding to begin treatment of the infestation of Portuguese Broom. Portuguese Broom is confined to a small area between Cox Creek and Lees Creek in the Elk Creek Watershed, but it has not been treated since 2018, when the Weed Board stopped funding to this project.

Planning

Describe how the council uses planning documents to identify and implement on-the-ground watershed restoration and stakeholder engagement projects.

The Council has completed bioassessment surveys of many of the highest priority sub-basins in the Elk Creek Watershed: Jack Creek, Johney Creek, Hardscrabble Creek, Ellenburg Creek, Big Tom Folley Creek. The data from the bioassessments has been used to guide Restoration Action Plans for these sub-basins.

These Restoration Plans have been used to develop and implement restoration projects on Jack Creek, Johney Creek, and Hardscrabble Creek. The planning has been completed, and funding is being sought for instream restoration work in Ellenburg Creek.

The bioassessment survey has been completed on Big Tom Folley Creek, and the Council has contracted with Cascade Environmental Group to draft the Restoration Action Plan for the Big Tom sub-basin.

Are projects of the council identified in a council action plan or strategic plan?

● Yes
❍ No

Provide the name and date of the most recent action plan or strategic plan.

Elk Creek Watershed Council - 2022 Action Plan
May 2022

Wrap-Up

List the watershed council staff (or contractors), their roles, affiliation (staff or contractor), length of time in position (use the Qualifications space), and contact information.

Role	Name	Affiliation	Qualifications	Email	Phone
Executive Director	Lee Russell	Contractor	Elk Creek Watershed Council - 18 years; Douglas SWCD - 2 years; Umpqua Basin Watershed Council - 1 year	russell.leland@gmail.com	(541) 836-7206
Project Development	Walt Barton	Contractor	35 years watershed restoration _ Douglas SWCD	wbarton85@gmail.com	(541) 391-1921

For Details Upload a list, including contact information, for the current board officers.

Budget

Item	Unit Type	Unit Number	Unit Cost	OWEB Funds	External Cash	External In-Kind	Total Costs
Salaries, Wages and Benefits							
			$0	$0	$0	$0	$0
			Category Sub-total	**$0**	$0	$0	$0
Contracted Services							
Executive Director	Years	2	$50,000.00	$70,000	$30,000	$0	$100,000
Restoration Coordinator	Years	2	$25,000.00	$50,000	$0	$0	$50,000
Board of Directors	Hours	352	$20.00	$0	$0	$7,040	$7,040
			Category Sub-total	**$120,000**	$30,000	$7,040	$157,040
Travel and Training							
			$0	$0	$0	$0	$0
			Category Sub-total	**$0**	$0	$0	$0
Materials and Supplies							
			$0	$0	$0	$0	$0
			Category Sub-total	**$0**	$0	$0	$0
Equipment							
			$0	$0	$0	$0	$0
			Category Sub-total	**$0**	$0	$0	$0
Other							
Rent	Years	2	$1,800.00	$3,600	$0	$0	$3,600
Insurance	Years	2	$1,350.00	$2,700	$0	$0	$2,700
Landowner Outreach - Free Lunch Program (Printing; Postage; Room; Dinners)	Years	2	$1,400.00	$2,800	$0	$0	$2,800
Landowner Outreach - Website (Domain; Hosting)	Years	2	$150.00	$300	$0	$0	$300
NOWC Membership	Years	2	$200.00	$400	$0	$0	$400
Miscellaneous Other	Years	2	$122.00	$244	$0	$0	$244
Landowner Outreach - Brochure (Development; Printing; Mailing)	Each	980	$1.45	$1,421	$0	$0	$1,421
			Category Sub-total	**$11,465**	$0	$0	$11,465

* = OWEB funds excluded from indirect.

			Modified Total Direct Cost Amounts	**$131,465**	$30,000	$7,040	$168,505
Indirect Costs							
	0%			$0	$0		$0
Post Grant							
			Total	**$131,465**	$30,000	$7,040	$168,505

Provide context and justification for how your budget was developed. Explain how project costs and/or rates were determined.

Executive Director and Project Development Coordinator services are provided through personal services contracts. Costs associated with delivering these services, which would include such items as salary, benefits, insurance, and indirect costs for an employee, are the responsibility of the contractor, and are included in the

Contracted Services line item..

Contracted Services:

Executive Director: $50,000/year (Estimated @ .75 FTE)

Project Development: $25,000/year (Estimated @ .5 FTE)

Board of Directors: Average of 8 Directors per meeting; 11 meetings per year; 2 hours per meeting; $20.00 per hour.

Does the budget identify a contingency amount for specific line item(s) within the Contracted Services and/or Material and Supplies budget category?

❍Yes

●No

Funding and Match

Fund Sources and Amounts

Organization Type	Name	Source Note	Contribution Type	Amount	Description	Status
Non-Governmental Organization	Elk Creek Watershed Council	General Fund Assets	In-Kind - Labor	$7,040	Board of Directors - Meeting Time	Secured
Non-Governmental Organization	Elk Creek Watershed Council	General Fund Assets	Cash	$30,000	Council General Fund	Secured
Fund Source Cash Total				$30,000	**Fund Source In-Kind Total**	$7,040

Match

Contribution Source-Type: Description	Amount
Elk Creek Watershed Council-In-Kind - Labor: Board of Directors - Meeting Time	$7,040
Elk Creek Watershed Council-Cash: Council General Fund	$30,000
Match Total	$37,040

Do match funding sources have any restrictions on how funds are used, timelines or other limitations that would impact the portion of the project proposed for OWEB funding?

❍ Yes

● No

Do you need state OWEB dollars (not Federal) to match the requirements of any other federal funding you will be using to complete this project?

❍ Yes

● No

Does the non-OWEB cash funding include Pacific Coast Salmon Recovery Funds?

❍ Yes

● No

Uploads

Bylaws: Bylaws (Amended 11-19-2013).pdf **- Bylaws - Amended 11/19/203; Reviewed 1/23/2023**

Local Recognition: Elk Creek Watershed Council - County Designation.pdf **- County Designation**

Policies and Procedures: Policies and Procedures (January 2023)(Signed).pdf **- Policies & Procedures**

Action Plan: 2022 Action Plan (May 2022).pdf **- 2022 Action Plan**

Secured Match Forms: Match Form (signed).pdf **- Secured Match Form**

Local Recognition: Board of Directors.pdf **- Board of Directors List**

Local Recognition: Board Minutes (2023-02-21).pdf **- Minutes Documenting Election of Board Officers**

Strategic Plan: ElkCreek_Strategic_Plan_08.17.2019(lr)r.pdf **- Elk Creek Long-term Strategic Plan**

Permit Page

No Permits have been identified for this application.

Elk Creek Watershed Council
Bylaws

As amended 11/19/2013

1. ARTICLE 1 - DEFINITIONS, INTERPRETATION, AND CONSTRUCTION

1.1. DEFINITIONS: As used in these Bylaws:

1.1.1. "Applicable Laws" means statutes, regulations, rules, ordinances, and other legal requirements of Governmental Agencies that affect the Council, or these Bylaws.

1.1.2. "Alternate" means an individual appointed to perform the duties of a Director when that Director is unable to do so.

1.1.3. "Board" means the Board of Directors of this Council.

1.1.4. "Council" means the Elk Creek Watershed Council, Inc.

1.1.5. "Director" means an individual appointed by the Board, as a Member of the Board.

1.1.6. "Entity" includes but is not limited to any corporation, unincorporated association, estate, partnership, trust, limited liability company, joint venture, Governmental Agency, and other juristic person.

1.1.7. "Government Agency" includes but is not limited to the State of Oregon and any commission, department, agency, official, or instrumentality of the State of Oregon; the United States and any commission, department, agency, official, or instrumentality of the United States; a county, city, district, authority, or any other municipality or unit of local government.

1.1.8. "Individual" means any natural person.

1.1.9. "Member of the Board" means a Director or an Alternate who is serving on the Board in the absence of the Director represented by that Alternate.

1.1.10. "Person" includes an Individual or Entity.

1.1.11. "Third-Party Claims" includes any demands, claims, legal actions, arbitration, administrative proceedings, criminal proceedings, and other adversarial proceedings that are asserted, filed, prosecuted, or appealed and any resulting expenses and liabilities, including damages, judgments, attorney fees, arbitration costs, and penalties.

1.1.12. "Elk Creek Watershed" and "Watershed" means the entire land area drained by the Elk Creek and its tributaries.

1.1.13. "Statistically Valid Sciences" refers to hypotheses that have been posted, data collections made using standard methodology, with results of the data measurements objectively assessed using an analysis of the data described in the science of statistics.

1.2. STATUTORY DEFINITIONS: Words and phrases that are not defined in these Bylaws will have the definition stated in ORS 65.001, ORS 541.351, or other Applicable Laws. For purposes of interpretation of these Bylaws, the definitions stated in Section 1.1 of these Bylaws supersede definitions contained in Applicable Laws.

1.3. INTERPRETATION: Generally, unless particular provisions of these Bylaws state otherwise or unless the content indicates otherwise, the following provisions apply to interpretation of these Bylaws:

1.3.1. Verbs in the present tense include the future and vice versa.

1.3.2. Nouns include the singular and plural forms.

1.3.3. "Shall", "will", and "must" denote acts or obligations that are mandatory.

1.3.4. "May" signifies a discretionary or permissive act.

1.3.5. "Means" denotes an exhaustive definition.

1.3.6. "Includes" denotes a partial definition. The phrase "without limitation" will be deemed to follow the words "includes" and "including" when referring to a list class or group of Persons, things, conditions, events, obligations, rights, powers, or liabilities.

1.3.7. Words and phrases that are defined by these Bylaws or Applicable Laws are capitalized.

1.3.8. References to sections and subsections of these Bylaws are capitalized.

2. ARTICLE 2 – PURPOSE, GOALS, AND PRINCIPLES IRC 501(C)(3)

PURPOSES This Council is organized and will be operated exclusively for charitable, scientific, and educational purposes.

2.1.2. The purpose of this Council will be to engage in lawful activities, none of which are for profit, for which nonprofit corporations may be organized under the laws of the State of Oregon and 501(c)(3) of the Internal Revenue Code.

2.2. PRIMARY PURPOSES: The primary purposes for which this Council is organized are:

2.2.1. To prepare and implement a Watershed action program for the Elk Creek Watershed pursuant to ORS 541.388;

2.2.2. To improve environmental integrity and economic stability in the Elk Creek Watershed;

2.2.3. To foster community understanding and appreciation of Watershed processes; and

2.2.4. To develop, implement, and monitor practices beneficial to the Watershed health, recognizing that human and livestock use is an important part of the equation.

2.3. GOALS: This Council will endeavor to fulfill the primary purposes stated in Section 2.2 by pursuing the following goals:

2.3.1. Provide public participation in the implementation of ORS 541.351 to 541.426;

2.3.2. Encourage landowners to recognize and accept responsibility for that portion of the Watershed under their stewardship and to take voluntary action in the interest of the Watershed;

2.3.3. Foster public awareness of Watershed processes, activities, and opportunities to take responsibility for, and contribute positively to, the Watershed;

2.3.4. Foster scientific understanding through a program of Watershed information and activities;

2.3.5. Serve as a clearinghouse for Watershed information and activities;

2.3.6. Operate in a manner which supports economic stability and environmental integrity (using Statistically Valid Sciences) within the Elk Creek Watershed; and

2.3.7. Encourage cities and their residents to recognize and accept responsibility for their individual and collective impacts on the Watershed.

2.4. PRINCIPLES: This Council and the Directors ascribe to the following statements of principle:

2.4.1. It is possible to achieve both economic stability and environmental integrity within the Elk Creek Watershed and Douglas County using Statistically Valid Sciences.

2.4.2. The natural product and process of the Watershed are indicators of Watershed health and are important to the economy and vitality of communities.

2.4.3. The actions of Persons residing or working within Douglas County can affect the stability of the Watershed and related economy (livestock, logging, farming, etc.).

2.4.4. Land management and other human activities have a legitimate place in the Watershed.

2.4.5. Coordinated planning and action for Watershed health are important, and are most effectively achieved by the Persons who reside and work within the Watershed.

2.4.6. Watershed-scale perspective improves the ability of Persons to sustain the health of the Watershed and related economic activities.

2.4.7. Fish are important to the economic, recreational, ecological, and cultural values of Persons and communities within the Watershed.

2.4.8. This Council shall respect private property rights during the implementation of projects designed to improve Watershed productivity and health. This Council will participate in a project only with the voluntary cooperation of the owner of the land on which the project is located.

2.4.9. This Council shall have no regulatory authority over any private property or publicly owned or managed lands.

3. ARTICLE 3 – DIRECTORS

3.1. NUMBER: This Council will have eleven (11) regular Directors.

3.2. APPOINTMENT AND ELECTION: Eleven (11) Directors will be appointed by the Board.

3.3. QUALIFICATIONS: Directors must be of the age of majority in State of Oregon and must own land within the Elk Creek Watershed.

3.4. COMPOSITION: The composition of this Watershed Council will represent a balance of interested and affected persons within the Elk Creek Watershed and assure a high level of citizen involvement in development and implementation of a watershed action program.

3.5. TERMS: Except as provided in subsection 3.6.2, Directors appointed by the Board shall serve terms of two years that will begin on March 1 of the year of appointment.

3.6. VACANCIES

3.6.1. A vacancy on the Board will exist upon the death, resignation, or removal of a Director.

3.6.2. If a position held by the elected Director is vacant, the Board will appoint a replacement. This Director shall serve for the remainder of the term of the one being replaced.

3.7. REMOVAL AND RESIGNATION

3.7.1. Any Director who is appointed by the Board may be removed by written order of the Board, with or without cause, in accordance to ORS 65.331. A copy of any order for removal will be kept in the records of the Council.

3.7.2. Any Director may resign by giving written notice in accordance with ORS 65.321.

3.8. ALTERNATES

3.8.1. Each Director of the Board may appoint one Alternate who will attend and participate in the meetings of the Board when the Director is unable to attend. All appointments of Alternates will be subject to the written approval of the Board, which will not be unreasonably withheld.

3.8.2. When a Director dies, resigns or is removed from office, or when a Director's term expires, his or her Alternate appointment will be terminated.

3.8.3. When attending and participating in meetings of the Board on behalf of a Director, an Alternate will have all the powers and duties of a Director.

3.8.4. If an Alternate's position is vacant, a replacement will be appointed in accordance with Subsection 3.8.1.

3.8.5. Any Alternate approved by the Board can serve as Alternate for more than one Director, but may only represent one Director at a meeting.

3.9. POWERS: Subject to Applicable Laws and limitations of these Bylaws, the activities and affairs of this Council will be conducted and all powers will be exercised under the direction of the Board.

3.10. DUTIES OF THE BOARD

3.10.1. The Members of the Board shall perform any and all duties imposed on them individually or collectively by Applicable Laws, or these Bylaws.

3.10.2. In addition to other duties imposed by Applicable Laws, and these Bylaws, the Board shall:

1. Appoint and remove, employ and discharge, and except as otherwise provided in these Bylaws, prescribe the duties and fix the compensation, if any, of all officers, agents and employees of the Council.
2. Supervise all officers, agents and employees of the Council to assure their duties are performed properly.
3. Develop such policies, procedures, and rules that the Board deems necessary for exercising the powers granted by these Bylaws, including rules regarding meetings of the Board and committees; policies regarding entry upon private land; policies regarding confidentiality of information provided this Council by Persons; procedures of financial transactions; and rules governing committees.

3.11. COMPENSATION: Directors and Alternates will serve without compensation for their services, but they will be allowed reasonable advancement or reimbursement of expenses incurred in performance of their duties as approved by the Board.

3.12. TIME AND PLACE OF MEETINGS

3.12.1. Meetings of the Board will be held at the Sunnydale Grange Hall unless otherwise provided by the Board.

3.12.2. Regular meetings will be held on the 3rd Tuesday of each month at 7:00 PM. If the regular meeting day falls on a legal holiday, an alternate meeting date and time may be selected by the Board.

3.13. NOTICE OF MEETINGS

3.13.1. No notice is required for any regular meeting of the Board.

3.13.2. Except as provided in Subsection 3.13.3, the Secretary of the Council shall give each Director notice of a special meeting of the Board at least seven (7) days before the meeting is held. Such notice may be oral or written. Oral notice may be given personally or by telephone, and a written record of the notice must be made. Written notice may be given by personal delivery, deposit in the U.S. mail, facsimile transmission, telegraph, or e-mail.

3.13.3. If emergency circumstances require immediate action by the Board, notice may be given personally, or by telephone, facsimile transmission, or email not less than twenty four hours before the time of the meeting.

3.13.4. The notice of a special meeting must state the place, date, and time of the meeting and the matters proposed to be acted upon at the meeting. If an emergency meeting is called, the notice must describe the nature of the emergency.

3.13.5. If the Secretary learns that a Director will not be able to attend a special meeting, or if the Secretary cannot after diligent effort locate a Director to give notice, the Secretary shall give notice to the Alternate for that Director. If a Director learns that he or she cannot attend a regular or special meeting, the Director will notify both the Secretary and the Director's Alternate personally, by telephone, by facsimile transmission, or by e-mail.

3.13.6. Whenever notice of a meeting is required to be given to a Director, a written waiver of notice signed by the Director, before or after the time of the meeting, will be equivalent to giving such notice.

3.14. QUORUM FOR MEETINGS:

3.14.1. Six (6) voting Members of the Board constitute a quorum for the Board. An Alternate will be counted for purpose of a quorum only if the Director represented by the Alternate is not present at the meeting.

3.14.2. No final action will be taken by the Board at any meeting at which the required quorum is not present.

3.15. DECISIONS OF BOARD: The decisions of the Board will be made by a majority vote.

3.16. CONDUCT OF MEETINGS:

3.16.1. The Chairman of the Council will preside over meetings. If the Chairman is absent, the Vice-Chairman will preside over a meeting. If Chairman and Vice-Chairman are absent, the Board may designate a temporary Chairperson to preside over the meeting.

3.16.2. Minutes of meetings will be kept by or under the direction of the Secretary of the Council.

3.16.3. Meetings will be governed by rules of order determined by the Board that are consistent with these Bylaws and Applicable Laws.

4. ARTICLE 4 – OFFICERS

4.1. QUALIFICATIONS: Any individual Director of the Council may serve as officer of this Council.

4.2. ELECTION AND TERM OF OFFICE: Officers will be elected by the Board annually between March 1 and March 31.

4.3. RESIGNATION: Any officer may resign at any time by giving written notice to the Board or to the Chairman or Secretary of the Council. Any resignation will take effect the date of receipt of such notice or at any later date specified therein, and, unless otherwise specified therein, the acceptance of such resignation will not be necessary to make it effective.

4.4. VACANCIES: A vacancy caused by death, resignation, or removal of an officer will be filled by the Board. A vacancy in any office other than the Chairman may be filled temporarily by appointment by the Chairman until the Board fills the vacancy. Vacancies occurring in offices of officers created at the discretion of the Board may or may not be filled as the Board determines.

4.5. DUTIES OF THE CHAIRMAN

4.5.1. The Chairman will be chief executive officer of the Council and shall, subject to the control of the Board, supervise and control the affairs of the Council and the activities of the officers.

4.5.2. The Chairman shall preside at all meetings of the Council.

4.5.3. Except as otherwise provided in Applicable Laws or the Bylaws, the Chairman shall, in the name of the Council, execute deeds, mortgages, bonds, contracts or other instruments when authorized by the Board.

4.6. DUTIES OF THE VICE-CHAIRMAN: The Vice-Chairman will perform all duties of the Chairman when the Chairman is absent or is unable or unwilling to perform those duties. When acting as Chairman the Vice-Chairman will have the powers and responsibilities of the Chairman.

4.7. DUTIES OF THE SECRETARY

4.7.1. The Secretary shall:

1. Certify and keep the original, or a copy, of these Bylaws as amended;
2. Keep minutes of all meetings of the Board and committees.
3. Assure that all notices are duly given in accordance with these Bylaws or as required by Applicable Laws; and
4. Be custodian of the records of the Council.

4.7.2. Clerical tasks assigned to the Secretary may be performed by others under the direction of the Secretary.

4.8. DUTIES OF THE TREASURER

4.8.1. The Treasurer shall:

1. Have charge and custody of, and be responsible for, all funds and securities of the Council and deposit all funds in the name of the Council in banks or other depositories selected by the Board;
2. Receive, and give receipt for, monies due and payable to the Council;
3. Disburse, or cause to be dispersed, the funds of the Council as may be directed by the Board, taking proper vouchers for such disbursements.
4. Keep and maintain adequate and correct accounts of the Council's properties and business transactions, including accounts of its assets, liabilities, receipts, disbursements, gains and losses.
5. Render to the Chairman and Board, whenever requested, an account of any or all of his or her transactions as Treasurer and of the financial condition of the Council; and
6. Prepare, or cause to be prepared, and certify, or cause to be certified, the financial statements to be included in the required reports.

4.8.2. Clerical and bookkeeping tasks assigned to the Treasurer may be performed by others under the direction of the Treasurer.

4.9. ADDITIONAL DUTIES: In addition to the duties listed, each officer shall perform other such duties as may be required by Applicable Laws, or by other provisions of these Bylaws, or which may be assigned from time to time by the Board.

5. ARTICLE 5 – COMMITTEES

5.1. FORMATION OF COMMITTEES: The Board or the Chairman may establish standing committees and ad hoc committees to assist and advise the Board. The authority of each committee will be determined by the Board or the Chairman and may be modified or revoked by the Board or the Chairman at any time.

5.2. MEETINGS AND ACTIONS OF MEETINGS:

5.2.1. Committees will be subject to the control of the Board and may only perform functions and take actions that are authorized by the Board.

5.2.2. The committees will determine the time and place of committee meetings, unless directed otherwise by the Board. Notice of committee meetings will be given to committee members in the same manner as notice of Board meetings is given to Members of the Board.

5.2.3. The Board may designate the Chairperson of a committee who will preside over meetings of the committee, but if the Board does not do so, the committee may designate the Chairperson.

5.2.4. Meetings and decisions of committees will be governed by rules determined by the Board that are consistent with these Bylaws and Applicable Laws.

5.2.5. Each committee shall report on its actions to the Board at the next regular Board meeting.

6. ARTICLE 6 – EXECUTION OF INSTRUMENTS, DEPOSITS AND FUNDS

6.1. LIABILITY FOR COUNCIL OBLIGATIONS: The Directors, Alternates and officers will not be personally liable for the debts, liabilities, or other obligations for the Council.

6.2. INDEMNIFICATION BY COUNCIL OF DIRECTORS AND OFFICERS: The Directors, Alternates, officers, and other agents of the Council who are acting on behalf of the Council in accordance with these Bylaws will be indemnified from Third-Party Claims by the Council to the fullest extent permissible under Applicable Laws.

6.3. INSURANCE FOR COUNCIL AGENTS: The Board may, by resolution, authorize the Council to purchase and maintain liability insurance for any agent of the Council (including a Director, Alternate, officer, employee, or other agent of the Council) against Third-Party Claims arising out of the agent's acts or omissions that occur while the agent is acting on behalf of the Council in accordance with the Council Bylaws.

7. ARTICLE 7 – LIABILITIES AND THIRD-PARTY CLAIMS

7.1. EXECUTION OF INSTRUMENTS: The Board, unless as otherwise provided in the Bylaws, may by resolution authorize any officer or agent of the Council to enter into any contract or execute and deliver any instrument in the name of and on behalf of the Council, and such authority may be general or confined to specific instances. Unless so authorized, no officer, agent, or employee will have any power or authority to bind the Council by any contract or engagement or to pledge its credit or to render it liable for any purpose or in any amount.

7.2. CHECKS AND NOTES: Except as otherwise provided in these Bylaws, or as otherwise required by Applicable Laws, checks, drafts, promissory notes, orders for payment, and other evidence of indebtedness of the Council must be signed by two officers of the Council.

7.3. DEPOSITS: All funds of the Council must be deposited in a timely manner to the credit of the Council in banks or other depositories selected by the Board.

7.4. GIFTS: The Board may accept on behalf of the Council any contribution, gift, bequest or devise for the nonprofit of this Council.

8. ARTICLE 8 – COUNCIL RECORDS

8.1. MAINTENANCE OF COUNCIL RECORDS: The Council shall keep all Council records at its principle office, including:

8.1.1. A copy of the Bylaws as amended to date;

8.1.2. Minutes of each meeting of the Board, any committee appointed by the Board, which indicate:

1. The time and place of the meeting;
2. Whether the meeting was regular or special;
3. How the meeting was called;
4. The notice given for the meeting;
5. The names of those present; and
6. The business transacted at the meetings;

8.1.3. Adequate and correct books and records of accounts, including accounts of its properties and business transactions and accounts of its assets, liabilities, receipts, disbursements, gains and losses; and

8.1.4. Any records required by Applicable Laws.

8.2. INSPECTION OF RECORDS: Every Director will have the absolute right at any reasonable time to inspect and copy all books, records, and documents of every kind and to inspect the physical properties of this Council as may be required under these Bylaws and Applicable Laws.

8.3. PERIODIC REPORT: The Board shall cause any annual or periodic reports required by Applicable Laws to be submitted to the Secretary of State.

9. ARTICLE 9 – IRC 501(C)(3) TAX EXEMPT PROVISIONS

9.1. LIMITATION ON ACTIVITIES

9.1.1. No substantial part of the activities for this Council will be the carrying on of propaganda, or otherwise attempting to influence legislation, except as otherwise provided in Section 501(h) of the Internal Revenue Code, and this Council will not participate in, or intervene in (including the publishing or distribution of statements), any political campaign on behalf of, or in opposition to, any candidate for public office.

9.1.2. Notwithstanding any other provisions of these Bylaws, this Council will not carry on any activities not permitted to be carried on by a corporation exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code, or by a corporation, contributions to

which are deductible under Section 170(c)(2) of the Internal Revenue Code.

9.2. PROHIBITION AGAINST PRIVATE INUREMENT: No part of the net earnings of this Council will inure to the benefit of, or be distributable to, its Members, Directors or trustees, officers, or other private Persons, except that the Council will be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes of this corporation.

9.3. DISTRIBUTION OF ASSETS: Upon dissolution of this Council, its assets remaining after payment of all debts and liabilities of this Council will be distributed for one or more exempt purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code or will be distributed to the federal government, or to a state or local government, for a public purpose. Such distribution will be made in accordance with all Applicable Laws.

10. ARTICLE 10 – AMENDMENT OF BYLAWS

10.1. AMENDMENTS IN GENERAL: Subject to the powers of the Members under Section 10.2 and except as otherwise provided by the Articles of Incorporation and Applicable Bylaws, these Bylaws may be amended by approval of the Board.

10.2. AMENDMENTS TO ARTICLE 2: Amendments to Article 2 of these Bylaws concerning purposes, goals and principles of this Council may be approved by 60% of the Board as determined by the “Director’s List” 30 days prior to the vote on the proposed change.

BEFORE THE BOARD OF COUNTY COMMISSIONERS
OF DOUGLAS COUNTY

AN ORDER ESTABLISHING THE ELK CREEK WATERSHED COUNCIL AND APPROVING ITS STEERING COMMITTEE MEMBERS	)))))	ORDER

This matter comes before the Board of County Commissioners on February 6, 2002, and the Board finds:

1. The Oregon Legislative Assembly has encouraged local government groups to form voluntary local watershed councils to protect and enhance the quality of the watershed;

2. Management techniques and programs for the protection and enhancement of the Elk Creek watershed are most effective and efficient when voluntarily initiated at the local level;

3. Cooperative partnerships between affected private individuals, interested citizens, and representatives of local, state and federal agencies may improve opportunities to address the goals of sustaining natural resource values and watershed protection and enhancement within the Smith River Basin Watershed.

4. A watershed council is most effective when it includes a balance of interested and affected persons within the watershed and assures that all parties and persons with interests in the watershed are afforded opportunities to be involved in watershed protection and enhancement.

NOW, THEREFORE, IT IS HEREBY ORDERED:

1. The *Elk Creek Watershed Council*, comprised of the residents of Douglas County to protect and enhance the Elk Creek Basin Watershed, is hereby created.

2. Membership in said watershed council shall be open to any person, party, or entity interested in and/or affected by activities in the Elk Creek basin watershed;

3. The watershed council shall be advisory to the Douglas County Board of Commissioners.

4. The watershed council shall have no regulatory authority over any private property or publicly owned or managed property within Douglas County.

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5. The Elk Creek Watershed Council shall be managed by a steering committee made up of interested and affected persons who are representative of the following interests:

Agriculture, Livestock, Ranching
Timber, Mining and Aggregate
Fishing, Recreation, Conservation
Municipalities, Local Conservation Districts
Douglas County Commissioners
Member at Large

6. The steering committee's members shall be appointed by the Board of Commissioners, and the individuals as listed on the attached **Exhibit A** shall make up the membership of the initial steering committee.

7. The terms of the original members shall be staggered and shall be selected by lottery drawing among each interested group; one-half for an initial two year term, and one-half for an initial three year term. Terms shall commence the first day of March of the year appointed. After the initial term, each appointment shall be for a term of two years. At the expiration of a member's term, the Board of Commissioners shall appoint a new member or may reappoint the member whose term expired for no more than one additional two year term. If a member resigns from the committee, the board shall appoint a replacement who shall serve for the remainder of the term of the member being replaced. The committee shall appoint its own chair, and each committee member shall select one alternate to serve in his/her absence.

8. The watershed council's steering committee shall operate on a consensus approach.

9. The Douglas County Board of Commissioners shall evaluate the watershed council on a two year cycle; at which time changes, deletions, additions or other modification may be made.

10. The boundaries of the Elk Creek Watershed Council are the Elk Creek watershed boundaries within Douglas County.

11. The boundaries of the Umpqua Basin Watershed Council are hereby modified to exclude the Elk Creek watershed. The Elk Creek watershed is not within the geographic area of the Umpqua Basin Watershed Council.

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12. Any watershed council conducting projects, managing projects, seeking grants or otherwise operating outside its own watershed boundaries and within the boundaries of another watershed council shall notify the watershed council in the affected area of the project, grant application or operations.

DATED this 13th day of February, 2002.

BOARD OF COUNTY COMMISSIONERS
OF DOUGLAS COUNTY, OREGON

DOUG ROBERTSON, CHAIR

MICHAEL J. WINTERS, COMMISSIONER

Commissioner Morgan voted against
JOYCE MORGAN, COMMISSIONER

Elk Creek Watershed Council

Policies and Procedures



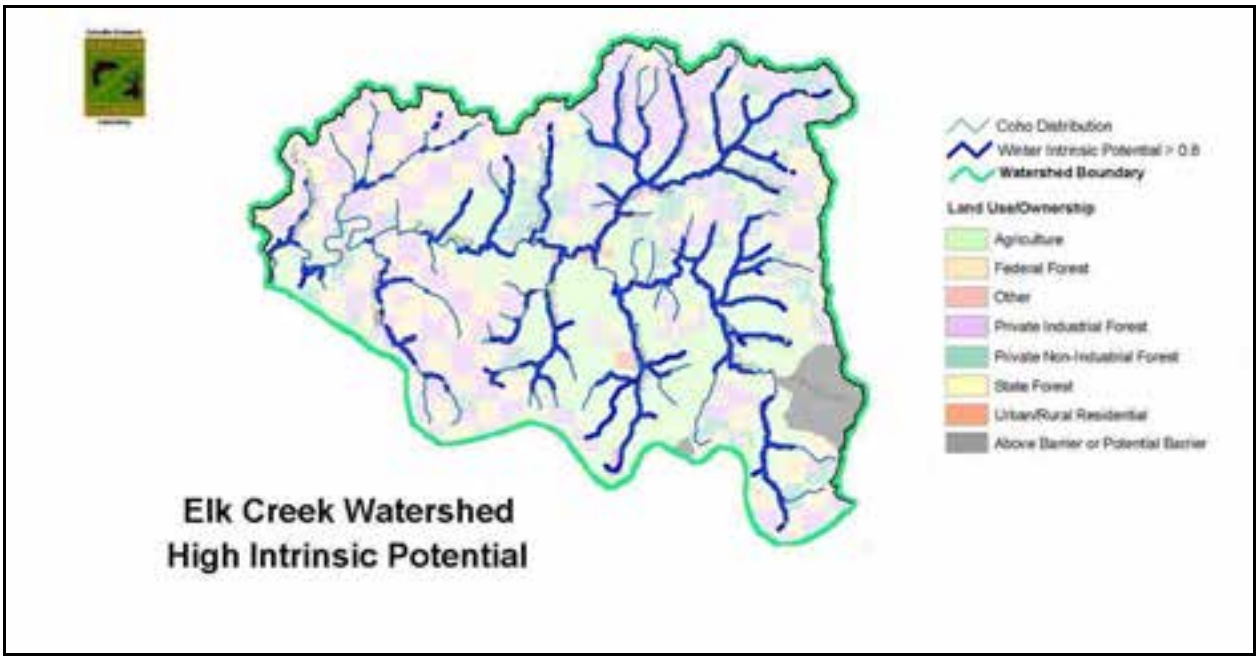
Spawning Coho - Cox Creek

[As Amended: 17 January 2023]

THE ELK CREEK WATERSHED

The Elk Creek Watershed comprises 187,000 acres in North Douglas County. The watershed is sparsely populated, with a population of approximately 5,000. There are two (2) incorporated cities within the watershed, Drain and Yoncalla, each with a population of approximately 1,100. The majority of the land in the watershed is privately owned (76%), the other 24% is O&C land managed by the Roseburg District BLM. The primary land use is forestry (73%), and of this forest land, 46% is industrial timber and 54% is small woodland owners. The remainder of the land (27%) is used for agriculture, predominately for raising cattle and sheep.

The Elk Creek Watershed is important habitat for coho salmon. The watershed contains more miles of High Intrinsic Potential coho habitat than any other fifth-field watershed in the Umpqua Basin. Of the 248 miles of anadromous fish habitat in the watershed, 172 miles are High Intrinsic Potential for coho. The majority of this habitat is in the lower reaches of the tributaries on privately owned agricultural land.



THE ELK CREEK WATERSHED COUNCIL

The Elk Creek Watershed Council is a 501(c)(3) non-profit corporation. The council was formed in 2002 to engage and inform landowners in the watershed about conditions in the watershed, and about how their land management actions affect the watershed, and especially the habitat of anadromous fish. The council is actively engaged in developing and implementing voluntary watershed restoration and improvement projects with willing landowners.

PURPOSE

The primary *purposes* of the Elk Creek Watershed Council are:

- To prepare and implement a watershed action program for the Elk Creek Watershed pursuant to ORS 541.388;
- To improve environmental integrity and economic stability in the Elk Creek Watershed;
- To foster community understanding and appreciation of watershed processes; and
- To develop, implement, and monitor practices beneficial to the watershed health, recognizing that human and livestock use is an important part of the equation.

Elk Creek Watershed Council Bylaws (Amended: 11/19/2013)

GOALS

The primary *goals* of the Elk Creek Watershed Council are:

- To provide public participation in the preparation and implementation of a watershed action program for the Elk Creek Watershed;
- To encourage landowners to recognize and accept responsibility for that portion of the watershed under their stewardship and to take voluntary action in the interest of the watershed;
- To foster public awareness of watershed processes, activities, and opportunities to take responsibility for, and contribute positively to, the watershed;
- To foster scientific understanding through a program of watershed information and activities;
- To serve as a clearinghouse for watershed information and activities;
- To operate in a manner which supports economic stability and environmental integrity (using statistically valid science) within the Elk Creek Watershed; and
- To encourage cities and their residents to recognize and accept responsibility for their individual and collective impacts on the Watershed.

Elk Creek Watershed Council Bylaws (Amended: 11/19/2013)

PRINCIPLES

The primary *principles* of the Elk Creek Watershed Council are:

- It is possible to achieve both economic stability and environmental integrity within the Elk Creek Watershed and Douglas County using statistically valid sciences;
- The natural product and process of the Watershed are indicators of Watershed health and are important to the economy and vitality of communities;
- The actions of persons residing or working within the Elk Creek Watershed can affect the stability of the watershed and related economy (livestock, logging, farming, etc.);

- Land management and other human activities have a legitimate place in the Watershed;
- Coordinated planning and action for watershed health are important, and are most effectively achieved by the persons who reside and work within the watershed;
- Watershed-scale perspective improves the ability of persons to sustain the health of the watershed and related economic activities;
- Fish are important to the economic, recreational, ecological, and cultural values of persons and communities within the watershed;
- This council shall have no regulatory authority over any private property or publicly owned or managed lands; and
- This council shall respect private property rights during the implementation of projects designed to improve watershed productivity and health. This council will participate in a project only with the voluntary cooperation of the owner of the land on which the project is located.

Elk Creek Watershed Council Bylaws (Amended: 11/19/2013)

POLICIES

I.) ORGANIZATIONAL POLICIES:

In the conduct of its business, it shall be the *policy* of the Elk Creek Watershed Council to:

- Encourage the public to attend council meetings, and to participate in council activities.
- Conduct the business of the council in an open and transparent manner. This shall include public announcements of regularly scheduled council meetings and access to agendas and minutes of council meetings.
- Include a broad representation of community interests on the governing board of the council. These interests shall include representatives of the primary land uses in the watershed, *i.e.* agriculture, forestry, and urban.
- Include representatives of state and federal land management agencies that operate within the watershed in all activities and decisions of the council, *i.e.* Douglas Soil and Water Conservation District, Oregon Department of Fish and Wildlife, and Roseburg District Bureau of Land Management.
- Respect private property rights during the implementation of projects designed to improve watershed productivity and health. The council will participate in a project only with the voluntary cooperation of the owner of the land on which the project is located.
- Not use litigation as a means to achieve the council's ecological goals. The Elk Creek Watershed Council is *not* a regulatory agency, and has *no* regulatory authority.

II.) CONFLICT OF INTEREST POLICIES:

- Statement of Potential Conflict of Interest: Occasionally, the council will consider a decision that involves a member of the Board of Directors. If the Board's decision may have a financial impact, either on the Board Member, his/her immediate family, or on a company that the Board Member or his/her family has a financial interest in, there may be a conflict of interest. If a Board Member feels that there may be a potential conflict of interest, he/she shall immediately bring the potential conflict to the attention of Board of Directors. The Board Member will disclose to the Board all details of the potential conflict of interest.
- Conflict of Interest: If a member of the Board of Directors declares that there may be a conflict of interest, the Board Member with the conflict will not participate in any further discussion, or any votes on the matter being considered by the Board. The remaining Board members will consider the potential conflict of interest, and determine whether the conflict of interest warrants exclusion of the Board member from discussion or voting on the matter at hand. The Board member with the potential conflict may request a vote. The final decision will be made by a majority vote of the remaining Board members.

III.) FISCAL POLICIES:

It shall be the *policy* of the Elk Creek Watershed Council to:

- Ensure that the highest standards of accountability are maintained, and that internal controls over financial records reflect generally accepted accounting procedures (GAAP);
- Maintain council financial records in a QuickBooks accounting system. The system shall be available for review by any member of the Board of Directors upon request;
- Require that all council expenditures be reviewed and approved by a majority vote of the Board of Directors. Approval may be by a vote at a regularly scheduled council meeting, or by a phone poll of the Board;
- Require that all council checks be reviewed and signed by two (2) officers of the Board of Directors.
- Duties of the Executive Director:
  - Enter bills (accounts payable) and checks (accounts receivable) into the QuickBooks system;
  - Reconcile the monthly bank statement with the QuickBooks system and submit the reconciliation report to the Treasurer;
  - Prepare and submit a report of accounts payable and accounts receivable to the Treasurer before each monthly meeting.

- Duties of the Treasurer:
  - Review the monthly reconciliation report, accounts payable, and accounts receivable, and prepare a written report for the Board of Directors before each monthly meeting;
  - Present the Treasurer's report, including bank reconciliation, accounts payable, and accounts receivable to the Board of Directors at each monthly meeting. The Treasurer's report will be accepted by a majority vote of the Board of Directors.

IV.) CONTRACTOR POLICIES:

- Contracted Services: It is the policy of the Elk Creek Watershed Council to secure the services necessary for managing the operations of the council, and for managing the projects and programs of the council, through contracts with qualified, independent contractors.
- Contract Review: The Elk Creek Watershed Council will complete a review of the Council Coordinator/Executive Director at least every biennium. The evaluation will be reviewed by the Executive Committee and the schedule of the review will be announced at the regular monthly council meeting. All Directors will be invited to attend.

V.) COUNCIL ACTION PLAN:

- Watershed Council Action Plan: It is the policy of the Elk Creek Watershed Council to review and update its Action Plan at least every two (2) years. The Action Plan will be reviewed by the Executive Committee and the schedule of the review will be announced at the regular monthly council meeting. All Directors will be asked for input and invited to attend. Recommendations of the Executive Committee, and a draft of the updated Action Plan, will be presented at the next monthly meeting. Acceptance of the Action Plan will be by a majority vote of the Board of Directors.
- Self-Evaluation: The OWEB Council Support Grant requires that the council complete a self-evaluation at least every two (2) years. The self-evaluation will be part of the process to review and update the council's Action Plan. The self-evaluation will be reviewed by the Executive Committee and the schedule of the review will be announced at the regular monthly council meeting. All Directors will be asked for input and invited to attend. Recommendations of the Executive Committee will be included in the draft of the updated Action Plan. Acceptance will be by a majority vote of the Board of Directors.

SIGNATURE PAGE:

The Elk Creek Watershed Council - Policies and Procedures (2023) is hereby accepted and adopted by the Board of Directors of the Elk Creek Watershed Council.



January 17, 2023

Elk Creek Watershed Council

2022 Action Plan



Johney Creek Culvert Replacement - August 2021

May 2022

PURPOSE

The primary purposes of the Elk Creek Watershed Council are:

- To prepare and implement a Watershed action program for the Elk Creek Watershed pursuant to ORS 541.388;
- To improve environmental integrity and economic stability in the Elk Creek Watershed;
- To foster community understanding and appreciation of watershed processes; and
- To develop, implement, and monitor practices beneficial to the watershed health, recognizing that human and livestock use is an important part of the equation.

Elk Creek Watershed Council Bylaws (Amended: 11/19/2013)

GOALS

The primary goals of the Elk Creek Watershed Council are:

- To provide public participation in the implementation of ORS 541.351 to 541.426;
- To encourage landowners to recognize and accept responsibility for that portion of the watershed under their stewardship and to take voluntary action in the interest of the watershed;
- To foster public awareness of watershed processes, activities, and opportunities to take responsibility for, and contribute positively to, the watershed;
- To foster scientific understanding through a program of watershed information and activities;
- To serve as a clearinghouse for watershed information and activities;
- To operate in a manner which supports economic stability and environmental integrity (using statistically valid science) within the Elk Creek Watershed; and
- To encourage cities and their residents to recognize and accept responsibility for their individual and collective impacts on the Watershed.

Elk Creek Watershed Council Bylaws (Amended: 11/19/2013)

Elk Creek Watershed Council

Strategic Restoration Action Plan

June 2019

The Elk Creek Watershed Council 2022 Action Plan is based on the priority subwatersheds, and priority restoration actions, developed in the Council's long-range Strategic Restoration Action Plan - June 2019.

Subwatershed	Total Stream Channel Miles Surveyed	Poor Summer Habitat %	Poor Winter Habitat %	Poor Winter / Summer Overlap %	% Private Industrial Forest	TOTAL POINTS	PRIORITY RANKING
Middle Elk Creek	11.30	59%	72%	59%	30%	**13**	**HIGHEST**
Lower Pass Creek	29.78	65%	80%	46%	45%	**12**	**HIGHEST**
Big Tom Folley Creek	15.23	39%	61%	31%	47%	**12**	**HIGHEST**
Brush Creek	13.50	44%	96%	44%	45%	**11**	**NEXT HIGHEST**
Billy Creek	17.31	69%	55%	40%	42%	**11**	**NEXT HIGHEST**
Lower Elk Creek	4.35	49%	52%	33%	29%	**10**	**NEXT HIGHEST**
Yoncalla Creek	10.57	100%	88%	88%	20%	**9**	**LOWEST**
Upper Elk Creek	17.80	53%	71%	49%	25%	**9**	**LOWEST**
Headwaters Elk Creek	16.28	53%	84%	37%	26%	**8**	**LOWEST**
Upper Pass Creek	12.37	65%	37%	25%	38%	**7**	**LOWEST**
TOTAL	**148.49**						

2022 ACTION PLAN

GOAL 1: WATERSHED RESTORATION:

Plan and implement projects in the Elk Creek Watershed that restore or improve habitat for fish and wildlife, especially endangered coho salmon; that restore or improve riparian habitat and function; and that restore or improve upland habitat and function.

A. Strategy 1: Improve or Restore Instream Habitat

Priority Actions:

- Improve coho summer and overwinter habitat
- Improve complex instream habitat for juvenile coho
- Restore floodplain connectivity

Priority Watersheds:

- Middle Elk Creek 6th-Field
- Lower Pass Creek 6th-Field
- Big Tom Folley Creek 6th-Field

Current Projects:

Action 1: Jack-Hardscrabble Creek Habitat & Riparian Improvement [High Priority]
Action 2: Parker Creek Habitat Improvement [High Priority]

Projects in Development:

Action 1: Ellenburg Creek Habitat Improvement [High Priority]
Action 2: Upper Ellenburg Creek Habitat Improvement [Medium Priority]

B. Strategy 2: Improve or Restore Instream Connectivity

Priority Actions:

- Restore or improve anadromous fish passage

Priority Watersheds:

- Middle Elk Creek 6th-Field
- Lower Pass Creek 6th-Field
- Big Tom Folley Creek 6th-Field

Current Projects:

Action 1: Johney Creek Culvert Replacements [High Priority]
Action 2: Ellenburg Creek Fish Passage Improvement [High Priority]

Projects in Development:

Action 1: Upper Ellenburg Creek Culvert Replacement [Medium Priority]
Action 2: Big Tom Folley Culvert Replacement [Medium Priority]

C. <u>Strategy 3</u>: Improve or Restore Riparian Habitat and Function

Priority Actions:

- Install livestock exclusion fencing
- Replace invasive species with native trees and shrubs
- Plant willows to reduce streambank erosion and encourage beaver expansion

Priority Watersheds:

- Middle Elk Creek 6th-Field
- Lower Pass Creek 6th-Field
- Big Tom Folley Creek 6th-Field

Current Projects:

Action 1: Jack-Hardscrabble Creek Habitat & Riparian Improvement [High Priority]
Action 2: Clover Creek Tributary Fencing [Medium Priority]
Action 3: Johney Creek Riparian Improvement [Medium Priority]

Projects in Development:

Action 1: Parker Creek Riparian Improvement [Medium Priority]

D. <u>Strategy 4</u>: Improve or Restore Upland Habitat and Function

Priority Actions:

- Reduce erosion from upland sources
- Reduce runoff from agricultural lands

Priority Watersheds:

- Middle Elk Creek 6th-Field
- Lower Pass Creek 6th-Field
- Yoncalla Creek

Current Projects:

Action 1: Kennerly Stream Protection [High Priority]
Action 2: Turkey Crick Livestock Water [High Priority]
Action 3: Clover Creek Livestock Water [High Priority]

Projects in Development:

Action 1: Van Epps Livestock Water [Medium Priority]
Action 2: City of Elkton Stormwater Erosion Control [High Priority]
Action 3: Branscomb Upland Habitat Improvement [High Priority]

GOAL 2: WATERSHED MONITORING:

Plan and implement projects that monitor the condition of water quality, and fish and wildlife habitat in the Elk Creek Watershed.

A. Strategy 1: Watershed Assessment

Priority Actions:

- Using the rapid bioassessment protocols developed by the Elk Creek Watershed Council and Cascade Environmental, collect data on anadromous fish numbers and distribution, and on habitat conditions, in priority sub-basins in the watershed

Priority Watersheds:

- Middle Elk Creek 6th-Field
- Lower Pass Creek 6th-Field
- Big Tom Folley 6th-Field

Current Projects:

Action 1: Jack Creek Bioassessment [High Priority]

Projects in Development:

Action 2: Sand Creek/Rock Creek Bioassessment [Medium Priority]

B. Strategy 2: Water Quality Monitoring

Priority Actions:

- Monitor water quality in the Elk Creek Basin

Priority Watersheds:

- Yoncalla Creek
- Billy Creek
- Jack Creek

Projects in Development:

Action 1: Elk Creek Temperature Study [Medium Priority]

GOAL 3: COMMUNITY OUTREACH AND EDUCATION:

Provide information and technical assistance to landowners that increases their understanding of watershed processes, and fosters land management actions that improve conditions in the watershed.

A. Strategy 1: Improve awareness of watershed processes and fish life cycles:

Priority Actions:

- Provide technical assistance to landowners and land managers requesting assistance
- Provide educational opportunities to the general public

Current Projects:

Action 1: Elk Creek Watershed "Free Lunch" Program [High Priority]
Action 2: Elk Creek Watershed Council web site [High Priority]
Action 3: Elk Creek Watershed Council Education Program [Medium Priority]

Projects in Development:

Action 1: Expand the Elk Creek Watershed Council website [High Priority]
Action 2: Develop Elk Creek Watershed Council brochure [Medium Priority]

B. Strategy 2: Increase public awareness of the council and its activities:

Priority Actions:

- Provide the general public information about the council and its activities

Current Projects:

Action 1: Elk Creek Watershed "Free Lunch" Program [High Priority]
Action 2: Elk Creek Watershed Council web site [High Priority]
Action 3: Elk Creek Watershed Council Education Program [Medium Priority]

GOAL 4: ORGANIZATIONAL IMPROVEMENT:

Improve the organizational effectiveness of the Elk Creek Watershed Council to carry out its mission, and to be a leader in the management of natural resources in the watershed.

A. Strategy 1: Update the Council's Work Plan goals for the 2021-2023 Biennium:

Priority Actions:

- Complete a Council self-evaluation using the OWEB self-evaluation tool

B. Strategy 2: Develop Collaborative Partnerships with Other Organizations:

Priority Actions:

- Develop and maintain Watershed Council collaborative efforts with other natural resource agencies and organizations within the Elk Creek Watershed and the Umpqua Basin

Current Projects:

Action 1: Continue Watershed Council participation and involvement in current Umpqua Basin partnerships and working groups [High Priority]

- Douglas County/Umpqua Basin CREP Partnership
- Douglas County Noxious Weed Control Program
- Umpqua Basin Collaborative (Focused Investment Partnership
- Umpqua Basin Beaver Workgroup
- NRCS Local Workgroup

Projects in Development:

Action 1: Explore opportunities to develop new partnerships, and to collaborate with other natural resource agencies and organizations, to encourage conservation and land use practices that promote environmental integrity and economic stability in the Elk Creek Watershed and the Umpqua Basin [High Priority]

GOAL 5: WATERSHED PLANNING:

Develop restoration plans at appropriate scales and time frames to guide watershed restoration in the Elk Creek Watershed.

A. Strategy 1: Develop sub-watershed-scale restoration action plans

Priority Actions:

- Develop restoration action plans for priority sub-basins in the Elk Creek Watershed

Current Projects:

Action 1: Big Tom Folley Restoration Action Plan [High Priority]

APPROVED:

The Elk Creek Watershed Council 2020 Action Plan is hereby accepted and adopted by the Board of Directors of the Elk Creek Watershed Council.

James Mast - Chairman May 17, 2022

MATCH FUNDING FORM

Document here the match funding shown on the budget page of your grant application

OWEB accepts all non-OWEB funds as match. An applicant may not use *another OWEB grant* to match an OWEB grant; this includes ODA Weed Board projects because they are funded through OWEB grants. However, an applicant who benefits from a pass-through OWEB agreement with another state agency, by receiving either staff expertise or a grant from that state agency, may use those benefits as match for an OWEB grant. (Example: A grantee may use as match the effort provided by ODFW restoration biologists because OWEB funding for those positions is the result of a pass-through agreement).

At the time of application, match funding for OWEB funds requested does not have to be *secured*, but you must show that at least 25% of match funding has been *sought*. On this form, you do not necessarily need to show authorized signatures ("secured match"), but the more match that is secured, the stronger the application. Identify the type of match (cash or in-kind), the status of the match (secured or pending), and either a dollar amount or a dollar value (based on local market rates) of the in-kind contribution.

If you have questions about whether your proposed match is eligible or not, see Allowable Match document in OGMS http://apps.wrd.state.or.us/apps/oweb/fiscal/nologin.aspx under Technical Assistance application or contact your local OWEB regional program representative (contact information available in the instructions to this application).

Project Name: Elk Creek Council Support

Applicant: Elk Creek Watershed Council

Match Funding Source	Type (√ one)	Status (√ one)*	Dollar Value	Match Funding Source Signature/Date*
Elk Creek Watershed Council	☒ cash ☐ in kind	☒ secured ☐ pending	$30,000.00	
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		

* **IMPORTANT:** If you checked the "Secured" box in the Status Column for any match funding source, you must provide either the signature of an authorized representative of the match source in the final Column, or attach a letter of support from the match funding source that specifically mentions the dollar amount you show in the Dollar Value Column.

Board of Directors - Elk Creek Watershed Council - 21 February 2023

James Mast	(541) 662-0445	jamesmast6@gmail.com	Chairman
Joe Coons	(541) 784-6672	kittiecoons@yahoo.com	Vice-Chairman
Kittie Coons	(541) 784-6672	kittiecoons@yahoo.com	Secretary
Cindy Johnsrud	(541) 521-5593	cindyjohnsrud@gmail.com	Treasurer
Brad Chapman	(541) 729-3813	abclogger1@peoplepc.com	
John Kittelman	(541) 580-3997	john.kittelman@hotmail.com	
Bob Rundell	(541) 953-4628	rundellinc@gmail.com	
Gene Zuiches	(503) 423-7775	ez4me4@netzero.net	
Linda Galetti	(541) 580-5171	lgaletti44@gmail.com	
Rick Reinhart	(541) 580-6247	rickey1reinhart@hotmail.com	

Elk Creek Watershed Council

Board of Directors Meeting – Minutes

February 21, 2023

Board Attendance:

× Marvin Akins	× Kittie Coons	✓ James Mast
✓ Susan Applegate	✓ Linda Galetti	✓ Rick Reinhart
× Harold Burris	✓ Cindy Johnsrud	× Bob Rundell
✓ Brad Chapman	× John Kittelman	✓ Gene Zuiches
× Joe Coons		

Others in Attendance: Lee Russell, Rich Galetti.

Minutes:

The Council approved the January minutes.

Treasurer's Report:

The Council approved the February Treasurer's Report.

Beginning Balance: 1 January 2023		$130,924.47
Deposits:	$.54	
Checks:	$13,574.51	
Ending Balance: 31 January 2023		$117,350.50

Outstanding Deposits	$10,982.38
Outstanding Checks	$457.66
Bank Balance:	$127,875.22

Accounts Receivable	$48,790.00	
Accounts Payable	$222.16	
Fund Balance:		$176,443.06

Executive Committee – James Mast

- James Mast reported on the updates to the Council's Policies and Procedures document.
- James Mast asked about progress on the Parker Creek project.

Douglas SWCD – Cindy Bright

Cindy Bright was unable to attend due to snow.

Bureau of Land Management – Jeff McEnroe

No Report.

Oregon Department of Fish and Wildlife – Eric Himmelreich

No Report.

Project Development Report – Walt Barton

Walt was unable to attend due to snow.

Old Business:

- The Board approved a motion (Zuiches/Chapman) to extend the terms of the current Officers of the Board of Directors for another year.
- The motion passed unanimously.

New Business:

- The Board approved a motion (Zuiches/Chapman) to develop a Memorandum of Agreement with the Douglas SWCD to begin landowner outreach to reestablish the Cox Creek Cooperative Weed Management Area..

Executive Director Report:

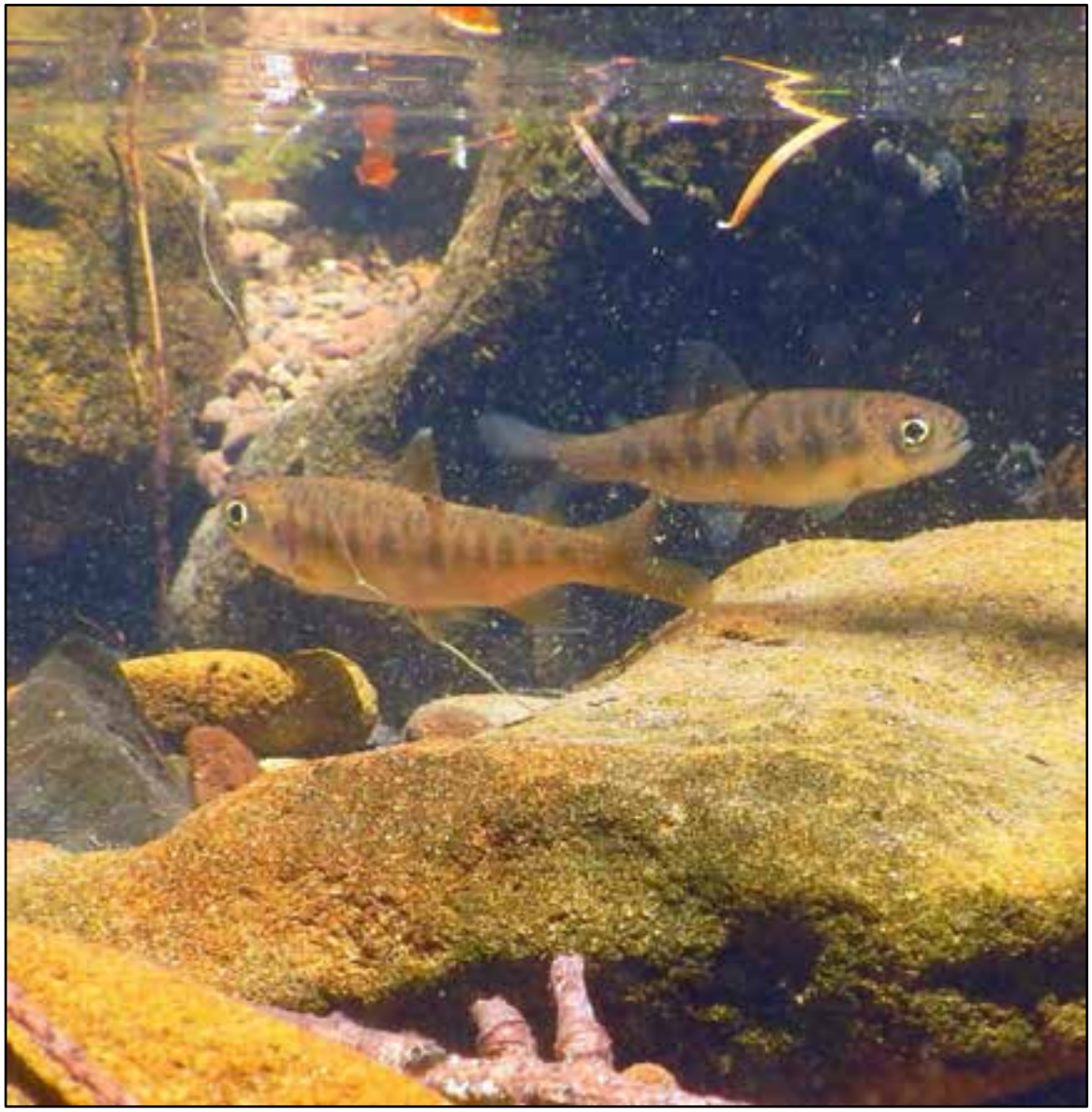
- Lee Russell reported on the Council's ongoing projects and project funding. [See attached report]

Director's Reports:

Adjournment:

Elk Creek Watershed Council

Strategic Restoration Action Plan



Juvenile Coho Salmon

June 2019

Submitted to:

Elk Creek Watershed Council

Contact: Lee Russell - Executive Director

(541) 836-7206

russell.leland@gmail.com

Submitted by:

Cascade Environmental Group, LLC

Contact: John Runyon

(503) 894-8585, x3

Jrunyon@cascadeenv.com

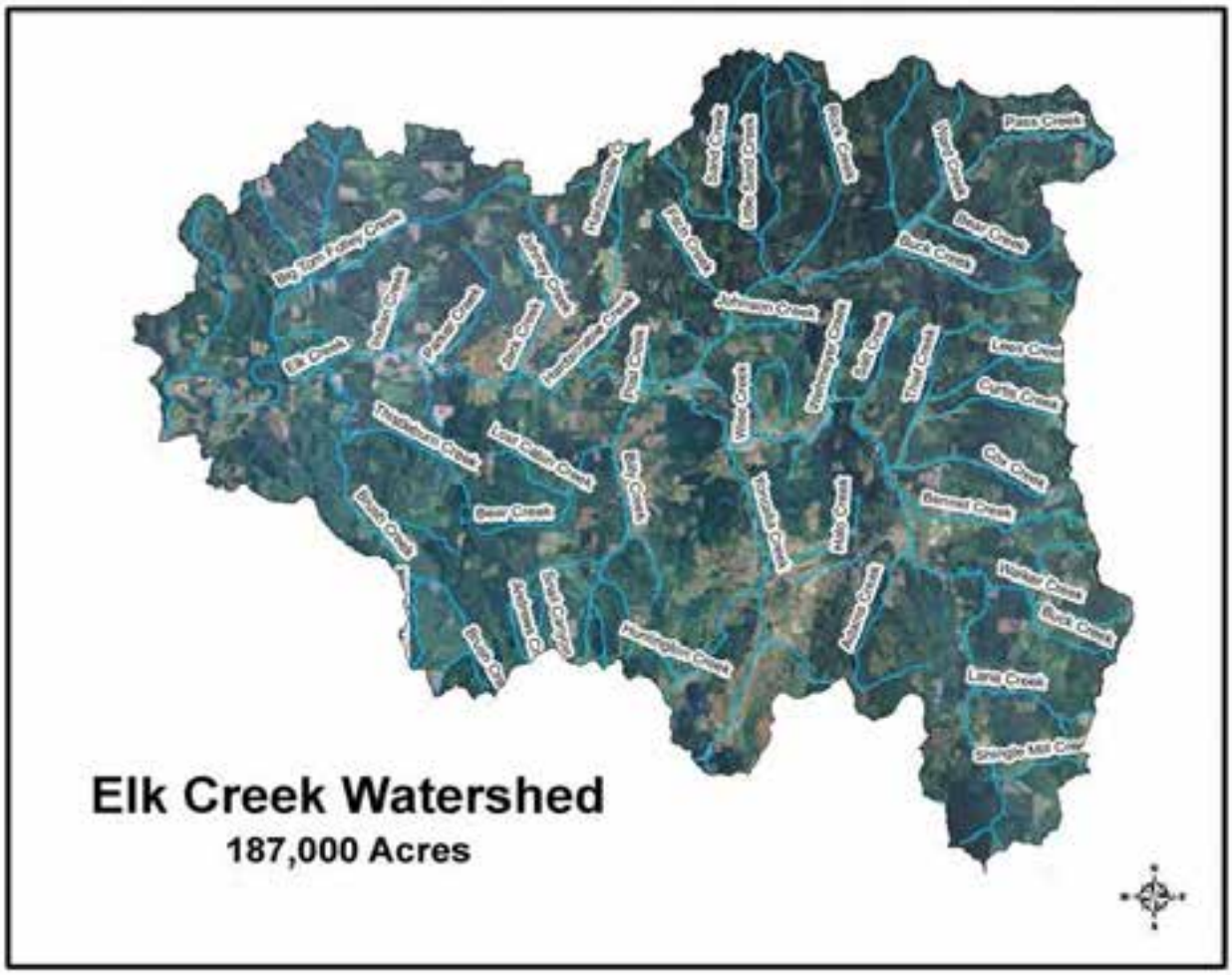
Funding provided by:

Roseburg District BLM Resource Advisory Committee

DRAFT

Introduction

The Elk Creek Watershed is a priority area for restoring Oregon Coastal coho salmon habitat. Historically Elk Creek and its tributary streams contained some of the highest quality coho salmon habitat in the Umpqua River Basin. Today, as a result of a variety of actions, stream habitats in the watershed have been degraded. There are extensive opportunities to restore habitat to benefit coho populations.



The Elk Creek Watershed Council

The Elk Creek Watershed Council (Council) is a non-regulatory, non-government organization that works with cooperating landowners to restore stream habitat, and to improve water quality, throughout the Elk Creek Watershed. The Douglas County Commissioners officially recognized the Council in 2002, and since its founding, the Council has worked collaboratively with local landowners, industrial timber companies, the Bureau of Land Management (BLM), and the Douglas Soil and Water Conservation District on restoration projects, funding efforts, watershed monitoring, and community outreach activities.

To date, the Council has implemented stream restoration projects that have removed fish passage barriers; added large wood and boulders to streams to create pools and complex habitat for fish; and planted streamside vegetation to provide shade and reduce summer water temperatures to improve juvenile coho survival.

Elk Creek Watershed Council Strategic Restoration Plan

The Council developed this Strategic Restoration Action Plan (Strategic Plan) to guide landowner outreach and restoration actions designed to improve stream habitats and the processes that sustain coho salmon and other native fish populations. The Strategic Plan's geographic area (Plan Area) encompasses Elk Creek and all tributaries from its headwaters to the Umpqua River.

One of the primary goals of this planning effort was to establish objective criteria that would utilize available scientific data to prioritize those sixth-field hydrologic units with the highest likelihood for successful restoration actions. Since the primary premise of the ESA Recovery Plan for Oregon Coast Coho Salmon is that recovery of salmon populations will be achieved through the improvement of freshwater habitats that are critical to juvenile salmon survival, this plan compares available reach-scale habitat data to established ODFW benchmarks and identifies those reaches with the highest probability to respond positively to restoration actions.

The Strategic Plan's comprehensive, watershed-wide restoration approach will accelerate the Council's implementation of actions designed to enhance stream, riparian, and floodplain habitats and provide the largest benefits to coho and other native fish populations.

These actions will contribute to the recovery of ESA-listed coho salmon and improve the environment that sustains fish and wildlife populations, water quality, and the area's quality of life.

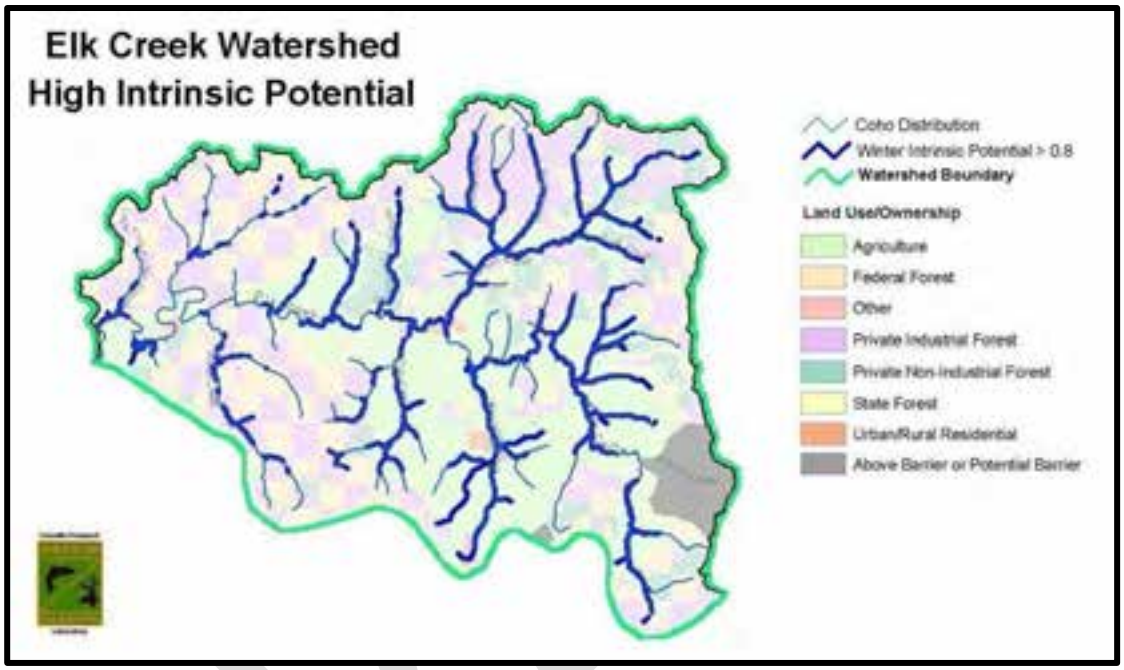
Elk Creek Watershed coho are listed under the federal and State of Oregon Endangered Species Acts



"This plan calls for continued action to repair the ecosystem processes that influence the health and stability of the rearing habitats for juvenile coho salmon."

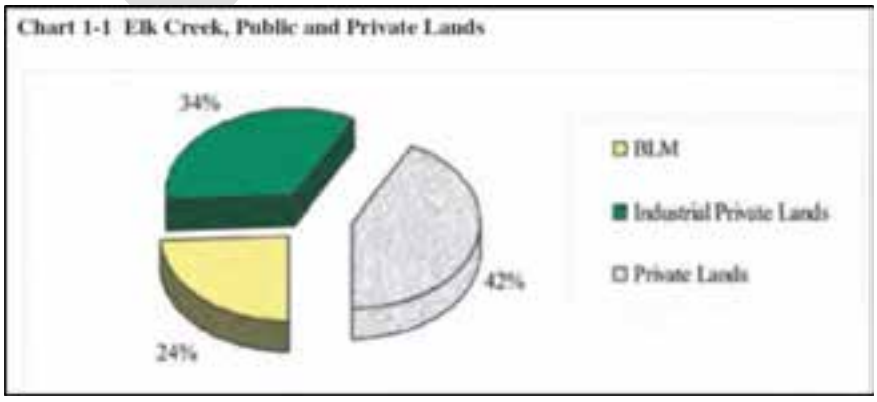
The Elk Creek Watershed - Overview

The Elk Creek fifth-field watershed is important spawning and rearing habitat for coho salmon, as well as Chinook, steelhead, cutthroat trout, and Pacific Lamprey. It was designated a Tier 1 Key Watershed by the Roseburg District BLM in the Northwest Forest Plan (1994), and ranked #1 by the Umpqua Basin Watershed Council when it prioritized the subwatersheds of the Umpqua Basin for restoration priority using the Bradbury Process (1998). ODFW's Oregon Coast Coho Conservation Plan identifies the Elk Creek Watershed as having the "highest winter intrinsic potential" (>0.8).



The Elk Creek Watershed encompasses 186,620 acres, and ranges in elevation from 200 feet at the mouth near the city of Elkton, to over 3,000 feet at the headwater ridges. Nearly all of the watershed's precipitation comes from rainfall. The most significant quantities of rainfall occur between October and May; very little precipitation occurs during the summer and early fall when stream flows are at their lowest.

More than 76% of the watershed's area is in private ownership, including 34% in industrial timber lands and 42% in non-industrial private ownership. Land use is predominantly forestry (72%). Early and mid-seral forests dominate the majority of the watershed. Much of the low gradient land, and historical floodplains along the creeks, have been converted to pasture, and are used primarily for grazing of cattle and sheep. The watershed includes two small communities, Drain and Yoncalla, each with a population of about 1,000.



Ten subwatersheds contribute to Elk Creek (see table below). The main subwatersheds include the headwaters of Elk Creek, Pass Creek, Yoncalla Creek, Big Tom Folley Creek, Billy Creek, Brush Creek, and other smaller tributaries.

	BLM		Private Industrial Forest		Other Private		TOTAL
Subwatershed	Acres	%	Acres	%	Acres	%	Acres
Big Tom Folley Creek	7,190	51%	6,630	47%	370	3%	**14,190**
Billy Creek	4,260	26%	6,890	42%	5,200	32%	**16,350**
Brush Creek	7,180	53%	5,990	45%	287	2%	**13,457**
Headwaters Elk Creek	6,360	28%	5,820	26%	10,437	46%	**22,617**
Lower Elk Creek	4,390	35%	3,620	29%	4,580	36%	**12,590**
Lower Pass Creek	2,160	10%	10,190	45%	10,178	45%	**22,528**
Middle Elk Creek	5,260	22%	7,300	30%	11,610	48%	**24,170**
Upper Elk Creek	4,670	19%	6,320	51%	13,987	56%	**24,977**
Upper Pass Creek	2,540	15%	6,590	51%	8,245	47%	**17,375**
Yoncalla Creek	990	5%	3,670	51%	13,706	75%	**18,366**
TOTAL / AVERAGE %	**45,000**	**24%**	**63,020**	**34%**	**78,600**	**42%**	**186,620**

Restoration Need: Restoring Endangered Coho Salmon Populations

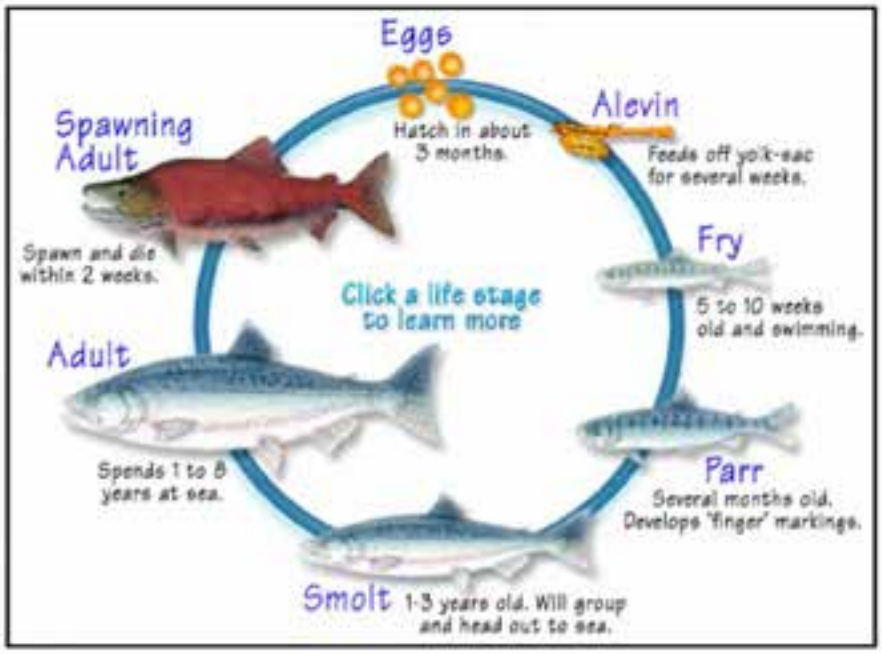
Coho salmon numbers have dramatically declined from historical levels. The Elk Creek and other Umpqua River Basin coho populations are listed under the state and federal endangered species acts. A number of factors, including fishing, sea lions and other predators, as well as ocean conditions, have contributed to population declines. Another major factor affecting coho salmon populations is stream habitat quality. Adult coho salmon require healthy streams with clean gravels for spawning; juveniles require deep pools with complex habitat for summer rearing, and side channels and other off-channel habitats to escape high winter flows.

Juvenile coho spend up to two years rearing in freshwater streams before they migrate to the ocean. With this long period in freshwater, juveniles are very vulnerable to degraded stream habitat. A primary factor limiting Elk Creek coho populations is the loss of habitats that coho need to feed and survive through winter floods. Optimal winter habitat includes complex pools with lots of large wood, and access to off-channel and floodplain areas where the fish can rest and feed during high water events. Juvenile coho also prefer complex stream habitats for feeding and growing during the summer months. Optimal summer habitats are characterized by streams with abundant pools, large wood, shade, and cool water.

Past land use practices have degraded much of the habitat in the watershed, especially in the lower gradient reaches which contain most of the best coho habitat. Incised channels are widespread. Many have been reduced to bedrock by splash dams, by channel straightening, and by "stream cleaning," a required forest practice in the 1960s and '70s which removed most of the large woody debris from the channel.

"Large Woody Debris is extremely important in low gradient streams that contain an abundant source of fine sediment. Log Jams, and to a lesser extent, individual pieces of large wood, act as a source of roughness that traps sediment and helps to moderate its progression down a given stream channel. In streams with extremely high sediment loads, the few areas of quality spawning gravel are often only found in association with these wood formations." (East Elk Watershed Assessment Unit, Roseburg District BLM, 1996)

Coho Life Cycle



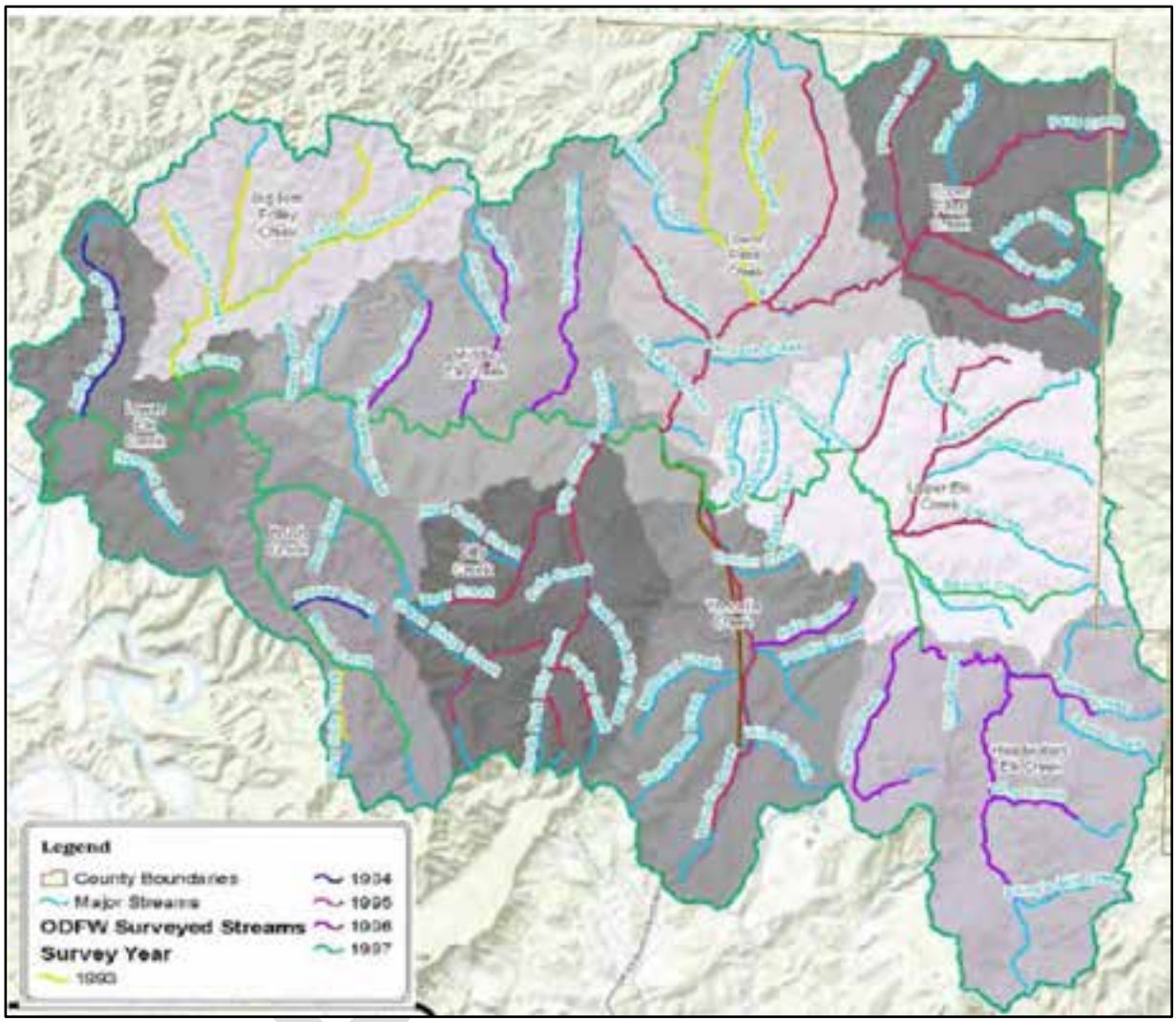
Juvenile coho salmon in Jack Creek, a tributary to Elk Creek



1990s ODFW Stream Habitat Inventories

Between 1992 and 1998, the Oregon Department of Fish and Wildlife (ODFW) inventoried fish habitat for streams throughout the Elk Creek Watershed. The inventories measured a variety of habitat characteristics, including data on pools, large wood, and channel substrate (gravels, cobbles, etc.). The stream habitat inventories provide a baseline for habitat conditions, and a way to measure habitat improvements over time.

ODFW Stream Inventory Extent and Year Completed



Evaluating 1990s Coho Habitat Inventories

The Council is characterizing coho habitat with ODFW's HabRate model. The HabRate model determines coho habitat quality based on ODFW stream inventory data such as channel substrate, pool characteristics, quantities of large wood, and other information. The model evaluates habitat quality based on specific ODFW benchmarks for summer and winter juvenile rearing habitat needs. The benchmarks set quantitative goals for optimal coho stream habitat – substrate, pools, large wood, and other characteristics. Based on the benchmarks for summer and winter coho habitat, streams are rated in one of three categories: Good, Fair, or Poor (see the figure below). The HabRate model evaluation is valuable because it (1) rates the quality of coho winter and summer habitat, (2) provides a framework for tracking changes in stream habitat quality over time, and (3) sets benchmarks that establish specific, quantitative criteria for restoring coho habitat.

The HabRate model evaluated more than 140 miles of Elk Creek watershed tributary streams. Most of the streams in the Elk Creek Watershed are poor habitat for juvenile coho salmon based on the HabRate model findings: 60% of the stream miles are poor summer habitat, 72% are poor winter habitat, and 45% have overlapping poor winter *and* summer habitat (see table and maps on the following pages). While most HabRate model evaluations are based on 1990s stream inventory information, current habitat inventories are confirming that most habitat remains in poor condition.

ODFW habitat benchmarks for summer juvenile coho habitat quality
Categories: Good, Fair, and Poor

Summer Rearing 0+	Good	Fair	Poor
Fines (%)	≤ 10	10 to 30	> 30
Gravel (%)	≥ 15	≥ 5 to 15	< 5
Cobble and boulder (%)	≥ 15	≥ 8 to 15	< 8
Pool Area (% pools)	≥ 40 to ≤ 60	≥ 20 to 40	< 20 and > 60
Pool complexity	3	2	1
Additional Cover			
% undercut	≥ 15	≥ 10 to 15	< 10
LWD / 100m	≥ 20	≥ 10 to 20	< 10
boulders / 100m	≥ 20	≥ 5 to 20	< 5
Gradient (%)	≤ 5		> 5

ODFW habitat benchmarks for winter juvenile coho habitat quality
Categories: Good, Fair, and Poor

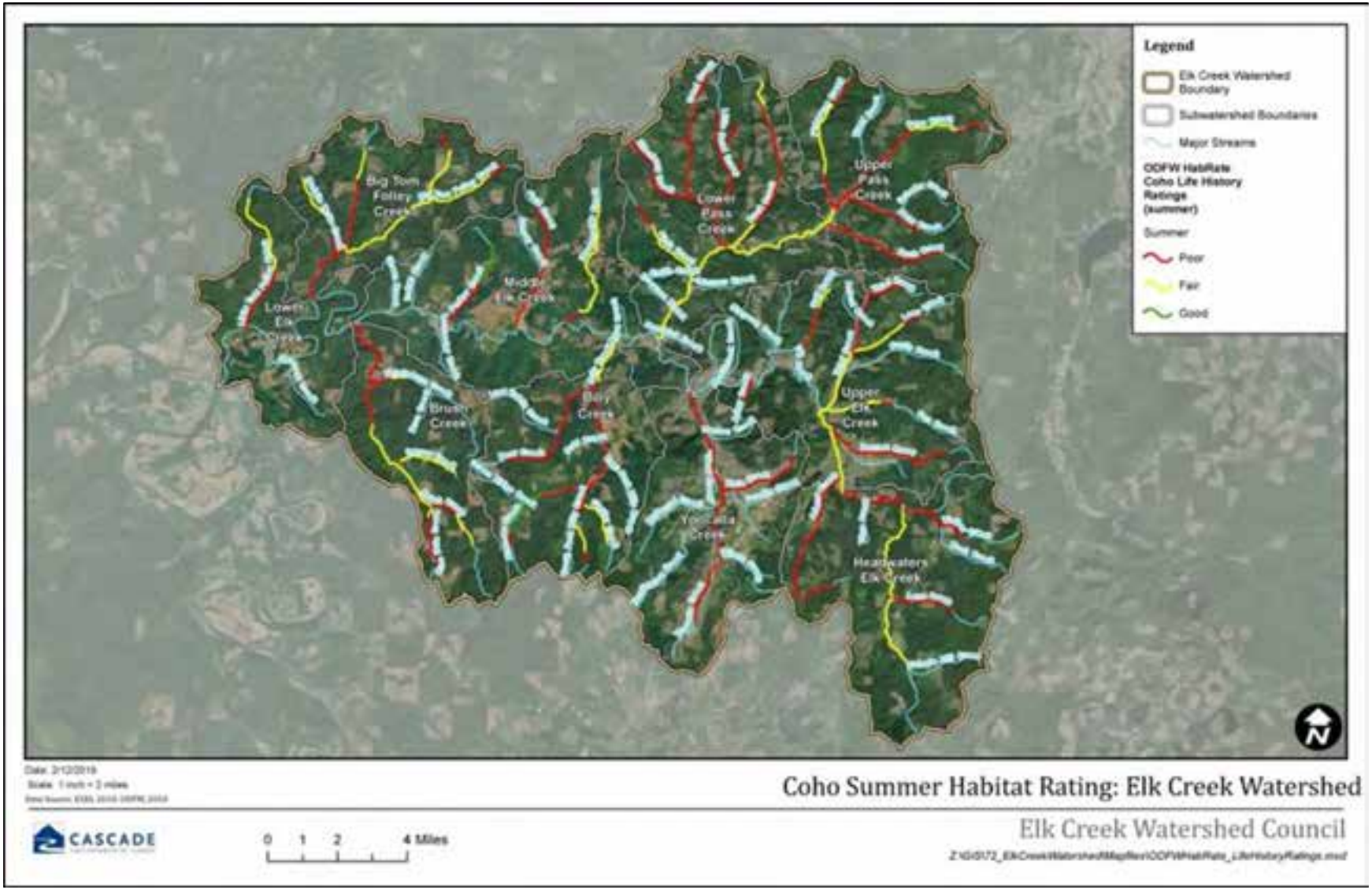
Overwintering 0+	Good	Fair	Poor
Fines (%)	≤ 10	10 to ≤ 30	> 30
Cobble and boulder (%)	≥ 25	≥ 10 to 25	< 10
Pool Area (% pools)	≥ 40 to ≤ 80	≥ 20 to 40	< 20 and > 80
Pool complexity	3	2	1
Additional Cover			
% undercut	≥ 20	≥ 10 to 20	< 10
LWD / 100m	≥ 20	≥ 10 to 20	< 10
boulders / 100m	≥ 20	≥ 5 to 20	< 5
Sheltered Pools	≥ 15	5 to < 10	< 5
Gradient	≤ 5		> 5

HabRate model results summarized for Elk Creek Subwatersheds.
The summary is for summer and winter coho salmon habitat based on the 1990's stream inventories
The habitat ratings provide baseline information for targeting and tracking the factors that limit coho salmon populations

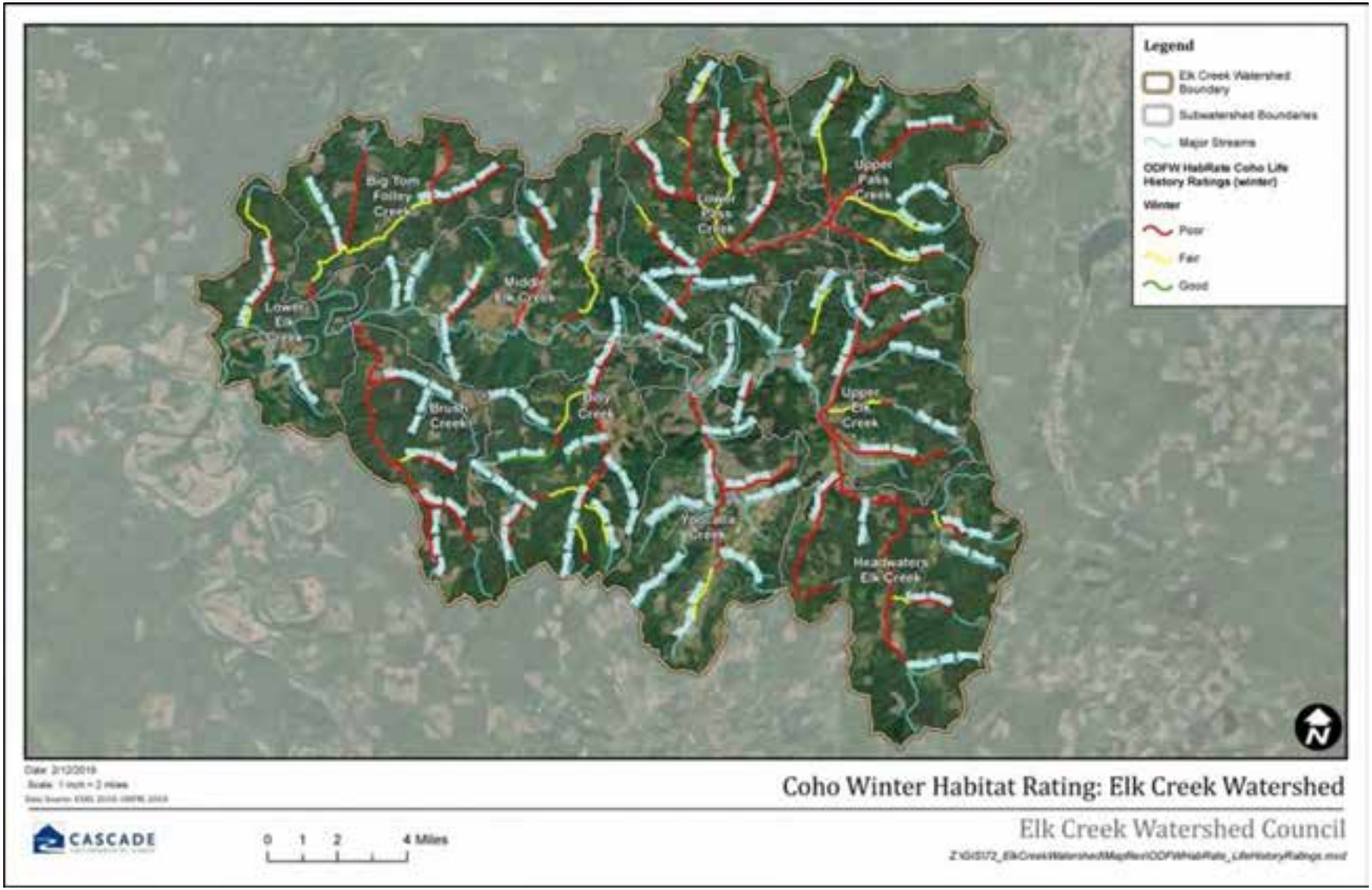
Subwatershed	Total Stream Channel Miles Surveyed	Summer Rearing Habitat (gradient: <5%)			Winter Rearing Habitat (gradient: <5%)			Poor Summer/ Winter Overlap (miles)	Poor Summer %	Poor Winter %	Poor Summer / Winter Overlap %
		Poor = 1 (miles)	Fair = 2 (miles)	Good = 3 (miles)	Poor = 1 (miles)	Fair = 2 (miles)	Winter = 3 (miles)				
Headwaters Elk Creek	16.28	8.62	7.66	0.00	13.67	1.50	0.00	6.01	53%	84%	37%
Upper Elk Creek	17.80	9.52	7.23	0.00	12.57	4.18	0.00	8.75	53%	71%	49%
Upper Pass Creek	12.37	8.00	3.38	0.00	4.55	6.83	0.00	3.15	65%	37%	25%
Lower Pass Creek	29.78	19.31	10.21	0.00	23.96	5.56	0.00	13.75	65%	80%	46%
Yoncalla Creek	10.57	10.57	0.00	0.00	9.35	1.22	0.00	9.35	100%	88%	88%
Billy Creek	17.31	11.87	3.08	1.20	9.54	3.56	3.05	6.94	69%	55%	40%
Middle Elk Creek	11.30	6.69	3.68	0.94	8.18	2.19	0.94	6.69	59%	72%	59%
Brush Creek	13.50	5.95	7.55	0.00	13.00	0.50	0.00	5.95	44%	96%	44%
Big Tom Folley Creek	15.23	5.88	9.35	0.00	9.34	3.98	1.91	4.75	39%	61%	31%
Lower Elk Creek	4.35	2.13	2.22	0.00	2.25	2.10	0.00	1.42	49%	52%	33%
TOTALS	**148.49**	**88.53**	**54.36**	**2.14**	**106.41**	**31.61**	**5.90**	**66.77**	**60%**	**72%**	**45%**

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Map illustrating Elk Creek Watershed streams with HabRate model rating categories for juvenile coho summer habitat quality: Good, Fair, Poor



Map illustrating Elk Creek Watershed streams with HabRate model rating categories for juvenile coho winter habitat quality: Good, Fair, Poor



Evaluating Current Habitat and Juvenile Coho Abundance and Distribution

To improve watershed conditions, the Council has implemented a variety of watershed restoration projects designed to enhance coho habitat. Despite limited data, the Council has made progress toward addressing key limiting factors for coho salmon and other fish species; however, most of these restoration actions have been selected based on landowner access and other opportunistic factors, and not from a comprehensive, watershed-wide effort that prioritizes and targets restoration activities for subwatersheds and specific stream reaches. To address the limited amount of information on the current status of fish and stream habitat, the Council developed a data collection protocol to update ODFW's 1990s stream inventory information. The inventory includes snorkel surveys to establish fish abundance and distribution, with an emphasis on coho, systematic stream habitat measurements, and collection of water temperature data.

The stream habitat data is collected in a manner that facilitates comparison to the 1990s ODFW habitat inventories and HabRate model results. This approach provides a framework for assessing stream habitat changes over time. The evaluation of information on coho distribution and numbers, stream habitat quality, and water temperature patterns assists with identifying the stream-specific factors limiting coho populations. Specific restoration actions can then be developed and prioritized based on how well specific actions and locations address the limiting factors and ODFW's coho habitat benchmarks.

Elk Creek Watershed Council's Fish and Stream Inventory Methods

The Council's fish and stream habitat inventory methodology involves snorkeling and recording habitat data for every 5th pool (20% subsample of pools) to assess coho numbers and distribution, and to characterize stream habitat. For every snorkeled pool, and the riffle area immediately upstream of the pool, additional data are recorded on the habitat characteristics, including pool width, length, and depth; substrate (e.g., sands, gravels, cobbles); and the quantity of large wood present in the pool and riffle. The stream habitat inventory methods largely conform to the ODFW aquatic habitat protocol.

To assess water temperature patterns, continuous water temperature data loggers are placed at the top and the bottom of the stream system where fish and habitat are inventoried. The continuous water temperature data – collected through the summer period when water temperatures are the highest – provide information on water temperature changes throughout the day and over the course of the summer. Placing temperature loggers in the upper and lower portions of the stream channel network provides insights into how water temperatures change in the downstream direction as streams progress from headwater areas with dense vegetation cover over small channels, to large valley-bottom streams with less vegetation cover over wider channels.

The stream and fish inventory information is summarized and evaluated to assess the factors that are limiting coho juvenile rearing. Examples of liming factors (LFs) that are commonly observed include few deep pools with large wood cover, stream channels that are deeply entrenched and isolated from the floodplain, and high water temperatures.



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Restoration Action Plans

A Restoration Action Plan (Action Plan) is developed for each inventoried stream. The purpose of the Action Plan is to document the factors limiting both summer and winter juvenile coho survival, and to outline restoration actions to address those limiting factors. The restoration actions are guided by ODFW habitat benchmarks (e.g., the number of pieces of wood placed). To date, inventories and Action Plans have been completed for the following streams:

- Jack Creek (Middle Elk Creek Subwatershed) - 2015
- Curtis, Cox, Thief, and Lees Creek (Upper Elk Creek Subwatershed) - 2015
- Hardscrabble Creek (Middle Elk Creek Subwatershed) - 2016
- Ellenburg Creek (Lower Pass Creek Subwatershed) - 2016

The Ellenburg Creek stream and fish inventory findings and restoration actions are outlined in Appendix A as an example of the Council's approach to Action Plans.

The Action Plans provide the foundation for the Council to pursue funding for implementing restoration actions. Recently the Council received an Oregon Watershed Enhancement Board (OWEB) grant to support restoration actions for portions of Jack and Hardscrabble Creeks. The Council is currently working to fund and implement restoration actions for Ellenburg Creek (see Appendix A).

Addressing Key Limiting Factors for Coho Salmon

The Council's restoration actions focus on improving stream habitat that supports coho during the two periods when conditions most limit coho salmon survival: the summer period when water temperatures are high, and the winter period when fish seek refuge from high stream flows. The emphasis is on restoration actions in low-gradient, valley bottom stream reaches with complex habitats that support coho during both of these periods. Low-gradient stream reaches ("response reaches") are more likely to respond to restoration actions that improve both winter and summer habitat. For example, restoration actions such as the placement of large wood in the stream channel help capture stream substrate, which over time forms pools, reconnects the stream channel to the floodplain, and creates complex habitats. Complex habitats include side channels and off-channel alcoves, beaver ponds, and connections to wetlands and backwater areas.

A key conclusion of the fish and stream habitat inventories is that elevated water temperatures and limited high-quality pool habitat areas are limiting coho populations during the warm summer periods. Coho were largely absent from areas where maximum water temperatures were at or above 68^0 F.

Because coho will move upstream into cooler water areas, improving connectivity and habitat quality in streams where summer rearing water temperatures are optimal is a restoration priority. The Council is addressing this priority through extensive restoration actions in cooler, upstream channels, primarily placing large wood, boulders, and other materials to capture bedload and to create pools and other habitats for juvenile coho.

Water temperatures are too high in the lower portions of many streams in the watershed for summer juvenile coho rearing. Habitat actions in the higher temperature areas focus on improving stream temperatures by increasing shade and taking steps to decrease exposed bedrock areas through the placement of large wood and other structures designed to capture bedload (sediment, cobbles, and gravel). Bedrock areas contribute to water heating because shallow water flowing over these areas is exposed to direct solar radiation. In contrast, where there is abundant substrate, a portion of the stream flows through the substrate, where it is not exposed to solar radiation and can cool.

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Elk Creek Watershed Restoration: Strategy to Actions

The following diagram outlines the relationships between the Strategic Plan, Rapid Stream and Fish Inventories, Stream Restoration Action Plans, and implementing restoration actions. The Strategic Plan sets the overall direction and subwatershed priorities for targeting stream inventories and subsequent restoration actions. The strategic framework is adaptive, and it is expected that priorities and actions will change over time as new data and restoration project monitoring information are generated.



Restoration Priorities

The Council developed criteria for identifying subwatershed priorities for phasing stream restoration planning and implementation as follows:

Criteria A: Percent of streams with poor coho winter habitat based on HabRate model results.

Rationale: Winter habitat (e.g., access to off-channel habitats during high-water events) is the key factor limiting coho populations.

Criteria B: Percent of streams with *both* poor coho winter *and* summer habitat based on HabRate model results.

Rationale: It is efficient to focus restoration on the portion of the stream network where poor winter and summer habitat overlap.

Criteria C: Average stream rating for the quality of coho spawning substrate based on HabRate model results.

Rationale: Adequate substrate (e.g., well-sorted gravels and cobbles) supports successful coho spawning.

Criteria D: Percent of industrial forest land.

Rationale: The Watershed Council has developed good working relationships, and successfully implemented restoration actions, with industrial forest landowners. The industrial forest lands in the Elk Creek Watershed encompass the full range of habitat necessary to support coho recovery – including spawning and summer and winter rearing habitats.

Criteria E: Landowner opportunity to engage in restoration actions based on the Council's assessment.

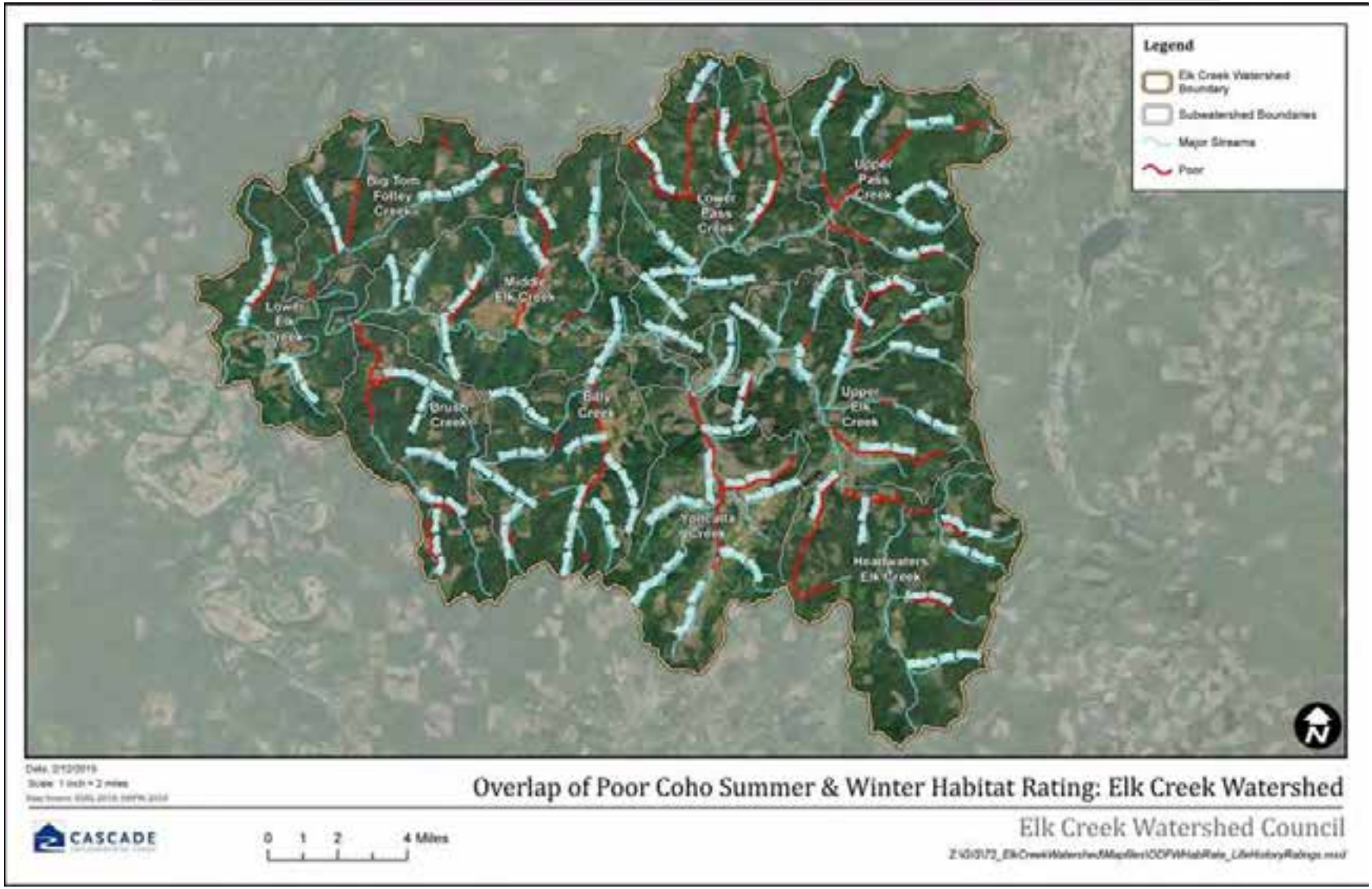
Rationale: The Council's outreach is focused on engaging landowners in voluntary restoration actions on private land**.** Some landowners, mainly industrial forest and other large owners, are receptive to pursuing restoration actions on their lands.

The table on the next page shows the subwatershed restoration priority ranking. The priorities are intended to guide restoration planning and implementation phasing. For example, the Council is now planning to collect stream and fish inventory information in the Big Tom Folley Creek system. The stream and fish inventory information collected will provide the foundation for developing a stream restoration action plan and implementing restoration actions over time.

Subwatershed priorities will evolve and change as new information is available and phased restoration actions are implemented over time.

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Elk Creek streams with HabRate model rating categories for juvenile coho habitat where there is overlapping poor winter and summer habitat quality



Elk Creek Subwatershed priorities for planning and implementing restoration actions.

Priorities were determined through HabRate ratings for summer and winter rearing habitat and spawning substrate. Additional criteria include percent of industrial forest land and the Council's assessment of landowner opportunities to engage in restoration actions on private lands.

Subwatershed	Total Stream Channel Miles Surveyed	Poor Summer Habitat %	Poor Winter Habitat %	Poor Winter / Summer Overlap %	% Private Industrial Forest	% HabRate: Poor Winter 1 = 30% - 39% 2 = 40% - 59% 3 = ≥60%	% HabRate: Poor Summer/Winter Overlap 1 = 30% - 39% 2 = 40% - 49% 3 = ≥50%	% HabRate: Spawning Substrate (ave. for all reaches) 1 = Poor 2 = Fair 3 = Good	% Industrial Forest Land 1 = <26% 2 = 27% - 39% 3 = ≥40%	Landowner Opportunity 1 = Limited 2 = Fair 3 = Good	TOTAL POINTS	PRIORITY RANKING	Landowner Opportunity Comments / Other Comments
Middle Elk Creek	11.30	59%	72%	59%	30%	3	3	2	2	3	13	HIGHEST	Cooperation with major landowner. Restoration to be implemented on Jack and Hardscrabble Creek. Landowner is receptive to stream assessments and restoration projects
Lower Pass Creek	29.78	65%	80%	46%	45%	3	2	1	3	3	12	HIGHEST	Cooperation with Giustina Land & Timber; landowner is receptive to stream assessments
Big Tom Folley Creek	15.23	39%	61%	31%	47%	3	1	2	3	3	12	HIGHEST	BLM priority watershed. Cooperation with Seneca Jones Timber Company and BLM for stream assessments and restoration projects
Brush Creek	13.50	44%	96%	44%	45%	3	2	2	3	1	11	NEXT HIGHEST	Limited working relationship with primary industrial forest landowner; substantial restoration already accomplished in the subwatershed
Headwaters Elk Creek	16.28	53%	84%	37%	26%	3	1	1	2	3	10	NEXT HIGHEST	BLM priority watershed. The Council is working on landowner outreach
Billy Creek	17.31	69%	55%	40%	26%	2	2	2	2	2	10	NEXT HIGHEST	Limited working relationship with primary industrial forest landowner
Lower Elk Creek	4.35	49%	52%	33%	29%	2	1	2	2	3	10	NEXT HIGHEST	Cooperation with Seneca Jones Timber Company and BLM for stream assessments and restoration
Yoncalla Creek	10.57	100%	88%	88%	20%	3	3	1	1	1	9	LOWEST	Fragmented private ownership. Little industrial forest land. Flood control levees limit restoration opportunities
Upper Elk Creek	17.80	53%	71%	49%	25%	3	2	1	1	2	9	LOWEST	Fragmented private ownership. Limited working relationships with landowners
Upper Pass Creek	12.37	65%	37%	25%	38%	1	1	1	2	2	7	LOWEST	Fragmented private ownership. Limited working relationships with landowners. Erodible soils
TOTALS	148.49												

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Restoration Outcomes

The Strategic Plan describes the Council's planned activities through 2025. Over this period the Council will complete restoration activities designed to address the key limiting factors for coho salmon: lack of winter and summer habitat complexity, high water temperatures, and lack of access to quality off-channel habitat.

Ecological outcomes are the long-term environmental effects resulting from the Council's comprehensive restoration actions over time. The Council's restoration approach focuses on restoring stream, floodplain, and riparian habitat and watershed processes. The emphasis is on restoring habitat characteristics that support and sustain ecological processes for the long-term. In some instances, restoration restores habitat structure in the short term while also taking actions that support the short- and long-term recovery of watershed processes and habitats. For example, restoration actions may include enhancing habitat complexity through structural actions, such as placing large wood in streams and floodplains. These structural actions, in conjunction with planting native trees and other vegetation to restore floodplain and riparian habitats, over time will promote the delivery and retention of large wood in the system as trees and other woody debris fall into the stream and are caught on the placed wood.

By 2025 the Council's restoration activities will achieve the following outcomes for improved habitat quality, capacity, and diversity in support of Oregon coastal coho populations:

1. Restored Watershed Processes, Stream Habitat Complexity, and Off-Channel Floodplain Access.

   Objective: 8 miles of stream channel and associated floodplain habitat restored.

2. Improved Water Temperatures.

   Objective: 8 miles of riparian habitat and associated stream shade restored through native plantings and invasive control.

3. Improved Stream Restoration Effectiveness through Monitoring and Analysis.

   Objective: All implemented restoration projects will have monitoring data collected and analysis completed to determine if the project is meeting restoration goals and outcomes over time. This analysis will be used to modify and improve the effectiveness of future stream restoration actions.

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Appendix A:

Summary of the Ellenburg Creek Restoration Action Plan



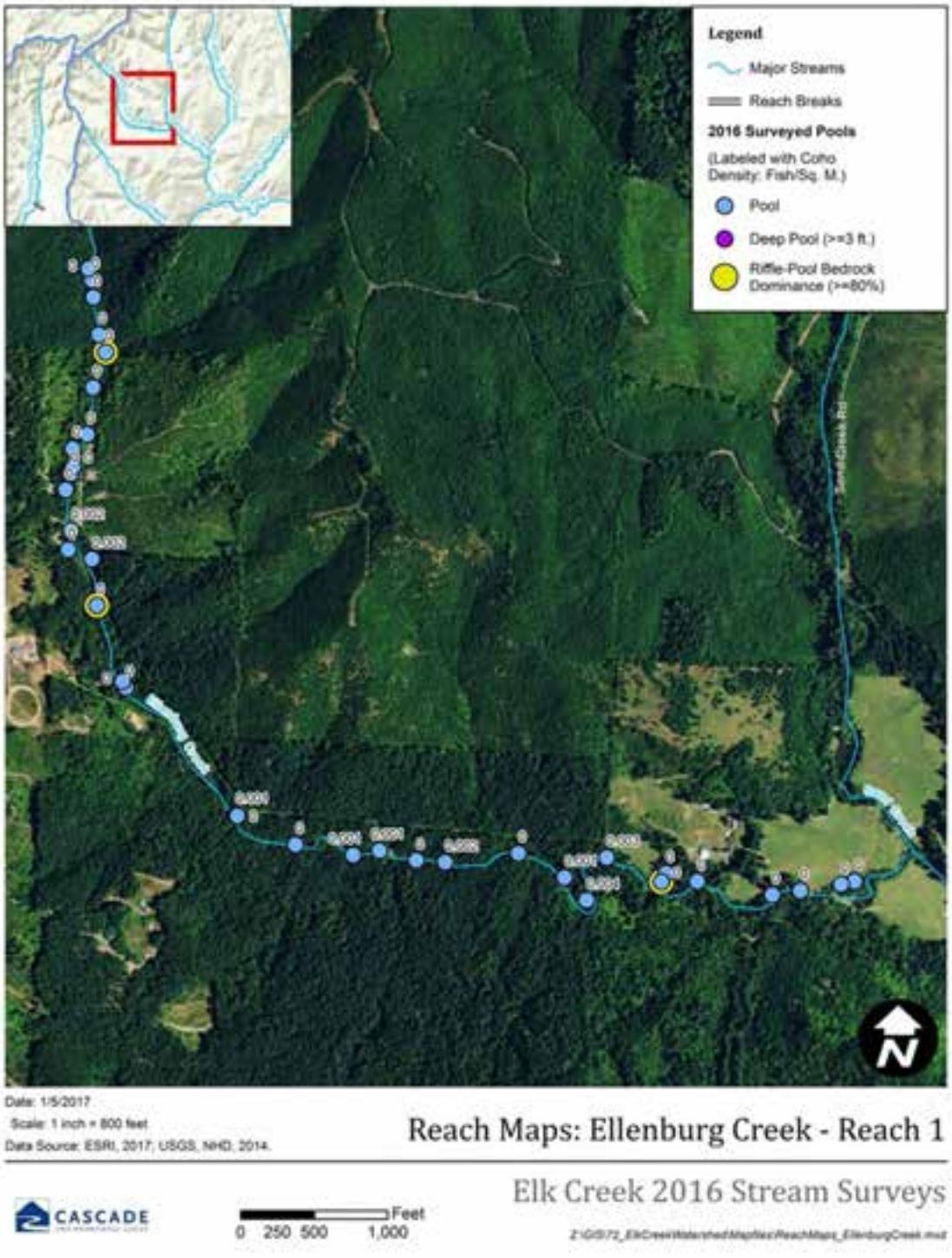
Ellenburg Creek

Elk Creek Watershed Council

June 2017

Ellenburg Creek Stream Habitat Inventory

Ellenburg Creek is a tributary to Sand Creek in the Lower Pass Creek Subwatershed. The 1990s ODFW habitat inventory did not include Ellenburg Creek. In order to assess the factors limiting coho, data on coho numbers and distribution, stream habitat, and water temperatures were was collected in the summer of 2016 for approximately 1.92 miles of Ellenburg Creek.



Ellenburg Creek Stream Habitat

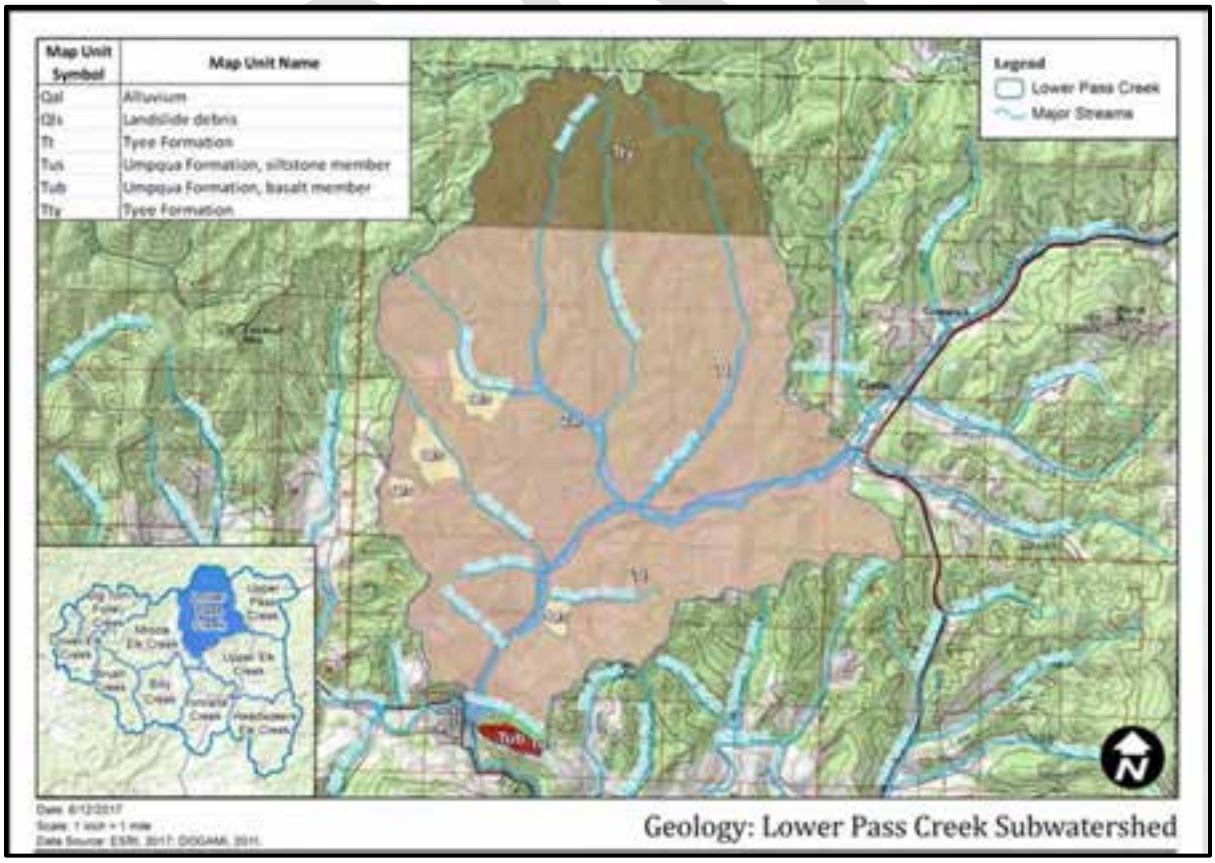
Overview:

The inventoried section of Ellenburg Creek is characterized by a low- to moderate gradient channel, with an average gradient of approximately 2%. Gradients as high as 5% were observed in several channel sections where there were bedrock chutes or small drops. These steeper channel areas were very short and did not present any fish passage issues. Coho salmon prefer gradients of 4% or less for adult spawning and juvenile rearing, and the inventoried reach is within this preferred gradient.

The inventoried reach is characterized as a narrow valley with low terraces that somewhat constrains channel movement in the lower portion, and a narrow valley more constrained by hillslopes in the upper portion. Three primary bedrock-dominated areas were observed, and about 9% of the reach length is dominated by bedrock. The 2016 survey noted a possible fish passage barrier in upper Ellenburg Creek. A log had lodged itself at the top of a four-foot bedrock shelf; no juvenile coho were observed above the barrier during the snorkel survey.

Substrate:

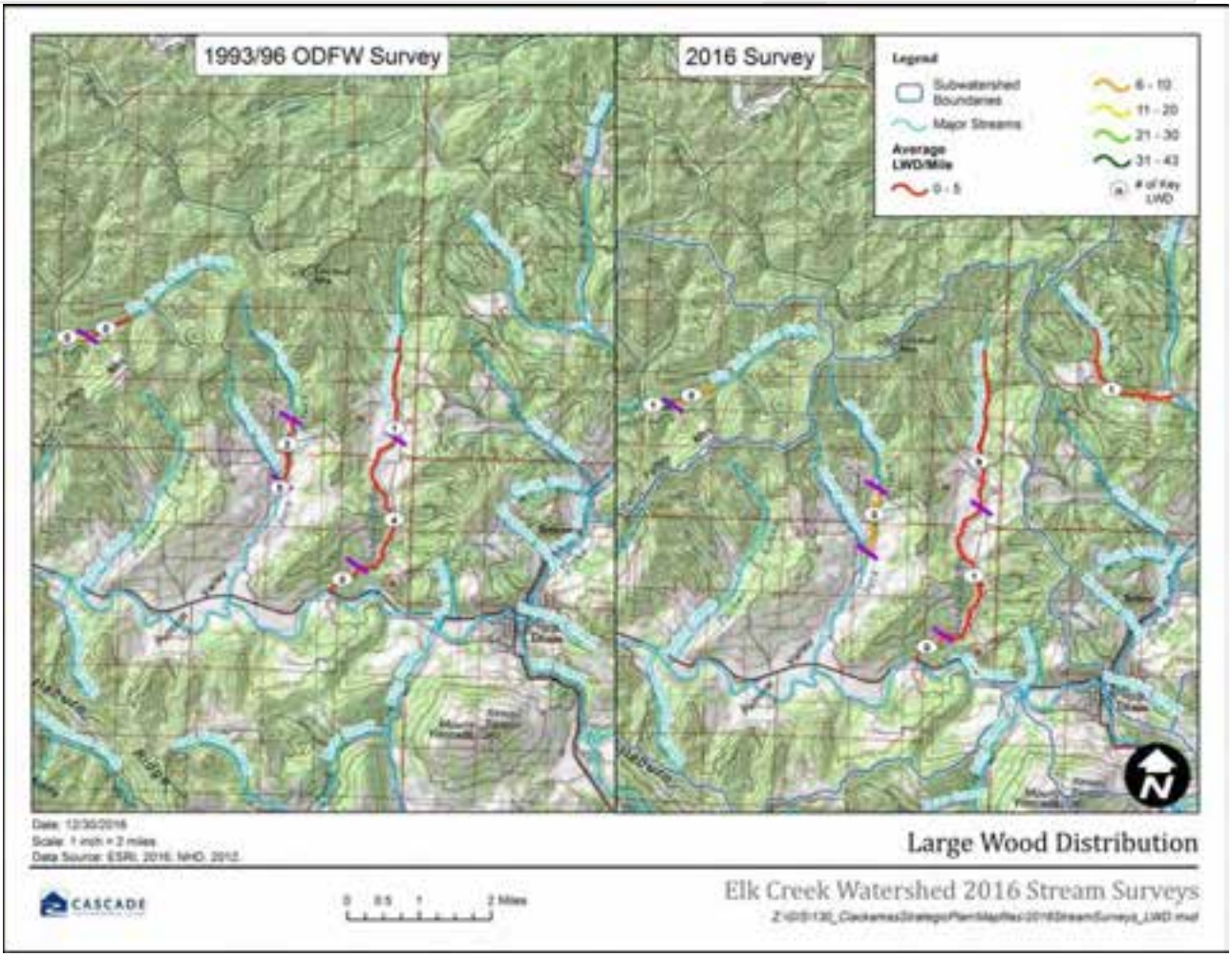
The map below illustrates the Lower Pass Creek Subwatershed's geologic formations. The subwatershed, particularly in the headwater areas, is underlain by sand- and siltstones (e.g., Tyee Formation). These fine-grained sand- and siltstone formations contribute sand and silt to the stream channel substrate. Other parts of the sub-watershed are underlain by harder rocks including basalts (e.g., Umpqua Formation, basalt member) covered by historic landslide debris that contributes coarser material, such as cobbles and gravels, to the stream channel. The combination of fine- and coarse-grained rocks in the stream system yields abundant substrate for creating habitat, including depositional areas where logs can capture substrate, creating pools, and well-sorted gravels and cobbles, which are ideal for coho spawning and rearing.



Large Wood:

The number of large wood pieces counted in the 2016 Ellenburg Creek inventory averaged 1.99 pieces/mile; the number of key pieces averaged 0.07 key pieces/mile. Overall the number of pieces of wood in the channel is very low and not adequate to support the formation of quality pool habitat. In particular, key pieces of large wood (those of sufficient size to remain stable during flood events) are nearly absent. Stable key pieces trap other pieces of large wood and create complex habitats with cover and deep pools. These large key pieces also trap substrate at levels sufficient to cover bedrock, and to aggrade incised channels and improve floodplain connectivity.

Ellenburg Creek large wood counts in comparison to other recently inventoried streams. Ellenburg Creek is on the right side of the map



Pools:

The density of pools was 81.09 pools per mile. No deep pools (> 3 feet deep) were noted in the 2016 Ellenburg Creek inventory.

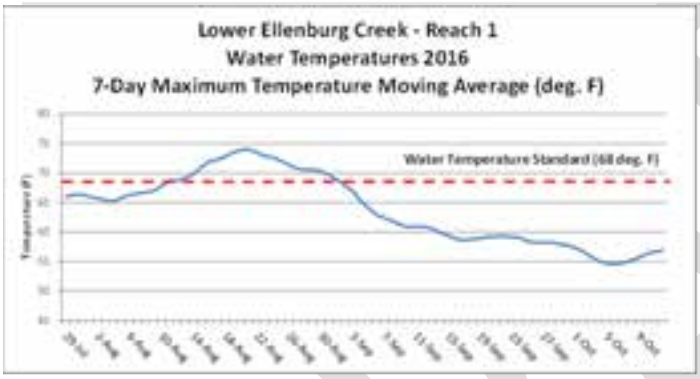
The low pool numbers, and lack of deep pools, are indicators of poor habitat quality. A high density of pools, and particularly of deep pools with cooler water, is important for juvenile coho survival. Stream flows were low during the inventory period and these extremely low flows created isolated pools. High densities of rearing coho were trapped in some of these pools with no connectivity to upstream areas and cooler water. As the summer progressed some pools probably dried up, killing the fish.

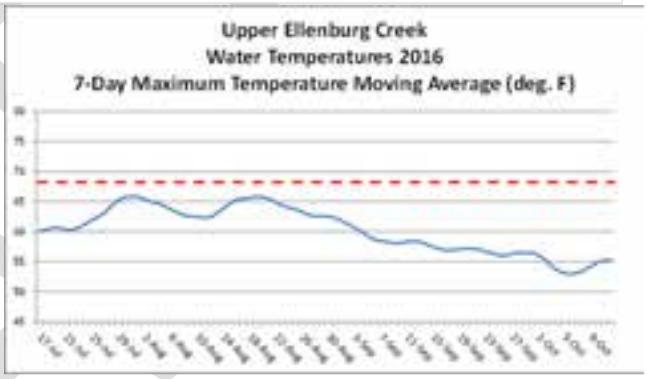
Water temperatures:

The graphs on this page show the 7-day-maximum-water-temperature moving average over the monitoring period for lower and upper Ellenburg Creek. The graphs also show the DEQ's 68^0 F temperature standard for trout and salmon. Lower Ellenburg Creek exceeded 68^0 F for an extended period between August 11 and September 3, 2016. In contrast, water temperatures in upper Ellenburg Creek were cold throughout the monitoring period, never exceeding 66^0 F, two degrees below the DEQ temperature standard.

Based on the continuous water temperature monitoring observations during the habitat inventory, summer water temperatures are too high for summer coho rearing in lower Ellenburg Creek during the periods of the summer with higher air temperatures and lower flows, which primarily occur from August to early September. Upper Ellenburg Creek has optimal temperatures for coho summer rearing. No juvenile coho were observed in the very lowest portions of Ellenburg Creek. It appears that juvenile coho are moving upstream to cooler areas during the hottest period of the summer. This finding is supported by research which has documented coho moving upstream to escape high water temperatures.

Lower and upper Ellenburg Creek summer 2016 water temperatures





Coho Densities:

Very low coho densities were noted in Ellenburg Creek in 2016 (average = 0.0005 coho/m2). The highest densities of coho were in the middle and upper portions of the inventory reach, but the numbers were very low, and in most pools no coho were observed; no, or very few, coho were observed in the lower portions of the reach.

It appears that juvenile coho distribution and densities are controlled by both by summer water temperatures and the quality of available pool habitat. The lower reaches of Ellenburg Creek had no coho. The highest densities of coho, though still very low, were found in the upper portions where the reach flows through forested areas and where water temperatures are very low.

Ellenburg Creek Restoration Strategy

The HabRate model evaluated Ellenburg Creek's current habitat quality against ODFW benchmarks for substrate, cover, and pool complexity (see table on next page). Overall, lower Ellenburg Creek has poor winter and summer coho rearing habitat. Substrate quality is the only benchmark rated as fair.

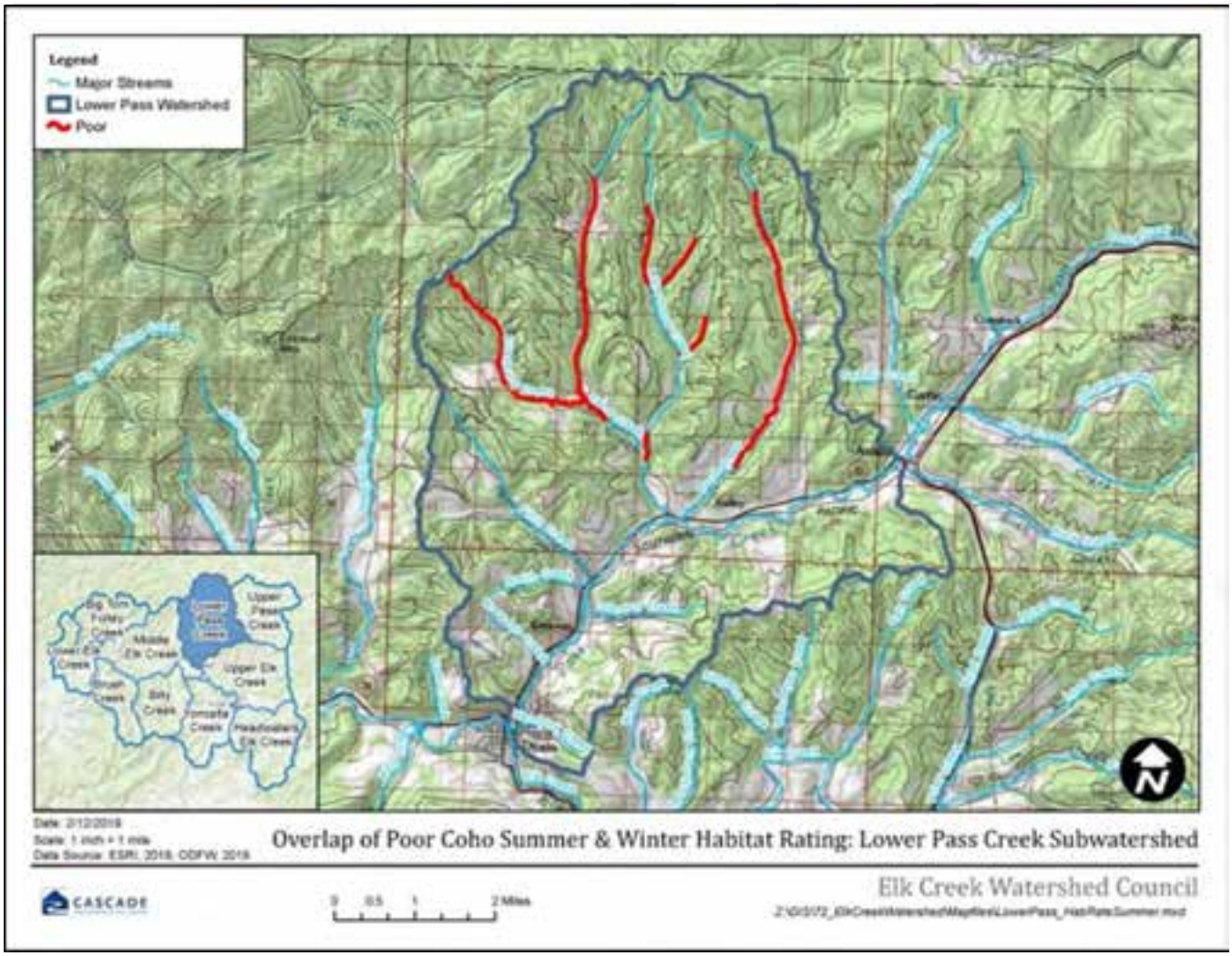
For comparison, the map on the next page shows stream segments with winter and summer HabRate model evaluations for Ellenburg Creek and the other Lower Pass Creek tributaries that were assessed by ODFW in the 1990s. In addition to Ellenburg Creek, most of the streams in the subwatershed are rated as poor summer and winter coho rearing habitat, though this finding should be confirmed with the Council's more recent habitat inventories.

The restoration strategy for Ellenburg Creek focuses on improving summer and winter habitat conditions. Restoration actions will be guided by ODFW benchmarks for the enhancement of pools, increasing the quantity of large wood, improving side-channel and floodplain connectivity, and enhancing riparian trees and other native vegetation where appropriate.

Ellenburg Creek HabRate limiting factors evaluation for summer and winter coho habitat characteristics: 1 = Poor, 2 = Fair, 3 = Good. The overall rating is poor for winter and summer habitat

Stream	Subwatershed	Reach #	Reach Length (Mi)	Substrate	Cover	% Pools	Pool Complexity	Summer Rearing 0+ Rating	% Pools	% Sheltered Pools	Pool Complexity	Over-Winter 0+ Rating
ELLENBURG CREEK	UPPER PASS CREEK	1	1.92	2	1	1	1	1	1	1	1	1

Ellenburg Creek and other Lower Pass Creek Subwatershed streams with HabRate model rating categories for juvenile coho where there is overlapping poor winter and summer habitat quality



OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item H

Council Capacity Applications

224-039 – Greater Yamhill WC

Board Meeting July 25-26, 2023

Application Name: Greater Yamhill Watershed Council Capacity 2023-2025

Application Number: 224-039-22883

By: Greater Yamhill Watershed Council

Offering Type: Council Capacity Grants

Application Type: Council Capacity

OWEB Region: Willamette Basin
County: Yamhill
Coordinates: 45.1794876763201,-123.231703777518

Applicant:
Greta Holmstrom
PO Box 1517
McMinnville OR 97128-4619
503-434-7313 x2739
greta@gywc.org

Payee:
Greta Holmstrom
PO Box 1517
McMinnville OR 97128
503-434-7313 x2739
greta@gywc.org

Project Manager:
Greta Holmstrom
PO Box 1517
McMinnville OR 97128
503-434-7313 x2739
greta@gywc.org

Budget Summary:
OWEB Amount Requested: $127,145
Total Project Amount: $131,465

Administrative Information

Abstract

Provide an abstract statement for the project. Include the following information: 1) Identify the project location; 2) Briefly state the project need; 3) Describe the proposed work; 4) Identify project partners.

The Greater Yamhill Watershed Council (GYWC) encompasses the Yamhill and Chehalem Watersheds, an area of more than 529,000 acres, ranging from the crest of the Coast Range to the Willamette River. This service area includes eight sub-basins and more than 1,000 stream miles. Roughly 70% of the drainage lies within Yamhill County, with most of the remaining area in northern Polk County. Small portions of the watershed are within Washington, Lincoln, and Tillamook Counties. The GYWC includes 10 incorporated cities and a total population of more than 110,000.

Council Capacity Support funding is requested to help fund an Executive Director and basic operations needed to implement the strategic goals of the GYWC's stakeholder-driven Watershed Restoration Action Plan. Priority projects include building council capacity and strengthening organizational health, initiatives for riparian habitat restoration, oak and prairie habitat restoration, fish passage and LWD enhancement, priority invasive weed control and inventories, fish population assessments, as well as supporting a thriving volunteer base that integrates community members into all aspects of the GYWC's watershed programming and planning.

Funding will be used to conduct landowner recruitment, project development, volunteer engagement, stakeholder coordination, strategic planning, governance, organizational development, and fiscal management.

Primary partners include Yamhill SWCD, Polk SWCD, NRCS, OWEB, ODFW, ODF, US BLM, USFWS, Confederated Tribes of Grand Ronde, Cities of McMinnville and Newberg, as well as other small cities within the watershed boundary, Yamhill County Public Works, local school districts, Yamhill Watershed Stewardship Fund, local interest groups, and a diverse variety of private landownership.

Location Information

Current Location:

What is the ownership of the project site(s)?

✓ *Public land (any lands owned by the Federal government, the State of Oregon, a city, county, district or municipal or public corporation in Oregon)*

What agency(ies) are involved?

Cities of McMinnville, Newberg, Yamhill, Willamina, Amity, Dayton, Dundee, Lafayette, and Carlton
School Districts of McMinnville, Newberg, Yamhill, Willamina, and Carlton
Yamhill & Polk SWCDs
Yamhill & Polk Counties
NRCS
US BLM
USFWS
USFS

❑ *Tribal lands (any lands owned/managed by a Tribal government)*
❑ *Private (land owned by non-governmental entities)*
❑ *Not applicable to this project*

✓ *This grant will take place in more than one county.*

List the counties affected:

Yamhill and Polk Counties.

Permits

Other than the land-use form, do you need a permit, license or other regulatory approval of any of the proposed project activities?

❍ Yes

● No

Racial and Ethnic Impact Statement

Racial and Ethnic Impact Statement

❍ The proposed grant project policies or programs could have a disproportionate or unique POSITIVE impact on the following minority persons. (indicate all that apply)

❍ The proposed grant project policies or programs could have a disproportionate or unique NEGATIVE impact on the following minority persons. (indicate all that apply)

● The proposed grant project policies or programs WILL HAVE NO disproportionate or unique impact on minority persons.

Insurance Information

If applicable, select all the activities that are part of your project - These require a risk assessment tool unless otherwise noted (check all that apply).

❑ *Working with hazardous materials (not including materials used in the normal operation of equipment such as hydraulic fluid)*

❑ *Earth moving work around the footprint of a drinking water well*

❑ *Removal or alteration of structures that hold back water on land or instream including dams, levees, dikes, tidegates and other water control devices (this does not include temporary diversion dams used solely to divert water for irrigation)*

✓ *Applicant's staff or volunteers are working with kids related to this project (DAS Risk assessment tool not required, additional insurance is required)*

❑ *Applicant's staff are applying herbicides or pesticides (DAS Risk assessment tool not required, additional insurance is required)*

❑ *Insurance not applicable to this project*

Additional Information

❑ *This project affects Sage-Grouse.*

Problem Statement

Does the watershed council have a fiscal sponsor?

❍ Yes
● No

Is the council a membership organization?

❍ Yes
● No

The council is a group of councils operating collectively.

❍ Yes
● No

Is the applicant a group of councils operating independently?

❍ Yes
● No

For Details Upload the council's most recent bylaws.

Councils are required to review their council's bylaws once every three years, provide the date of the last time the council's governing body reviewed the council's bylaws?

06/14/2022

Councils are required to review their policies and procedures once every three years, provide the date of the last time the council's governing body reviewed the council's policies and procedures?

06/14/2022

For Details Upload the council's most recent policies and procedures.

For Details Upload the council's local government designation

For Details Upload the council's policies and procedures.

Date of the council's 2021-2023 self assessment?

01/10/2023

Date of last council officer elections.

01/10/2023

For Details Upload the minutes from the board meeting documenting the results of the officer election.

Does the council have written position descriptions for council board officers?

● Yes
❍ No

Does the council have written roles and responsibilities for council governing body members?

● Yes
❍ No

How many times did/will the council governing body meet between July 1, 2021-June 30, 2023?
17

How many times will the council governing body meet between July 1,-June 30, of the upcoming biennium for which you are seeking funding?
20

Describe how the council advertises its general council meetings.
The GYWC's Monthly Public Board Meetings are advertised through a variety of outlets, including the Yamhill County News-Register newspaper, at the McMinnville Public Library Bulletin and website, on the Yamhill County Public Works website, the Yamhill SWCD Newsletters and Websites, the GYWC website, and GYWC Facebook. The GYWC also maintains an email distribution list of interested parties, which receives the meeting announcements.

Do council governing body meetings have agendas, sign-in sheets, and minutes?
● Yes
❍ No

Describe how your board membership includes a diverse range of geographic areas and community interests in the watershed.
The GYWC Board of Directors currently includes 6 voting members, as well as a diverse group of technical / stakeholder advisory (non-voting) liaisons. GYWC voting and non-voting membership alike represent a wide diversity of priority interests, landownership types, and geographies within the Greater Yamhill Watershed.

--VOTING MEMBERSHIP--
Our voting membership represents a range of stakeholder types, local commodities, and priority habitats. 1 of our voting members is an agency representative (City of McMinnville) and the remaining 3 are volunteers.

Members interests are with water quality, agriculture, fish habitat monitoring & restoration, as well as terrestrial habitat restoration.

--TECHNICAL/STAKEHOLDER ADVISORY (non-voting) ---
Representation includes members of local the Yamhill NRCS and SWCD office, members of local City governments, many state and federal agencies and the Confederated Tribes of Grand Ronde.

Our technical / stakeholder advisory members provide essential connections to their representative agencies and organizations. They work with the GYWC staff and Board voting members on prioritizing, developing, implementing, and managing on-the-ground watershed programs and strategic actions plans for habitat monitoring and restoration, and landowner engagement. They are imperative in helping to secure funding and in-kind services to support on-the-ground projects. Our watershed programs would not be possible without the contributions of these advisory members.

Describe any board membership and recruitment challenges and actions being taken to address those challenges.
--VOTING MEMBERSHIP--
Our priority goal is to more deeply engage the voting body in management and action, while providing for continuity of daily operations of administration. GYWC has hired a part-time administrative assistant and a CPA to perform administrative and reporting tasks. This addresses a key capacity barrier to provide additional support for daily operations/admin while engaging the Board/Officers more deeply in management.

Our 2nd goal is to maintain and expand our current voting membership to at least 7 total members. We hope to engage new members from Newberg and the South / North Valleys where we have lesser geographic representation on the voting body at this time.

Currently the GYWC has 6 voting members, with bylaws allowing for a range of up to 11. GYWC has struggled in the past to recruit new voting membership. In 2023 GYWC has recruited two new members who have already taken an active role in the success of the Council.

Since COVID-19, more community members have participated in our monthly public Board meetings as we have been able to conduct business using Web-video and Call-In options. As COVID-19 concerns are alleviated, the GYWC plans to transition to a hybrid model of in-person meetings with options for participation remotely. This hybrid participation model will be invaluable for retaining and expanding voting membership as typical barriers include travel time/transportation access to in-person meetings, or members have a need to travel away for work and school, or have other obligations which make remote participation a vital option for engagement.

--- TECHNICAL/STAKEHOLDER ADVISORY (non-voting) ---
One of the challenges we've had with our Technical / Stakeholder Advisory membership is recruiting engagement enough members of the following: agency reps for smaller cities, and additional stakeholders of agricultural commodities and forestry (industrial and family woodland). While these types of stakeholders have participated effectively with the GYWC for specific watershed projects that involve their individual properties, and we partner together as a more intimate collaboration to get work done, GYWC seeks to engage these stakeholders as part of larger collaborative and planning processes. Outreach to groups and individuals in Winter/Spring 2023 has been meet with interest. Greater collaboration and involvement is anticipated moving forward.

Are projects of the council, including those identified in the work plan, identified in a council action plan or strategic plan?

● Yes
❍ No

Provide the name and date of the most recent action plan or strategic plan.

Workload Descriptions and Assignments for OWEB Capacity v22.06.10

Is the work of the council specifically designed to benefit salmon or steelhead?

● Yes
❍ No

✓Upper Willamette River - Steelhead
✓Upper Willamette River - Chinook Salmon

Describe how the resulting council capacity grant will benefit salmon or steelhead or their habitat?

The Greater Yamhill Watershed contains 360 miles of stream habitat for Upper Willamette Winter steelhead trout and 109 miles of stream habitat for Upper Willamette Spring Chinook Salmon. Limiting factors include impaired water quality (303d listings, i.e. temperature, DO, pesticides, turbidity/sediment); water quantity and over-allocation of surface water rights during summer; impaired access to habitat due to numerous fish passage barriers; and altered physical habitat related to invasive plant species, stream incision and channelization, removal and lack of LWD, removal and degradation of riparian/floodplain habitat, and lack of floodplain and side-channel connectivity.

The council's 2013 Watershed Restoration Action Plan and pending June 2019 Action Plan Update, 2014 Yamhill Fish Passage Restoration Action Plan, and 1999 - 2002 5th-field HUC sub-basin assessments focus largely on fish

recovery actions. In the past 2 years the council has assisted with the development of 15 restoration projects that address salmon and/or steelhead and their habitats. The Executive Director will utilize watershed assessments, action plans and relevant Recovery Plans to develop a prioritized list of future restoration and monitoring projects.

GYWC has partnered with the BLM and the Spirit Mountain Community Fund to conduct eDNA sampling to determine the presence of fish in various waterbodies in the watershed. The Council plans to continue to partner on research using existing collected samples, and conduct new eDNA sampling projects.

Regional Assessments or Recovery Plans
Upper Willamette River Conservation and Recovery Plan for Chinook Salmon and Steelhead
Northwest Power and Conservation Council Willamette Subbasin Plan
A Monitoring Strategy for the Oregon Plan for Salmon and Watersheds Monitoring
Oregon's Native Fish Conservation Policy
Oregon Conservation Strategy
The Oregon Plan for Salmon and Watersheds

Council Capacity Metrics:
https://www.oregon.gov/oweb/Forms/OC-Application-Watershed-Council-Metrics-23-25.xlsx

Input the total acres encompassed by this watershed.
529000

Input the Federal Recovery plan applicable to your watershed council.
Upper Willamette River Conservation and Recovery Plan for Chinook Salmon and Steelhead, Oregon Department of Fish and Wildlife and National Marine Fisheries Service Northwest Region, 2011.

Input the description of the plan implemented that outlines the need for this activity
This project supports local watershed councils by providing capacity to engage in salmonid recovery planning and coordination. The Recovery Plan(s) indicate state and local collaboration and partnerships, especially in the form of watershed councils, are needed to successfully implement Recovery Plan actions and refer to the Oregon Plan. The Oregon Plan for Salmon and Watersheds (1997) provides the governance structure for implementing restoration in Oregon and specifically charges these watersh

Proposed Solution

Community Engagement

Briefly describe the council's stakeholder engagement accomplishments from the 2021-2023 biennium.

* Seventeen public meetings of the Board of Directors so far in 2021-2023, with more planned in March, April, May and June 2023.

* Held Annual Elections in January 2023.

* Recruited two new board members for a total of six board members.

* Completed Operational Assessment.

* Hired Executive Director, February 2023.

* Develop and maintain social media and online presence, including:
Email Distribution List - 881 subscribers
Facebook Page - 552 followers
Instagram - 54 followers
Website

Stakeholder Engagement has resulted in a variety of partnerships and landowner participation in projects. These include:

* Private landowner cash contributions to restore floodplain in Hess Creek.

* Outreach to owners of working lands and urban stakeholders in Cozine Creek, including referrals, annual mailers, presentations and tours.

* Recruitment of landowners and cash contributions to restore upland oak woodland outside of McMinnville.

* Contacts with landowners, including the Confederated Tribes of Grand Ronde, various industrial timber companies, small woodland owners to secure survey permissions for Rapid Bio Assessment of Fish Distributions & Abundance.

* Partnership with Yamhill SWCD and Yamhill County Public Works on the Yamhill County Roadside Vegetation Management Committee - attending quarterly meetings, tours of priority weed areas and implementation of demonstration projects.

* Coordinate volunteer-led manual treatment of Garlic Mustard.

Briefly describe the council's stakeholder engagement challenges from the 2021-2023 biennium

Recruiting technical advisors and stakeholders from smaller cities, as well as agricultural and forestry representatives has been a challenge. These stakeholders participate in project specific efforts on their individual lands, however we sould like more collaboration in the overall planning process of the council.

Meetings during the COVID-19 pandemic were challenging due to restrictions on in-person attendance. As restrictions are relaxed, hybrid meetings are anticipated to allow stakeholders a variety of ways to participate.

The Council was without a staff member for a significant portion of the biennium. Hiring an Executive Director in February 2023 has created additional capacity for stakeholder engagement.

Briefly describe the council's stakeholder engagement plans for the 2023-2025 biennium.

* Quarterly E-Newsletters
* Weekly Website Updates
* At least 10 annual meetings of the Council, with additional Executive Committee meetings
* Publicize meetings and events through website, social media and mailchimp email list
* Annual community presentations, workshops, project tours, or similar outreach events
* 1-2 outreach booths at existing local events each year, such as farmers markets, town and harvest festivals, and Earth Day Celebrations.
* Quarterly participation in Yamhill County Roadside Vegetation Management Committee - including recruitment of demonstration projects.
* Offer and coordinate student internship opportunities with local colleges, universities and community colleges.
* Landowner outreach events as part of Salt Creek Collaborative focus on water quality, fisheries, and long-term planning in sub-basin.
* Landowner outreach in Cozine Creek and Baker Creek areas, including urban lands and working lands.
* Focus on stakeholder engagement to owners of working lands throughout the watershed boundary.
*Focus on partnerships with retirement communities, homeowners associations, and service/community organizations with common goals.

Describe the council's efforts to engage with local tribes present in the council's geography.

Local tribes present within the geographical boundary of the Greater Yamhill Watershed Council include the Confederated Tribes of Grand Ronde and Confederated Tribes of Warm Springs. The Council actively seeks to partner and collaborate with the tribes on restoration projects and outreach events.

One example of collaboration in 2022 was the first annual Camas Festival at Linfield University. The GYWC and Confederated Tribes of the Grand Ronde partnered with the University to host a celebration of the use of camas lilies as a traditional foodway. The event included a tour of camas growth in the Cozine Creek area. Approximately 120 people attended the event. A second annual festival is planned for May 2023.

Another example is that the GYWC received funding from the Spirit Mountain Community Fund and also secured landowner permission from the Confederated Tribes of the Grand Ronde to complete eDNA sampling within the watershed.

Describe the council's efforts to engage with non-traditional partners.

The council held virtual meetings during the COVID-19 pandemic, and now plans hybrid meetings. These options allow stakeholders to attend meetings that would otherwise find travel to be a burden.

The council actively partners with local higher education institutions on community engagement and restoration activities. This reaches a diverse cross-section of individuals and provides links to partners that might otherwise be overlooked in the community.

The council also plans to expand outreach to owners of working lands in the watershed. This expands the traditional focus of the GYWC on urban lands.

A future opportunity includes outreach to the Hispanic and Latino community. The 2021 US Census estimates that 12.6% of Yamhill County's population speaks a language other than English at home. The Census identifies 16% of the County's population as Hispanic or Latino. Offering outreach materials in alternative languages is an opportunity for greater stakeholder participation.

Restoration

Provide a brief summary of the council's 2021-2023 restoration accomplishments.

Cozine Creek
* Maintenance of previously completed restoration sites
* Outreach to owners of working lands and urban stakeholders to secure access, tours, contributions.
* Riparian enhancement for 1 acre of habitat along unnamed tributary within Ash Meadows Park, in McMinnville.

Chehalem Valley
* Maintenance of previously completed restoration sites

Salt Creek
* Maintenance of previously completed restoration sites
* Outreach to agricultural landowners for additional restoration sites

Hess Creek
* Large wood material placement
* Riparian vegetation planting and maintenance.

Yamhill River
* Culvert replacement on unnamed tributary of Glenbrook Creek, approximately 1.5 miles from confluence of Gooseneck Creek, tributary to Mill Creek and Yamhill River

Oak and Prairie Habitat Restoration
* Miller Woods site planting and maintenance
* Cooke Property planting and maintenance

Briefly describe the council's restoration challenges from the 2021-2023 biennium

GYWC was without staff for a significant portion of the 2021-2023 biennium, which limited capacity to accomplish restoration activities. This capacity has been enhanced with the hiring of a new Executive Director in February 2023. Full-time staff for the council will allow development of partnerships and allow for outreach to landowners and other stakeholders.

In addition, board member recruitment has been successful. Four existing board members were joined by two new board members in January 2023. The hiring of a part-time administrator and CPA in 2022 has allowed the Board to become more engaged in action rather than day-to-day administration.

Provide a brief summary of the council's restoration plans for 2023-2025.

Riparian Habitat Restoration
Working in collaboration with a diversity of partners, the GYWC seeks to continue its thriving riparian habitat restoration program to address poor surface water quality, elevated stream temperatures, channel erosion and a lack of LWD recruitment across urban and working lands.

The GYWC will align its primary riparian habitat restoration efforts within four existing strategic water quality monitoring and community engagement focus areas: Cozine Creek, Chehalem Valley, Salt Creek and Palmer Creek.

The urban interface of these focus areas, in particular, is defined in the GYWC Needs Assessment and Action Plan Update as a valued niche role for the GYWC. Urban areas are under-served locally, with no other conservation group leading collaborations to improve urban stream water quality or stormwater quality.

GYWC will strengthen partnership with the BLM to streamline financial and in-kind match to support LWD project implementation and grant proposal development. Have a stakeholder meeting to review data and determine how to use data to identify new LWD.

The Partnership will also work together to update the 2014 Fish Passage Barrier Database and Action Plan based on the results of the RBA Fish Snorkel Inventories. This will also include updating the Database / Plan to include the Upper South Yamhill sub-basin, which was excluded from the 2014 report due to lack of fish passage data collected in that sub-basin, which will be partially remedied by the RBA inventory results.

GYWC is a partner with the Yamhill Soil and Water Conservation District to conduct landowner outreach for two weed control projects in 2023. These include outreach for garlic mustard on Baker Creek, as well as garden yellow loosestrife on the Willamette River at the Grand Island Greenway.

Planning

Describe how the council uses planning documents to identify and implement on-the-ground watershed restoration and stakeholder engagement projects.

Potential projects and stakeholder engagement opportunities are reviewed to determine whether they acheve the goals outlined in the GYWC Watershed Restoration Action Plan.

Are projects of the council identified in a council action plan or strategic plan?

● Yes
❍ No

Provide the name and date of the most recent action plan or strategic plan.

Greater Yamhill Watershed Council Watershed Restoration Action Plan, November 14, 2014

Wrap-Up

List the watershed council staff (or contractors), their roles, affiliation (staff or contractor), length of time in position (use the Qualifications space), and contact information.

Role	Name	Affiliation	Qualifications	Email	Phone
Administrator	Tom Wilson	Contractor	Professional Contractor with Business Liability Insurance	tom@rhythmadmin.net	(971) 218-9718
Board Secretary	Matt Young	City of McMinnville	Board Member - 4 Years	Matt.Young@mcminnvilleoregon.gov	(503) 434-7313
Board President & Treasurer	Jordan Anderson	Yamhill Soil and Water Conservation District	Board Member - 4 Years	jordan@gywc.org	(971) 409-5798
Vice Chair	Jacob Peterson	Oregon Department of Fish & Wildlife	Board Member, 2-years, Fisheries	MorganCreekSTEP@gmail.com	
Executive Director	Greta Holmstrom	Greater Yamhill Watershed Council		greta@gywc.org	(360) 721-5745

For Details Upload a list, including contact information, for the current board officers.

Budget

Item	Unit Type	Unit Number	Unit Cost	OWEB Funds	External Cash	External In-Kind	Total Costs
Salaries, Wages and Benefits							
Executive Director	Hours	2100	$45.00	$94,500	$0	$0	$94,500
			Category Sub-total	**$94,500**	$0	$0	$94,500
Contracted Services							
HR Services - Annual Membership	Years	1	$700.00	$700	$0	$0	$700
CPA - State and Federal Filings	Each	1	$1,000.00	$1,000	$0	$0	$1,000
CPA - Audit/Review	Each	1	$4,000.00	$4,000	$0	$0	$4,000
Administrative Services	Hours	168	$30.00	$5,040	$0	$0	$5,040
Bookkeeping	Hours	158	$45.00	$7,110	$0	$0	$7,110
HR Services - Hourly	Hours	12	$175.00	$2,100	$0	$0	$2,100
Payroll Services	Hours	12	$50.00	$600	$0	$0	$600
			Category Sub-total	**$20,550**	$0	$0	$20,550
Travel and Training							
Lodging	Each	2	$200.00	$400	$0	$0	$400
Training / Conferences	Each	2	$300.00	$600	$0	$0	$600
Mileage	Miles	500	$0.66	$328	$0	$0	$328
			Category Sub-total	**$1,328**	$0	$0	$1,328
Materials and Supplies							
Office Supplies	Years	2	$213.50	$427	$0	$0	$427
			Category Sub-total	**$427**	$0	$0	$427
Equipment							
			$0	$0	$0	$0	$0
			Category Sub-total	**$0**	$0	$0	$0
Other							
Phone / Internet	Months	24	$125.00	$3,000	$0	$0	$3,000
Insurance (DO & Liability)	Years	1	$3,500.00	$3,500	$0	$0	$3,500
Annual Non-Profit Incorporation Fees	Years	1	$50.00	$50	$0	$0	$50
Membership Dues	Years	1	$200.00	$200	$0	$0	$200
Website Hosting Fees	Years	1	$200.00	$200	$0	$0	$200
PO Box Rental	Years	1	$200.00	$200	$0	$0	$200
Software Licenses	Years	1	$1,190.00	$1,190	$0	$0	$1,190
Printing	Each	1000	$1.00	$1,000	$0	$0	$1,000
Event Venues Rentals & Refreshments	Each	2	$500.00	$1,000	$0	$0	$1,000
Board In Kind Volunteer	Hours	144	$30.00	$0	$0	$4,320	$4,320
			Category Sub-total	**$10,340**	$0	$4,320	$14,660

* = OWEB funds excluded from indirect.

			Modified Total Direct Cost Amounts	**$127,145**	$0	$4,320	$131,465
Indirect Costs							
	0%			$0	$0		$0
Post Grant							
			Total	**$127,145**	$0	$4,320	$131,465

Provide context and justification for how your budget was developed. Explain how project costs and/or rates were determined.

The OWEB Council Support 2023-2025 grant budget was developed by the GYWC Board of Directors. The primary change from the 2021-2023 budget is hiring a full-time Executive Director, to provide the volunteer council with capacity to accomplish the goals of the action plan.

Two other important changes from the 2021 - 2023 are focused on providing administrative and fiscal support.

This includes a line item for a part-time Administrative Assistant who will provide support for the GYWC Board and Executive Director.

The Administrative Assistant's time will be used for bookkeeping/fiscal reporting and engagement for the Board of Directors and Committees, including prep for and participation in (minutes taking) at monthly meetings. This position will work with the Executive Director and Board Officers to achieve these goals. The position is identified as a top priority for the GYWC's organizational health and capacity needs for ongoing management and administration.

The second new line item includes a contracted Fiscal Year Financial Review by our CPA. This Review will help highlight strengths and opportunities in the GYWC's fiscal policies and practices. We hope in the future to be able to continue these Reviews every year and potentially conduct an audit as funding allows. This Review is also identified as a top priority for GYWC's organizational health and ongoing management and administration.

Does the budget identify a contingency amount for specific line item(s) within the Contracted Services and/or Material and Supplies budget category?

❍Yes
●No

Funding and Match

Fund Sources and Amounts

Organization Type	Name	Source Note	Contribution Type	Amount	Description	Status
Local	GYWC	GYWC Board & Officers	In-Kind - Volunteers	$4,320	GYWC Board and Officers	Pending
Fund Source Cash Total		**$0**	**Fund Source In-Kind Total**			**$4,320**

Match

Contribution Source-Type: Description	Amount
GYWC-In-Kind - Volunteers: GYWC Board and Officers	$4,320
Match Total	**$4,320**

Do match funding sources have any restrictions on how funds are used, timelines or other limitations that would impact the portion of the project proposed for OWEB funding?

❍ Yes

● No

Do you need state OWEB dollars (not Federal) to match the requirements of any other federal funding you will be using to complete this project?

❍ Yes

● No

Does the non-OWEB cash funding include Pacific Coast Salmon Recovery Funds?

❍ Yes

● No

Uploads

Bylaws: GYWC Bylaws 2015.pdf **- Bylaws**

Action Plan: GYWC Action Plan.pdf **- Action Plan**

Local Recognition: GYWC Local Govt Designation.pdf **- Local Recognition**

Policies and Procedures: Signed GYWC Operating Policies 2018.pdf **- Policies**

Fiscal Policies: GYWC Financial Policy v.22.06.10.pdf **- Board approved**

Strategic Plan: Project workload OWEB Capacity v22.06.10.pdf **- Approved 22-23 Workplan / Workload Assignments**

Secured Match Forms: OWEB Small grants 2022.pdf **- Signed Match**

Policies and Procedures: 2023 01 10 Board Minutes.pdf **- Officer Elections 2023**

Policies and Procedures: GYWC Board Contacts.pdf **- Board Contact List**

Permit Page

No Permits have been identified for this application.

GREATER YAMHILL WATERSHED COUNCIL

Bylaws

Approved:

James Riedman, Chair

11/18/2015

Signed: _____

(Authorized Signer)

GREATER YAMHILL WATERSHED COUNCIL BYLAWS

NAME OF CORPORATION: GREATER YAMHILL WATERSHED COUNCIL

ARTICLE I: PURPOSE

The corporation is organized and operated exclusively for charitable, scientific, and educational purposes. Subject to the limitations stated in the Articles of Incorporation, the purposes of this corporation shall be to engage in any lawful activities, none of which are for profit, for which corporations may be organized under Chapter 65 of the Oregon Revised Statutes (or its corresponding future provisions) and Section 501(c)(3) of the Internal Revenue Code (or its corresponding future provisions).

The corporation's primary purpose shall be to work collaboratively with communities and landowners to develop and carry out voluntary watershed protection, restoration, enhancement, monitoring, and community engagement activities.

ARTICLE II: NONMEMBERSHIP

This corporation shall have no 'members' as that term is defined by Oregon Revised Statutes Chapter 65, but shall have members for other purposes. These members shall have none of the rights or duties described in ORS Chapter 65 (or its corresponding future provisions).

ARTICLE III: MISSION STATEMENT

The Greater Yamhill Watershed Council works to protect, restore, and monitor the quality of local natural resources through collaborative, community-based, and voluntary solutions.

ARTICLE IV: SERVICE AREA

The Greater Yamhill Watershed Council's primary service area encompasses the lands drained by the Yamhill River and Chehalem Creek Watersheds, the Lambert Slough, and Grand Island that drain directly into the Willamette River. These lands may be collectively referred to as the Greater Yamhill Watershed.

ARTICLE V: MEMBERSHIP

The Greater Yamhill Watershed Council shall endeavor to recruit and maintain membership representative of a broad range of interests in reasonable proportion and in accordance with the stated purposes and in accordance with ORS 541.910 and ORS 541.890(15).

Membership Eligibility

Membership in the GYWC is open to any individual, community, business or government group that either lives or performs work within the Greater Yamhill Watershed.

Members shall complete a registration form that indicates a desire to take an active part and/or to be kept informed of Council activities.

Only registered members are eligible for nomination to the Board of Directors and making recommendations to the Board of Directors.

Removal

Membership may be terminated with or without cause by a two-thirds vote of the Board of Directors in office.

Membership Fees

The Board of Directors may establish a membership fee schedule for use in carrying out its business.

ARTICLE VI: BOARD OF DIRECTORS

Duties

The affairs of the corporation shall be managed by the Board of Directors.

Number

The Board of Directors may vary between a minimum of three and a maximum of eleven members, each referred to as a Director.

Qualifications

A Director on the Board must be an active, registered member of the Council. In accordance with ORS 541.910(2) the Board of Directors shall represent a balance of interested and affected persons in the watershed, including, but not limited to, the following:

- Watershed Residents (from each of the sub-basins of the watershed)
- Yamhill and Polk Counties
- Cities of McMinnville and Newberg
- Small Cities
- Yamhill and Polk Soil and Water Conservation Districts
- Confederated Tribes of Grand Ronde
- McMinnville Water and Light

- Other Utilities
- Business or Community Development Associations
- Agriculture
- Viticulture
- Industrial Forestry
- Small Woodlands Association
- Environmental Groups
- Student Representatives (high school and college)

Election
Directors of the Board shall be elected by a majority vote of the Board of Directors present at the annual meeting.

Terms of Office
The term of office for a Director shall be two years. Directors may serve up to two consecutive two-year terms in a seat. The Board of Directors may elect to waive a term limit for a Director if an appeal is submitted justifying the need for an additional, consecutive term. The Board shall make provisions to stagger the terms of Directors so that each cycle less than one-half of the terms shall expire.

Removal
A Director may resign by giving notice to the Board. A Director may be removed for failure to attend three consecutive meetings or with or without cause by a vote of two-thirds of Directors in office.

Vacancies
Vacancies on the Board of Directors shall be filled by majority vote of Directors in office.

Quorum and Action
A quorum at a Board meeting shall be a majority of the number of Directors prescribed by the Board, or if no number is prescribed, the majority of the number in office immediately before the meeting begins.

If a quorum is present, action is taken by a majority vote of the Directors present, except as otherwise provided by these bylaws. Where the law requires a majority vote of the Directors in office to establish committees to exercise Board functions, to amend the Articles of Incorporation, to sell assets not in the regular course of business, to merge, or to dissolve, or for other matters, such action is taken by that majority as required by law.

Regular Meetings
Regular meetings of the Board of Directors shall be held at the time and place to be determined by the Board of Directors, but no less frequently than once per quarter. No other notice of the date, time, place or purpose of these meetings is required.

Annual Meetings
The annual meeting shall be held each year on a date in January as determined by the Board of Directors. If the annual meeting date is other than a regular meeting, notice shall be given to each Director as provided under Special Meetings. At the annual meeting, Directors and Officers shall be elected.

Special Meetings
Special Meetings of the Board of Directors shall be held at the time and place to be determined by the Board of Directors. Notice of such meetings, describing the date, time, place, and purpose of the meeting, shall be delivered to each Director personally, or by telephone, or by mail, or by email not less than five days in advance of such meeting.

Action by Consent
Any action required or permitted by law to be taken at a meeting of the Board of Directors may be taken without a meeting if a consent in writing, setting forth the action to be taken or so taken, shall be signed by all Directors in office. A written communication includes a communication that is transmitted or received by electronic means. Signing includes an electronic signature that is executed or adopted by a Director with the intent to sign. A written consent is included in records of the corporation as action by the Board of Directors.

Compensation
Directors shall not receive compensation for Board service, but may be reimbursed for actual and reasonable expenses incurred in performing their duties upon the approval of the Board of Directors.

ARTICLE VII: BOARD OFFICERS

Titles and Qualifications
The corporation shall have a Chair and Secretary as required by law and may have a Vice-Chair and Treasurer, as elected by the Board of Directors. All officers of this corporation must be members of the Board of Directors. The same person may hold more than one office, other than Chair and Secretary or Chair and Treasurer, if the Board so elects.

Term and Election
The term of office for officers shall be one year. Officers may serve up to two consecutive one-year terms. Officers shall be elected by a majority vote of the Board of Directors present at the annual meeting.

Vacancy
An officer may resign at any time by delivering notice to the Board. An officer may be removed with or without cause by a two-thirds vote of the Directors in office.

Any vacancy in an officer position shall be filled by an election of the Board. Such person shall hold such office until the next annual meeting at which time regular elections of officers shall occur.

Chair
The Chair is the chief officer of the corporation and shall act as the Chair of the Board. The Chair shall ensure that all orders and resolutions of the Board are carried into effect, call and manage meetings of the Board, and sign as necessary as the specific representative of the Council. The Chair shall have any other powers and duties as may be prescribed by the Board of Directors.

Vice-Chair
The Vice-Chair shall exercise all functions of the office of Chair in the event the Chair is absent or unable to act, and perform other duties as prescribed by the Board of Directors.

Secretary
The Secretary shall have overall responsibility for all record keeping. The Secretary shall perform, or cause to be performed, the following duties: a) official recording of the minutes of all proceedings of Board of Directors meetings and actions; b) provision for notice of all meetings of the Board of Directors; c) authentication of the records of the corporation; and d) any other duties as may be prescribed by the Board.

Treasurer
The Treasurer shall have the overall responsibility for all corporate funds. The Treasurer shall perform, or cause to be performed, the following duties: a) maintenance of full and accurate accounts of all financial records of the corporation; b) deposit of all monies and other valuable effects in the name and to the credit of the corporation in such depositories as may be designated by the Board of Directors; c) disbursement of all funds when proper to do so; d) presentation of financial reports as to the financial condition of the corporation to the Board of Directors; and e) any other duties as prescribed by the Board of Directors.

ARTICLE VIII: COMMITTEES

Board Committees

The Board of Directors may establish Board committees as it deems necessary and desirable. A Board committee is any committee that exercises any function of the Board of Directors and shall be composed of two or more directors elected by a majority vote of all Directors in office. A quorum at a Board Committee meeting shall be a majority of all Committee members in office. If a quorum is present, action is taken by a majority vote of Directors present.

Advisory Committees

The Board of Directors may establish Advisory Committees as it deems necessary and desirable. An Advisory Committee is any committee that does not exercise Board functions. Committee chairs shall be appointed by the Board. These committees shall have at least one Director of staff member, but otherwise have no membership requirements.

Limitations on the Authority of Committees

No committee may authorize payment of a dividend or any part of the income or profit of the corporation to its Directors or officers; may approve dissolution, merger, or the sale, pledge, or transfer of all or substantially all of the corporation's assets; may elect, appoint, or remove Directors or fill vacancies on the Board or on any of its committees exercising Board functions; nor may adopt, amend, or repeal the Articles of Incorporation, Bylaws, or any resolution by the Board of Directors.

ARTICLE IX: CORPORATE RECORDS

The Council shall keep at its principal office, or such other location as designated by the Board, the following corporate records:

- Articles of Incorporation and Bylaws as amended to date;
- Minutes of all meetings of the Board and committees exercising Board functions;
- Books and records of all financial accounts;
- A list of the names and business or home addresses of its current Board;
- Copies of the annual financial statements and annual audits for the seven most recent years;
- Copies of the federal, state, and local income tax annual returns and annual reports for the seven most recent years;
- Copies of the most recent annual report delivered to the Secretary of State of Oregon;

- Copies of federal and state tax exemption materials; and
- Any other document or information necessary to the maintenance and operation of the corporation.

ARTICLE X: INDEMNITY OF DIRECTORS AND OFFICERS

The Corporation will indemnify an individual, who is made party to a proceeding because s/he is or was a director or officer, against liability incurred in the proceeding to the fullest extent permitted by law.

ARTICLE XI: AMENDMENTS TO ARTICLES AND BYLAWS

The Articles of Incorporation may be amended and/or restated by a two-thirds vote of all Directors in office at any meeting where such action has been announced and a summary has been presented in the meeting's notice.

These bylaws may be amended or altered by a majority vote of all Directors in office at any meeting where such action has been announced and a summary has been presented in the meeting's notice.

These bylaws may be repealed and new bylaws adopted by a majority vote of Directors in office at any meeting where such action has been presented in the meeting's notice.

Bylaws History

2/10/2011: Adopted and Approved

9/18/2014: Amended and Approved

11/14/2014: Amended and Approved

11/18/2015: Amended and Approved

GREATER YAMHILL WATERSHED COUNCIL

Watershed Restoration Action Plan

Approved:
November 14, 2014

Signed: Marci E. Hunlie
(Authorized Signer)

Greater Yamhill Watershed Council

Watershed Restoration Action Plan

2013









Greater Yamhill Watershed Council
237 NE Ford Street, Suite 9
PO Box 1517
McMinnville, OR 97128
(503) 474-1047
Contact: Luke Westphal, Executive Director

Supported By:
Oregon Watershed Enhancement Board
Bureau of Land Management – Salem District
And other Watershed Council Partner Organizations

2013 GYWC Watershed Restoration Action Plan

Addendum 11/14/2014

This addendum is to document the GYWC's understanding that recently completed habitat studies and conservation strategies for Fender's blue butterfly and associated species (summarized below) necessitate a thorough review of and updates to the council's 2013 Watershed Restoration Action Plan to incorporate priorities for upland restoration.

Habitat Studies

HCP for Fender's Blue Butterfly on Private Lands in Yamhill County

The Yamhill SWCD and Institute for Applied Ecology (IAE) recently completed a multi-year habitat/population study for ESA-listed Fender's blue butterfly and Kincaid's lupine for private lands in Yamhill County. This study provided the data necessary for the YSWCD to draft a Habitat Conservation Plan (HCP) (Draft, March 2014).

IAE was contracted to develop an Action Plan based on the collected data, which was published alongside the draft HCP (Conservation Strategy for Fender's Blue Butterfly and Associated Habitats in Yamhill County; March, 2014). This strategic plan was developed to complement the YSWCD's HCP, as well as to serve as a stand-alone oak/prairie restoration planning document for local conservation organizations.

HCP for Fender's Blue Butterfly on Yamhill County Right-of-Ways

Yamhill County Public Works also recently completed a multi-year habitat/population study for ESA-listed Fender's blue butterfly and Kincaid's lupine for County transportation right-of-ways. The study provided the data necessary to finalize a Habitat Conservation Plan (HCP) and secure a federal ESA take-permit specific to County right-of-ways (Approved, March 2014).

GYWC Watershed Restoration Planning

The current 2013 Watershed Restoration Action Plan is aquatic/floodplain oriented. The GYWC has an important opportunity to integrate comprehensive oak/prairie restoration information and recommendations into its Watershed Restoration Action Plan now that these Fender's blue butterfly databases and associated strategic plans have been developed. The GYWC intends to broaden its Action Plan focus to a watershed approach, which encompasses the high priority habitats (upland and aquatic/floodplain) and associated species that our service area supports. In doing so, we intend to identify the particular niche that the GYWC can fill for oak/prairie restoration projects in our service area.

We are cognizant of the organizations working in this restoration arena locally and feel that the GYWC will able to participate in a meaningful and collaborative manner with our partners. The GYWC has already taken steps to pursue these collaborations by participating in a 2014 NRCS RCPP grant funding request to support Yamhill/Polk County oak and prairie restoration. This proposal is a partnership with nearly all of the key local players in oak/prairie restoration. If awarded, the GYWC will provide much needed support for landowner recruitment and outreach. The proposal partners have strongly encouraged this role for the GYWC.

Again, our intent is to use the most current and comprehensive watershed data available to set restoration priorities and identify the actions that the GYWC will take in the coming years. Expanding our focus to include upland areas is an essential component to our watershed restoration goals. We look forward to working with our restoration partners in 2014/2015 to review our current Watershed Restoration Action Plan and to define a strategic, watershed approach that gives equal consideration to priority upland and aquatic/floodplain habitats.

Project Support and Document Preparation:

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Notes:

Acknowledgements

The completion of the Greater Yamhill Watershed Restoration Action Plan was accomplished through the combined efforts of citizens, local universities, private and non-profit organizations, and public agencies.

Technical advice for the Action Plan was provided by a Technical Advisory Committee (TAC), composed of the following individuals:

Steve Wegner – Bureau of Land Management

Erik Grimstad – City of McMinnville

Chad Tillberg – Linfield College

Tom Murtagh – Oregon Department of Fish and Wildlife

Dave Stewart – Oregon Department of Fish and Wildlife

Marc Bell – Polk Soil and Water Conservation District

Tom Thomson – Polk Soil and Water Conservation District

Terry Anthony – Portland State University & Conservation Strategies

Kelsey Copes-Gerbitz – The Nature Conservancy

Marie Vicksta – Yamhill Soil and Water Conservation District

Dan Kent and **Kevin Scribner** of Salmon-Safe contributed content and valuable comments.

Funding for the development of the Action Plan was provided by the **Oregon Watershed Enhancement Board** and by the **Bureau of Land Management**.

Notes:

The Greater Yamhill Watershed Council Action Plan Summary



The Greater Yamhill Watershed Council, a non-profit organization with a volunteer board and council members, fosters community engagement in the basin to protect and enhance the health of our watershed. With the volunteerism of our community and a local sense of stewardship, we can achieve long-term watershed health.



The Greater Yamhill Watershed Restoration Action Plan advances the Council's mission to improve the health of the Yamhill River, Chehalem Creek, and tributary streams. The Action Plan is the framework and roadmap for guiding the Council's activities by pursuing the following goals:



Goal 1: Organize the Council for action

Goal 2: Concentrate the Council's activities by emphasizing actions in riparian and aquatic areas within Willamette Valley lowlands

Goal 3: Work collaboratively with organizations and residents on watershed restoration, education and outreach, and monitoring



Goal 4: Track watershed conditions and restoration success through monitoring and assessment lectures about watershed issues and fish populations;

Council meetings are held on the second Thursday night of the month and the public is encouraged to attend. In addition, the Council sponsors a variety of fun and educational activities



What can you do in your community?

- Participate in streamside tree planting and water quality monitoring;
- Mark storm drains in urban areas;
- SOLVE stream cleanups – help remove trash and unnatural debris from your creek;
- Get dressed-up and be goofy with the Council in McMinnville's annual UFO festival Alien Parade.
- Join other residents to survey spawning salmon
- Attend lectures about watershed issues and fish populations;
- And a host of other fun activities that connect you to nature



For more information on the Council, upcoming events, and volunteer activities, visit the Council's web site and facebook account:

http://www.yamhillwatershedcouncil.org/

https://www.facebook.com/greateryamhillwatershedcouncil



Volunteers are the heart of the Greater Yamhill Watershed Council.



Greater Yamhill Watershed Council Watershed Restoration Action Plan

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Introduction

The Greater Yamhill Watershed Council is a diverse group of community residents, landowners, environmental groups, businesses, and government agencies who work to enhance the natural resources of the Greater Yamhill Watershed. Working in collaboration with partner organizations and landowners, the Council seeks to increase understanding of the watershed and to accelerate the pace and effectiveness of watershed enhancement through voluntary restoration actions.

The Greater Yamhill Watershed Restoration Action Plan advances the Council's mission to improve the health of the Yamhill River, Chehalem Creek, and tributary streams. The Action Plan is the strategic framework and detailed roadmap intended to guide Council activities over the next five years. These activities include organizational development, voluntary restoration project implementation, building partnerships with other organizations, community and landowner education and involvement, and collecting information on watershed conditions.

Council Board Members

JL Liddane, Chair Watershed Resident

Erik Grimstad, City of McMinnville

Dave Hanson, Native Plant Society of Oregon

Marci Humlie, McMinnville Water and Light

Sonja Johnson, City of Newberg

Dave Riedman, Watershed Resident

Leonard A. Rydell, Yamhill County Small Woodlands Association

Bruce Sigloh, Watershed Resident

Steve Wegner, Mary's Peak Resource Area – Salem Bureau of Land Management

Council Staff

Luke Westphal, Executive Director

Notes:

Watershed Council Accomplishments



Since its formation in 1995, the Greater Yamhill Watershed Council has engaged the community and landowners in a number of educational and watershed enhancement activities, including landowner workshops, riparian restoration projects, fish habitat improvements and volunteer water temperature and water quality monitoring. Some of the stream restoration projects completed by the Council include enhancing fish habitat in Gooseneck Creek, a tributary to Mill Creek; improving upland and wet prairie habitats within Yamhill County's Deer Creek Park; and extensive riparian tree planting and invasive plant control along Muddy Creek. The Council is involved with the Palmer and Cozine Creek Pesticide Steward Partnerships (PSPs). Through water quality monitoring, the PSP identifies potential concerns and improves water quality affected by pesticide use. This partnership combines local expertise and water quality sampling results to encourage voluntary changes in pesticide use and management practices.

Development of the Action Plan



This document builds on the Greater Yamhill Watershed Council's 2005 action plan. The range of activities covered in the Action Plan include those necessary to increase the pace and effectiveness of the Council's watershed enhancement and educational actions. The Action Plan focuses on organizational development, on-the-ground restoration, building partnerships, outreach and education, and watershed assessment and monitoring. Because these activities cannot be achieved by the Council working in isolation, the Action Plan also provides a framework for developing partnerships with local and regional organizations that are in alignment with the Council's watershed improvement mission.

The Action Plan was developed through the guidance of the Council's Board and a Technical Advisory Committee (TAC). The TAC was comprised of representatives from partnership organizations, including Yamhill and Polk Soil and Water Conservation Districts (SWCDs), Oregon Department of Fish and Wildlife (ODFW), the Bureau of Land Management (BLM), City of McMinnville, Linfield College, The Nature Conservancy, and Portland State University. The Council Board's Chair and Executive Director also participated in the TAC meetings.

Greater Yamhill Watershed Overview

Encompassing an area of 529,510 acres, ranging from the crest of the Coast Range to the Willamette River, the Greater Yamhill Watershed Council's service area encompasses the Yamhill and Chehalem basins. Overall, the Greater Yamhill Watershed Council's service area includes eight watersheds:

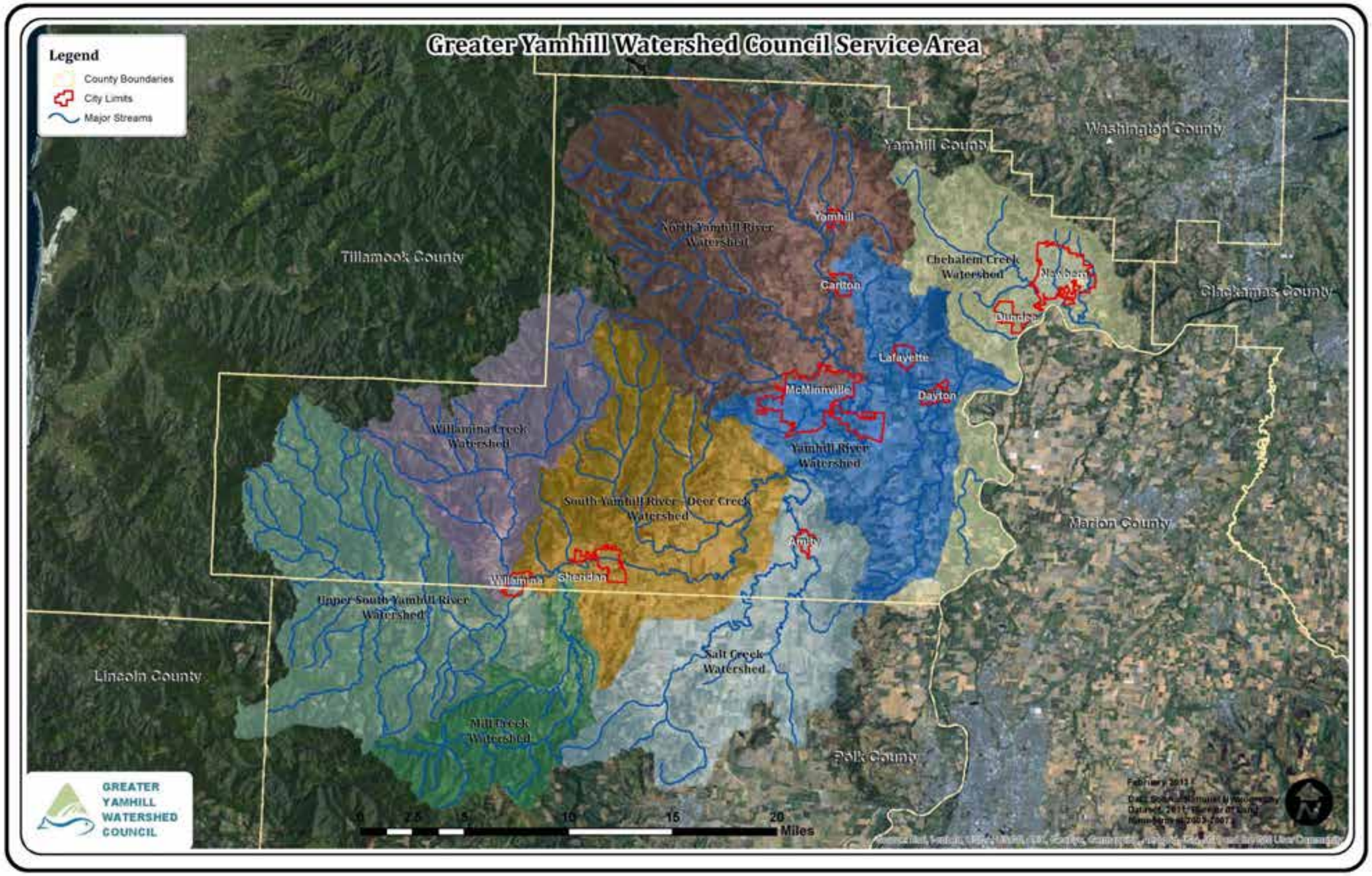
North Yamhill River	Salt Creek
Willamina Creek	South Yamhill River/Deer Creek
Upper South Yamhill River	Yamhill River
Mill Creek	Chehalem Creek*

*Chehalem Creek Watershed includes Lambert Slough, a tributary to the Willamette River.

The majority (approximately 87%) of land in the Greater Yamhill Watershed Council's service area (hereafter, Greater Yamhill Watershed) is in private ownership with predominant land uses of agriculture and industrial forestry. The Bureau of Land Management, Confederated Tribes of the Grand Ronde, and the U.S. Forest Service manage properties in the Coast Range upland areas of the basin.

Roughly 70% of the Greater Yamhill Watershed lies within Yamhill County, with most of the remaining in Polk County. Small portions of the watershed are within Washington, Lincoln, and Tillamook Counties. There are ten incorporated cities and towns in the watershed: McMinnville, Newberg, Willamina, Sheridan, Amity, Carlton, Yamhill, Lafayette, Dayton, and Dundee.




Greater Yamhill Watershed Council Service Area
Legend
County Boundaries
City Limits
Major Streams
Tillamook County
Yamhill County
Washington County
Clackamas County
Marion County
Polk County
Lincoln County
North Yamhill River Watershed
Chehalem Creek Watershed
Willamina Creek Watershed
Yamhill River Watershed
South Yamhill River - Deer Creek Watershed
Upper South Yamhill River Watershed
Salt Creek Watershed
Mill Creek Watershed
Yamhill
Carlton
Newberg
Dundee
Lafayette
McMinnville
Dayton
Amity
Willamina
Sheridan
GREATER YAMHILL WATERSHED COUNCIL
0 2.5 5 10 15 20 Miles

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The watershed's human population is growing. In 2012, Yamhill County's population estimate is 100, 550, a considerable increase over the U.S. Census' 1990 population estimate of 65,551 (PSU Population Research Center 2012 http://www.pdx.edu/prc/home). Much of the population growth has been concentrated in the Greater Yamhill Watershed's towns and cities.

Aquatic habitats and fish populations



The Yamhill River and Chehalem Creek begin in the Coast Range and foothills. These streams meander through the valley and past communities such as Sheridan, McMinnville, and Newberg before reaching the Willamette River. The watershed's streams are bordered by forests, wetland areas and other water-associated, or "riparian vegetation", that provides shade and other important habitat for wildlife and fish. Historically, the Yamhill River was characterized by a wide band of riparian and floodplain forests with an active channel meandering across the floodplain. Over the last 100 years, various land use practices have dramatically reduced the amount of streamside vegetation and the ability of the channels to migrate across their floodplains.

Cutthroat trout spawn and live their lives within the Greater Yamhill Watershed's streams, including Chehalem Creek. Coho salmon, winter steelhead, and lamprey are present in the watershed. These species are anadromous—fish that spend their adult life at sea and breed in freshwater. Another anadromous fish, Chinook salmon, do not spawn in the watershed, but young salmon from Cascade Range spawning streams will move from the Willamette River into the lower Yamhill River during the higher winter and early spring flows as they make their slow journey to the ocean. Coho salmon, which are weaker swimmers than Chinook salmon and could not ascend Willamette Falls, were not historically present in the watershed. With the addition of a fish ladder at the falls, coho are now accessing spawning areas in the Yamhill River and other Willamette River tributaries and their populations are growing.



As a result of habitat modifications, historical overfishing, and other factors, Willamette River Basin Chinook salmon and steelhead trout populations have declined to alarming levels, and the larger reproductive units they belong to—the Upper Willamette River Chinook evolutionarily significant unit (ESU) and the Upper Willamette River steelhead distinct population segment (DPS)—are listed as threatened under the ESA.



While the majority of Willamette River Basin winter steelhead spawn in tributaries on the east side of the basin flowing out of the Cascade Range (e.g., Molalla and Santiam Rivers), steelhead do spawn in the west-side Coast Range tributaries. The Oregon Department of Fish and Wildlife (ODFW) recognizes the Yamhill, Tualatin, and Luckiamute Rivers as containing west-side steelhead populations. While these steelhead populations are not as large as the east-side populations, steelhead production from west-side tributaries, including the Yamhill River, help buffer or compensate for the other populations and contribute to the population's recovery.

The majority of Upper Willamette winter steelhead, including the fish returning to the Greater Yamhill Watershed's streams, return to freshwater in January through April, pass Willamette Falls from mid-February to mid-May, and spawn in March through June, with peak spawning in late April and early May. Steelhead can migrate far upstream to spawn in smaller, higher gradient tributaries. Juvenile steelhead rear in streams for one to four years (most often two years), then migrate in April through May downstream through the Willamette River and Columbia River estuary into the ocean.

Historically, the Willamette Basin lamprey population was the largest in the Columbia River Basin. Pacific lamprey has seen dramatic population decline throughout the Pacific Northwest and the number of lamprey passing Willamette Falls has also fallen precipitously. The reasons for the population decline are not well understood, but lamprey passage problems at Willamette Falls, dams, and road crossings have contributed to the population's decline.



Lamprey begin to migrate from the ocean in the early spring, moving into the Willamette River and then up the tributary rivers and small streams. The adults reside in freshwater for approximately a year before spawning. Little is known about Willamette Basin lamprey behavior or distribution during the adult migration and holding period.

Recent studies sponsored by the Confederated Tribes of the Grand Ronde and other organizations have provided preliminary information on Willamette Basin lamprey migration patterns. These studies indicate that a significant proportion of the Willamette Basin's lamprey population migrates into the Yamhill River where they spawn in small tributary streams, such as Agency Creek, a tributary to Willamina Creek. After emergence from the stream gravels, larval lamprey burrow in silt and fine sediment substrates where they rear and feed on detritus and other organic material for 4 to 8 years, after which they undergo metamorphosis and migration to the ocean.

Upland habitats and wildlife

The Greater Yamhill Watershed includes extensive forested areas within the Coast Range and foothills. As the watershed transitions from the forested areas into the flat, broad Willamette Valley the landscape becomes very diverse: farms, wineries, woodlots, homes, and small urban centers are interspersed with natural environments, including rare Willamette Valley habitats such as oak woodlands and prairie grasslands.



Fender's blue butterfly on Kincaid's lupine

The increasingly rare native upland habitats are home to important plant and wildlife species. One example is Kincaid's lupine. This lupine, which grows in native prairies that have been virtually eliminated from the Willamette Valley as a result of conversion to agriculture, urbanization, and other development, is threatened in the wild. Fender's blue butterfly, which is protected under the federal Endangered Species Act (ESA), needs Kincaid's lupine to survive. The butterfly's larvae eat the plant's leaves during the fall then crawl down the stem and hide among the roots during the mild winters. In spring, the larvae re-emerge and eat more leaves and then form cocoons.

Notes:

Watershed Restoration Partner Organizations

Organizations are achieving a lot in the watershed – below are some examples of what is happening in restoration with a focus on partnerships and how upland restoration is being achieved.

Yamhill and Polk Counties

In 1995, recognizing the importance of conserving the natural resources of the watershed, Polk and Yamhill Counties formed the Greater Yamhill Watershed Council (then named the Yamhill Basin Council) to identify problems and needs in the watershed and to develop an action plan. Polk and Yamhill Counties own and manage significant acreage across the Greater Yamhill Watershed. Yamhill County is a key partner for the proposed Yamhales Westsider Trail, which would provide a multi-use trail connecting from McMinnville to Gaston following an unused rail line. Yamhill County Parks manages a variety of parks and natural areas, most of which are located near water bodies. Yamhill County Parks implements land management practices to protect water quality, including the protection and enhancement of riparian and wetland areas, greatly limiting the use of fertilizers and pesticides, landscaping with native plants, and controlling invasive plant species. Yamhill County Parks is also a key partner for the proposed Yamhill River Watertrail, which is being led by a committee of local residents and organizations. Polk and Yamhill County Public Works Departments are engaged in discussions with the Greater Yamhill Watershed Council to address high priority fish passage barriers. Polk County is currently partnering with the Greater Yamhill Watershed Council to acquire funding to address a high priority fish passage barrier in the Mill Creek watershed. Yamhill County Public Works is also finalizing a Habitat Conservation Plan (HCP) to protect upland prairie species on County lands, including two federal and state listed species: Kincaid's lupine and Fender's blue butterfly.



Cities



A number of local municipalities are active in the restoration and preservation of natural resources in the Greater Yamhill Watershed. The City of Newberg is leading efforts to improve urban water quality through their Willamette Total Maximum Daily Load (TMDL) Implementation Plan. The City of McMinnville has partnered with a variety of local conservation groups to conduct water quality monitoring programs, riparian plantings, and storm drain markings in partnership with the GYWC. The City of Dundee established the 20-acre Harvey Creek Trail and partnered with the Greater Yamhill Watershed Council to replace a fish passage barrier culvert. The City of Sheridan worked with the Council to restore riparian vegetation along the South Yamhill River. The City of Carlton partnered with the Council to plant trees along the North Yamhill River at Wennerberg Park. In addition, the Cities of Carlton, Dayton, Dundee, Lafayette, McMinnville, Newberg, Sheridan, and Willamina provide sponsorships for the Greater Yamhill Watershed Council's programs.

Yamhill SWCD

The YSWCD works to conserve, restore, and protect Yamhill County's natural resources by providing technical, financial, and educational assistance to citizens, landowners and businesses. The YSWCD owns and maintains a number of important conservation properties, including Miller Woods and Chegwyn Farms. The District has also made significant progress in the protection and restoration of upland habitats. The YSWCD is currently finalizing a Habitat Conservation Plan (HCP) to protect upland prairie species on private lands, including two federal and state listed species: Kincaid's lupine and Fender's blue butterfly.

Polk SWCD

The PSWCD is organized to promote conservation and wise use of natural resources in Polk County. In addition to implementing on-the-ground restoration and monitoring activities, the District has developed extensive outreach and education programs for youth and adults, including landowner resource management workshops, outdoor school events, college internships, and has published a variety landowner resource handbooks.

Bureau of Land Management

The BLM has significant upland and forested holdings across the Greater Yamhill Watershed, in particular the North Yamhill, Willamina, Upper South Yamhill, and Mill Watersheds. The BLM actively manages these lands to produce a consistent volume of timber while protecting and restoring water quality and native salmonid fisheries, among other natural resource concerns. Conservation activities implemented by the BLM include road sediment and erosion control, aquatic and riparian habitat enhancement, fish passage restoration, and sustainable forest thinning.

Confederated Tribes of the Grand Ronde



The Confederated Tribes of Grand Ronde is a diverse organization that provides a variety of programs and services to tribal members and surrounding communities. The Tribe's Natural Resources Department is organized to manage the natural resources of the Grand Ronde Tribes, such as upland forests and prairies, streams, fish and wildlife. Pacific lamprey is a culturally significant species to the Tribe and is found in Agency Creek. The Tribe is currently working collaboratively with Oregon State University and Cramer Fish Sciences to conduct research on Pacific lamprey behavior, migration, and distributions.

Yamhill Partners for Land and Water

The YPLW is an informal group of public and private organizations working together to protect and enhance the natural resources of the Yamhill valley area and its people by conserving significant lands & waters for wildlife habitat, for working lands, and for parks & natural spaces. The YPLW is actively working to establish a land trust presence in Yamhill County. In addition, the YPLW is particularly focused on the protection and enhancement of oak savanna and woodlands, upland and wet prairies, and populations of the federal and state listed Kincaid's lupine and Fender's blue butterfly.

Yamhill Watershed Stewardship Fund

The YWSF is a Yamhill County-based non-profit corporation dedicated to promoting knowledge and appreciation of healthy lands, waters, and wildlife in the Yamhill River valley. The YWSF provides local community grants for environmental outreach and education and sponsors annual environmental-themed film festivals.

Institute for Applied Ecology

IAE is a 501(c)(3) nonprofit organization with a mission to conserve native species and habitats through restoration, research, and education. The IAE has developed and implemented habitat restoration and conservation research programs throughout Oregon, including the introduction of federally listed Nelson's checkermallow within Deer Creek County Park in Yamhill County.





The Nature Conservancy

The TNC is actively engaged in upland conservation efforts in the Yamhill Valley. The TNC owns and manages the 630-acre Yamhill Oaks Preserve, which includes significant holdings of rare oak woodlands, upland prairies, and populations of federal and state listed Kincaid's lupine and Fender's blue butterfly. The TNC is an active member of the YPLW and has led the YPLW's strategic planning efforts.

Greater Yamhill Watershed Issues

There are a number of environmental issues affecting the Greater Yamhill Watershed's rivers and streams. Historical practices and current land use management are contributing to poor water quality and fish habitat. Most of the watershed's streams and associated riparian vegetation and floodplains are suffering from multiple symptoms that indicate poor watershed health. The Greater Yamhill Watershed Council is dedicated to improving the watershed by addressing the range of environmental problems. The sections below outline the key issues affecting the watershed.

Watershed Issues Addressed by the Action Plan

Hot: Water temperatures exceed what is healthy for fish and other organisms.

Dry: Reduced water flows restrict stream habitat and increase water temperatures.

Disconnected: Road stream crossings can be barriers to fish movement; channels are disconnected from floodplains, which reduces fish habitat.

Dirty: Contaminated water from poor urban stormwater management and runoff from inadequately maintained rural roads and other land use practices is contributing to poor water quality.

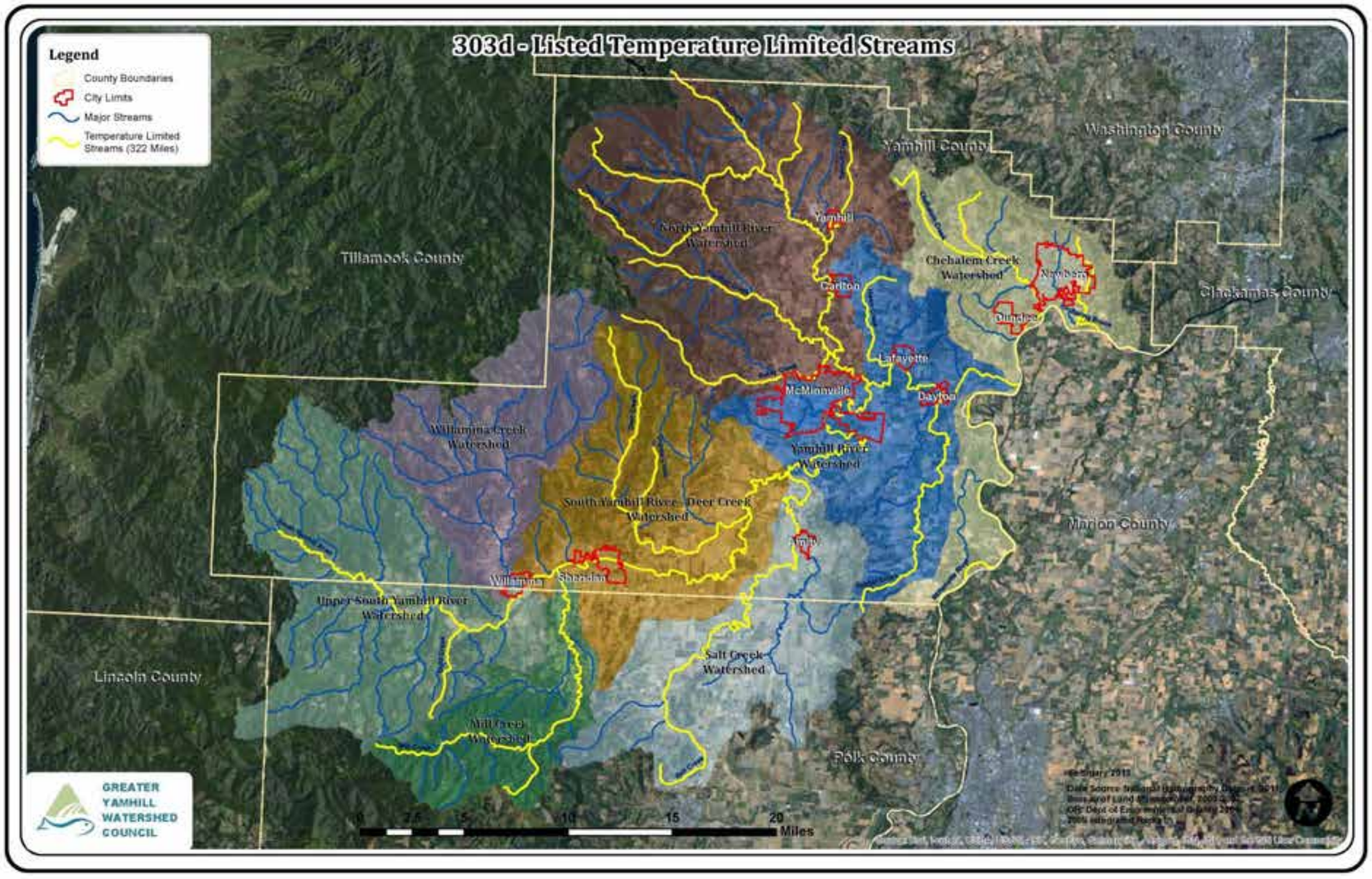
Simplified: Streams have lost complexity that contributes to high quality fish habitat, including deep pools and cover, due to reduced amounts of large wood in streams and land uses affecting the width and quality of streamside vegetation and the active floodplain.

Weedy: Invasive plants are non-native species that invade habitats. In riparian areas and floodplains, invasive plants replace native plants and degrade habitats.

Hot

Stream water temperatures that are too high for healthy fish populations are a problem in the Greater Yamhill Watershed. Late summer water temperatures in large portions of the watershed's streams often exceed 65 degrees Fahrenheit, which is stressful for cold-water fish such as trout and steelhead. A key factor that contributes to these high water temperatures is loss of shade over stream channels. Removal of riparian areas or narrowing of the corridor of vegetation next to streams reduces the amount of cover over the stream, increasing sun exposure and heating the water. The Oregon Department of Environmental Quality (DEQ) has identified Greater Yamhill Watershed streams that exceed healthy temperature for fish. More than 322 miles of streams are "water quality limited" for temperature.

Notes:


303d - Listed Temperature Limited Streams
Legend
County Boundaries
City Limits
Major Streams
Temperature Limited Streams (322 Miles)
Tillamook County
Yamhill County
Washington County
Clackamas County
Marion County
Polk County
Lincoln County
North Yamhill River Watershed
Yamhill
Carlton
Chehalem Creek Watershed
Newberg
Dundee
Lafayette
McMinnville
Dayton
Yamhill River Watershed
Willamina Creek Watershed
South Yamhill River - Deer Creek Watershed
Amity
Sheridan
Willamina
Upper South Yamhill River Watershed
Salt Creek Watershed
Mill Creek Watershed
GREATER YAMHILL WATERSHED COUNCIL
0 2.5 5 10 15 20
Miles

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Dry

By its nature the Yamhill River, its tributaries, and Chehalem Creek have very low flows during the summer and early fall. Unlike many of the other Willamette Basin rivers that are fed by the high Cascade Mountains, low flows in the Greater Yamhill Watershed are not supplemented by a large snowpack, abundant groundwater, or water stored in reservoirs behind dams. The low water levels of the Greater Yamhill Watershed's streams are further reduced when water is withdrawn for agricultural and municipal uses. Low flows reduce the habitat available for aquatic species, including ESA-listed steelhead, and exacerbate high water temperatures because the low water volume heats up more quickly.

Climate change could magnify the Greater Yamhill Watershed's warm streams and low flows. There is a growing consensus that climate change is occurring at global, national, regional, and local scales. Predicted climate change is expected to affect watersheds and the abundance and persistence of many native fish, wildlife and plant species, with significant impacts on native salmon and trout.



A recent State of Oregon report, *Climate Change and Freshwater Resources in Oregon* (Chang and Jones 2010), outlines the potential impact of climate changes on watersheds. The following is a summary of how the report's predicted climate change could affect rain-dominated watersheds within the Willamette Basin:

- More extreme events such as floods and droughts.
- Higher summer air temperatures, accompanied by reduced precipitation, will decrease stream flow in the summer.
- Water temperatures will rise as air temperature increases, particularly in urban streams where natural riparian vegetation is typically lacking. The decline in stream flows will exacerbate water temperature increases because the lower volume of water will be heated up more quickly.
- Short-term droughts (3–6 months) will increase. These droughts, combined with increased frequency of heat waves, could drive the increased frequency of sustained periods of high water temperatures and lower summer flows.
- Increased evaporation due to warmer air temperatures may also result in reductions in total annual groundwater recharge.

Disconnected



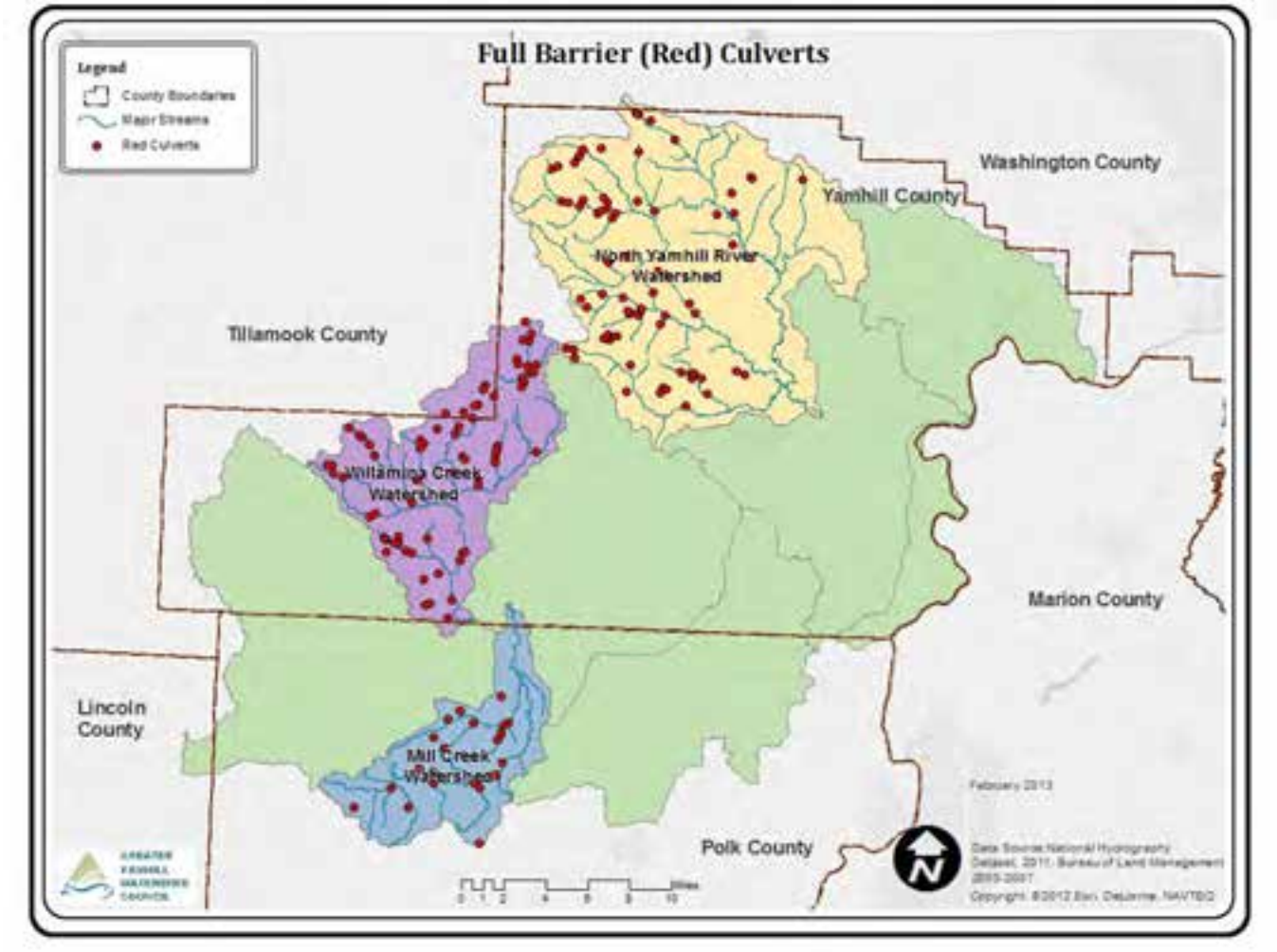
Historically rivers and streams within the Greater Yamhill Watershed could actively meander across the floodplain. Over the last 100 years, the placement of revetments and other practices have diminished the tendency for rivers and streams to meander. These actions have disconnected channels from the floodplain, reduced fish habitat by limiting access to floodplain areas during high flows, and blocked side channels.

Fish passage barriers on tributary streams to the Yamhill River can pose significant problems for fish populations. Road crossing culverts are the primary fish passage barrier present in the Greater Yamhill Watershed. Culverts, which can be too high or too steep for fish to swim through, prevent fish from accessing important areas for spawning or from moving into cool tributary streams when the river warms during the summer months. With more than 1,500 road crossings within the watershed, there are a large number of potential fish passage barriers that can affect fish populations.

The Council has been evaluating fish passage at road crossing culverts in the Mill Creek, Willamina, and North Yamhill Watersheds. This information will aid in identifying culverts that are barriers to fish passage and prioritizing culvert replacement. Improving fish passage will have immediate benefits by opening more stream habitat to steelhead, cutthroat trout, and lamprey populations.






Full Barrier (Red) Culverts
Legend
County Boundaries
Major Streams
Red Culverts
Washington County
Yamhill County
North Yamhill River Watershed
Tillamook County
Willamina Creek Watershed
Marion County
Lincoln County
Mill Creek Watershed
Polk County
February 2013
N

Dirty



Urban and rural areas within the Greater Yamhill Watershed contribute to poor water quality in streams. Roads, parking lots, rooftops, and other areas are "impervious" to water infiltrating into the ground. Rainfall hitting these impervious surfaces quickly runoff the storm drain system, contributing large amounts of water carrying sediments, oils, and other contaminates into streams. In rural areas, ditches along roads that are not properly maintained, or farm fields that do not control erosion can also transport water with sediments, pesticides and other chemicals into streams. In addition, poor land management practices can introduce other chemicals into waterways, including pesticides, and leaky septic systems and other sources can contaminate water with bacteria.

Simplified

Large wood from trees falling into stream channels provides important habitat for fish and wildlife. Large accumulations of wood in the river (i.e., log jams) help scour deep pools which tend to be cooler, and provide cover for fish and wildlife. Throughout the Greater Yamhill Watershed, there has been a dramatic reduction in the amount of wood in stream channels. Historical practices, such as log drives down the Yamhill River during the early logging of the watershed, promoted the removal of wood. Removal of riparian trees, the narrowing of the band of vegetation along channels from land use, and the conversion of conifer trees to deciduous trees such as alder, have also limited the contribution of wood into the streams.



In addition, the placement of revetments and other practices to "control" the river have diminished the Yamhill River's tendency to meander. Together, these factors have narrowed the active floodplain and corridor of floodplain vegetation; the combined effect has been a reduction in the number of trees in the channel that contributes to quality habitat.

Weedy

Invasive plants are non-native species that invade habitats. In the Greater Yamhill Watershed's riparian areas and floodplains, invasive plants replace native plants and degrade habitats. Blackberry, Japanese knotweed, purple loosestrife, spurge laurel, and other invasive plants are aggressively taking over habitat along the Yamhill River and other streams and reducing habitat diversity and quality. Reducing vegetation quality along streams can degrade water quality and fish habitat over time by diminishing the numbers of native trees and reducing shade over channels.



Armenian (Himalayan) Blackberry displaces native riparian habitats



Reed canarygrass creates a monotypic infestation where no other plants will grow

Notes:

Action Plan Structure

The Greater Yamhill Watershed Restoration Action Plan is the foundation for the Council's activities and coordinated actions with partner organizations. The Action Plan is organized around a framework that describes the overarching purpose of the plan, goals that define success, and the strategies and actions designed to achieve the goals.

Action Plan Purpose

Working in partnership with other organizations, individuals, and landowners, the Greater Yamhill Watershed Council will increase resident's understanding of the watershed and accelerate the pace and effectiveness of aquatic and riparian restoration.



Notes:

Greater Yamhill Watershed Council

Action Plan Structure

Purpose →Goals → Strategies →Actions

Purpose: Broad and visionary. The reason for the Action Plan and coordinated actions

Goals: Specific outcomes that will define success

Strategies: Overall approach used to achieve the goals in alignment with the purpose

Actions: Specific activities, including where, when, and partnerships



Notes:

Action Plan Goals

The purpose of the Greater Yamhill Watershed Restoration Action Plan will be accomplished by pursuing the following goals:



Goal 1: Organize the Council for action

Goal 2: Concentrate the Council's activities by emphasizing actions in riparian and aquatic areas within Willamette Valley lowlands

Goal 3: Work collaboratively with organizations and residents on watershed restoration, education and outreach, and monitoring

Goal 4: Track watershed conditions and restoration success through monitoring and assessment

Action Plan Strategies and Actions

Greater Yamhill Watershed Restoration Action Plan's strategies outline the direction and overall approach to achieve the Action Plan's goals. The strategies provide the framework for the Council's specific actions, including where and the partnerships that will be implemented to achieve the goals. The Action Plan strategies are as follows:

- Organizational health
- Partnerships with landowners and organizations
- Education and outreach
- On-the-ground-restoration
- Monitoring
- Assessment and reporting
- Fundraising



Goal 1: Organize the Council for action

The Greater Yamhill Watershed Council's organizational structure and representation contributes to the Action Plan's success. The Board's diverse representation, experience, skills, and perspectives will guide the implementation of the Action Plan and help provide outreach and communication to the broader community and partner organizations. The Board will form Technical Advisory Committees (TACs) that will provide scientific and technical guidance and review for the Action Plan's restoration projects and other activities. Council staff will implement projects under the guidance and review of the Board and TACs.



Activities pursued under this goal will include reviewing Board membership, TAC representation, and staff skills to assure alignment with the Action Plan's goals and activities. Gaps identified through this review will facilitate recruitment of new Board and TAC members and provide a framework for staff development.

Strategy: Organizational Health

Action 1-1 – Review Board membership and augment Board representation to facilitate implementation of the Action Plan

Action 1-2 – Recruit a full working Board and implement Annual Work Plans for Board Directors

Action 1-3 – Identify and pursue opportunities for Board and Staff development and training

Strategy: Partnerships with Landowners and Organizations

Action 1-4 – Form an Action Plan implementation technical advisory committee (TAC)

Action 1-5 – Identify landowners and recruit individuals from organizations who will help facilitate Action Plan implementation for Board and TAC membership



Action 1-6 – Develop and implement a communication plan to inform the general public, key partners, and stakeholders on the status of the watershed, Action Plan progress, and opportunities for engagement

Strategy: Education and outreach

Action 1-7 – Revise the Council's website and regularly update the website and the Facebook page to facilitate community outreach

Strategy: Fundraising

Action 1-8 – Identify and recruit a range of funding sources to implement projects and to support watershed council capacity needs

Goal 2: Concentrate the Council's activities by emphasizing actions in riparian and aquatic areas within Willamette Valley lowlands

The Greater Yamhill Watershed Council will focus its activities within watershed areas where lowlands, agriculture, and urban areas are dominant. Relative to the forested Coast Range areas, the lowlands of the Willamette Valley, where intensive land uses are concentrated, have the poorest aquatic habitat and water quality. Within these areas, the Council will emphasize actions in streams, riparian corridors, and floodplains. It is important for the Council to stress working in the aquatic and riparian environment because other partner organizations, such as the Yamhill Partners for Land and Water, The Nature Conservancy, and the Soil and Water Conservation Districts, are focusing work in upland habitat areas such as prairies and oak woodlands. The Council will continue to work with these and other organizations, but with a concentration on stream, riparian and floodplain habitats.



The Greater Yamhill Watershed Restoration Action Plan will focus activities in the five watersheds where lowlands, and associated agricultural and urban land uses, are a key landscape component:



- Chehalem Creek
- North Yamhill River
- South Yamhill River
- Salt Creek
- Yamhill River

The emphasis on areas within these watersheds does not mean the Council will not pursue projects and outreach in the other watersheds where uplands and forestry are the dominant land uses. The Council will pursue as a priority addressing fish passage barriers and opportunistic projects and partnerships focused on in-stream habitat and other projects in these other watersheds, the Forested Upland Focus Area, comprised of the Upper South Yamhill River, Mill Creek and Willamina Creek Watersheds.

Strategy: Education and outreach

Action 2-1 – Promote best management practices, including tools and programs used by OSU Extension Service, Natural Resources Conservation Service (NRCS), SWCD's, and Salmon-Safe

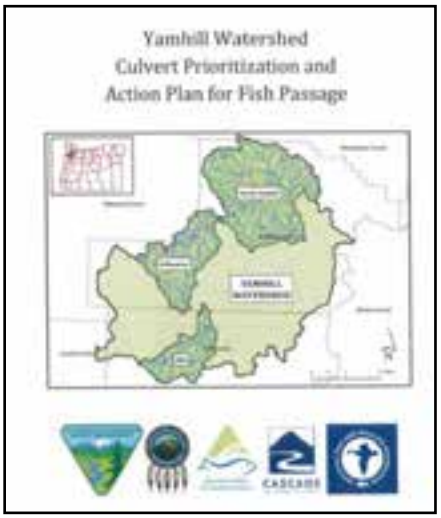
Action 2-2 – Implement volunteer program for storm-drain markings

Action 2-3 – Identify and complete at least one demonstration project in each watershed

Action 2-4 – Facilitate watershed residents' participation in salmon spawning surveys in collaboration with ODFW

Action 2-5 – Pursue outreach opportunities, including participation in local events and partnerships with the through Evergreen Museum's Wings & Waves Waterpark

Action 2-6 – Develop and implement targeted landowner/sector workshops to promote best management practices, including Salmon-Safe certifications



Strategy: On-the-ground restoration

Action 2-7 – Implement aquatic and riparian projects and best management practices

Action 2-8 – Implement fish passage improvements based on the 2013 *Yamhill Watershed Culvert Prioritization and Action Plan for Fish Passage*

Action 2-9 – Implement stormwater and Low Impact Development (LID) projects and best management practices

Action 2-10 – Implement road and agricultural sediment control projects and best management practices

Strategy: Monitoring

Action 2-11 – Implement water quality monitoring projects

Action 2-12 – Continue to participate and expand Yamhill Pesticide Stewardship Partnership (PSP)

Strategy: Assessment and reporting

Action 2-13 – Complete rapid bioassessments of fish distribution and abundance in the streams throughout the North Yamhill, Willamina, and Mill Creek watersheds

Goal 3: Work collaboratively with organizations and residents on watershed restoration, education and outreach, and monitoring

A number of organizations in the watershed are pursuing restoration and have unique expertise. Partnerships will enhance the Council's capabilities and increase the pace and effectiveness of restoration. In addition to the organizations described on page 11 of

Partnerships

We can't do it alone!

Restoration at the scale of the Greater Yamhill Watershed is a big undertaking. Partnerships with other organizations enhance the Council's capabilities to improve the watershed.

this plan, the Council will strive to identify other local, state and national organizations that have missions in alignment with the Council's watershed restoration activities.

Through the development of the Greater Yamhill Watershed Restoration Action Plan, Salmon-Safe was identified as an organization that has a unique role in the watershed and that complements the Council's mission.

Salmon-Safe, a Portland-based non-profit, has a track record of applying environmental certification in Yamhill County and beyond as a strategy to inspire water quality protection and habitat conservation. More than a decade after certifying its first farms and vineyards in Yamhill County, Salmon-Safe has become one of the nation's leading regional eco labels with more than 80,000 acres of farm and urban lands certified in Oregon, Washington, California, and British Columbia.

Salmon-Safe focuses on improving practices in these areas:

- **Riparian areas**
- **Water use**
- **Erosion and sediment control**
- **Fish passage**
- **Integrated pest management**
- **Animal management**
- **Enhancing habitat and**

Salmon-Safe has become a leading U.S. certifier of ecologically sustainable viticulture with more than 250 Oregon and Washington vineyards achieving certification, including nearly half of the wine grape acreage in Oregon's Willamette Valley. Certification for winegrowers focuses on reducing runoff from hillside vineyards and enhancement of native biodiversity on vineyard sites. The Yamhill Watershed contains the largest concentration of Salmon-Safe certified vineyards in the Pacific Northwest.

Salmon-Safe offers a series of peer-reviewed certification programs linking land management practices with the protection of agricultural and urban watersheds. Whether the site is farm, orchard, residential development, corporate or university campus, certification requires adopting management practices that protects water quality and restore habitat. With Salmon-Safe certification, landowners gain added-value in the marketplace, improve watershed habitat and water quality, and contribute to salmon recovery.

Salmon-Safe's certification program complements the Council's watershed restoration mission. Building on Salmon-Safe's success with Yamhill Watershed winegrowers, the Council will engage local partners, landowners, and institutions to facilitate participation in Salmon-Safe certification. The Council will collaborate with Salmon-Safe to pursue a long-term, whole-watershed approach, targeting a range of agricultural and other sectors and land uses, including urban areas, to improve management practices at a landscape scale.

Strategy: Organizational and landowner partnerships

Action 3-1 – Define roles, responsibilities, and actions to pursue with key partners

Action 3-2 – Work in collaboration with Salmon-Safe to define, roles, responsibilities, and actions, including grant proposals and other fund-raising strategies, to pursue with Salmon-Safe

Action 3-3 – Pursue partnerships with growers, SWCD's, and Salmon-Safe to promote agriculture-focused best management practices, including Salmon-Safe certification

Action 3-4 – Pursue partnerships and projects with landowners of forested uplands, including Confederated Tribes of the Grand Ronde, BLM, and private forest landowners

Action 3-5 – Pursue partnerships with cities, corporations, residential developers, and universities to promote urban-focused best management practices, including Salmon-Safe certification

Action 3-6 – Pursue partnerships with natural area and park land management groups to promote natural area-focused best management practices, including Salmon-Safe certification

Action 3-7 – Explore collaborations with partners, including the YSWCD and Salmon-Safe, to communicate pesticide monitoring results to agricultural landowners, improve involvement in the PSP, and to promote landowner involvement in conservation practices utilized by Salmon-Safe, the YSWCD, Natural Resources Conservation Service (NRCS), and other partners



Action 3-8 – Pursue partnerships with other watershed councils to maximize staff and council resources effectively and efficiently

Goal 4: The Council tracks watershed conditions and restoration success through monitoring and assessment



The Greater Yamhill Watershed Council is committed to understanding watershed conditions in order to target restoration actions, measure progress in watershed conditions over time, and evaluate the success of on-the-ground restoration and other actions. Targeted information collection and reporting will help inform the Council, partner organizations, and stakeholders on the status of the watershed's resources and help to target restoration activities to the locations where they are most effective.

The Council has collected information to assess watershed conditions, including water quality and fish passage barrier in formation. With the exception of the fish barrier information, which has been analyzed and reported, the Council's water quality data have not be organized or summarized in a manner that provides a comprehensive assessment of the watershed conditions.

The Council, in coordination with partnership organizations, will summarize past data collection efforts and implement a systematic data collection process that is designed to assess the status of the watershed, help target restoration areas and activities, and to evaluate improvements in watershed conditions over time. The monitoring and assessment activities will include water quality collection and reporting, fish presence and spawning inventories, fish passage barrier assessments, and post-restoration project monitoring. The Council will synthesize and summarize the collected data and other information into a periodic "state of the watershed" report that will communicate findings to partner organizations, watershed residents, and other stakeholders.

Strategy: Organizational and landowner partnerships

Action 4-1 – Pursue monitoring and assessment partnerships with Confederated Tribes of the Grand Ronde, BLM, SWCDs, Cities, Counties, PSPs, and Salmon-Safe

Strategy: Assessment and reporting

Action 4-2 – Provide periodic "state of the watershed" report (synthesize water quality, rapid bioassessment, and other information)

Action Plan Phasing



Greater Yamhill Watershed Restoration Action Plan outlines actions that will be pursued over a five year period. The Greater Yamhill Watershed Council's Board and Action Plan TAC will review Council activities within the framework of the Action Plan on an annual basis. Based on this review and an assessment of staffing and funding, the Council and TAC will develop and approve a work plan that will outline the actions to be pursued through the course of the year.

Year 1 activities will focus on organizing the Council and TAC to support the implementation of the Action Plan. Year 1 activities will focus on the following:

- Review Board membership, augment Board representation, recruit working Board members, and implement Annual Work Plans for Board Directors;
- Organize an Action Plan implementation technical advisory committee (TAC);
- Develop and implement a communication plan to inform partner organizations, the watershed community, and other stakeholders about the Council's activities and opportunities for engagement;
- Pursuing partnerships with other organizations, including implementing Salmon-Safe certification in priority watershed areas;
- Pursue specific outreach activities, including the Evergreen Museum's Wings and Waves Waterpark and existing community events
- Implementing specific on-the-ground restoration projects, with an emphasis on addressing fish passage barriers;
- Identifying landowners for demonstration projects; and
- Implementing targeted monitoring and watershed assessment actions, including continued involvement in the PSPs, and collecting information on fish presence and distribution.

Notes:

Appendix A: Compiled Action Plan Strategies and Actions

Action Plan Goals

Goal 1: Organize the Council for action

Goal 2: Concentrate the Council's activities by emphasizing actions in riparian and aquatic areas within Willamette Valley lowlands

Goal 3: Work collaboratively with organizations and residents on watershed restoration, education and outreach, and monitoring

Goal 4: Track watershed conditions and restoration success through monitoring and assessment

Strategy	Greater Yamhill Watershed Action Plan – Actions
Organizational health	**Action 1-1** – Review Board membership and augment Board representation to facilitate implementation of the Action Plan **Action 1-2** – Recruit a full working Board and implement Annual Work Plans for Board Directors **Action 1-3** – Identify and pursue opportunities for Board and Staff development and training

Strategy	Greater Yamhill Watershed Action Plan – Actions
Partnerships with landowners and organizations	**Action 1-4 –** Form an Action Plan implementation technical advisory committee (TAC) **Action 1-5** – Identify landowners and recruit individuals from organizations who will help facilitate Action Plan implementation for Board and TAC membership **Action 1-6** – Develop and implement a communication plan to inform the general public, key partners, and stakeholders on the status of the watershed, Action Plan progress, and opportunities for engagement **Action 3-1** – Define roles, responsibilities, and actions to pursue with key partners **Action 3-2** – Work in collaboration with Salmon-Safe to define, roles, responsibilities, and actions, including grant proposals and other fund-raising strategies, to pursue with Salmon-Safe **Action 3-3** – Pursue partnerships with growers, SWCD's, and Salmon-Safe to promote agriculture-focused best management practices, including Salmon-Safe certification **Action 3-4** – Pursue partnerships and projects with landowners of forested uplands, including Confederated Tribes of the Grand Ronde, BLM, and private forest landowners **Action 3-5** – Pursue partnerships with cities, corporations, residential developers, and universities to promote urban-focused best management practices, including Salmon-Safe certification **Action 3-6** – Pursue partnerships with natural area and park land management groups to promote natural area-focused best management practices, including Salmon-Safe certification **Action 3-7** – Explore collaborations with partners, including the YSWCD and Salmon-Safe, to communicate pesticide monitoring results to agricultural landowners, improve involvement in the PSP, and to promote landowner involvement in conservation practices utilized by Salmon-Safe, the YSWCD, Natural Resources Conservation Service (NRCS), and other partners **Action 3-8** – Pursue partnerships with other watershed councils to maximize staff and council resources effectively and efficiently **Action 4-1** – Pursue monitoring and assessment partnerships with Confederated Tribes of the Grand Ronde, BLM, SWCDs, Cities, Counties, PSPs, and Salmon-Safe

Strategy	Greater Yamhill Watershed Action Plan – Actions
Education and outreach	**Action 1-7** – Revise the Council's website and regularly update the website and the Facebook page to facilitate community outreach **Action 2-1** – Promote best management practices, including tools and programs used by OSU Extension Service, Natural Resources Conservation Service (NRCS), SWCD's, and Salmon-Safe **Action 2-2** – Implement volunteer program for storm-drain markings **Action 2-3** – Identify and complete at least one demonstration project in each watershed **Action 2-4** – Facilitate watershed residents' participation in salmon spawning surveys in collaboration with ODFW **Action 2-5** – Pursue outreach opportunities, including participation in local events and partnerships with the through Evergreen Museum's Wings & Waves Waterpark **Action 2-6** – Develop and implement targeted landowner/sector workshops to promote best management practices, including Salmon-Safe certifications
On-the-ground-restoration	**Action 2-7** – Implement aquatic and riparian projects and best management practices **Action 2-8** – Implement fish passage improvements based on the 2013 *Yamhill Watershed Culvert Prioritization and Action Plan for Fish Passage* **Action 2-9** – Implement stormwater and Low Impact Development (LID) projects and best management practices **Action 2-10** – Implement road and agricultural sediment control projects and best management practices
Monitoring	**Action 2-11** – Implement water quality monitoring projects **Action 2-12** – Continue to participate and expand Yamhill Pesticide Stewardship Partnership (PSP)
Assessment and reporting	**Action 2-13** – Complete rapid bioassessments of fish distribution and abundance in the streams throughout the North Yamhill, Willamina, and Mill Creek watersheds **Action 4-2** – Provide periodic "state of the watershed" report (synthesize water quality, rapid bioassessment, and other information)
Fundraising	**Action 1-8** – Identify and recruit a range of funding sources to implement projects and to support watershed council capacity needs

Notes:

Yamhill County

DEPARTMENT OF PLANNING AND DEVELOPMENT

535 EAST FIFTH STREET • McMINNVILLE, OREGON 97128-4523 • (503) 434-7516

February 17, 1995 DG___ RJ___ TB___ JG___ JM___

MEMORANDUM

To: Yamhill and Polk County Board of Commissioners

From: Kenneth Friday, Senior Planner KF

Re: **Yamhill Basin Council**

February 16, 1995 the Yamhill Basin Council Steering Committee met to recommend appointments to the Yamhill Basin Council. The goal of the basin council is to identify problems and needs in the watershed and develop a basin action plan. To do this the council must represent a broad range of interests in the Yamhill Basin. The steering committee has identified members it believes will accomplish this goal. These appointments need to be approved by both the Polk and Yamhill County Board of Commissioners. The steering committee has recommended the following appointments:

NAME	AFFILIATION	REPRESENTING
Mike Propes	Polk County	County Government
Dennis Goecks	Yamhill County	County Government
Greg Scholes	Newberg Planning	City Government
Sue Hollis	Dayton Administratur	Small Cities
Mike Sauerwein	Sheridan City Manager	City Government
John Kennedy	McMinnville Public Works	City Government
John Harshman	McMinnville Water and Light	Utilities
Ray Hobson	Perrydale Water Association	Water Assoc.
Sam Sweeney	Farm Owner	Agriculture

2-22-95 Board Order
95-100

Roger Buchholz	Bailey Nurseries	Agriculture
Stan Christensen	Yamhill SWCD	Agriculture
Dan Upton	Willamette Ind.	Forestry
Leonard Rydell	Small Woodlands Assoc.	Forestry
Richard Zimbrick	Timber Owner	Forestry
Janice Thompson	Park and Rec. Board	Unaffiliated
* To Be Appointed	Bureau of Land Mgmnt.	Federal Agency
* To Be Appointed	Carlton Lake Rest.	Carlton Lake Restoration
* To Be Appointed	Confederated Tribes of G.R.	Confederated Tribes of Grand Ronde

* Note: Because several names have been submitted by these organizations, they will each be requested to choose their own representative.

In addition, one other council member is being sought to represent environmental concerns. When that person is selected their name will be forwarded to both county boards for approval.

GYWC Administrator

From: Barbara Stanley
Sent: Wednesday, June 29, 2011 10:21 AM
To: GYWC Administrator
Subject: RE: Request for Resolution Research - Greater Yamhill Watershed Council
Attachments: BOC Memo, 2-9-94.pdf; Board Order 95-100, 2-22-95.pdf; Charter & Rules.pdf

Good Morning, Bernadette.

Your information helped point me in the right direction and I found three documents in the file that may be helpful.

1. The oldest document is dated February 9, 1994, and it is a memo between commissioners. It contains good background information.

2. The document dated February 17, 1995, has Board Order 95-100 dated February 22, 1995 on it, indicating official acceptance by the Board of Commissioners. We consider this the creation document of the Watershed Council, however, it is a memorandum rather than a resolution.

3. The third document, identified as *Charter & Rules – 1999 Revision*, was received in our office on February 8, 1999, and placed in the file. I'm not sure who created the document and we have no Board Order to make it an official document. On the last page you will see 'Terms of Office' mentioned although we have no Board Order indicating acceptance of terms by the commissioners.

No resolution can be found in the hard-file or any e-files.

You are a kind and good person yourself, Bernadette, and your words touched my heart. A sincere thank you!

Barbara Stanley
Executive Secretary
Yamhill County Board of Commissioners' Office
ph - 503-434-7501; fax - 503-434-7553
stanleyb@co.yamhill.or.us

From: GYWC Administrator
Sent: Tuesday, June 28, 2011 1:19 PM
To: Barbara Stanley
Subject: Request for Resolution Research - Greater Yamhill Watershed Council

Good Afternoon Barbara,

First, I've got to tell you that it is always a pleasure working with you. You are courteous, helpful and always professional – what a great skill set! Yamhill County & the Commissioners are lucky to have you as their "first point of contact"!!

Next, per our telephone conversation earlier today, you were going to have Ann (?) do a little research on finding the Resolution that approved the formation of the Yamhill Basin Council. As far as I can find, the Resolution went before the Board of Commissioners in either late January, February or early March of 1995. I hope this will be enough to go on – if not, please just let me know and we'll try another tact. Thanks again!

Bernadette Hansen
Greater Yamhill Watershed Council
800 NE 7th Street
P.O. Box 1517
McMinnville, OR 97128
Phone: 503.474.1047

GREATER YAMHILL WATERSHED COUNCIL

Operating Policies

Approved:

James Riedman, Board Secretary

12/04/2018

Signed: _____

(Authorized Signer)

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Open and Inclusive Organization

The Greater Yamhill Watershed Council (Council) is committed to operating as an open, inclusive, and diversely-represented organization. In addition, the Council desires to be as transparent as possible while maintaining obligations to protect the privacy of donors, employees, volunteers, client, and other persons or entities.

Public Notification of Meetings Policy:

A key component to having an open and inclusive council is inviting the public to regular meetings. Regularly scheduled board meetings occur at least once a quarter. In order to promote these meetings and encourage community involvement the council will post the date, time, and location of the meeting in the following at least one week before the meeting:

- Newspaper Community Bulletins (online and print)
- Council Website, Social Media, and Newsletters
- Partner Organization Websites, Social Media, and Newsletters

Public Requests for Documentation:

The Council shall make the following available to the public for inspection upon request:

- Articles of Incorporation
- Bylaws
- Organizational/Governance Policies and Procedures
- Form 1023 Request for Tax-Exemption and Tax-Exempt Determination Letter
- Form 990 Federal Return of Organization Exempt From Income Tax (three most recent years)
- Audited Financials
- Annual Organizational Reports
- Agendas and Board-Approved Minutes for Meetings of the Board of Directors and Board Committees.

The Council may comply with the requirement that it provide copies to the public by posting these documents on the Council's website in an electronic format. Documents may also be posted to trusted, secure third-party websites, such as www.guidestar.org.

Balanced Interests on Governing Body

The mission of the Greater Yamhill Watershed Council (Council) is to work collaboratively with communities and landowners to develop and carry out voluntary watershed protection, restoration, enhancement, monitoring, and community engagement activities. In order to achieve our mission, the council strives to bring people and organizations with different goals, views, and resources onto its Board of Directors. In doing so, the Council seeks to engage a balance of interests and affected persons within the watershed.

Efforts will be made to bring together individuals, community, business, or government groups that either live or work within the Greater Yamhill Watershed. The Board of Directors will actively recruit Board members to maintain a broad range of interests on the governing body, including, but not limited to, the following key interests:

- Watershed Residents (from each 5th-field sub-basin)
- Agriculture (Farm Bureau and Growers)
- Viticulture (AVAs, Growers, LIVE)
- Nurseries
- Forestry (Industrial and Small Woodlands)
- Tribal Governments (Confederated Tribes of Grand Ronde, Confederated Tribes of Warm Springs)
- Incorporated Municipalities (Amity, Carlton, Dayton, Dundee, Lafayette, McMinnville, Newberg, Sheridan, and Willamina)
- County Governments (Polk and Yamhill)
- State Agencies (ODA, ODF, and ODFW)
- Federal Agencies (BLM, NRCS, USDA, USFWS)
- Soil and Water Conservation Districts (Polk and Yamhill)
- Water and Irrigation Districts (Buell/Red Prairie Water District, McMinnville Water and Light, Palmer Creek Irrigation District)
- Public and Private Conservation Organizations and Businesses
- Educational Institutions (Colleges, School Districts, Universities)
- Student and Youth Representatives

Council Membership Form

Thank you for your interest in becoming a member of the Greater Yamhill Watershed Council (Council). Membership is an opportunity to show your support for local, grassroots, natural resource conservation in your community. As a member, you join a diverse network of individuals, organizations, and stakeholders working together to empower our local communities to be good stewards of the lands and waters in the Yamhill and Chehalem valleys.

Membership Benefits: Council members are eligible for deeper involvement in our watershed programming and governance, as well as discounts on training and gear, including:

- Nomination to Council Committees, Board of Directors, Associate Directors
- Nomination to the Network of Oregon Watershed Councils (NOWC) Board of Directors and Committees (NOWC supports the interests & needs of Councils statewide)
- Discounts and Scholarships on Trainings, Workshops, and Conferences (as available)
- Discounts on Gear purchased through participating companies (as available)

Contact Information

Name: _____ Date: _____

Org / Business / Affiliation Name (optional): _____

Email: _____

Phone: _____ ☐ Mobile ☐ Home ☐ Office

Mailing Address: _____

City: _____ State: _____ Zip: _____

Membership Representation (check all that apply)

☐ Community Member ☐ Landowner ☐ Industry / Business

☐ Government Agency ☐ Tribal ☐ Non-Profit

☐ Special District ☐ Student ☐ Other: _____

Get Involved: What Interests You? (check all that apply)

☐ GYWC Monthly E-Newsletter ☐ Volunteer ☐ Internships ☐ Employment

☐ Education & Outreach ☐ Habitat Monitoring ☐ Habitat Restoration ☐ Governance

☐ Other: _____

Tax-Deductible Donation (optional)

Donate Online at www.gywc.org/donate

Checks made to GYWC may be mailed to
PO Box 1517 McMinnville, OR 97128

☐ $30 Supporter ☐ $15 Regular

☐ $5 Student ☐ Other: $

Council Board of Directors Application Form

Thank you for your interest in serving as a member of the Greater Yamhill Watershed Council's (Council) Board of Directors (Board). Service on the Council Board is a volunteer position dedicated to providing effective governance and leadership for the Council, working in coordination with a diversity of partners, including the Board of Directors, Associate Board members, Committee members, the Executive Director and other Staff, Partner Organizations, as well as Donors and Funders.

To qualify for nomination to the Board, you must be a registered member of the Council and agree to the Board Member Roles and Responsibilities policy included in this packet.

Prior to applying for nomination to the Board, it is encouraged that prospective candidates serve at least one year as a Committee member or an Associate Board Member.

Term of Appointment:
The term of office for a Board Member is two years, expiring at the Council Annual Meeting.

Directors may serve up to two consecutive two-year terms. Additional consecutive terms may be served upon written intent to continue service and with approval from the Board.

Application Process:
Please complete the Board Member application packet and return to the Council by mail, email attachment, or our main office.

Applications may be submitted at any time and will be considered at the next available meeting of the Board. Applicant will be notified of the meeting date and encouraged to attend to present their application.

Application for Board of Directors: Must be a registered Council Member. If you need to update your contact information, please complete a new Council Membership Form.

Name: _____ Date: _____

Applicant Questionnaire: (Attach additional sheets as needed)

1. **Interest in Service:** Why are you interested in serving on the Council Board of Directors?

   _____
   _____
   _____
   _____
   _____
   _____
   _____

2. **Conservation & Natural Resources:** Please describe your experience with Oregon's Watershed Councils and/or other relevant natural resource conservation organizations:

   _____
   _____
   _____
   _____
   _____
   _____
   _____

3. **Interests & Stakeholders:** Please describe your past and current experience working with and/or representing diverse watershed interests and/or stakeholders, such as agriculture, forestry, fisheries, wildlife, rural and urban landscapes, stormwater, and other related activities

   _____
   _____
   _____
   _____
   _____
   _____
   _____

4. **Governance Experience:** Please describe your experience serving on Non-Profit Boards of Directors, Commissions, Advisory Groups, or other similar organizational governance activities:

   _____

   _____

   _____

   _____

   _____

   _____

5. **Meeting Attendance:** Members of the Board of Directors are expected to prepare for, attend, and actively engage in monthly meetings of the Board of Directors. Board Members who fail to attend Board Meetings may be removed at the discretion of the Board, and may be automatically removed after three consecutive absences.

   Will you be able to effectively attend and engage in monthly meetings of the Board? Please provide any information about time conflicts, availability, or other considerations relevant to your active participation in monthly meetings:

   _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

6. **Roles and Responsibilities:** Members of the Board of Directors are required to serve in accordance to the terms of the Board Member Roles and Responsibilities Policy.

   ☐ I have read, understand, and agree to the terms of the Board Member Roles and Responsibilities Policy.

Board Member Roles and Responsibilities

The Greater Yamhill Watershed Council (Council) is a 501c-3 non-profit organization that works collaboratively with communities and landowners to develop and carry out voluntary watershed protection, restoration, enhancement, monitoring, and community engagement activities.

The Council endeavors to recruit and maintain a diverse and engaged membership. Any individual, community, business, or government group that either lives or performs work within the Greater Yamhill Watershed is eligible to register for membership. Registered members may make recommendations to the Board of Directors (Board) and are eligible for nomination to the Board.

The affairs of the Council are managed by the Board as stipulated in the Bylaws. As individuals and a collective group, the Board shall endeavor, to the best of their abilities and resources, to serve in the following capacities:

- Demonstrate a commitment to and understanding of the Council's mission, goals, programs, policies and procedures, and fundraising
- Represent a key interest of the watershed
- Share experience and knowledge
- Work cooperatively to improve Council performance, efficacy, and sustainability
- Expand knowledge or responsibilities through training
- Represent the Council in the community and encourage public involvement
- Serve on at least one committee

Areas of Governance

The Board is responsible for governing the Council's affairs. Governance is primarily driven by developing, maintaining, and administrating policies and procedures that define how the Council is managed and operated, including:

Community Representation:
How do we ensure community interests and needs are fully represented and addressed? How do we encourage an open and inclusive culture throughout our organization and our activities?

- Maintain and administer Balanced Interests and Open and Inclusive Organization policies
- Identify, prioritize, and actively pursue a diversity of representation and interests in Membership, Board of Directors, Employees, and Volunteers
- Provide for and promote opportunities for the public to engage in the Council's governance, programs, and projects

Capacity Building:
How do we plan for adequate resources to achieve the Council's mission and goals, and to implement strategic plans and programs?

- Maintain and administer Capacity Building policies and plans
- Develop diverse financial support from grantors and donors
- Build mutually-beneficial partnerships and cooperatives
- Seek opportunities that enhance community support, engagement, understanding, and involvement in the Council's mission and goals

Annual Reviews & Strategic Planning:
How do we identify what is working and what is not, why, and what actions will be taken in the short/long-term based on that knowledge?

- Review mission and goals
- Create and evaluate organizational and programmatic action plans
- Develop and review work plans
- Evaluate overall organizational health and Strategic Planning and Evaluation policies annually

Finance:
How do we soundly manage and maximize the benefits of financial investments from our funders, donors, and supporters?

- Maintain and administer Financial Policies & Procedures
- Ensure financial accountability, transparency, and reporting to funders, donors, members, Board of Directors, OR DOJ, IRS, and the public
- Set and review accounting operations, procedures and controls to safeguard assets and minimize risks of mismanagement
- Oversee an ongoing process of budget development, approval, and review
- Manage and maintain property the organization possesses

Human Resources:
How do we recruit, retain, manage, support, and develop personnel (i.e. the Board of Directors, Membership, Employees, and Volunteers)?

- Manage and Support personnel
    - Maintain and administer personnel policies
    - Recruit and Retain personnel
    - Train, evaluate, and recognize personnel
    - Support the growth and development of personnel

Board Officers Roles & Responsibilities

The Board of Directors (Board) shall elect Council Officers, including a **Chair** and **Secretary** as required by law, and a **Vice-Chair** and **Treasurer** as desired. Council Officers must be members of the Board.

Chair (required by ORS 65.371)

- Performs all duties of a Board Member (see Board Member Roles & Responsibilities)
- Chairs the Executive Committee
- Serves as the Principal Officer of the organization
- Actively ensures that the Board fulfills governance duties, including developing, maintaining, and administering policies and procedures; and operating in accordance with the Articles of Incorporation and Bylaws.
- Ensures that resolutions of the Board are carried out.
- Ensures roles are set for Board meetings, including facilitator, secretary, & timekeeper
- Performs other duties as prescribed by the Board

Vice-Chair

- Performs all duties of a Board Member (see Board Member Roles & Responsibilities)
- Serves on Executive Committee
- Performs duties of the Chair in the event the Chair is absent or unable to act
- Perform other duties as prescribed by the Board

Secretary (required by ORS 65.371)

- Performs all duties of a Board Member (see Board Member Roles & Responsibilities)
- Serves on Executive Committee
- Performs or causes to be performed, the following record keeping tasks
    - Official recording of the Board meeting minutes and actions;
    - Provision for notice of all meetings of the Board
    - Authentication of the records of the corporation
- Performs other duties as prescribed by the Board

Treasurer

- Performs all duties of a Board Member (see Board Member Roles & Responsibilities)
- Serves on Executive Committee
- Performs or causes to be performed, the following financial duties:
    - Maintenance of full and accurate accounts of all financial records
    - Deposit of all monies and other valuable effects in the name and to the credit of the corporation in such depositories as may be designated by the Board
    - Disbursement of all funds when proper to do so
    - Presentation of financial reports as to the financial condition of the corporation to the Board;
- Actively ensures that the Board fulfills governance duties related to corporate funds, including developing, maintaining, and administering financial policies and procedures; and operating in accordance with the Articles of Incorporation and Bylaws
- Performs other duties as prescribed by the Board

Executive Director Roles & Responsibilities

The Executive Director (ED) provides leadership for the Council, manages daily operations, and implements the Board of Director's (Board) resolutions. The ED reports and is accountable to the Board.

Working in coordination with the Board, Officers, and Committees, the ED performs, or causes to be performed, the following tasks, as well other duties prescribed by the Board:

Partnership Development & Facilitation

- Build partnerships and facilitate stakeholder processes that implement priority watershed programs, including restoration, monitoring, and education & outreach
- Network with groups to identify and develop partnership opportunities, including participating in other organizations' activities and meetings
- Provide opportunities for the public to participate in Council activities
- Develop and maintain community outreach tools and materials

Watershed Project Development & Management

- Develop projects that align with documented watershed priorities and Council action plans, including restoration, monitoring, and education and outreach projects
- Manage project implementation, including permitting, contractors, budgets, and reporting
- Develop and facilitate updates to Council action plans and work plans.

Personnel & Volunteer Management

- Advise the Board of human resource and volunteer needs
- Manage staff, interns, and volunteers, including recruitment, training, coordination, and supervision

General & Administrative Services

- Coordinate meetings, including announcements and documentation.
- Maintain organizational, project, and programmatic records and databases.
- Provide fiscal services, including purchasing, accounts payable, accounts receivable, payroll, grant administration, budgeting, forecasting, and tax accountant coordination

Fundraising

- Secure diverse funding for priority watershed programs and Council operations
- Implement fundraising events and activities to support Council capacity needs.

Board and Advisory Committees

As defined in the Bylaws, the Board of Directors (Board) may establish Committees as deemed necessary and desirable. For example, to meet a need such as developing education and outreach, to recruit members to the governing body, or to develop a restoration project.

Board Committees
The Board may establish Board Committees, which may exercise limited Board functions and are composed of two or more Directors. Voting membership of Board Committees is limited to Board Members.

The Council shall have, at a minimum, the following Board Committee(s):

- **Executive Committee (EC):** Chaired by the Board, and composed of the current Board Officers, and others as designated by the Board. The EC is responsible for ensuring the maintenance and administration of policies and procedures that govern the Council, including Board development and governance, program operations and management, financial oversight and accountability, as well as fundraising and capacity building.

  The EC reports and is accountable to the Board. The Board may delegate Board duties to the EC, including tasks that are defined in policy as Board duties.

Advisory Committees
The Board of Directors may also establish Advisory Committees that do not exercise Board functions. These committees shall have at least one Director, staff member or others as designated by the Board, but otherwise have no membership requirements. Advisory Committees report and are accountable to the Board.

The Council shall establish and convene the following Advisory Committees as desired to facilitate the development and implementation of watershed programming and capacity building:

- **Habitat Restoration**
- **Education & Outreach**
- **Monitoring & Assessments**
- **Capacity Building**
- **Self-Assessment**

Self-Assessment of Governing Body

The Board of Directors (Board) is committed to assessing the performance of the Council and the Board itself in order to identify our strengths and areas in which we have room for improvement.

The Board shall conduct a self-assessment at a minimum of every two years, including:

- An advisory committee shall be appointed in March to determine the instrument or process to be used in Board self-assessment. The process for evaluation shall be recommended to and approved by the Board.
- If an instrument is used, all Board Members will be asked to complete the evaluation instrument and submit them to the Board Secretary.
- A summary of the evaluations will be presented to and discussed by the Board
- The overall goal of the self-assessment is to improve Council operations and policies for the benefit of our local watersheds and communities. Such assessments help to clarify roles, to enhance harmony and understanding among Board Members, and to improve efficiency and effectiveness of the Board.
- The results of the self-assessment and Board discussion will be used to improve and focus Council work plans and action plans

Succession Planning for Board Leadership & Executive Director

BOARD MEMBERS & OFFICERS

Holistic planning for changes in Board Membership and Officer Leadership is an essential duty of the Board of Directors, and, while challenging, provides an opportunity to identify skills, representation, and perspectives that may complement continued growth and advancement of organizational health. A succession policy for Board Members and Officers is an important tool for effective management and long-term strategic planning. The Board shall be prepared in the event of permanent change in Board Membership and Officers – either planned or unplanned – to ensure stability and accountability of the Council. The Board shall be responsible for implementing this policy and its related procedures, and for annually reviewing and updating the policy as needed.

The purpose of this policy is to provide guidance of roles and procedures to support positive leadership transitions that build organizational capacity when a planned or unplanned change occurs in Board Membership and Officer Leadership.

Emergency Succession

- **Temporary Unplanned Absence**: In the event of an unplanned, short-term absence (3 months or less) or long-term absence (more than 3 months) in which a Board Member is unable to fulfill their duties because of unexpected circumstances, the Board may appoint an existing, registered Council member to fill the vacancy through a majority vote of the Board members present at a meeting with a quorum. If the vacant Board Member is also an Officer, the Board may appoint an existing Board Member to fill the Officer position through a majority vote of the Board members present at a meeting with a quorum. The appointed Board Member and/or Officer will complete the existing term duration of the vacancy filled.

- **Permanent Unplanned Absence**: In the event of an unplanned, permanent absence in which a Board Member or Officer is unable to return to their position, the Board may appoint an existing, registered Council member to fill the vacancy through a majority vote of the Board members present at a meeting with a quorum. If the vacant Board Member is also an Officer, the Board may appoint an existing Board Member to fill the Officer position through a majority vote of the Board members present at a meeting with a quorum. The appointed Board Member and/or Officer will complete the existing term duration of the vacancy filled. The Board may elect to begin a search process for a permanent replacement for the vacated Board Member / Officer Position.

Planned Board & Officer Transitions

In the event that a Board Member or Officer has reached a term-limit or provides notice that they will not be seeking re-election, it is the Board's responsibility to ensure that their succession is thoughtfully planned out so as to ensure continued effectiveness of governance and management of the Council's operations. Planning for Board Member or Officer succession should include consideration of an organizational and Board self-assessment, reviews of roles and responsibilities

for Board Members and Officer Positions, and a clear and timely search and selection process for a replacement.

- **Organizational Review and Board Self-Assessment:** The Executive Committee and Board of Directors will work in coordination with the Executive Director to conduct an Organizational Review of the Council's policies, strategic plans, and operations. In addition, the Executive Committee will work with the Board to implement a Board Self-Assessment to review practices, skills, representation, and performance of the Board as a whole and as Board Members individually. The Executive Committee will provide a summary report to the Board.

- **Job Descriptions of Board Members & Officers:** The Board will annually review the Job Descriptions of the Board Members and Officers to ensure alignment with organizational strategic plans, policies, and resources.

- **Board Member and Officer Recruitment and Election:** After completion of the above due diligence, the Board will work in coordination with the Executive Director to plan a search and recruitment process that is transparent and timely. The Board may elect to develop a list of potential candidates to contact whose qualities align with the current leadership needs of the Council's Board. Once recruited, the Board is ultimately responsible for appointing the new Board Member or Officer to fill the vacancy, which is conducted through a majority vote of the Board Members present at a meeting with a quorum. If the vacancy is an Officer Position, the recruited member must be an existing Board Member before they are eligible for election to an Officer Position.

EXECUTIVE DIRECTOR

The Board of Directors (Board) understands that changes in executive leadership are inevitable for any organization and can be a challenging time, involving both risk and opportunity. A succession policy for the Executive Director position is a critical tool for effective management and long-term strategic planning. The Board shall be prepared in the event of a permanent change in the Executive Director position, either planned or unplanned, to ensure the stability and accountability of the Council. The Board shall be responsible for implementing this policy and its related procedures and for annually reviewing and updating the policy as needed.

The purpose of this policy is to establish guiding principles, clarify roles, and to identify procedures that support a positive leadership transition that fosters good endings and beginnings with departing and arriving leaders and builds organizational capacity when a planned or unplanned change occurs.

Guiding Principles

- The Board believes that its due diligence responsibility, as well as the interests of the Council, will be best served by a robust, competitive search process. The Executive Director has the single greatest impact on the Council's development and effectiveness, therefore, his or her

selection should not be rushed. Internal candidates from the staff and/or Board will be seriously considered along with qualified candidates emerging from external search.

- The Executive Director's position is often shaped by the incumbent's talents and areas of specialized interest. That person's departure may necessitate other organizational changes including the creation of new positions and/or realignment of current positions.

- The foremost goal of an interim Executive Director is the maintenance and continuity of the Council's mission-related work. A transition also presents an opportunity for growth and organizational development.

Emergency Succession

- **Temporary Unplanned Absence**: In the event of an unplanned, short-term absence (3 months or less) or long-term absence (more than 3 months) in which the Executive Director is unable to fulfill their duties because of unexpected circumstances, the Board may assign some or all of the Executive Director's duties to other staff or a member of the Board, or contract or hire an outside interim Executive Director.

  The Board must approve any changes in wages for staff acting as the interim Executive Director. The interim Executive Director will report directly to the Executive Committee and the Board of Directors. The Board Chair, in consultation with the Executive Committee and Interim Executive Director will contact all staff members to inform them about the interim leadership plans. The interim Executive Director shall, in consultation with the Board, communicate the temporary leadership structure to key stakeholders, partners, and funders.

- **Permanent Unplanned Absence**: In the event of an unplanned, permanent absence in which the Executive Director is unable to return to the position, the Board may select a staff member, Board member, or an outside person as an interim Executive Director and begin the search process for hiring new leadership.

  The Board must approve any changes in wages for staff acting as the interim Executive Director. The interim Executive Director will report directly to the Executive Committee and the Board of Directors. The Board Chair, in consultation with the Executive Committee and Interim Executive Director will contact all staff members to inform them about the interim leadership plans. The interim Executive Director shall, in consultation with the Board, communicate the temporary leadership structure to key stakeholders, partners, and funders.

Duties of the Interim Executive Director: The primary responsibility of the Interim Executive Director is to assure that the organization continues to operate without disruption and that all organizational commitments previously made are appropriately executed, including but not limited to:

- Managing day-to-day operations of the organization, including grant and contract obligations, reports, and other obligations to funders and other stakeholders
- Supervising staff
- Maintaining finances and revenue generation and overseeing budgets and expenditures

- Reporting to Board and Executive Committee on a regular basis on the status of the organization and support needs
- Conducting organizational analysis and consulting with the Board on potential improvements to operations
- Serving as the spokesperson for the organization including speaking engagements and other external communication

Departure Defined Transition

A Planned Succession or "departure defined transition" can provide an opportunity to position the Council for sustainability and continued success. Preparing for a planned succession includes identifying internal and external communication plans, conducting an organizational assessment and identifying leadership needs, updating Executive Director job description, and defining a clear and transparent search and hiring process.

- **Communication Plan:** The Executive Committee will work with the Executive Director to coordinate communication of the Planned Transition to staff and key stakeholders, including partners and funders.

- **Organizational Assessment:** The Executive Committee will work with the Executive Director to review the Council's existing policies, strategic plans, financial status, risk management, and administrative systems. The Executive Committee will also coordinate with the Technical Advisory Committee for input on organizational performance and leadership needs. A summary report will be provided to the Board.

- **Job Description:** The Board will annually review the Job Description of the Executive Director to ensure alignment with organizational strategic plans, policies, and resources.

- **Executive Director Search and Hiring Process:** After completion of the above due diligence, the Executive Committee will work in coordination with the Board and Executive Director to plan a search and hiring process that is transparent and timely. The Board may elect to create a special Hiring Committee to carry-out the recruitment process, or may elect to have the Executive Committee implement the process. The recruitment process will include opportunity for Board review of the announcement, applications submitted, and results of interviews. The full Board will be responsible for final hiring decisions and approving offers of employment.

Conflicts of Interest

The Board of Directors (Board) shall monitor the transactions between the Council and insiders to ensure that any transaction between the Council and an insider that is a conflict of interest is fair to the corporation and does not grant excessive benefit to the insider.

The purposes of this policy are to ensure that Board Members and Officers act loyally to the Council and that the Board Members, Officers, and those who exercise substantial influence over the corporation do not use their influence to obtain benefits in excess of fair market value in transactions with the corporation. This policy seeks to ensure that the Council maintains high ethical standards and observes state and federal taxation concerning conflicts and excess benefits transactions.

Definition of Conflicts Of Interest
Definition of Conflict: A conflict of interest arises when an insider described below may benefit financially from a decision he or she could make in his or her capacity as an insider, including indirect benefits to family members or businesses with which the insider is closely associated. A conflict of interest arises in any such transaction between the Council and an insider, except for:

- Transactions in the normal course of operations that are available to the general public under similar terms and circumstances, and
- Expense reimbursements to an insider made pursuant to an accountable plan under IRS Reg. 1.62-2(c)(2).

Consequences of Conflicts: Some conflicts of interest are prohibited and the Council cannot engage in them. Others are permitted but are subject to special procedures set out below to ensure that the transaction is fair to the corporation and complies with applicable laws, regulations, and funder agreements.

Conflicts that Fall Outside of Definition: The Board recognizes that this policy may not describe all of the transactions or matters in which an insider or an individual or business closely connected with an insider may engage in a transaction or other matter with the Council that creates divided loyalties or the possibility or perception of a conflict of interest or of unfair advantage to the other party. In such cases, the Board shall determine whether the transaction should be treated as a conflict of interest under this policy or should otherwise be scrutinized.

Definition of Insider
An insider is any of the following persons, family members, or entities:

Insider: An insider is any person who is in a position of authority over the Council or who exerts substantial influence over the corporation, including Board members, Officers, Key staff, funders, and major donors. An insider described in this section remains an insider for five years after his or her influence over the Council ends.

Family Members: Family members of insiders are also insiders. Family members include any person who is related by blood or marriage, or whose relationship is similar to that of persons who are related by blood or marriage.

Entities: An entity in which a Board Member is a general partner, Board Member, Officer, or other key employee is an insider. Corporations and limited liability companies in which an insider owns more than 5% of the voting power, partnerships in which the insider owns more than 5% of the profits and trusts or estates in which the insider owns more than 5% of the beneficial interest are insider entities.

Other Nonprofits and For-Profits: Another nonprofit or for-profit entity is an insider if:

- One of our Board Members is also a Board Member or Officer of the other entity, and
- We and the other entity are engaged in a transaction that is significant enough that the transaction is or should be approved by the Boards of both organizations.

Prohibited Conflicts

Loans to Directors or Officers: The Council cannot make a loan or guarantee an obligation to or for the benefit to any of its Board Members, Officers, or other insiders.

Gifts: Unless the amount is approved by the Board, the Council cannot make gifts of value higher than $50 to Board Members, Officers, or other insiders. An insider may not receive more than $100 worth of gifts from the Board in a fiscal year.

Procedure for Permissible Conflicts

In order to ensure that permissible transactions with insiders are fair to the corporation and comply with state and federal laws:

1. *Full Disclosure:* All insiders must promptly and fully disclose all material facts of every actual or potential conflict of interest to the Board of Directors at the time such conflict arises.

2. *Determination of Fairness:* When the Council engages in a transaction with an insider that constitutes a conflict of interest, the Board shall handle the transaction as follows:

    a. *Impartial Board:* The Board shall exclude any insider that has a conflict of interest with respect to the transaction from all discussion and from voting on the transaction. The Board may ask questions of the insider prior to beginning its discussion.

    b. *Comparable Data:* The Board shall gather appropriate data to ensure that the compensation for each insider is reasonable.

    c. *Documentation:* The Board shall document its decision by keeping written records that state the terms of the transaction and date approved, the Board Members present and who voted on it, the comparability data and how the data was obtained, and any actions taken with respect to Board Members who had a conflict of interest with

respect to the transaction. The records must be prepared before the latter of the next Board meeting or 60 days after the final action is taken. Once prepared, the records must be reviewed and approved by the Board within a reasonable time.

3. *Reporting Benefits:* When the Council provides an economic benefit to an insider for the insider's services as an employee or an independent contractor, the Council shall contemporaneously document the transaction as required by the IRS (generally on an original Form W-2, Form 990, or Form 1099, or with a written employment contract).

Compliance with Policy
In order to ensure compliance with this policy:

1. *Annual Disclosure Statement:* Each year, Board Members, Officers, and key staff shall each disclose interests that could give rise to a conflict of interest under this policy. Such disclosure shall be made on the Disclosure and Acknowledgement form attached to this policy and shall be filed with the Secretary or the Secretary's designee.

2. *List of Potential Insiders:* On an annual basis, the Secretary or the Secretary's designee shall develop and maintain a list of insiders who engage in or are reasonably likely to engage in transactions that constitute conflicts of interest with the Council during the year.

3. *Ongoing Disclosure Obligation:* Board Members, Officers, and key employees shall have an ongoing obligation to notify the Board promptly of interests that subsequently arise that could give rise to a conflict of interest under this policy.

4. *Monitoring:* The Board Secretary or the Secretary's designee shall monitor and enforce compliance with this policy by reviewing the list of insiders and the Disclosure and Acknowledgement forms each year and by bringing potential or actual conflicts to the attention of the Board. The Board shall disclose conflicts as they arise and ensure that the procedures in this policy are followed.

5. *Conveyance to Executive Director:* The Board Secretary or the Secretary's designee shall convey the list of insiders identified above to the Executive Director and shall instruct the Executive Director to notify the Board if the Executive Director or any employee plans to engage in a transaction with an insider that constitutes a conflict of interest, including payment or reimbursement for business or travel expenses of the insider and/or members of the insider's family not made pursuant to an accountable plan under IRS Reg. 1.62-2(c)(2). If so, the Board shall monitor the transaction to ensure that it complies with the procedure in Section IV above.

Delegation to Committee
The Board may delegate its responsibilities under this policy to a committee of the Board. The committee shall comply with this policy and shall report to the Board in a timely manner.

Conflicts Of Interest Policy Disclosure and Acknowledgement Statement

Each Board Member, Officer, and key employee shall sign and submit this form annually.

Disclosure
Please report below any actual or potential conflicts of interest between the corporation and you, a family member, or a business, or corporation with which you are connected within the meaning of the Conflicts of Interest Policy.

You have an ongoing obligation to notify the Board promptly of any such conflicts of interest that subsequently arise.

List of Conflicts or Potential Conflicts
Please list and explain any conflicts here:

_____

_____

_____

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_____

Acknowledgement
I have received, read, understand, and will comply with the Conflicts of Interest Policy of the Council. I affirm that, other than the interests reported, I am aware of no conflicts of interest that I have or may have within the meaning of the Conflicts of Interest Policy.

Signature: _____

Title: _____

Print Name: _____

Date: _____

Please submit this form to the Board Secretary and retain a copy for your records.

Whistleblower

The Council seeks to conduct all of its activities in a responsible, legal, and ethical manner. All Members of the Board of Directors (Board), Officers, staff, and volunteers must practice integrity and honesty in fulfilling their responsibilities; must comply with all applicable laws and regulations; and must comply with all Council governing documents, policies, and procedures.

The purpose of this Whistleblower Policy is to provide a mechanism to report irresponsible, illegal, or unethical behavior.

Reporting Responsibility
This Whistleblower Policy is intended to encourage and enable Board Members, Officers, staff, volunteers, and other representatives of the Council to raise serious concerns internally so that the Council may address and correct inappropriate conduct and actions. It is the responsibility of all Board Members, Officers, staff, and volunteers to report concerns about suspected violations of laws and regulations and policies and procedures that govern the Council.

No Retaliation
It is contrary to the values of the Council for anyone to retaliate against any officer, director, employee, or volunteer who, in good faith, reports an ethics violation, or a suspected violation of law, or suspected fraud, or suspected violation of any regulation or policy governing the operations of the Council. Board Members, Officers, staff, or volunteers shall not, with intent to retaliate or discriminate, take any action harmful to any person described above, including interference with the lawful employment or livelihood of any person. Moreover, any Board Member, Officer, staff, or volunteer who retaliates against someone who has reported a concern in good faith is subject to discipline up to and including dismissal from their position or termination of employment.

Reporting Procedure
Concerns should be stated in writing when at all possible, and may be submitted anonymously. All reported concerns are considered confidential and handled per this Policy.

Concerns should first be discussed with and reported to the Board Chair. If the reporting individual is not comfortable directing their concern to the Chair, is not satisfied with the Chair's response, or the Chair is implicated in the complaint, then the concern shall be directed to another Board Member, Officer, or the Executive Director.

Concerns received shall be promptly forwarded to the Board. Except in the event of an anonymous submission, the Board will promptly notify the reporting individual an acknowledgment of receipt of the reported concern.

All reports will be promptly investigated by the Board, and appropriate corrective action will be approved, if warranted by the investigation. Action must include a conclusion and/or follow-up with the reporting individual for complete closure of the concern. The Board has the authority to retain outside legal counsel, accountants, or any other resource deemed necessary to conduct a full and complete investigation of the allegations.

Acting in Good Faith
Anyone reporting a concern must act in good faith and have reasonable grounds for believing the information disclosed indicates an irresponsible, illegal, or unethical behavior. Any reports that prove not to be substantiated and which prove to have been made maliciously or knowingly to be false will be viewed as a serious disciplinary offense and may result in discipline up to and including dismissal from the volunteer position or termination from employment.

Confidentiality
The Council encourages anyone reporting a concern to identify himself or herself when making a report in order to facilitate review and investigation. However, reports may be submitted anonymously. Reports of concerns, and investigations pertaining thereto, shall be kept confidential to the extent possible, with the understanding that confidentiality may not be maintained where identification is required by law or in order to enable the Council or law enforcement to conduct an adequate investigation

Use of Litigation

The Greater Yamhill Watershed Council (Council) works to protect, restore, and monitor the quality of local natural resources through collaborative, community-based, and voluntary solutions. We seek to positively engage the public and bring people together to meet the challenges in the watershed.

The Council does not rely on litigation to compel regulatory enforcement as a means to implement our mission. We do not use litigation to pursue protection, enhancement, or restoration of watershed health (i.e. use litigation to enforce environmental regulations).

The Council may pursue grant funding opportunities that result from litigation (i.e. BPA Willamette Wildlife Mitigation Program) and accept funds that result from litigation (i.e. SEP funds). The Council may also accept funds that result from out-of-court settlement agreements.

Litigation necessary to enforce contracts is considered tenable, and is not considered litigation used to compel regulatory enforcement as a means to implement the Council's mission.

Records Retention and Destruction

The Council is committed to ensuring that records are retained as appropriate and as required by law and that unlawful destruction of documents does not occur.

Supervision of Records Retention
The Secretary or Secretary's designee shall serve as the Record Retention Supervisor. The Supervisor will manage records in accord with these guidelines as well as to ensure compliance with all local, state, and federal laws. The Supervisor may establish guidelines for additional records.

The Supervisor shall develop a policy for retention of electronic records, including emails. The electronic retention policy shall determine what files need to be kept and shall include backup procedures, archiving of documents, and regular check-ups of the reliability of the system.

Observance of Retention Policy
All employees and volunteers will follow records retention guidelines set out in this policy and by the Record Retention Supervisor. Records outlined in the Record Retention Schedule should be retained for the length of time provided on the schedule and destroyed at the end of the stated period.

Duration Special Circumstances
The Record Retention Supervisor may adjust the duration of retention as needed by the corporation, provided the term meets the minimum retention requirements of local, state, and federal laws.

Document Destruction
No officer, director, employee, or volunteer of this corporation shall knowingly destroy a document with the intent to obstruct or influence the investigation or proper administration of any matter within the jurisdiction of any department or agency of the United States or any state or its subdivisions.

Suspension of Record Destruction Schedule
In the event the Council becomes involved in any governmental investigation, audit, or litigation, further disposal of documents shall be suspended until such time as the Board of Directors, with advice from an attorney, determines otherwise. All staff and volunteers shall be notified of the suspension of regular disposal procedures.

Discipline
Any employee found to have knowingly violated this policy and destroyed records shall be subject to appropriate disciplinary action up to and including discharge.

Records Retention Schedule
The Records Retention Schedule is not exhaustive and will be updated when additional information is available. The Schedule has not been reviewed by legal counsel and is based upon examples from comparable nonprofit watershed councils in Oregon and from the 5th edition (current) Oregon Nonprofit Corporation Handbook produced by the Nonprofit Association of Oregon (2012)

The following documents shall be retained as described:

Type of Record	Retention Requirement
Corporate	
Governance & Incorporation Records: Articles of Incorporation and Bylaws; Minutes of Board of Directors and Board committee meetings; Annual state incorporation reports	Permanent
Intellectual Property: Trademark registrations, copyrights, and samples of protected works	Permanent
Government Relations: State and federal lobbying and political contribution reports and supporting records	10 years
Accounting, Fiscal, and Payroll	
Corporate Tax Records: IRS Form 1023, tax-exemption determination letter, and related correspondence; Annual state (CT-12) and federal (990) tax returns/reports and supporting records; files relating to tax audits	Permanent
External Audit Records: Audited financial statements/reports and attorney contingent liability letters	Permanent
Internal Audit Records	3 years
Accounts Receivable and Payable: Ledgers and schedules; Invoices	7 years
Bank Records: Bank reconciliations, bank statements, deposit slips and checks (unless for important payments and purchases)	3 years
Checks: For important payments and purchases only	Permanently
Employee Timesheets and Expense Reports	7 years
Payroll Tax Records: W-2 and W-4; Federal quarterly form 941; State quarterly reports; State withholding form WR; 1099 forms	7 years
Insurance	
Insurance Records: Policies (including expired), accident reports, claims, etc.	Permanently
Waivers of Liability: For clients and volunteers	7 years

Contracts	
Funded Grants: Proposals, grant agreements and amendments, reports, and correspondence	7 years after closure
Contracts: Final, execution copies of all contracts, agreements, licenses, leases, etc.	6 years after expiration
Human Resources	
Employment and Personnel Records: Employee names, addresses, social security numbers, dates of birth, USCIS form I-9; job description; dates of hire and termination/separation; evaluations and disciplinary actions	7 years
Employment Applications (including not hired)	3 years
Retirement and Pension Records	Permanently
General and Programs	
Correspondence (General)	2 years
Correspondence (Legal and Important)	Permanently
Photographs (high quality with details)	10 years
Presentations (re-usable)	7 years
Press Releases/Public Filings	Permanent

Financial Policies and Procedures

The Council is committed to protecting and using our assets for our nonprofit mission. Proper financial practices are very important in doing this, since proper practices help to prevent and detect errors and fraud. Strong financial practices also assure our donors that we use their gifts for the purposes for which they were intended.

The Board of Directors is responsible for the active oversight of the financial position of the Council. The Executive Director is responsible for developing and enacting operational procedures to implement the policies described in this document. The Board shall establish a standing Executive Committee to review and assist in the administration of these policies and procedures.

To the greatest extent possible, the Council's financial policies and procedures are in accord with generally accepted accounting principles (GAAP). The Board seeks to continuously improve our capacity to operate consistent with GAAP.

All financial records are to be kept in an electronic accounting system (such as QuickBooks), routinely backed-up on a secure, external system, available for review by the Board of Directors upon request, and shown to the Executive Committee in agreed-upon formats (e.g. monthly, quarterly, and annual reports).

General Practices

Review of Risks: The Board of Directors will review these policies each year to consider whether financial risks have changed and whether additional controls may be implemented based on Council capacities and available resources. Such changes may include a change in laws or regulations that govern the financial operations of the Council, hiring of employees, or a major change in our programs. The Board will identify any new risks and adopt appropriate procedures to minimize those risks. The Board may consult with a professional to ensure that these policies properly address such risks.

Segregation of Roles: There are several fiscal "roles" in the Council, including: custody, authorization, execution, and monitoring. For example, the individual who has authority to sign checks acts in the custodial role. The person who approves payment of a bill is authorizing. The Board of Directors as a whole acts in the authorizing role when it approves the annual budget and makes a decision to purchase a major item like a copier. The person who prepares the checks for signature acts in the execution role, executing an action that has been authorized by the Board through the annual budget or by the individual responsible for approving payment of the bill. The individual who reconciles the bank statement acts in the monitoring role. The Board also acts in a monitoring role when it reviews the monthly financial reports to be sure that its plan (the budget) is being executed properly.

To the greatest extent possible, the Board of Directors seeks to separate the responsibilities for fiscal roles so that at least two fulfill these roles. **It is particularly important that the same person does not authorize, execute, and monitor any transaction.** At each step of handling funds, the Council shall ensure that more than one person verifies that the step is done correctly.

Receipt of Funds

Risks: The Council faces the risk that funds that we receive may be stolen or lost or that someone may be falsely accused of stealing funds. We also face the risk that we may fail to record a restriction that a donor has placed on our use of funds.

Policy: All funds, whether cash or check, which the Council receives will be deposited intact into the bank account, with no monies removed to make payments or for other purposes. All cash receipts should be deposited into the bank as soon as possible. This allows for a complete accounting and independent verification of what happens to our funds. Communications from donors that establish restrictions on the use of their contributions will be recorded. If we believe that a donor has restricted the use of funds in a conversation, we will follow up and secure written confirmation of the donor's intent.

Procedure:

1. Receipt of Checks: The Executive Director or a designee opens all mail addressed to the Council; makes a photocopy of all checks received and provides the photocopies to the Executive Committee. This allows the Committee to verify that all checks received are deposited.

   The Executive Director or a designee will endorse all checks by an endorsement stamp that provides that the check is "For Deposit Only" and will be paid to the order of the corporate bank and lists the organization's name and account number. This lessens the risk that a check may be stolen and cashed.

2. Receipt of Cash: Cash is easily stolen or miscounted and must be handled carefully:
   - *a.* The person accepting the cash must provide a written log when taking the cash.
   - *b.* The log entry should state the person's name, the date, the amount of the cash, and the purpose of the payment.
   - *c.* When a donation receipt is requested (or required by law), use a pre-numbered receipt book with an automatic duplicate copy.
   - *d.* No pages may be removed from the log entry book or receipt book
   - *e.* The log entry book, receipt book, and cash shall be placed in a secure location, such as a locked drawer or safe.
   - *f.* The Executive Committee will compare the log entry book, receipt book, and the bank's list of cash deposits when making the Bank Reconciliation (described below).

3. Depositing and Recording: The Executive Director or designee will deposit and record corporate funds as follows:
   - *a.* Grant Funds
     - *i.* An Estimate shall be created based on the approved grant budget dated for when the grant was officially awarded. This provides for user-friendly and efficient budget tracking of grant-funded projects.
     - *ii.* Invoices shall be created for each grant reimbursement request or payment advancement.
     - *iii.* When funds are received, a Receipt of Payment will be entered and funds recorded in the Undeposited Funds Account.

iv. When funds are ready for deposit, a Record of Deposit will be entered for the appropriate bank account and a deposit slip prepared.
v. When feasible, the funds will be deposited by an individual other than the person who initially received the funds, such as a member of the Executive Committee. Otherwise, the funds will be deposited by the Executive Director.
vi. An electronic and hard-copy record of the following will be filed chronologically:
    1. Invoice, with hand-written cross-reference notations at the top denoting the grant funder, project ID / restricted use, and date of request for funding disbursement.
    2. Detached Deposit Summary from the Deposit Slip
    3. A photocopy of the check and voucher
    4. Deposit Receipt from the corporate bank

b. Donations
i. Donation Receipts shall be created for each donor's contributions and funds recorded in the Undeposited Funds Account. If cash will be included, the Donation Receipt shall provide sufficient information for cross-reference with the hand-written pre-numbered receipt book.
ii. When funds are ready for deposit, a Record of Deposit will be entered for the appropriate bank account and a deposit slip prepared.
iii. When feasible, the funds will be deposited by an individual other than the person who initially received the funds, such as a member of the Executive Committee. Otherwise, the funds will be deposited by the Executive Director.
iv. An electronic and hard-copy record of the following will be filed chronologically:
    1. Donation Receipt, with hand-written cross-reference notations at the top denoting the donor, project ID / restricted use, and date of request for donation.
    2. Detached Deposit Summary from the Deposit Slip
    3. A photocopy of any check and voucher
    4. Deposit Receipt from the corporate bank.

4. <u>Acknowledging Donations</u>: While IRS rules require acknowledgment of donations of more than $75, our policy is to provide written acknowledgement for every gift we receive of more than $40.
    a. The Executive Director or designee shall respond to each donation with a letter (mailed or electronic, depending on contact information available/provided)) thanking the donor for their generosity.
    b. The thank you letter shall include the amount of the gift, state if the gift was cash (which includes a check), and provide the Council's EIN # for tax purposes.
    c. If the gift was donated property of some kind, the thank you letter will not place a value on the donated property.
    d. If the donor received something of value in return, the letter must contain a description of the donation and a good faith estimate of the value of what was provided to the donor in return.
    e. The thank you letter should state one of the following

i. No goods or services were provided in exchange for your contribution, or
ii. In exchange for your contribution, we provided you () whose fair market value is ($).

Disbursement of Funds

Payments by Check

Risks: The Council faces the risk that our funds will be spent on unauthorized items, that someone will steal our funds by taking blank checks or by writing checks to payees who are not our vendors, or that payments we make will be improperly recorded.

Policy: Make all disbursements from the Council's funds by check, with the exceptions of petty cash and Board-approved electronic disbursements.

Procedure:

1. Opening Bank Accounts: Bank accounts may be opened only upon authorization by the Board of Directors.
    a. All bank accounts must be opened with the Council's employer identification number (EIN).
    b. The Board shall approve the authorized signers on the Council's bank accounts.
    c. Where feasible, an individual who reconciles the bank statement should not be an authorized signer.
    d. Where feasible, an individual who acts in a custodial and executing role should not be an authorized signer.

2. Custody of Checks: The Executive Director is the only person authorized to have access to unused check stock. The checks should be stored in a locked location and information about how to access them should be kept confidential from everyone but the Board Chair.

3. Check Authorization: All invoices will be forwarded immediately to the Executive Committee for review and authorization to pay, except for recurring expenses in an approved budget (i.e. rent, utilities, etc).
    a. The Executive Director and Executive Committee will review all invoices for accuracy, agreement with contracts, conformity to budget or Board authorization, and compliance with grant fund requirements.
    b. The Executive Director and Executive Committee will ensure that all conditions and specifications on a contract or order have been satisfactorily fulfilled.
    c. The Executive Director will enter the invoice as a bill in QuickBooks and assign appropriate billing/accounting information.
    d. The Executive Committee will approve invoices, indicating they have reviewed the invoice and authorized a check.

4. Payments by Check: Upon approval of the invoice, the Executive Director is authorized to enter a Bill Payment and prepare checks for signature.

    If a check is voided, the check will have "VOID" written in large letters in ink on the face and have the signature portion of the check torn out. Voided checks will be kept on file.

5. Duties of Check Signers: All checks will be signed by Board Members authorized by the Board. A check signer must not be the person who prepares the checks or who conducts the bookkeeping. Prior to signing the check, a check signer will do the following:
    a. Compare the check to the original invoice
    b. Ensure that the Executive Committee has provided documentation of authorization of the check
    c. Ensure that the amount of the check is not clearly unreasonable

6. Distribution and Recording of Check Payments:
    a. The Executive Director will distribute authorized, signed checks to their intended recipients.
    b. An electronic and hard-copy record of the following will be filed chronologically:
        i. Bill, with hand-written cross-reference notations at the top denoting the vendor, project ID / funding source, and date of invoice.
        ii. Original Invoice (or receipt) received from the vendor
        iii. Detached check voucher

7. Prohibited Practices: In no event will:
    a. Invoices be paid unless approved by the Executive Committee or are recurring expenses in an approved budget (rent, utilities, etc)
    b. Blank checks be signed in advance
    c. A check signer sign a check made out to the signer
    d. Checks be made out to Cash, Bearer, etc, except for Petty Cash re-charge

8. Special Circumstances:
    a. The Executive Director may sign a check if none of the signatory Board members are available and the check is essential to avoid fees or penalties, to meet regular payroll and associated bills (e.g. tax, retirement, health insurance payments), to re-issue a check that has already been approved, or to provide a check to a contractor for work already performed per the requirements of an approved contract and authorized by the Executive Committee.

Petty Cash Funds

Risks: Payments by cash are not as completely documented and are not as easily monitored as payments by check and thus subject the Council to a relatively greater likelihood of errors and fraud.

Policy: The Petty Cash Fund should only be used when payment by check is impracticable. The Petty Cash balance should always be $200 in cash and receipts.

Procedure:

1. Administration of Petty Cash Fund: The Executive Director is responsible for the administration of the Petty Cash Fund.
    a. The Fund shall be funded by checks made out to Petty Cash that are authorized by the Executive Committee and signed by Board-designated signers. The Executive Director

will record checks written to reimburse the Petty Cash Fund in QuickBooks as journal entries.

b. The Executive Director will require receipts for all purchases and may ask those reimbursed to sign for money provided as reimbursement.

c. The Executive Director will record all cash purchases in a journal and save the receipts.

d. The Executive Director will also enter the journal transactions into QuickBooks as Bills following the same process used to record check payments.

e. An electronic and hard-copy record of the following will be filed chronologically:

i. Bill, with hand-written cross-reference notations at the top denoting the vendor, project ID / funding source, and date of invoice.

ii. Original Invoice (or receipt) received from the vendor

Expense Reimbursement

Risks: The Council does not have the same level of control over expenses incurred on behalf of the corporation by those who pay with personal funds and seek reimbursement as it does for expenses paid directly by the Council. The corporation is not in as good a position to determine whether the goods or services purchased might have been obtained at a lower price elsewhere, whether there is personal benefit to the person seeking reimbursement and how the expenditure fits in with the rest of the organization's budget.

Policy: In proper circumstances, Board Members, employees, and volunteers are entitled to be reimbursed for expenses related to the Council that they incurred on behalf of the organization. To receive reimbursement, the following requirements must be met:

- The expense must have been authorized in advance by the Board of Directors or by the Executive Committee or later approved by the Board of Directors.
- The expense must have been incurred for goods or services purchased for the Council.
- Travel expenses must be related to the Council. Reimbursement and allowances will be made at the current standard rates as established by the IRS or as established by a grant agreement.

Procedure: To be reimbursed for expenses:

1. Documentation: Reasonable documentation must be provided showing the date, amount, and the goods or services purchased. Credit card receipts and store receipts that do not describe the purchase are not reasonable documentation. The receipt must describe the purchase.
2. Timely Submission: Documentation and a request for reimbursement must be submitted within 30 days from the date the expense was incurred.
3. Payment and Recording: Depending on the amount of the expenses, reimbursements will be issued and recorded in accordance with the policies/procedures stated above for Payments by Check or Petty Cash Funds.
4. Overpayment: If the Council overpays on a reimbursement, any excess reimbursement must be returned within a reasonable period of time.

Payroll

Risks: The Council faces the risk that our funds will be spent on unauthorized payroll expenses, that someone will steal our funds by taking blank checks or by writing checks to payees who are not our employees, or that payroll expenses we make will be improperly calculated or recorded.

Policy: In addition to the controls established for payments by check, Payroll expenses will be subject to additional internal controls that reduce the risk of error and fraud, including separation of duties, requiring documentation and approval of timesheets, and requiring enhanced payroll subscription services. In addition, the same person must consistently process payroll and have minimal if any interruptions during the process.

Procedure:

1. Check Authorization: Timesheets will be submitted to the Executive Director and forwarded immediately to the Executive Committee for review and authorization to pay.
    a. The Executive Director and Executive Committee will review all timesheets for accuracy, consistency with employee job descriptions and employment agreements, conformity to budget or Board authorization, and compliance with grant requirements.
    b. The Executive Committee will approve timesheets, indicating they have reviewed the timesheets and authorized a payroll check.

2. Payroll Payments by Check: Upon approval of the timesheets, the Executive Director is authorized to enter Payroll Checks, to prepare the final payroll summary, and prepare checks for signature.

3. Duties of Check Signers: All payroll checks will be signed by Board Members authorized by the Board. Where feasible, a check signer should not be the person who prepares the checks or who conducts the bookkeeping. Prior to signing the check, a check signer will do the following:
    a. Compare the payroll check to the timesheet invoice
    b. Review the final payroll summary
    c. Ensure that the Executive Committee has provided documentation of authorization of the payroll check
    d. Check to be sure that the amount of the payroll check is not clearly unreasonable

4. Distribution and Recording of Payroll Check Payments:
    a. The Executive Director will distribute authorized, signed payroll checks to employees in person or through mail (if requested).
    b. An electronic and hard-copy record of the following will be filed chronologically:
        i. QuickBooks Payroll Summary, with hand-written cross-reference notations at the top denoting the employee, project ID / funding source, and date of payroll period.
        ii. Timesheet approved by Executive Committee
        iii. Check voucher

Purchasing

Risks: The Council wants to ensure that all purchases on behalf of the corporation are authorized by the Board of Directors or by Board policies. Unauthorized purchases deplete the Council's resources and interfere with the Board's ability to govern properly.

Policy: All purchases made on behalf of the Council must be made pursuant to the Board-approved budget or Board rules.

Procedure:
1. All purchases not specifically itemized in a Board-approved budget must be pre-approved by the Executive Committee
2. All purchases over $1,000 must be pre-approved by the Executive Committee whether or not the purchases/services are in an approved budget.

Tax Forms And Legal Liabilities

Risks: The Council wants to ensure that all taxes and liabilities are filed in accordance with applicable laws and regulations that govern the corporation. In addition, the Council faces the risk that tax forms and legal liabilities will be improperly calculated or recorded.

Policy: All taxes and legal liabilities will be reviewed by the Executive Committee. The Council may consult a professional CPA to ensure proper reporting and accounting.

Procedure:
1. The Executive Director will work with the Executive Committee and/or Board-approved CPA to facilitate preparation of the organization's 990 and CT-12 tax returns. Copies of these forms shall be provided to the Board of Directors for review prior to filing.
2. State and Federal quarterly payroll reports are prepared and filed by the Executive Director, who may elect to use the CPA or other payroll service provider. Copies of the quarterly payroll reports shall be provided to the Executive Committee for review prior to filing.
3. The Executive Director will immediately notify the Executive Committee of any tax problems or penalties, who will then notify the Board.

Budgeting, Monitoring, Reporting, & Audits

Risks: Budgeting, monitoring, reporting, and conducting audits allow us to track our finances, uncover errors, and manage our resources effectively. Monitoring also assists us in identifying discrepancies between our accounting records and banking records that suggest theft or fraud, checks signed by unauthorized signers, and identify theft.

Policy: The Executive Committee will work with the Executive Director to prepare/review Budgets and to ensure that regular financial statements are provided to the Board of Directors consistent with GAAP reporting standards. The Executive Committee will also monitor the Council's accounts regularly and will perform or cause to be performed written reconciliations of all bank or investment accounts which prove that the balances presented on our financial reports agree with the records of the bank.

Procedure:
1. Fiscal Period: The fiscal period for the organization shall be July 1 to June 30

2. Budgeting: Annual budgets are prepared by the Executive Director and Executive Committee and approved by the Board of Directors before the beginning of the budget fiscal year.

3. Regular Reporting:
    a. The Board of Directors shall receive a regular (no less than quarterly) accounting of the Council's financial status, preferably at each meeting. This is to include a Statement of Financial Position (Balance Sheet), Statement of Activities (Profit/Loss), Statement of Cash Flow or Cash Position.
    b. The Board may propose items for an ad hoc investigation. The Executive Director will work closely with the Board-designated reviewers as necessary to complete an adequate investigation of the item in question in a timely manner and report conclusions to the Board.

4. Bank Reconciliations:
    a. The Executive Director shall provide the Executive Committee with a copy of all records of deposits, disbursements, and other bank transactions for reviewing monthly bank statements.
    b. The Council will ensure that the Executive Director and Executive Committee have online, read-only access to the bank account and bank statements.
    c. The Executive Committee will work with the Executive Director to reconcile the bank statement each month. Reconciliations should be done within 7 days of receiving the statements, as follows:
        i. Review all checks for correct signatures, number of signatures, and protest to the bank any signature errors.
        ii. Review the checks in the bank record to ensure that:
            1. The name of the payee, the amount of the check, and the date of the check agree with the corporation's accounting records
            2. Whoever the check was made out to was the depositor of the check
        iii. Compare the bank deposit records with our accounting records to determine whether each deposit recorded in the accounting records agrees with the bank record.
        iv. Check whether the ending balance in the bank statement agrees with the general ledger cash account.
        v. Review the list of outstanding checks. All checks outstanding over 90 days will be thoroughly reviewed.
        vi. Review the list of deposits in accounting records not yet recorded by the bank.
        vii. Once reconciled the Executive Committee will sign a printed copy acknowledging that the reconciliation was performed.

5. Audits: The Council shall authorize and contract, as required and funded by any Grant Agreement, audits of the financial accounts and records requiring audit. The Executive Committee and Executive Director shall cooperate with and assist the Auditor(s) in conducting the audit. The Executive Committee will review and approve audits upon their completion. A current copy of Council audits will be available for review by the general public upon request.

Exceptions

Exceptions to this policy may be made by the unanimous decision of the Executive Committee and the Executive Director. These exceptions must be reported in writing at the next Board meeting.

Insurance Coverage & Liabilities

The Council is committed to identifying and mitigating the risks and liabilities associated with the diversity of its watershed activities and programs. Insurance coverage is a key component of safeguarding our assets, particularly to help cope with the financial consequences of unpredictable events that are sudden and accidental.

The Board of Directors is responsible for the active oversight of the Council's risks and liabilities, including insurance coverage and limits. The Board shall set, and annually review, the types of coverage and minimum amounts needed to safeguard the Council.

General Coverage

Insurance Type	Minimum Amount	When Required
Worker's Compensation (SAIF Insurance)	$500,000 per accident	Required per State Statute
General Liability	$1,000,000 per occurrence $2,000,000 general aggregate	Always
Automobile Liability	$1,000,000 combined single limit (per accident)	Always
Board & Officer Liability	$1,000,000 aggregate	Always

Activity-Based Coverage

Pesticide Applicator Limited Pollution Liability	$500,000 per occurrence $1,000,000 aggregate	When Council staff are applying pesticides and herbicides
Pollution Liability	$500,000 per occurrence $1,000,000 aggregate	When Council staff are performing earthwork near wetlands, water, or ESA species
Professional Liability	$500,000 per occurrence $1,000,000 aggregate	When Council staff have a professional license and are doing work that falls under that license.
Abuse or Molestation Coverage	$100,000 per occurrence $300,000 aggregate	When Council staff or volunteers are working with children

Specialized Insurance Types and Coverage Amounts
For projects that carry greater risks to the organization, our personnel, or our community, the Council is responsible for identifying these liabilities and assuring that appropriate insurance coverage types and amounts are secured.

Examples of projects that require specialized insurance include:

- Working with hazardous materials (not including materials used in the normal operation of equipment, such as hydraulic fluid)
- Earth moving work around the footprint of a well
- Aerial application of chemicals
- Transporting individuals on the water
- Removal or alteration of structures that hold back water on land or instream including, dams, levees, dikes, tide gates, and other water control devices (this does not include temporary diversion dams used solely to divert water for irrigation)

Working with Contractors
Contractors hired by the Council must meet the minimum limits and coverage types described in the above tables, based on the contracted project and activities. The Council shall require that these limits and coverage types be included in signed contracts, and that the contractor will provide certificates of insurance documenting that adequate and appropriate insurance coverage has been obtained for the contracted project and activities.

Suspected Child Abuse & Neglect

Purpose
The Greater Yamhill Watershed Council (Council) provides environmental educational activities and volunteer opportunities for youth. In accordance with Oregon's Reporting of Child Abuse Law, the Council has adopted policy and procedures for reporting suspected child abuse and neglect.

The Council declares that the relationship between a child and his/her parent, and/or guardian and Council staff and other Council agents is of paramount importance. It is our responsibility to intervene based upon information in any and all instances of suspected non-accidental injury, neglect, sexual abuse and cruelty imposed on a child by their parents, and/or guardians, Council staff or other Council agents, and in the suspected instance where a child is deprived of his/her right to conditions of minimal nurture, health and safety.

All suspected child abuse and neglect will be reported to the Child Welfare Hotline 503.731.3100 Oregon State Law (ORS 419B.005 – 419B.045).

All Council staff and other Council agents (including Board of Directors, volunteers, and students and interns) who become aware of any evidence of such abuse or neglect shall comply with stated policy and procedure.

Definitions
The following definitions may assist in identifying reportable situations. If you have any questions, please contact the Council Executive Director.

A. Abuse

- **Physical Abuse** the non-accidental damage of physical injury or physical maltreatment of a child. Examples may include:
    - Throwing, kicking, burning or cutting a child
    - Striking a child with a closed fist
    - Shaking a child
    - Interfering with a child's breathing
    - Threatening a child with a deadly weapon
    - Doing any act that would cause bodily harm greater than temporary pain or minor temporary marks.
    - Physical discipline that includes excessive or unreasonable force against the child.

- **Sexual Abuse** committing or allowing to be committed any sexual offense against a child.
  This may include:
  - Any contact or interaction between a child and an adult when the child is being used for the sexual stimulation of the perpetrator or another person;
  - Intentional touching, either directly or through the clothing, of the sexual or other intimate parts of a child (not associated with bathing or diaper changing).
  - This may also include permitting, compelling, encouraging, aiding or otherwise causing a child to engage in touching the sexual or other intimate parts of another.
  - Sexual abuse may also be committed by a person under the age of 18; when that person is significantly older than the victim or when the perpetrator is in a position of power or control over another child.
  - Examples of signs of child sexual abuse may be torn, stained or bloody underclothing; genital discharge; infection or swelling, physical trauma or irritation of the genital area; pain with urination and difficulty in walking.
- **Sexual Exploitation** includes but is not limited to such actions as allowing, permitting, compelling, encouraging, aiding, or otherwise causing a child to engage in:
  - Prostitution
  - Sexually explicit, obscene or pornographic activity to be filmed, photographed, or electronically reproduced or transmitted.
  - Sexually explicit, obscene or pornographic activity as part of a live performance.

B. Neglect

- **Neglect** is an act or a failure of a child's parent, legal custodian, guardian or caregiver that shows a serious disregard of the child's health, welfare and safety.
  This may include the following examples:
  - Failure to provide food, shelter, clothing, supervision or health care necessary for a child's health, welfare or safety.
  - Actions, failures to act or omissions that result in injury or create a risk of injury to the physical, emotional and/or cognitive development of a child.
  - The ongoing effects of consistent inaction or behavior by a parent, custodian, guardian or caregiver to perform basic parental functions, obligations or duties when the result is to cause injury or create a risk of injury.

C. Threat of Harm

- **Threat of harm** includes all activities, conditions and persons that place a child at substantial risk of physical or sexual abuse, neglect, or mental injury. Threat of harm includes all actions, statements, written or non-verbal messages conveying threats of physical or mental injury which are serious enough to unsettle the child's mind including:
  - Expressions of intention to inflict pain, injury, evil, or punishment on the child.
  - An avowed determination to injure the child presently or in the future.
  - A caretaker regularly telling a child that if she/he tries to make decisions independent of the caretaker, or is too curious, then terrifying consequences, possibly death, will happen to the child.
  - Circumstances that expose children to acts of domestic violence. Violence in the home threatens a child's emotional state as well as physical well-being.

Reporting Procedures & Forms

- All Council staff, Board of Directors, volunteers, students and interns are required to immediately report any suspected sign of child abuse and neglect.
- It is important that the person suspecting the abuse listen to the child carefully for reporting purposes, but do not interview the child or contact the child's guardians. All interviews, contacts, and investigations will be done by the Department of Human Services (DHS).
- The person suspecting the abuse will immediately make a verbal report to their Day-of Council Supervisor and/or the Executive Director and complete the Suspected Child Abuse Report Form (Reporting Form).
  - The purpose is to confer on concern and to complete the Reporting Form, and is not for approval to report suspected abuse to the Child Welfare Hotline.
  - In the event the Executive Director is the alleged perpetrator, the verbal report is directed to the Day-of Supervisor and/or the Council Board Chair.
- The person suspecting the abuse will also immediately make a verbal report to the Child Welfare Hotline 503.378.6704. The Hotline will ask for the same or similar information as is included in the Council Reporting Form.
- The Executive Director will immediately inform Council Board Chair about the report of suspected abuse
- **Reporting Form:** The person suspecting the abuse will complete the Suspected Child Abuse Report Form (Report Form) and send the completed report to the Council Executive Director, marked "Confidential", within 24-hours.

  The Reporting Form includes the following questions to be completed to the best of the reporter's knowledge:
  - Name of the class or location of the program and date where suspected abuse was learned of
  - Name of the child, address, birthdate and sex.
  - Names of the parents, custodians or guardians responsible for the care of the child.
  - Nature and extent of alleged abuse, including:
    - Any evidence of previous abuse
    - The explanation given for the abuse
    - Any other information that the person making the report believes might be helpful in establishing the cause of the abuse and the identity of the perpetrator

Confidentiality

- Information obtained and/or shared by the Council and DHS personnel in meetings when discussing the details of the suspected abuse shall remain confidential.
- Council staff and other agents shall not discuss any details of the suspected abuse to a party not entitled to the information; disclosure or discussion of any details of suspected abuse to a party not entitled to the information may be cause for immediate termination. Do not contact the child's guardians or inform them that a report has been made (this will be done by DHS)
- Storage of all suspected child abuse or neglect files must be marked "CONFIDENTIAL" and be stored in a locked cabinet at the Council main office. No copies will be made of the forms on any child abuse and/or neglect report. The files are to remain readily available for

inspection or review by DHS for up to seven (7) years. . Thereafter, all files are to be disposed of in a confidential and secure manner.

When Council Staff or Agents are Suspected:

- If the Executive Director is informed by staff, law enforcement and/or DHS personnel of an investigation or incident of suspected child abuse that may have occurred at a Council site, by a Council staff person or other Council agent, a parent volunteer, or another child enrolled in a Council program, the Executive Director shall complete the Suspected Child Abuse Report form and document what type of abuse is being alleged or investigated and submit to the Council Board Chair within 24-hours.
- Any Council staff person or agent who observes another Council staff or agent, parent volunteer and/or other child enrolled in a Council program committing any suspected child abuse as defined in this document, must follow the reporting policy and procedures for suspected child abuse and neglect.
- In the event the Executive Director is the alleged perpetrator, the Council staff person or other agent observing the incident must follow the appropriate reporting procedures for suspected child abuse or neglect and report directly to the Council Board Chair.

Disciplinary Action

- When a Council staff person or other agent is observed and accused of violating the Suspected Child Abuse and Neglect Policy and Procedures, that person will be immediately removed from his/her position. Said removal shall be verified by written correspondence.
- Staff may be eligible for suspension with pay while removed from their position.
- A Council staff person or other agent accused of child abuse shall be reinstated upon a determination by DHS or the investigative law enforcement entity that the alleged abuse has no supportable factual basis.
- In the event where the situation clearly demonstrates a clear and evident case of child abuse or neglect, as defined, such staff or other agent shall be immediately terminated.

Orientation & Ongoing Training

- Orientation and annual training on the Suspected Child Abuse and Neglect Reporting Policy and Procedures must be provided to all relevant staff, Board of Directors, volunteers, and students and interns prior to assuming work duties that bring them into contact with youth.
- Orientation and annual training will include information on identification and reporting of child abuse and neglect; legal responsibilities of mandatory reporters, Council program policy and procedures, community resources and any other pertinent information. Training materials from other contact agencies will be incorporated into the orientation and training program as appropriate.
- Upon completion of orientation, said staff or other agent is required to sign and date the Acknowledgement of Orientation and Ongoing Training Form, which will be retained in their personnel file

SUSPECTED CHILD ABUSE & NEGLECT POLICY

Mandatory Reporting Form

Instructions:

- All Council staff, Board of Directors, volunteers, students and interns are required to immediately report any suspected sign of child abuse and neglect.

- It is important that the person suspecting the abuse listen to the child carefully for reporting purposes, but do not interview the child or contact the child's guardians. All interviews, contacts, and investigations will be done by the Department of Human Services (DHS).

- The person suspecting the abuse will immediately make a verbal report to their Day-of Council Supervisor and/or the Executive Director and complete the Suspected Child Abuse Report Form (Reporting Form).
    - The purpose is to confer on concern and to complete the Reporting Form, and is not for approval to report suspected abuse to the Child Welfare Hotline.
    - In the event the Executive Director is the alleged perpetrator, the verbal report is directed to the Day-of Supervisor and/or the Council Board Chair.

- The person suspecting the abuse will also immediately make a verbal report to the **Child Welfare Hotline (503)-378-6704**. The Child Welfare Hotline will ask for the same or similar information as is included in the Council Reporting Form.
- The Executive Director will immediately inform Council Board Chair about the report of suspected abuse

Reporting Form Questions:

The person suspecting the abuse will complete the below Suspected Child Abuse Report Form (Report Form) to the best of their knowledge. Send the completed report to the Council Executive Director, marked "Confidential", within 24-hours.

1. Name of the class or location of the program and date where suspected abuse was learned of:

2. Name of the child, address, birthdate and sex.

3. Names of the parents, custodians or guardians responsible for the care of the child.

4. Nature and extent of alleged abuse, including:

    - Any evidence of previous abuse

    - The explanation given for the abuse

5. Any other information that the person making the report believes might be helpful in establishing the cause of the abuse and the identity of the perpetrator

SUSPECTED CHILD ABUSE & NEGLECT POLICY
Acknowledgement of Orientation & Annual Training

The Council values the participation and contributions of staff, Board of Directors, volunteers, and students and interns. All such staff and other agents of the Council are asked to sign this statement as acknowledgement of having received a copy of and orientation regarding the Suspected Child Abuse and Neglect Policy and Procedures.

Orientation

_____ _____

Signature **Date**

_____

Printed Name

When you have completed orientation and signed this statement, please make a copy for yourself, and return the original to the Executive Director for inclusion in your Personnel File..

Ongoing Trainings

After completion of Annual Trainings, please provide a signature and date below.

_____ _____

Signature **Date**

_____ _____

Signature **Date**

_____ _____

Signature **Date**

Personnel Policy

The Greater Yamhill Watershed Council (the Council, the Council) is committed to fair, clearly stated, and supportive relationships between the organization and its staff. This personnel policy has been adopted by the Council to guide the personnel practices of the council and ensure consistent personnel decisions. It is the intention of the council to administer the personnel programs in a manner which complies with the letter and spirit of all applicable federal, state and local regulations.

This policy is not a contract. The statements are not intended to be exhaustive and are subject to change at any time without prior notice at the discretion of the Board of Directors. Employment is voluntary or "at-will," and employees may resign or be terminated from employment at any time, with or without cause.

Employee Relations

Equal Employment Opportunity

The Greater Yamhill Watershed Council is an Equal Opportunity Employer. It is the policy of the Council that employment decisions for all applicants and employees will be made without regard to race, color, religion, sex, national origin, age, disability, marital or veteran status, disability or other characteristics protected under local, state or federal law. No employee will be retaliated against for raising concerns under this policy.

Harassment

All employees and Council participants are expected and required to treat one another in a courteous and respectful manner at all times.

Harassment of any kind is prohibited. This specifically includes sexual harassment and other harassment based upon characteristics protected under local, state and federal discrimination regulations. By definition, harassment is any unwanted attention or action prohibited by law by someone in the workplace that creates an intimidating, hostile, or offensive work environment, including sexual harassment.

Retaliation against employees for complaints regarding behaviors described above or other conduct addressed by this policy will not be tolerated.

- If a person's behavior makes an employee uncomfortable, the employee should feel free to immediately advise the person that, in the employee's opinion, the behavior is inappropriate and that the employee would like it stopped.
- If the employee is not comfortable discussing the issue with the person, or if the person fails to respect an employee's request, the employee should report the incident to his or her supervisor. If, for whatever reason, the employee does not feel that the supervisor is a suitable person to whom to report the incident the employee should contact the Executive Director, or if appropriate, the Board Chair or a member of the Executive Committee.

Reports of harassment will be investigated promptly. Appropriate corrective actions will be taken upon completion of the investigation. Employees and Council members found to be

harassing other employees will be immediately and appropriately disciplined, up to and including immediate discharge.

Employee Classifications
All employees are classified in one of the following categories:

Regular, Part-Time Employees: Employees who are regularly scheduled to work less than 32 hours per week. Paid time off will be accrued at a rate proportional to the regularly scheduled hours. This individual is not eligible for additional employee benefits.

Regular, Full-Time Employees: Employees who are regularly scheduled to work at least 32 hours per week. This individual is eligible for all employee benefits.

Interns: Interns are not considered employees and may be of paid or unpaid status. If paid, the arrangement will be one lump stipend and considered a skill training educational opportunity. Interns are not eligible for benefits.

Temporary Employees: Employees who are paid hourly under Letter of Agreement for a specified period of time, usually six (6) months or less. Temporary employees are not eligible for benefits or paid time off. Most temporary help meets a specific short term Council need.

Employees are classified as either exempt or non-exempts according to provisions of the Fair Labor Standards Act.

All employees, regardless of status or duration of employment, are expected to meet and maintain Council standards for job performance and behavior.

Recruitment Procedures
All regular employee positions will be advertised.

Written job descriptions will be adopted by the Council for all positions.

The Council intends to recruit, hire, and rank applicants on the basis of the applicant's relative knowledge, skills, abilities, and specific job related factors. The decision to employ an applicant will be based solely on the applicant's qualification for the particular position along with other requisite job skills.

Hiring
On or before the first day of employment, persons employed by the Council will receive a letter of hire. The letter will include the following: title of the position, the beginning date of employment, position classification (exempt or non-exempt), the salary and benefits package, and the name or designation of the employee's supervisor. For non-exempt part-time employees it will also designate the hours per week to be worked. In addition the employee will receive a copy of their job description and a copy of the employee policy. The employee will be required to sign a statement acknowledging that they have read and understood the conditions of employment as described in the employee policy

Pay & Hours of Work

Work Schedule

Work Week

A regular work week is Monday through Sunday

Office hours

In general, office hours are Monday-Friday between 8am to 5 pm. Council meetings and other business meetings are held outside of regular office hours and employees may be required to attend. Due to the nature of Council work, actual working hours are variable and may include evening and weekend assignments

Rest and Meal Periods

Each employee is provided with a paid 15-minute rest break for every 4 hours worked. Employees working shifts of six hours or more will also be provided an unpaid 30 or 60 minute meal break.

Rest and meal periods are mandatory. Whenever possible, the rest and meal periods should be taken midway through the segment of work.

Recording Hours Worked

It is the responsibility of each employee to maintain an accurate record of time worked to ensure they are accurately paid.

Pay Days

Employees are paid monthly for the time period of the calendar month. Timesheets are due to the Executive Director by the last working day of the month. Employees will receive a paycheck by the 5th day of the following month.

The paycheck stub will show an employee's total earnings, the amount of each deduction, and the net earnings. Following the end of the payroll year, each employee will be supplied with a Wage and Tax Statement (W-2) form. This statement summarizes the income and deductions for the year.

The Council does not offer pay advances.

Payroll Deductions

Various payroll deductions are made each pay day to comply with federal and state laws pertaining to taxes and insurance. Deductions will be made for the following:

- Federal and State Income Tax Withholding
- Social Security (FICA)
- Medicare
- Workers' Compensation Insurance
- Other items designated and authorized by the employee in writing
- Other items required by law, such as wage garnishments

Overtime

No paid overtime is authorized. Employees shall not work excesses hours without prior approval from their supervisor. Non-exempt employees will be paid time and one-half for approved overtime for more than 40 hours in one week.

Employees are generally not permitted to work voluntarily without pay. However, employees can qualify as a volunteer if all of these conditions are met: 1) The work is at their own initiative, 2) the work is outside their normal work hours, 3) no payment is expected, and 4) the work is different from their regular job with the Council.

Compensatory Time
Employees are not permitted compensatory time.

Performance Management

Performance Reviews
A performance review should be a positive and interactive process whereby both the Council and the individual being reviewed receive information about his or her success in meeting the goals of the Council.

After ninety (90) days, new employees will receive an initial review.

Regular employee annual review
Every regular employee will receive a written performance evaluation by the Review Committee annually at the employee's anniversary date of hire. Employees will be given the opportunity to comment, in writing, on their performance evaluation. Performance evaluations will be signed by the employee and supervisor and placed in the employee's personnel file.

Salary Review
Each employee may be eligible for a salary review at the time of his or her performance review. The Council cannot guarantee salary increases for merit or inflation.

Employee Benefits

Summary
The Council does not currently provide fringe benefits (e.g. health insurance), other than holiday and leave days as provided specifically in these guidelines.

Paid Time Off
Regular full-time employees earn annual paid time off (PTO) leave at the following rate of accrual:

Years of Service	Days Per Year	Hours Accrued per Pay Period
0-3	10	6.66
4+	15	10

PTO hours accrue monthly, and employees may use PTO hours as they are accrued. PTO hours may not be used in advance of monthly accrual (i.e. no negative PTO value at the end of a month).

PTO should be used within the twelve month period in which the leave was earned, whenever possible. PTO hours in excess of 80 at the end of any payroll year will be paid on the final paycheck of that payroll year.
Accrual of PTO will be pro-rated for regular part-time employees.

PTO may be used for multiple types of leave, including vacation, sick leave, family leave, jury duty, or bereavement leave.

PTO Payout – Resignation or discharge
Upon termination of employment, an employee will receive pay for PTO earned up to the termination date, for each full pay period worked. Portions of a pay period worked will not be considered in the final PTO pay calculation.

Holidays
Regular full-time employees are eligible for holiday pay. Official holidays are as follows:
New Year's Day
Presidents Day
Memorial Day
Independence Day
Labor Day
Veteran's Day
Thanksgiving Day
Day after Thanksgiving
Christmas Day
Floating Holiday

One Floating Holiday is put on an employee's record on January 1st of each year and must be used by December 31 of the same year or it is "lost".
If a holiday falls on a Sunday, it will be observed on the following Monday. If a holiday falls on a Saturday, it will be observed on the preceding Friday.
Regular part-time employees will be compensated in proportion to the usual hours worked.
Temporary employees are not compensated for holidays.

Leaves of Absence
Leave Requests
Requests for Leave should be made in writing as far in advance as practicable, with a minimum two (2) weeks in advance. The Board Chair approves scheduled absences for the Executive Director. The Executive Director approves scheduled absences for all other employees. Leave will be granted with consideration being given to minimum interference with the Council's business.

Unpaid Leave
At the discretion of the Executive Director, or in the case of the Executive Director, the Board Chair, regular employees may be granted unpaid leave for a specified period of time. Employee benefits do not accrue while an employee is on unpaid leave. The employee must utilize any accrued paid time off during the leave. Requests will be granted as business conditions permit. The Board of Directors must be notified of any long-term unpaid leave.

The employee may be required to supply the Council with certification of the condition necessitating leave.

Parental Leave
At the discretion of the Board of Directors an employee may be granted a maximum of six (6) calendar weeks of parental leave in a 12-month period for the purposes of preparing for the birth or adoption of a child or caring for the newborn child. Accrued PTO may be used during this period, but it is otherwise unpaid leave.

Jury Duty
Employees should notify the Executive Director, or in the case of the Executive Director, the Chair, when summoned for Jury Duty. The supervisor and the employee will discuss the potential time commitment of jury duty and the needs of the Council to determine the manner in which to handle the summons.

The Council can offset any amounts received by an employee as jury fees or witness fees for a particular week against the salary due for that particular week. An exempt employee will not be compensated for work weeks in which no work is performed during the entire work week.

Benefits and leave will continue to accrue at regular rates and accrual caps will be waived during jury service.

Bereavement Leave
Regular employees shall be granted one (1) working day with pay due to a death in their immediate family (mother, father, sister, brother, spouse/partner, children, in-laws, grandparent, and grandchildren). With prior approval, PTO leave time may be used to supplement bereavement leave. Employees should notify the Executive Director, or in the case of the Executive Director, the Chair, when bereavement leave is required.

Military Leave
The Council intends to fully comply with Oregon and Federal laws as it relates to service by an employee in the uniformed services or National Guard. Any employee who is absent on their annual two week reserve or National Guard Duty or called up to active duty in the military should consult with the Executive Director, or in the case of the Executive Director should consult with the Chair to discuss the leave policies applicable to such absence.

Unauthorized Absences
Employees absent from work without the authorization of the board of Directors or their immediate supervisor may be subject to disciplinary action.

Except under extraordinary circumstances, an employee who is absent without authorization for three (3) consecutive days will be considered to have resigned voluntarily. The effective date of the resignation will be the last day that the employee was present at work.

Council Information

Work Products and Files

The work products of an employee and all supplies and materials, if purchased by the Council, shall remain the property of the council after voluntary or involuntary termination of that employee. The employee may retain any personal files; however, work files, other papers and copyright to any materials or media shall remain with the Council.

Electronic Communications

Limitations on Use

The electronic communications systems, including, but not limited to Internet access, software, e-mail, weblogs, text messages, and voice-mail, are owned by the Council. These systems are provided for employee use to promote efficient work performance. Use of the systems is limited to employees and others expressly authorized by the Council.

Occasional personal use of the systems is permitted. However, all use of these systems must be in keeping with our standards for professionalism in communications and must not adversely affect employee productivity. Broadcast, internally or externally, of unsolicited personal views on social, political, religious or other non-business related matters is not permitted.

Employee Privacy

All computer records, files, software and e-mail and voice-mail messages created, sent, received or stored on the Council system are considered Council records. The Council retains unrestricted access to these records. Therefore, the contents of records created, sent, received or stored on the Council's systems are not private.

Conflicts Of Interest

Council relies on the integrity and loyalty of every employee. Conflicts of interest are to be avoided at all times. Any employee of the Council in a position to award and/or administer contracts, hire subcontractors, or engage in procurement activities must disclose to the Executive Director, or if it is the Executive Director, to the Chair, if there is a personal or familial relationship, the disclosure or non-disclosure, or which might call into question the impartiality of the employee. If such a relationship exists, the Executive Committee must review and approve, in writing, the transaction or contract before it is executed. Violation of the policy will at a minimum result in a written performance warning and, notwithstanding all other provisions of the Employee Policy, could constitute grounds for termination.

No employee may accept a gift related to Council business valued at more than $50 unless specifically authorized by the Board of Directors.

Safety & Health

Safety and health is a primary concern of the Council. The Council strives to provide a safe and healthful work environment for its employees. Every employee must accept the responsibility to prevent injuries to themselves and fellow employees by prudently following safe work practices. All employees must report any injury incurred through work to their supervisor as soon as possible.

Drug & Alcohol Policy

The Council is strongly committed to providing a safe and productive working environment for our employees. Each employee is expected and required to report for work on time and in appropriate mental and physical condition to work safely and effectively.

Illegal and Controlled Substances

The following rules apply to Council employees:

- The use of alcohol or illegal drugs is prohibited during normal business activities. An exception for moderate consumption of alcohol (up to 2 beverages) may be made for networking events where alcohol is being served.
- Reporting for work, working or engaging in any activity on the Council's behalf under the influence of or with an illegal substance, alcohol, or unauthorized controlled substance in your system is prohibited.

Violation of these rules will subject an employee to disciplinary action up to and including discharge.

Treatment

Employees needing help with a substance abuse problem are encouraged to contact their supervisor or a treatment facility. No person will be penalized for seeking or accepting counseling or treatment for a substance abuse problem so long as job performance and/or safety are not compromised.

Grievance Procedure

It is the fundamental policy of the Council to have a workable system for employees to get questions answered and work-related problems resolved. Many conflicts can be resolved using the following approach:

1. First the employee is encouraged to try to work out the problem directly with the person involved.

2. If an employee cannot resolve the problem or is uncomfortable dealing directly with the other person, an employee should inform the Coordinator, or for the Coordinator, inform the Chair.

3. If the employee and the Coordinator (or Chair) are unable to resolve the problem after a serious attempt, or the issue directly involves the Coordinator, or for the Coordinator, involves the Chair, the employee should make an appointment with the Executive

committee, who after hearing all sides, conducting any necessary investigations, will make a recommendation for the employee's consideration.

4. If the problem remains unresolved, an employee or the Steering Committee may present the issue to the full Board for consideration. The board will have final decision-making authority for employment-related conflicts and is the only entity with the authority to terminate an employee.

5. Employees are not required or expected to tolerate any form of unlawful conduct such as sexual harassment.

In all instances, a thorough and fair investigation will take place, giving careful consideration to the rights and dignity of the people involved. The results of the investigation are confidential, except when requested in writing by the grieving employee or deemed relevant to a legal action.

Other Important Information

Personnel Records

The Council office shall maintain a personnel record for each employee, and will contain documentation regarding all aspects of an employee's tenure with the Council, such as employment application, change of status records, commendations, and performance letters or reviews. Personnel records may not be removed from the Council office. All personnel records are the property of the Council.

The personnel record is available for the employee's review. A copy of the personnel record will be provided to the employee if requested in writing. Employees may include letters of recognition, prior training, or additional records from outside sources in their personnel record.

The employee is responsible for notifying the Executive Director of changes in address, telephone number, and/or family status (births, marriage, divorce etc.) as payroll transactions may be affected by these changes.

Travel and Expenses

General Expense

Occasionally, employees may incur expenses on behalf of the Council. Employees will be reimbursed for actual work-related expenses incurred, as long as expenses are reasonable and the following procedures are followed:

- Employees must have their supervisor's approval before incurring each expense.
- Keep a receipt or other proof of payment for every expense.
- If the expense is less than $200, it may be reimbursed through Petty Cash funds.
- Expense reimbursement must be requested within 30 days of incurring an expense.

The supervisor is responsible for processing expense reimbursement requests. If the request is approved, reimbursement will be received no later than 60 days after the request.

Travel-Related Expense

Employees of the Council are eligible for job-related travel, lodging and per diem reimbursement. Council will pay reasonable travel expenses for official Council business, which may include:

- The cost of travel to and from the airport or bus station, including parking expenses and tolls
- The cost of airline or bus tickets
- The cost of an economy class rental car and gas, if necessary
- A mileage reimbursement
- The cost of lodging
- The cost of meals and other incidental expenses

The Council refers to the State of Oregon (OWEB) mileage/ per diem/ lodging reimbursement rates when processing mileage/travel expenses. See the OWEB Travel Reimbursement/allowance Guidelines for more information.

Employees must have their supervisor's approval prior to incurring travel expenses. Conference attendance must be approved by the Board of Directors prior to registration to ensure funding is available. Receipts must be provided for all expenses to the greatest extent possible.

The Council does not reimburse employees for their commute to and from the workplace.

Layoffs

It is Council's goal to provide stable employment to our employees. There may be occasions, however, when it may be necessary to initiate layoffs. In such cases, the Council will make every effort to give as much notice of an impending layoff as possible.

If an employee is selected for layoff, the final paycheck will be provided no later than the end of the next business day.

Employees recalled will retain their original date of hiring for purposes of benefit accrual, but will not actually accrue benefits while on layoff.

Termination Of Employment

Voluntary Resignation

All employees are "at will" and may resign at any time for any reason. Employees who voluntarily terminate employment with the Council are asked, when possible, to give the council at least 2 weeks' notice prior to the date of the employee's departure. Proper notice allows the Council sufficient time to prepare the final paycheck and secure a replacement.

Other Discharges

All employees are "at will employees" which means they may be terminated at any time with or without cause without subjecting the Council to a claim for breach of an employment contract. Decisions regarding termination of staff will be made by the Board of Directors. Discipline and/or discharge may result for many reasons including, but not limited to, inappropriate behavior and/or unsatisfactory performance, as defined below.

Inappropriate behavior is defined as including, but not limited to, misbehavior on the job, refusal to do work, wrongful use of or taking of organizational property, conviction of a felony or misdemeanor, and violation of any policies or practices of the Council.

Unsatisfactory performance means failure of an employee to meet performance standards, to complete tasks in a timely, competent way, or to maintain an adequate attendance record. Uncooperative behavior or negative attitudes that affect the work or morale of others may result in termination. At the discretion of the Executive Director, any staff member facing termination for unsatisfactory performance may be given the option to resign as described in the above section under "Voluntary Resignation."

Final Paychecks
Final Paychecks will be processed according to State of Oregon regulations.

Exit Interview
An exit interview may be requested by the Supervisor. The purpose of the exit interview is to ensure that all the required forms are completed and to collect any Council property in the employee's possession (e.g. keys, promotional materials).

Employment References
When the Council receives a request for information from another person or entity about an employee, either during employment or after the employee's employment has ended, it is the Council's policy to provide only the following:

a) dates of employment
b) last job title

In general, Council's policy is not to furnish any other information about work performance or employment, unless the employee specifically directs it to do so and signs a release prepared by the Council which authorizes it to do so. If an employee does not authorize the Council to furnish any additional information, it will advise the requesting person or entity that, absent a release, Council's policy is to provide only the information set out in a-b.

Conclusion
The continued success of the Council depends upon the commitment of all employees to support our standards and mission. The information in this Policy outlines best business practices to ensure success for the employee and for the Council.

This policy is intended to provide answers to many of the questions that may arise in an employment relationship. If an employee has any questions about the information that is outlined in the preceding pages, they are encouraged to discuss it with their supervisor.

Personnel Policy Acknowledgement Statement

I acknowledge that I have received and read the Council Employee Policy. I agree to conform to the rules, policies and procedures of the Council. I understand that these policies provide only a general reference and are not a full statement of Council's procedure nor are they a contract.

Dated: _____

Signature: _____

Print Name: _____

Complete and return to _____ by _____.

Financial Policies and Procedures

Original Adoption Date: 10/16/2016

Updates: In Progress March 2022 – Current

Updated Version Adopted on _____ by RESOLUTION_____

Signature of Chair:

Exceptions

Exceptions to these Financial Policies and Procedures policy may be made by the unanimous decision of the Executive Committee and the Executive Director. These exceptions must be reported in writing at the next Board meeting.

Changes to Financial Policy can only be made by resolution of the GYWC Board of Directors

Date Modified:

Resolution #:

Summary of Modifications:

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Overview

The Council is committed to protecting and using our assets for our nonprofit mission. Proper financial practices are very important in doing this, since proper practices help to prevent and detect errors and fraud. Strong financial practices also assure our donors that we use their gifts for the purposes for which they were intended.

The Board of Directors is responsible for the active oversight of the financial position of the Council. The Executive Director is responsible for developing and enacting operational procedures to implement the policies described in this document. The Board shall establish a standing Executive Committee to review and assist in the administration of these policies and procedures.

To the greatest extent possible, the Council's financial policies and procedures are in accord with generally accepted accounting principles (GAAP). The Board seeks to continuously improve our capacity to operate consistent with GAAP.

All financial records are to be kept in an electronic accounting system (such as QuickBooks), routinely backed-up on a secure, external system, available for review by the Board of Directors upon request, and shown to the Executive Committee in agreed-upon formats (e.g. monthly, quarterly, and annual reports).

General Practices

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Review of Risks: The Board of Directors will review these policies each year to consider whether financial risks have changed and whether additional controls may be implemented based on Council capacities and available resources. Such changes may include a change in laws or regulations that govern the financial operations of the Council, hiring of employees, or a major change in our programs. The Board will identify any new risks and adopt appropriate procedures to minimize those risks. The Board may consult with a professional to ensure that these policies properly address such risks.

Segregation of Roles: There are several fiscal "roles" in the Council, including: custody, authorization, execution, and monitoring. For example, the individual who has authority to sign checks acts in the custodial role. The person who approves payment of a bill is authorizing. The Board of Directors as a whole acts in the authorizing role when it approves the annual budget and makes a decision to purchase a major item like a copier. The person who prepares the checks for signature acts in the execution role, executing an action that has been authorized by the Board through the annual budget or by the individual responsible for approving payment of the bill. The individual who reconciles the bank statement acts in the monitoring role. The Board also acts in a monitoring role when it reviews the monthly financial reports to be sure that its plan (the budget) is being executed properly.

To the greatest extent possible, the Board of Directors seeks to separate the responsibilities for fiscal roles so that at least two fulfill these roles. **It is particularly important that the same person does not authorize, execute, and monitor any transaction.** At each step of handling funds, the Council shall ensure that more than one person verifies that the step is done correctly.

Request for Funds

The Watershed Council will bill for the OWEB Capacity Grants no less than quarterly.

Receipt of Funds

Risks: The Council faces the risk that funds that we receive may be stolen or lost or that someone may be falsely accused of stealing funds. We also face the risk that we may fail to record a restriction that a donor has placed on our use of funds.

Policy:

All funds, whether cash or check, which the Council receives will be deposited intact into the bank account, with no monies removed to make payments or for other purposes. All cash receipts should be deposited into the bank as soon as possible. This allows for a complete accounting and independent verification of what happens to our funds. Communications from donors that establish restrictions on the use of their contributions will be recorded. If we believe that a donor has restricted the use of funds in a conversation, we will follow up and secure written confirmation of the donor's intent.

Procedure:

1. Receipt of Checks:
   The Executive Director or a designee opens all mail addressed to the Council; makes a photocopy of all checks received without a voucher (as needed) and provides the photocopies to the Executive Committee. This allows the Committee to verify that all checks received are deposited.

   The Executive Director or a designee will endorse all checks by an endorsement stamp that provides that the check is "For Deposit Only" and will be paid to the order of the corporate bank and lists the organization's name and account number. This lessens the risk that a check may be stolen and cashed.

2. Receipt of Cash: Cash is easily stolen or miscounted and must be handled carefully:
   a. The person accepting the cash must provide a written log (i.e., entered into QB) when taking the cash.
   b. The log entry should state the person's name, the date, the amount of the cash, and the purpose of the payment.
   c. When a donation receipt is requested (or required by law), use a pre-numbered receipt book with an automatic duplicate copy.
   d. No pages may be removed from the log entry book or receipt book
   e. The log entry book, receipt book, and cash shall be placed in a secure location, such as a locked drawer or safe.
   f. The Executive Committee will compare the log entry book, receipt book, and the bank's list of cash deposits when making the Bank Reconciliation as described below or JUMP.

3. Receipt of Electronic Payments
   a. Invoices and receipts will be entered into QuickBooks.
   b. For PayPal, copies of the donations and e-transfers (as lump sum) are saved and entered into QuickBooks per individual donor. The entries for total sum is to match PayPal and bank statement.
   c. The Executive Committee will compare the log entry book, receipt book, and the bank's list of cash deposits when making the Bank Reconciliation as described below or JUMP

4. Depositing and Recording: The Executive Director or designee will deposit and record corporate funds as follows:
   a. Grant Funds / Contract
      i. An Estimate shall be created based on the approved grant budget dated for when the grant was officially awarded. This provides for user-friendly and efficient budget tracking of grant-funded projects.
      ii. Invoices shall be created for each grant reimbursement request or payment advancement.

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iii. When funds are received, a Receipt of Payment will be entered and funds recorded in the Undeposited Funds Account.
iv. When funds are ready for deposit, a Record of Deposit will be entered for the appropriate bank account and a deposit slip prepared.
v. When feasible, the funds will be deposited by an individual other than the person who initially received the funds, such as a member of the Executive Committee. Otherwise, the funds will be deposited by the Executive Director.
vi. An electronic and hard-copy record of the following will be filed chronologically:
    1. Invoice, with hand-written cross-reference notations at the top denoting the grant funder, project ID / restricted use, and date of request for funding disbursement.
    2. Detached Deposit Summary from the Deposit Slip
    3. A photocopy of the check and voucher
    4. Deposit Receipt from the corporate bank

b. Donations
i. Donation Receipts shall be created for each donor's contributions and funds recorded in the Undeposited Funds Account. If cash will be included, the Donation Receipt shall provide sufficient information for cross-reference with the hand-written pre-numbered receipt book.
ii. When funds are ready for deposit, a Record of Deposit will be entered for the appropriate bank account and a deposit slip prepared.
iii. When feasible, the funds will be deposited by an individual other than the person who initially received the funds, such as a member of the Executive Committee. Otherwise, the funds will be deposited by the Executive Director.
iv. An electronic and hard-copy record of the following will be filed chronologically:
    1. Donation Receipt, with hand-written cross-reference notations at the top denoting the donor, project ID / restricted use, and date of request for donation.
    2. Detached Deposit Summary from the Deposit Slip
    3. A photocopy of any check and voucher
    4. Deposit Receipt from the corporate bank.

5. Acknowledging Donations: While IRS rules require acknowledgment of donations of more than $75, our policy is to provide written acknowledgement for every gift we receive of more than $40.
    a. The Executive Director or designee shall respond to each donation with a letter (mailed or electronic, depending on contact information available/provided)) thanking the donor for their generosity.
    b. The thank you letter shall include the amount of the gift, state if the gift was cash (which includes a check) and provide the Council's EIN # for tax purposes.

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c. If the gift was donated property of some kind, the thank you letter will not place a value on the donated property.
d. If the donor received something of value in return, the letter must contain a description of the donation and a good faith estimate of the value of what was provided to the donor in return.
e. The thank you letter should state one of the following
    i. No goods or services were provided in exchange for your contribution, or
    ii. In exchange for your contribution, we provided you () whose fair market value is ($).

Disbursement of Funds

Payments by Check

Risks: The Council faces the risk that our funds will be spent on unauthorized items, that someone will steal our funds by taking blank checks or by writing checks to payees who are not our vendors, or that payments we make will be improperly recorded.

Policy:

Make all disbursements from the Council's funds by check, with the exceptions of petty cash and Board-approved electronic disbursements.

Procedure:

1. Opening Bank Accounts: Bank accounts may be opened only upon authorization by the Board of Directors.
    a. All bank accounts must be opened with the Council's employer identification number (EIN).
    b. The Board shall approve the authorized signers on the Council's bank accounts.
    c. An individual who reconciles the bank statement should not be an authorized signer, unless the Board approves an authorized signer.
    d. An individual who acts in a custodial and executing role should not be an authorized signer.
2. Custody of Checks: The Executive Director is the only person authorized to have access to unused check stock. The checks should be stored in a locked location.
3. Check Authorization: All invoices will be forwarded immediately to the Executive Committee for review and authorization to pay, except for recurring expenses in an approved budget (i.e., rent, utilities, etc.).
    a. The Executive Director and Executive Committee will review all invoices for accuracy, agreement with contracts, conformity to budget or Board authorization, and compliance with grant fund requirements.

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b. The Executive Director and Executive Committee will ensure that all conditions and specifications on a contract or order have been satisfactorily fulfilled.
c. The Executive Director will enter the invoice as a Bill in QuickBooks and assign appropriate billing/accounting information.
d. The Executive Committee will approve invoices, indicating they have reviewed the invoice and authorized a check.

4. Payments by Check: Upon approval of the invoice, the Executive Director is authorized to enter a Bill Payment and prepare checks for signature.

   If a check is voided, the check will have "VOID" written in large letters in black ink on the face and have the signature portion of the check torn out. Voided checks will be kept on file.

5. Duties of Check Signers: All checks will be signed by Board Members authorized by the Board. A check signer **must not** be the person who prepares the checks or who conducts the bookkeeping. Prior to signing the check, a check signer will do the following:
   a. Compare the check to the original invoice
   b. Ensure that the Executive Committee has provided documentation of authorization of the check
   c. Ensure that the amount of the check is not clearly unreasonable

6. Distribution and Recording of Check Payments:
   a. The Executive Director will distribute authorized, signed checks to their intended recipients.
   b. An electronic and hard-copy record of the following will be filed chronologically:
      i. Bill, with hand-written cross-reference notations at the top denoting the vendor, project ID / funding source, and date of invoice.
      ii. Original Invoice (or receipt) received from the vendor
      iii. Detached check voucher

7. Prohibited Practices: In no event will:
   a. Invoices be paid unless approved by the Executive Committee or are recurring expenses in an approved budget (rent, utilities, etc.)
   b. Blank checks be signed in advance
   c. A check signer sign a check made out to the signer
   d. Checks be made out to Cash, Bearer, etc., except for Petty Cash re-charge

8. Special Circumstances:
   a. The Executive Director may sign a check if none of the signatory Board members are available, and is authorized by the Executive Committee, and the check is essential to avoid fees or penalties, to meet regular payroll and associated bills (i.e., tax, retirement, health insurance payments), to re-issue

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a check that has already been approved, or to provide a check to a contractor for work already performed per the requirements of an approved contract and authorized by the Executive Committee.

Petty Cash Funds

Risks: Payments by cash are not as completely documented and are not as easily monitored as payments by check and thus subject the Council to a relatively greater likelihood of errors and fraud.

Policy:

The Petty Cash Fund should only be used when payment by check is impracticable. The Petty Cash balance should always be $200 in cash and receipts.

Procedure:

1. Administration of Petty Cash Fund: The Executive Director is responsible for the administration of the Petty Cash Fund.
    a. The Fund shall be funded by checks made out to Petty Cash that are authorized by the Executive Committee and signed by Board-designated signers. The Executive Director will record checks written to reimburse the Petty Cash Fund in QuickBooks as journal entries.
    b. The Executive Director will require receipts for all purchases and may ask those reimbursed to sign for money provided as reimbursement.
    c. The Executive Director will record all cash purchases in a journal and save the receipts.
    d. The Executive Director will also enter the journal transactions into QuickBooks as Bills following the same process used to record check payments.
    e. An electronic and hard-copy record of the following will be filed chronologically:
        i. Bill, with hand-written cross-reference notations at the top denoting the vendor, project ID / funding source, and date of invoice.
        ii. Original Invoice (or receipt) received from the vendor

Expense Reimbursement

Risks: The Council does not have the same level of control over expenses incurred on behalf of the corporation by those who pay with personal funds and seek reimbursement as it does for expenses paid directly by the Council. The corporation is not in as good a position to determine whether the goods or services purchased might have been obtained at a lower price elsewhere, whether there is personal benefit to the

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person seeking reimbursement and how the expenditure fits in with the rest of the organization's budget.

Policy:

In proper circumstances, Board Members, employees, and volunteers are entitled to be reimbursed for expenses related to the Council that they incurred on behalf of the organization. To receive reimbursement, the following requirements must be met:

- The expense must have been authorized in advance by the Board of Directors or by the Executive Committee or later approved by the Board of Directors.
- The expense must have been incurred for goods or services purchased for the Council.
- Travel expenses must be related to the Council. Reimbursement and allowances will be made at the current standard rates as established by the IRS or as established by a grant agreement.

Procedure:

To be reimbursed for expenses:

1. Documentation: Reasonable documentation must be provided showing the date, amount, and the goods or services purchased. Credit card receipts and store receipts that do not describe the purchase are not reasonable documentation. The receipt must describe the purchase.
2. Timely Submission: Documentation and a request for reimbursement must be submitted within 30 days from the date the expense was incurred.
3. Payment and Recording: Depending on the amount of the expenses, reimbursements will be issued and recorded in accordance with the policies/procedures stated above for Payments by Check or Petty Cash Funds.
4. Overpayment: If the Council overpays on a reimbursement, any excess reimbursement must be returned within 90 days from the date the expense was incurred.

Payroll

Risks: The Council faces the risk that our funds will be spent on unauthorized payroll expenses, that someone will steal our funds by taking blank checks or by writing checks to payees who are not our employees, or that payroll expenses we make will be improperly calculated or recorded.

Policy:

In addition to the controls established for payments by check, Payroll expenses will be subject to additional internal controls that reduce the risk of error and fraud, including separation of duties, requiring documentation and approval of timesheets, and requiring

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QuickBooks enhanced payroll subscription services. In addition, the same person must consistently process payroll and have minimal if any interruptions during the process.

Procedure:

1. Check Authorization: Timesheets will be submitted to the Executive Committee for review and authorization to pay.
    a. The Executive Director and Executive Committee will review all timesheets for accuracy, consistency with employee job descriptions and employment agreements, conformity to budget or Board authorization, and compliance with grant requirements.
    b. The Executive Committee will approve timesheets, indicating they have reviewed the timesheets and authorized a payroll check.
    c. When funds allow, use a payroll service.

2. Payroll Payments by Check: Upon approval of the timesheets, the Executive Director or Board Designee (Treasurer) is authorized to enter Payroll Checks, to prepare the final payroll summary, and prepare checks for signature.

3. Duties of Check Signers: All payroll checks will be signed by Board Members authorized by the Board. A check signer should not be the person who prepares the checks or who conducts the bookkeeping. Prior to signing the check, a check signer will do the following:
    a. Compare the payroll check to the timesheet invoice
    b. Review the final payroll summary
    c. Ensure that the Executive Committee has provided documentation of authorization of the payroll check
    d. Check to be sure that the amount of the payroll check is not clearly unreasonable

4. Distribution and Recording of Payroll Check Payments:
    a. The Executive Committee will distribute authorized, signed payroll checks to employees in person or through mail (if requested).
    b. An electronic and hard-copy record of the following will be filed chronologically:
        i. QuickBooks Payroll Summary, with hand-written cross-reference notations at the top denoting the employee, project ID / funding source, and date of payroll period.
        ii. Timesheet approved by Executive Committee
        iii. Check voucher

Purchasing

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Risks: The Council wants to ensure that all purchases on behalf of the corporation are authorized by the Board of Directors or by Board policies. Unauthorized purchases deplete the Council's resources and interfere with the Board's ability to govern properly.

Policy:

All purchases made on behalf of the Council must be made pursuant to the Board-approved budget or Board rules.

Procedure:

1. All purchases not specifically itemized in a Board-approved budget must be pre-approved by the Executive Committee
2. All purchases over $1,000 must be pre-approved by the Executive Committee whether or not the purchases/services are in an approved budget.

Tax Forms and Legal Liabilities

Risks: The Council wants to ensure that all taxes and liabilities are filed in accordance with applicable laws and regulations that govern the corporation. In addition, the Council faces the risk that tax forms and legal liabilities will be improperly calculated or recorded.

Policy:

All taxes and legal liabilities will be reviewed by the Executive Committee. The Council may consult a professional CPA to ensure proper reporting and accounting.

Procedure:

1. The Executive Director will work with the Executive Committee and/or Board-approved CPA to facilitate preparation of the organization's IRS 990 and OR CT-12 tax returns. Copies of these forms shall be provided to the Board of Directors for review prior to filing.
2. State and Federal quarterly payroll reports are prepared and filed by the Executive Director, who may elect to use the CPA or other payroll service provider. Copies of the quarterly payroll reports shall be provided to the Executive Committee for review prior to filing.
3. The Executive Director will immediately notify the Executive Committee of any tax problems or penalties, who will then notify the Board.

Budgeting, Monitoring, Reporting, & Audits

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Risks: Budgeting, monitoring, reporting, and conducting audits allow us to track our finances, uncover errors, and manage our resources effectively. Monitoring also assists us in identifying discrepancies between our accounting records and banking records that suggest theft or fraud, checks signed by unauthorized signers, and identify theft.

Policy:

The Executive Committee will work with the Executive Director to prepare/review Budgets and to ensure that regular financial statements are provided to the Board of Directors consistent with GAAP reporting standards. The Executive Committee will also monitor the Council's accounts regularly and will perform or cause to be performed written reconciliations of all bank or investment accounts which prove that the balances presented on our financial reports agree with the records of the bank.

Procedure:

1. Fiscal Period: The fiscal period for the organization shall be July 1 to June 30

2. Budgeting: Annual budgets are prepared by the Executive Committee or Board Designee and approved by the Board of Directors before the beginning of the budget fiscal year.

   Regular Reporting:
   - *a.* The Board of Directors shall receive a regular (no less than quarterly) accounting of the Council's financial status, preferably at each meeting. This is to include a Statement of Financial Position (Balance Sheet), Statement of Activities (Profit/Loss), Statement of Cash Flow or Cash Position, Budget vs Actual for Open Funds, and Statement of Cash Forecasting.
   - *b.* The board has created an online calendar that is populated with grant reporting requirements. The board has contracted an administrator who will monitor the calendar and provide a monthly report to the board on upcoming deadlines.
   - *c.* The Board will provide oversight for the Executive Director or Board Designee to prepare documents for board review and submittal to OWEB.
   - *d.* The Board may propose items for an ad hoc investigation. The Executive Director will work closely with the Board-designated reviewers as necessary to complete an adequate investigation of the item in question in a timely manner and report conclusions to the Board.

3. Bank Reconciliations:
   - *a.* The Executive Director or Board Designee shall provide the Executive Committee with a copy of all records of deposits, disbursements, and other financial transactions for reviewing monthly bank statements.
   - *b.* The Council will ensure that the Executive Director and Executive Committee have online access to the bank account and bank statements.

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c. The Executive Committee will work with the Executive Director or Board Designee to reconcile the bank statement each month. Reconciliations should be done within 7 days of receiving the statements, as follows:
    i. Review all checks for correct signatures, number of signatures, and protest to the bank any signature errors.
    ii. Review the checks in the bank record to ensure that:
        1. The name of the payee, the amount of the check, and the date of the check agree with the corporation's accounting records
        2. Whoever the check was made out to was the depositor of the check
    iii. Compare the bank deposit records with our accounting records to determine whether each deposit recorded in the accounting records agrees with the bank record.
    iv. Check whether the ending balance in the bank statement agrees with the general ledger cash account.
    v. Review the list of outstanding checks. All checks outstanding over 90 days will be thoroughly reviewed.
    vi. Review the list of deposits in accounting records not yet recorded by the bank.
    vii. Once reconciled the Executive Committee will sign a printed copy acknowledging that the reconciliation was performed.

4. Audits: The Council shall authorize and contract, as required and funded by any Grant Agreement, audits of the financial accounts and records requiring audit. The Executive Committee and Executive Director shall cooperate with and assist the Auditor(s) in conducting the audit. The Executive Committee will review and approve audits upon their completion. A current copy of Council audits will be available for review by the general public upon request.

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Project #1 - All 1
Project #2 Interim ED 2
Project #3 – Jordan, Interim ED, New ED 2
Project #4 – interim ED 2
Project #7 – Interim ED 3
Project #5 – Jordan, Interim ED, New ED 3
Project #9 - Jacob (Dependent on Jacob's time) / Interim ED, New ED 4
Project #10 – Jordan, Interim ED, New ED 4

Project #1 - All

OWEB Grant Number 218-039
Strengthening Organizational Health & Council Capacity
Project Category Stakeholder Engagement
Priority High

Governance – Tom, Board, Interim ED, New ED

- Host at least 6 publicized Monthly Public to maximize time for administrative housekeeping and balance public engagement
- Host at least 10 Executive Committee Meetings each per year to oversee. management and development of the GYWCs programming.
- In person meetings have been far more successful for outreach purposes and the GYCW is transitioning to Hybrid meeting for better access.
- Publicize meetings on Web site and thru Mail Chimp to encourage public engagement.
- Hold Annual Elections of Board Directors, Officers, and Committee members.
- Successfully retain existing Board members, and recruit at least 3 new Members to address gaps the Council needs.
- Conduct annual self-assessments of
    - policies and procedures
    - organizational and programmatic budgets
    - stakeholder representation
    - governing body diversity and skill sets
    - insurance and risk management
    - any additional safeguards identified by the board to ensure performance and meet workload obligations.

Outreach – Tom, Outreach Contractor, Interim ED

- E-Newsletters Quarterly
- Monthly Website Updates
- Annual community presentations, workshops, project tours, or similar outreach events

- 1-2 outreach booths at existing local events each year, such as farmers markets, town and harvest festivals, and Earth Day Celebrations.

Project #2 Interim ED

Riparian Habitat Restoration
OWEB Grants 11-18-009, 11-18-01
Project Category Restoration/Acquisition
Priority High

Cozine Creek: Post-planting Maintenance Phase

- Connect with Linfield regarding maintaining the Cozine Project amid changes in staffing.
- Outreach to our Cozine Creek working lands and urban stakeholders, including referrals, annual mailers, presentations, and tours.

Chehalem Valley: Maintenance Phase - Not Grant Funded

Salt Creek: Continue Maintenance phase and outreach to Salt Creek landowners and transition to Baker Creek for ag riparian.

Project #3 – Jordan, Interim ED, New ED

11-18-009; 1118-015
Oak & Prairie Habitat Restoration
Project Category l Restoration/Acquisition
Priority High

- Miller Woods project area has an active open small grant, will be planted in fall and then transitioned to maintenance.
- Cooke Property project area has an active open small grant, will be planted in fall and then transitioned to maintenance.

Project #4 – interim ED

Instream Habitat Restoration
Project Category Restoration/Acquisition
Priority High

- Goal of securing an assistance agreement with the BLM to streamline financial and in-kind match to support LWD project implementation and grant proposal development. Have a stakeholder meeting to review data and determine how to use data to identify new LWD.
- The Partnership will also work together to update the 2014 Fish Passage Barrier Database and Action Plan based on the results of the RBA Fish Snorkel Inventories.
- This will also include updating the Database / Plan to include the Upper South Yamhill sub-basin, which was excluded from the 2014 report due to lack of fish

passage data collected in that sub-basin, which will be partially remedied by the RBA inventory results.

Project #7 – Interim ED / Contractor John Runyon (Cascade Env. Group) for stakeholder meetings.

Project Title Rapid Bio Assessment of Fish Distributions & Abundances (RBA)
Project Category Monitoring
Priority High

- The results of the RBA Inventories will be used by our local partnership to inform planning and development of habitat restoration projects, as described in the "Instream Habitat Restoration" **project #4.**
- In addition, the data will be used to update the GYWCs 2014 Fish Passage Action Plan database and priorities, including the addition of the Upper South Yamhill sub-basin to the Action Plan, which was not included prior because of a lack of fish passage data.

Project #5 – Jordan, Interim ED, New ED

Priority Invasive Weed Control & Inventory
Project Category Restoration/Acquisition
Priority Medium

- Coordinate with the Yamhill SWCD to aid with Garlic Mustard and Knotweed (is this summer and need to do outreach, let SWCD know).
- Treatments where overlap exists with the GYWC's Cozine, Chehalem, and Palmer Creek focus areas. This includes continued landowner recruitment, surveying of weeds, coordination of volunteers for manual treatment and creating access paths, as well as coordinated contracted services for weed control as needed.
- The GYWC will continue to participate in quarterly meetings of the Yamhill County Roadside Vegetation Management Committee, which is spearheading this project. This also includes assisting with planning, recruitment, and implementation of roadside vegetation management demonstration projects.

Project #9 - Jacob / Interim ED, New ED

Project Title Volunteer-Led Fish Spawning Surveys
Project Category Monitoring
Priority Low

- 10+ stream miles monitored for spawning activity for Coho salmon (Oct- Dec) and ESA-listed winter steelhead trout (Feb - May), across four priority sub-basins.
- Continue to offer and coordinate student internship opportunities with local colleges, universities, and community colleges.

Project #10 – Jordan, Interim ED, New ED

Project Title Salt Creek Collaborative
Project Category Stakeholder Engagement
Priority Low

- The GYWC will continue to serve on the Collaborative's Steering Committee providing technical assistance about fisheries, water quality, and long-term planning in the Salt Creek sub-basin.
- We anticipate additional landowner outreach events and presentations will be coordinated to explore potential options for local management of water resources and natural concerns.
- The GYWC will also continue to implement the recruited Riparian Habitat Restoration project in the Salt Creek basin described in the "Riparian Habitat" project and conduct additional landowner outreach in the area to recruit another agricultural riparian project.

Match Funding Form

OWEB

Document the match funding shown on the budget page of your grant application.

OWEB accepts all non-OWEB funds as match. An applicant may NOT use another OWEB grant to match an OWEB grant; this includes ODA Weed Board projects because they are funded through OWEB grants. However, an applicant who benefits from a pass-through OWEB agreement with another state agency, by receiving either staff expertise or a grant from that state agency, may use those benefits as match for an OWEB grant. (Example: A grantee **MAY** use as match the effort provided by ODFW restoration biologists because OWEB funding for those positions is the result of a pass-through agreement).

At the time of application, match funding for OWEB funds requested does not have to be secured, but you must show that **at least 25% of match funding has been sought**. On this form, you do not necessarily need to show authorized signatures ("secured match"), but the more match that is secured, the stronger the application. Identify the type of match (cash or in-kind), the status of the match (secured or pending), and either a dollar amount or a dollar value (based on local market rates) of the in-kind contribution.

If you have questions about whether your proposed match is eligible or not, see Allowable Match document in OGMS https://apps.wrd.state.or.us/apps/oweb/fiscal/nologin.aspx under Technical Assistance application or contact your local OWEB regional program representative (contact information available in the instructions to this application).

Project Name: GYWC Council Support 2022-23

Applicant: Greater Yamhill Watershed Council

Match Funding Source	Type	Status*	Dollar Value	Match Funding Source Signature/Date*
GYWC Board of Directors	in-kind	secured	$4,320	6/12/22
	(select)	(select)		
	(select)	(select)		
	(select)	(select)		
	(select)	(select)		
	(select)	(select)		
	(select)	(select)		

*** IMPORTANT:** If you selected "secured" in the Status column for any match funding source, you must provide either the signature of an authorized representative of the match source in the Match Funding Source Signature/Date column, or attach a letter of support from the match funding source that specifically mentions the dollar amount you show in the Dollar Value column.

Greater Yamhill Watershed Council
Board Meeting Agenda
January 10, 2023 @ 6 PM

Zoom Meeting : https://us06web.zoom.us/j/84344475264 Meeting ID: 843 4447 5264

Attendance

Directors: Jordan Anderson, Matt Young, Jacob Peterson
Partners:Keith Nasman, Tom Wilson,
Guests: Kenneth Law Davis, Lou Savage, Grace Stone, Eric Tomczak, Anna Rankin (Pudding River), Kurt Berning (Pudding River), Eric Ellingson, Susan Aldrich-Markham, Virginia Wood - Friendsview Retirement,

Reports

Accountant

Please find attached the Financials Workbook for December.

This month there is a new tab of everyone GYWC paid above the 1099's threshold and who may be reportable. Other than Gordon (who I believe is probably known to at least one of the board), I contacted everyone on the list today and cleared some, got one EIN, and left messages for all the rest. I will e-file all the 1099's and the W-2 for Luke before the end of the month.

Jordan, I'd love to start work the first week in February on billing out Q4 amounts to grants. Let me know what your ability is.

Admin

Zoom Phone Set up with new number. Messages recorded. Must use extensions.

Action

Approve November Minutes
Approved December Minutes

Jordan moves, Matt 2nd, 3-0.

Vote to extend Rhythm current contract for year

Matt moved, Jordan Second, 3-0

Updates

Treasurer's Report (December bank statement is in DropBox now).

Appoint New Board Members

Eric Ellingson application

Board voted Passed 3-0

Ken Law-Davis application

Board Voted Passed 4-0

Elect Executive Committee (Chair/Vice/Treasurer)
Explanation of Roles and Responsibilities

Jordan and Jacob passed 4-0.

Jordan Chair
Jacob Vice Chair
Matt Secretary

Passed 5-0

Multiple payments from OWEB came through and multiple checks went out.

Check on tax reporting in relation to Statewide Transit Tax. We got mail saying that we did not file for the period ending on Sept. 30 2022.

OWEB Small Grant Final Reports are due for Miller Woods & Fromherz project 1/18. I can ask Kathy Leopold about extensions or we might be able to pull this off?

OWEB Glenbrook Culvert grant also needs a final report due by mid-february.

OWEB Capacity Grant - I want to make sure that when we hire a new ED we will be able to bill at a rate that covers their salary $60-70k per year. In the application we stated we would bill at $35/hr, which wouldn't cover hourly rate + taxes + insurance stipend... Should we reach out to Liz to see if we need an official budget adjustment or other form to fill out to make that change?

Payroll set-up for new ED. Should we consider switching to quickbooks online? Or possibly use a service like Gusto Payroll.

I think we need to vote on a new board chair as I was appointed to fulfill the remainder of Zach's term (from the bylaws):

> ***Term and Election***
>
> *The term of office for officers shall be one year. Officers may serve up to two consecutive one-year terms. Officers shall be elected by a majority vote of the Board of Directors present at the annual meeting.*
>
> ***Vacancy***

An officer may resign at any time by delivering notice to the Board. An officer may be removed with or without cause by a two-thirds vote of the Directors in office.

Any vacancy in an officer position shall be filled by an election of the Board. Such person shall hold such office until the next annual meeting at which time regular elections of officers shall occur.

Schedule interviews for new ED between Jan. 16 and 22.

Directors
Partner
ED Hiring
New Director Outreach
OWEB / Projects
Fish Survey

Kurt Berning described his experience as the new ED and was looking forward to work collaboratively.

GYWC native plant sale is on and running. Over 40,000 plants.
There is a local working group meeting with NRCW on February 15th.

Jacob would like to do EDNA on Salt Creek.and Lou said it would be great to have a visit.

Greater Yamhill Watershed Council

Officers and Board Members

Role	Name	Email	Phone
Board President and Treasurer	Jordan Anderson	Jordan@gywc.org	971-409-5798
Vice Chair	Jacob Peterson	Morgancreekstep@gmail.com	503-835-5000
Board Secretary	Matt Young	Matt.Young@mcminnvilleoregon.gov	503-434-7313
Board Member	Ken Law-Davis	Ken@gywc.org	520-268-4846
Board Member	James Riedman	James.riedman@gmail.com	503-857-6140
Board Member	Eric Ellingson	Eric@gywc.org	503-434-5153

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item H

Council Capacity Applications

224-053 – Umatilla Basin WC

Board Meeting July 25-26, 2023

Application Name: Council Capacity 2023-2025

Application Number: 224-053-22854

By: Umatilla Basin WS Foundation

Offering Type: Council Capacity Grants

Application Type: Council Capacity

OWEB Region: Mid Columbia
County: Umatilla
Coordinates: 45.675151723894,-118.785901515467

Applicant:
Michael T Ward
PO Box 1551
Pendleton OR 97801-0440
541.276.2190
umatillawatershed@gmail.com

Payee:
Michael T Ward
PO Box 1551
Pendleton OR 97801
541.276.2190
umatillawatershed@gmail.com

Project Manager:
Michael Ward
27 SE 3rd Street
Pendleton OR 97801
541-276-2190
umatillawatershed@gmail.com

Budget Summary:
OWEB Amount Requested: $131,465
Total Project Amount: $185,460

Administrative Information

Abstract

Provide an abstract statement for the project. Include the following information: 1) Identify the project location; 2) Briefly state the project need; 3) Describe the proposed work; 4) Identify project partners.

The UBWC operates within the Umatilla Basin located entirely in Umatilla County with main offices located in Pendleton where the majority of the watersheds rivers join. The Umatilla Watershed has historically had 6 anadromous species: Steelhead (oncorhynschus my kiss gairdneri), Spring and Fall Chinook salmon (Oncorhynchus tshawytscha), Coho salmon (Oncorhysnchus kisutch), and Pacific Lamprey (Lampetra trident ate).. It has has Bull trout (Salvelinus confluent) and Mountain whitefish (Prosopium williamsoni) in it's upper headwaters. Both Bull trout and summer Steelhead are currently listed as threatened undertake Endangered Species act. Three populations of salmon were extirpated from the Umatilla Watershed in the early 20th century, but recently have been reintroduced. The Umatilla Basin has a substantial amount of agricultural practices on, and around, the lands that surround the Umatilla River The Umatilla Basin supports a large agricultural community. Historically the Umatilla River has been used as a main source of irrigation and continues to be today. Diversion Dams were installed in the river to back up river water for irrigation purposes. Due to the fact that some diversion dams were placed in the river over fifty years ago and have not been updated since, these dams are now out dated. These dams were also installed in the river prior to any regulations on fish passage, therefore creating fish passage issues This grant project will fund the Umatilla Basin Watershed Councils activities towards improving fish passage and habitat through large scale restoration projects along the Umatilla and its tributaries. The council uses existing data while development new information to prioritize strategic restoration actions that will provide that most beneficial uplift to the entire system. As a local non-profit we like to see ourselves as a group of local individuals who come together to help educate, restore, and monitor Oregons natural resources.

Location Information

Current Location:

What is the ownership of the project site(s)?

❑*Public land (any lands owned by the Federal government, the State of Oregon, a city, county, district or municipal or public corporation in Oregon)*

❑*Tribal lands (any lands owned/managed by a Tribal government)*

❑*Private (land owned by non-governmental entities)*

✓*Not applicable to this project*

❑*This grant will take place in more than one county.*

Permits

Other than the land-use form, do you need a permit, license or other regulatory approval of any of the proposed project activities?

❍ Yes
● No

Racial and Ethnic Impact Statement

Racial and Ethnic Impact Statement

❍ The proposed grant project policies or programs could have a disproportionate or unique POSITIVE impact on the following minority persons. (indicate all that apply)

❍ The proposed grant project policies or programs could have a disproportionate or unique NEGATIVE impact on the following minority persons. (indicate all that apply)

● The proposed grant project policies or programs WILL HAVE NO disproportionate or unique impact on minority persons.

Insurance Information

If applicable, select all the activities that are part of your project - These require a risk assessment tool unless otherwise noted (check all that apply).

❑*Working with hazardous materials (not including materials used in the normal operation of equipment such as hydraulic fluid)*

❑*Earth moving work around the footprint of a drinking water well*

❑*Removal or alteration of structures that hold back water on land or instream including dams, levees, dikes, tidegates and other water control devices (this does not include temporary diversion dams used solely to divert water for irrigation)*

❑*Applicant's staff or volunteers are working with kids related to this project (DAS Risk assessment tool not required, additional insurance is required)*

❑*Applicant's staff are applying herbicides or pesticides (DAS Risk assessment tool not required, additional insurance is required)*

✓*Insurance not applicable to this project*

Additional Information

❑ *This project affects Sage-Grouse.*

Problem Statement

Does the watershed council have a fiscal sponsor?

❍ Yes
● No

Is the council a membership organization?

❍ Yes
● No

The council is a group of councils operating collectively.

❍ Yes
● No

Is the applicant a group of councils operating independently?

❍ Yes
● No

For Details Upload the council's most recent bylaws.

Councils are required to review their council's bylaws once every three years, provide the date of the last time the council's governing body reviewed the council's bylaws?

01/01/2022

Councils are required to review their policies and procedures once every three years, provide the date of the last time the council's governing body reviewed the council's policies and procedures?

01/01/2022

For Details Upload the council's most recent policies and procedures.

For Details Upload the council's local government designation

For Details Upload the council's policies and procedures.

Date of the council's 2021-2023 self assessment?

02/10/2023

Date of last council officer elections.

09/19/2022

For Details Upload the minutes from the board meeting documenting the results of the officer election.

Does the council have written position descriptions for council board officers?

● Yes
❍ No

Does the council have written roles and responsibilities for council governing body members?

● Yes
❍ No

How many times did/will the council governing body meet between July 1, 2021-June 30, 2023?
12

How many times will the council governing body meet between July 1,-June 30, of the upcoming biennium for which you are seeking funding?
5

Describe how the council advertises its general council meetings.
The UBWC advertises meetings through a number of different methods, such as; social media, email chains, the EO, word of mouth, direct phone calls, and the tribal radio station. Staff and board members also announce meeting opportunities and invitations at other meeting functions and/or partnering NGO meetings.

Do council governing body meetings have agendas, sign-in sheets, and minutes?
● Yes
❍ No

Describe how your board membership includes a diverse range of geographic areas and community interests in the watershed.
In 2023-2025 the UBWC is working towards gathering new board member support following a loss of some members during the covid-19 era. To guide this search, the UBWC is focused on gaining a wide-range of diverse backgrounds which include; basin wide geographic representation, diverse ethnic and cultural backgrounds, encouragement towards younger members, a wide range of educational and work experienced backgrounds but primarily individuals who have a strong passion for their communities and watershed restoration.

Describe any board membership and recruitment challenges and actions being taken to address those challenges.
In the past, the UBWC had strong pipeline for board representation from individuals who recently retired from the local Pendleton DEQ office. In recent years, the UBWC has worked towards expanding board representation to include individuals from a wider age and work background(s). The UBWC identified and understands the importance and value of having board representation from all ten communities that we represent and we will continue to look for support based on those geographic locations. The Covid-19 era brought on many challenges for gathering new board members due to the temporary loss of in-public UBWC events but also do to the many other NGO's that our board members are involved in and use as recruitment grounds. The UBWC hopes to gain new tribal representation, water users, educational institute (student and/or staff), and private sector board members during the 2023-2025 biennium.

Are projects of the council, including those identified in the work plan, identified in a council action plan or strategic plan?
● Yes
❍ No

Provide the name and date of the most recent action plan or strategic plan.
-Birch Creek Assessment & Action Plan 2017
-UBWC Bi-Annual Statement of Work (2023-2025)

Is the work of the council specifically designed to benefit salmon or steelhead?
● Yes
❍ No

✓Middle Columbia River - Steelhead
✓Middle Columbia River spring-run - Chinook Salmon

Describe how the resulting council capacity grant will benefit salmon or steelhead or their habitat?

The Umatilla Basin Watershed Council depends on the capacity support from OWEB to staff the organizations full time director. This position is tasked with building partner support, identifying project opportunities, gathering landowner support, and then leveraging these partnerships towards funding opportunities that result in on the ground restoration focused on supporting habitat restoration for Oregon's salmonid populations. The UBWC's main project focus has been on large scale river restoration actions such as; floodplain reconnection, barrier removals, facilitation partners with landowner supported water and land acquisitions, as well as supporting on the ground river cleanups, native re-veg opportunities, and invasive species removal opportunities. The UBWC staff also serves on other local and state boards as well as serving on the OWEB Region-6 Small Grant Review Team, the Umatilla Restoration Tech Team, the Stewards of the Umatilla River Environment. The UBWC also serves as the supply station for other NGO's who want to adopt a river through the SOLVE Program. All of these programs missions support and benefit salmon and steelhead habitat restoration.

Regional Assessments or Recovery Plans
Middle Columbia River Steelhead Distinct Population Segment ESA Recovery Plan
Northwest Power and Conservation Council Umatilla Subbasin Plan
Northwest Power and Conservation Council Umatilla Subbasin Plan
Oregon Conservation Strategy
The Oregon Plan for Salmon and Watersheds
Conservation and Recovery Plan for Oregon Steelhead Populations in the Middle Columbia River Steelhead Distinct Population Segment

Council Capacity Metrics:
https://www.oregon.gov/oweb/Forms/OC-Application-Watershed-Council-Metrics-23-25.xlsx

Input the total acres encompassed by this watershed.
1632625

Input the Federal Recovery plan applicable to your watershed council.
-Conservation & Recovery Plan for Oregon Steelhead Populations in the Middle Columbia River Steelhead Distinct Population Segment (2010)
-Mid-Columbia River Conservation & Recovery Plan

Input the description of the plan implemented that outlines the need for this activity
Middle Columbia River Steelhead Distinct Population Segment ESA Recovery Plan:
"Limiting Factors and Threats for the DPS at a general level, based on information from the ICTRT and the four management unit plans, the major factors limiting the viability of Middle Columbia steelhead populations are degraded tributary habitat, impaired fish passage in the mainstem Columbia River and tributaries, hatchery-related effects, and predation/competition/disease." (Middle Columbia River Steelhead Distinct Population Segment ESA Recovery Plan, 2008)

https://www.salmonrecovery.gov/Files/RecoveryPlans/mid-c-plan.pdf

The Umatilla Subbasin plan states, "passage obstructions are likely to cause immediate mortality, they are considered imminent threats and should be addressed wherever they occur. The obstructions listed in Table 45, Section 3.5.1.2 need to be addressed as high priority."

According to the Northwest Power and Conservation Council Umatilla/Willow sub basin plan; “Steelhead"

Proposed Solution

Community Engagement

Briefly describe the council's stakeholder engagement accomplishments from the 2021-2023 biennium.

During the 2021-2023 biennium the UBWC focused stakeholder engagement through our social media presence due to the impacts that Covid lockdowns had on day-to-day business. We were able to utilize social media algorithms to fund focused targeted ads based on individuals geographic locations, age, and ethnic backgrounds, which helped the Council reach a broader audience than we traditional had with meetings and/or public events. The UBWC continued to carry out our annual x2 river cleanup events, but we drew back on providing food and other components that put the community at a greater risk due to covid. We were able to bring in new components by partnering with the Umatilla National Forest who helped the UBWC incorporate a native tree give-away which helped our river cleanup event continue to grow even during the face of covid lockdowns. By late 2022 and into 2023 as covid regulations ended, the UBWC continued to re-establish our public events as well as our presence at the local farmers markets.

Briefly describe the council's stakeholder engagement challenges from the 2021-2023 biennium

The main challenges the UBWC faced with stakeholder/community engagement efforts during the 2021-2023 biennium was funding focused on community engagement efforts without a specific "engagement grant" as well as the regulation/changes that Covid brought on to our communities. The UBWC has always heavily relied on community volunteers for engagement efforts and the majority of those volunteers were of the retirement age - this was the population group that pulled back the most during the covid era. With funding challenges, the UBWC like many other Council's rely on the Council Capacity funding to cover many areas; office overhead, admin work, director salary, project management time, initial time invested into scoping and getting new projects off the ground. All of these areas are essential and help bring in new funding, so it is often difficult to shift a large amount of resources towards engagement because these efforts payoff on a longer timeline but often do not directly increase

Briefly describe the council's stakeholder engagement plans for the 2023-2025 biennium.

For the 2023-2025 biennium the UBWC plans to continue growing new partners with the x2 annual river cleanup event. Over the past few years we've grown the event to include; Umatilla National Forest, Umatilla County Public Works, Parks & Rec, Solve, S.U.R.E., and Amazon Corporate office. We are going to continue with the native tree give-away as well as booths at locals farmers market(s). We have plans to continue developing our new website in-progress as well as continued and increased efforts with our social media outreach campaigns. During the 2023 grant cycle, the UBWC has plans to apply for an OWEB Stakeholder Engagement grant which will focus on targeted engagement with landowners who are positioned on high-ranking prioritized passage barriers. The UBWC and partners have also launched the Umatilla Restoration Tech Team with the UBWC as the facilitator tasked at bringing partners together quarterly to discuss and share support for restoration projects in the basin.

Describe the council's efforts to engage with local tribes present in the council's geography.

The UBWC continues to closely collaborate with the Confederated Tribes of the Umatilla Indian Reservation on any and all projects that the Council carries out. Currently, the UBWC is working on designing and/or implementing five priority fish passage projects with CTUIR as well as a large scale basin wide assessment and action plan which focuses on the mainstem of the Umatilla from the headwaters of the Columbia River all the way up into the reservation at the headwaters of the North and South Fork(s) of the Umatilla River. CTUIR administers BPA funding in our basin so they are a major funding support in fisheries restoration efforts, with a DNR staff of over 140 individuals. This staff supports the UBWC with project funding, cultural 106 project clearance, and many other crucial aspects of restoration actions. The UBWC uses CTUIR documents to guide our work, mainly the River Vision and First Foods plans developed by CTUIR leadership.

Describe the council's efforts to engage with non-traditional partners.

The UBWC continues to develop new partners that have not traditionally played a major role in restoration efforts

in the basin. Such as Public Works and most notably our newest partnership with Amazon Corporate and Walmart Corporate who have become one of our main sponsors and staffing volunteers at our annual river cleanups. We also continue to work towards developing closer relationships with water users, the county, other NGO's, local educational institutes, other watersheds. The UBWC takes the position that everyone in the basin benefits from watershed restoration and that we all have a stake in protecting and enhancing our natural resources for future generations.

Restoration

Provide a brief summary of the council's 2021-2023 restoration accomplishments.

During the 2021-2023 biennium that UBWC completed the 100% design drawings for two high-priority ODFW statewide barrier(s) located on in the West Birch Creek sub-watershed. These barriers were identified in the Birch Creek Assessment & Action Plan as well as the Oregon ODFW Statewide Barrier Priority List. These barriers known as the Stanley Creek Culvert & the Hascall Diversion Dam are slated for project implementation during the 2023 in-stream work-window. The UBWC secured restoration funding for these projects through the OWEB Restoration grant funding, combined with ODFW, BPA/CTUIR funds as well as support from Umatilla County. After removing these barriers in 2023, the UBWC will have tackled five statewide fish passage barrier removals since 2017 and we are on track to secure funding for three more priority barriers, which are located in the Patawa Creek system - marking the UBWC's first restoration project located entirely on tribal lands. During this cycle, partners in the basin also began the process of securing funds and scoping work for the Umatilla Mainstem Assessment, which will wrap up by the end of the 2025 cycle. The UBWC also worked with local agencies, NGO's, and tribal governments to secure funding from the National Park Service to begin a trail connector throughout the Umatilla Basin, which will run along the Umatilla River - the UBWC is tasked with invasive species removal and re-veg of native species along the new trail corridor.

Briefly describe the council's restoration challenges from the 2021-2023 biennium

Like other work during the 2021-2023 cycle, the UBWC faced challenges brought on by the covid pandemic. These challenges were financial as well as an impact on the ability to work face-to-face with partners, landowners, and other agencies in order to gather support for on the ground restoration. Another major challenge during this period was the recruitment of new board members as well as leadership struggles between past board members. The board was split on focusing on projects or going back towards rebuilding a monitoring program. Another challenge during the period was the attention brought on to the high-nitrate levels in the lower Umatilla River area. This challenge is still in the process of being addressed through outreach, well testing, and what future action items will be required to address these issues. A number of partners in the basin are working towards this issue. Flooding in recent years has also brought on a lot of challenges will landowners.

Provide a brief summary of the council's restoration plans for 2023-2025.

During the 2023-2025 cycle, the UBWC will address the high-priority barriers on Stanley Creek and West Birch Creek while also securing design funding for three priority barriers located on the Patawa Creek system. Partners will also be collaborating on the Umatilla Mainstem Assessment & Action Plan, while also continuing to implement projects/high restoration actions items identified in the Birch Creek Assessment & Action Plan. The UBWC has began work on our first OWEB Stakeholder Engagement grant which will focus on an expansion to Morrow County as well as making contact with a set list of over 20 landowners who are situated on and/or near passage barriers listed in the ODFW Statewide Priority Barrier list.

Planning

Describe how the council uses planning documents to identify and implement on-the-ground watershed restoration and stakeholder engagement projects.

The UBWC uses a number of state, tribal, and federal documents to support the prioritization of our statement of work. Past and on-going assessments & action plans completed by the UBWC and partners are also utilized in project priorities. The four main documents that the UBWC works from are; the Oregon Department of Fish & Wildlife's culvert & barrier priority list, the Birch Creek Assessment & Action Plan, the Umatilla Main-stem Assessment (in-progress), as well as CTUIR's First Foods & Umatilla River Vision. The UBWC re-works the organizations statement of work every two years and then uses these priorities to make contact with landowners at which point the priorities are refocused based on landowner, partner, and funding support opportunities. Although the UBWC uses these documents to heavily guide our work, we also use input from local stakeholders and the overall board member guidance to help build our statement of work.

Are projects of the council identified in a council action plan or strategic plan?

● Yes
❍ No

Provide the name and date of the most recent action plan or strategic plan.

The Birch Creek Assessment & Action Plan
First Foods
UBWC 10-year Plan 2014
UBWC Statement of Work

Wrap-Up

List the watershed council staff (or contractors), their roles, affiliation (staff or contractor), length of time in position (use the Qualifications space), and contact information.

Role	Name	Affiliation	Qualifications	Email	Phone
Director	Michael Ward	UBWC	UBWC Coordinator	umatillawatershed@gmail.com	(541) 276-2190
Accounting	RBH Group	Contractor	Accounting Firm	adam.mack@rbhgroup.com	(973) 273-1600
President	Douglas Bennett	UBWC Board of Directors	NGO and Natural Resource Experience	doug@bennettgardens.com	(541) 571-6659
Treasurer	Dr. Sarah Anderson	UBWC Board of Directors & Executive Committtee	Phd in GIS, NGO & private sector experience in natural resources	sarah@anderson-geographics.com	(541) 656-6612

For Details Upload a list, including contact information, for the current board officers.

Budget

Item	Unit Type	Unit Number	Unit Cost	OWEB Funds	External Cash	External In-Kind	Total Costs
Salaries, Wages and Benefits							
UBWC Staffing	Hours	3505.28	$33.00	$100,675	$15,000	$0	$115,675
UBWC Board Committee Support	Match Lump Sum	1	$2,560.00	$0	$0	$2,560	$2,560
Project Management	Hours	100	$50.00	$0	$5,000	$0	$5,000
			Category Sub-total	**$100,675**	$20,000	$2,560	$123,235
Contracted Services							
Accounting Firm (Taxes, Payroll, Bookkeeping Support)	Hours	60	$50.00	$3,000	$0	$0	$3,000
Stewards of the Umatilla River Environment	Hours	500	$50.00	$0	$0	$25,000	$25,000
CTUIR Capacity Support for Fiscal & Project Management Contracting	Hours	50	$100.00	$0	$5,000	$0	$5,000
			Category Sub-total	**$3,000**	$5,000	$25,000	$33,000
Travel and Training							
			$0	$0	$0	$0	$0
			Category Sub-total	**$0**	$0	$0	$0
Materials and Supplies							
			$0	$0	$0	$0	$0
			Category Sub-total	**$0**	$0	$0	$0
Equipment							
2024-2025 Computer Upgrade(s)	Each	2	$1,412.50	$2,825	$0	$0	$2,825
			Category Sub-total	**$2,825**	$0	$0	$2,825
Other							
UBWC Office Rent & Bills	Months	24	$1,100.00	$24,965	$1,435	$0	$26,400
			Category Sub-total	**$24,965**	$1,435	$0	$26,400

* = OWEB funds excluded from indirect.

			Modified Total Direct Cost Amounts	**$131,465**	$26,435	$27,560	$185,460
Indirect Costs							
	0%			$0	$0		$0
Post Grant							
			Total	**$131,465**	$26,435	$27,560	$185,460

Provide context and justification for how your budget was developed. Explain how project costs and/or rates were determined.

This projects budget was developed using comparative rates with other Natural Resource NGO's and watershed council data provide by the Network of Oregon Watershed Councils partnered research with Oregon State University. Cost of living in Eastern Oregon as well as recent increases in cost of living/doing day-to-day business were also factored into the development of this budget.

Does the budget identify a contingency amount for specific line item(s) within the Contracted Services and/or Material and Supplies budget category?

❍Yes

●No

Funding and Match

Fund Sources and Amounts

Organization Type	Name	Source Note	Contribution Type	Amount	Description	Status
Tribe	Confederated Tribes of the Umatilla Indian Reservation	Capacity support for Project Scoping & Management/Fiscal Flow-through Project Funding	Cash	$5,000	Project Capacity Support & Fiscal Admin (Project Specific)	Pending
County	Umatilla County	County Commissioners Support	Cash	$20,000	Umatilla County Commissioner Support	Secured
Private organization	Amazon	Annual River Cleanup Donation	Cash	$500	Annual S.U.R.E River Cleanup Donation	Secured
Private organization	Walmart	Annual River Cleanup	Cash	$500	Annual S.U.R.E River Cleanup	Secured
Non-Governmental Organization	Umatilla Basin Watershed Foundation	Executive Committee & Board Volunteer Time	In-Kind - Labor	$2,560	Exec. Committee & Board Volunteer Time	Secured
Non-Governmental Organization	Umatilla Basin Watershed Foundation	Executive Committee & Board Volunteer Time	Cash	$435	Meeting Supply Donation(s)	Secured
Non-Governmental Organization	Stewards of the Umatilla River Environment	Annual River Cleanup	In-Kind - Volunteers	$25,000	Average Volunteer hours per-year (S.U.R.E)	Secured
Fund Source Cash Total	**$26,435**	**Fund Source In-Kind Total**	**$27,560**			

Match

Contribution Source-Type: Description	Amount
Confederated Tribes of the Umatilla Indian Reservation -Cash: Project Capacity Support & Fiscal Admin (Project Specific)	$0
Umatilla County-Cash: Umatilla County Commissioner Support	$20,000
Amazon-Cash: Annual S.U.R.E River Cleanup Donation	$0
Walmart-Cash: Annual S.U.R.E River Cleanup	$0
Umatilla Basin Watershed Foundation-In-Kind - Labor: Exec. Committee & Board Volunteer Time	$2,560
Umatilla Basin Watershed Foundation-Cash: Meeting Supply Donation(s)	$435
Stewards of the Umatilla River Environment -In-Kind - Volunteers: Average Volunteer hours per-year (S.U.R.E)	$25,000
Match Total	**$47,995**

Do match funding sources have any restrictions on how funds are used, timelines or other limitations that would impact the portion of the project proposed for OWEB funding?

❍ Yes

● No

Do you need state OWEB dollars (not Federal) to match the requirements of any other federal funding you will be using to complete this project?

❍ Yes
● No

Does the non-OWEB cash funding include Pacific Coast Salmon Recovery Funds?

❍ Yes
● No

Uploads

Bylaws: UBWC_Non_Profit_Bylaws.pdf **- Bylaws**

Policies and Procedures: UBWC Policies and Procedures.pdf **- Policies & Procedures**

Local Recognition: 22.pdf **- 2022 Commissioners Meeting**

Risk Assessment: OC-Org-Assess-Tool_2023_UBWC.pdf **- Self Assessment**

Secured Match Forms: Match-Form 2023-2025_Council Capacity_UBWC.pdf **- Secured Match Form**

Policies and Procedures: 2nd & 3rd Quarter UBWC_Board Meeting_2022.pdf **- Board Elections (2019 & 2022)**

Policies and Procedures: UBWC_Agenda(s)_2019-2020.pdf **- Officer Elections (2019 & 2022)**

Strategic Plan: UBWC Action Plan Final Draft.pdf **- UBWC 10-Year Action/Strategic Plan**

Policies and Procedures: Anti-Discrimination Policy.pdf **- Anti-Discrimination Policy**

Permit Page

No Permits have been identified for this application.

BYLAWS
OF
UMATILLA BASIN WATERSHED FOUNDATION

The name of the organization is Umatilla Basin Watershed Foundation. The organization is organized in accordance with the Oregon Nonprofit Corporation Act, as amended. The organization has not been formed for the making of any profit, or personal financial gain. The assets and income of the organization shall not be distributable to, or benefit the trustees, directors, or officers or other individuals. The assets and income shall only be used to promote corporate purposes as described below. Nothing contained herein, however, shall be deemed to prohibit the payment of reasonable compensation to employees and independent contractors for services provided for the benefit of the organization. This organization shall not carry on any other activities not permitted to be carried on by an organization exempt from federal income tax. The organization shall not endorse, contribute to, work for, or otherwise support (or oppose) a candidate for public office. The purpose of the organization is the following:

Watershed Enhancement and Restoration

The organization is organized exclusively for purposes pursuant to section 501(c)(3) of the Internal Revenue Code.

ARTICLE I
MEETINGS

Section 1. Annual Meeting. An annual meeting shall be held once each calendar year for the purpose of electing directors and for the transaction of such other business as may properly come before the meeting. The annual meeting shall be held at the time and place designated by the Board of Directors from time to time.

Section 2. Special Meetings. Special meetings maybe be requested by the President or the Board of Directors. A special meeting of members is not required to be held at a geographic location if the meeting is held by means of the internet of other electronic communications technology in a manner pursuant to which the members have the opportunity to read or hear the proceedings substantially concurrent with the occurrence of the proceedings, note on matters submitted to the members, pose questions, and make comments.

Section 3. Notice. Written notice of all meetings shall be provided under this section or as otherwise required by law. The Notice shall state the place, date, and hour of meeting, and if for a special meeting, the purpose of the meeting. Such notice shall be mailed to all directors of record at the address shown on the corporate books, at least 10 days prior to the meeting. Such notice

shall be deemed effective when deposited in ordinary U.S. mail, properly addressed, with postage prepaid.

Section 4. Place of Meeting. Meetings shall be held at the organization's principal place of business unless otherwise stated in the notice. Unless the articles of incorporation or bylaws provide otherwise, the board of directors may permit any or all directors to participate in a regular or special meeting by, or conduct the meeting through the use of, any means of communication by which all directors participating may simultaneously hear each other during this meeting. A director participating in a meeting by this means shall be deemed to be present in person at the meeting.

Section 5. Quorum. A majority of the directors shall constitute at quorum at a meeting. In the absence of a quorum, a majority of the directors may adjourn the meeting to another time without further notice. If a quorum is represented at an adjourned meeting, any business may be transacted that might have been transacted at the meeting as originally scheduled. The directors present at a meeting represented by a quorum may continue to transact business until adjournment, even if the withdrawal of some directors results in representation of less than a quorum.

Section 6. Informal Action. Any action required to be taken, or which may be taken, at a meeting, may be taken without a meeting and without prior notice if a consent in writing, setting forth the action so taken, is signed by the directors with respect to the subject matter of the vote.

ARTICLE II
DIRECTORS

Section 1. Number of Directors. The organization shall be managed by a Board of Directors consisting of 11 director(s).

Section 2. Election and Term of Office. The directors shall be elected at the annual meeting. Each director shall serve a term of 3 year(s), or until a successor has been elected and qualified.

Section 3. Quorum. A majority of directors shall constitute a quorum.

Section 4. Adverse Interest. In the determination of a quorum of the directors, or in voting, the disclosed adverse interest of a director shall not disqualify the director or invalidate his or her vote.

Section 5. Regular Meeting. The Board of Directors shall meet immediately after the election for the purpose of electing its new officers, appointing new committee chairpersons and for transacting such other business as may be deemed appropriate. The Board of Directors may provide, by resolution, for additional regular meetings without notice other than the notice provided by the resolution.

Section 6. Special Meeting. Special meetings may be requested by the President, Vice-President, Secretary, or any two directors by providing five days' written notice by ordinary United States mail, effective when mailed. Minutes of the meeting shall be sent to the Board of

Directors within two weeks after the meeting. A special meeting of members is not required to be held at a geographic location if the meeting is held by means of the internet of other electronic communications technology in a manner pursuant to which the members have the opportunity to read or hear the proceedings substantially concurrent with the occurrence of the proceedings, note on matters submitted to the members, pose questions, and make comments.

Section 7. Procedures. The vote of a majority of the directors present at a properly called meeting at which a quorum is present shall be the act of the Board of Directors, unless the vote of a greater number is required by law or by these by-laws for a particular resolution. A director of the organization who is present at a meeting of the Board of Directors at which action on any corporate matter is taken shall be presumed to have assented to the action taken unless their dissent shall be entered in the minutes of the meeting. The Board shall keep written minutes of its proceedings in its permanent records.

Section 8. Informal Action. Any action required to be taken at a meeting of directors, or any action which may be taken at a meeting of directors or of a committee of directors, may be taken without a meeting if a consent in writing setting forth the action so taken, is signed by all of the directors or all of the members of the committee of directors, as the case may be.

Section 9. Removal / Vacancies. A director shall be subject to removal, with or without cause, at a meeting called for that purpose. Any vacancy that occurs on the Board of Directors, whether by death, resignation, removal or any other cause, may be filled by the remaining directors. A director elected to fill a vacancy shall serve the remaining term of his or her predecessor, or until a successor has been elected and qualified.

Section 10. Committees. To the extent permitted by law, the Board of Directors may appoint from its members a committee or committees, temporary or permanent, and designate the duties, powers and authorities of such committees.

ARTICLE III
OFFICERS

Section 1. Number of Officers. The officers of the organization shall be a President, one or more Vice-Presidents (as determined by the Board of Directors), a Treasurer, and a Secretary. Two or more offices may be held by one person. The President may not serve concurrently as a Vice President.

President/Chairman. The President shall be the chief executive officer and shall preside at all meetings of the Board of Directors and its Executive Committee, if such a committee is created by the Board.

Vice President. The Vice President shall perform the duties of the President in the absence of the President and shall assist that office in the discharge of its leadership duties.

Secretary. The Secretary shall give notice of all meetings of the Board of Directors and Executive Committee, shall keep an accurate list of the directors, and shall have the authority to certify any records, or copies of records, as the official records of the organization. The Secretary shall maintain the minutes of the Board of Directors' meetings and all committee meetings.

Treasurer/CFO. The Treasurer shall be responsible for conducting the financial affairs of the organization as directed and authorized by the Board of Directors and Executive Committee, if any, and shall make reports of corporate finances as required, but no less often than at each meeting of the Board of Directors and Executive Committee.

Section 2. Election and Term of Office. The officers shall be elected annually by the Board of Directors at the first meeting of the Board of Directors, immediately following the annual meeting. Each officer shall serve a one year term or until a successor has been elected and qualified.

Section 3. Removal or Vacancy. The Board of Directors shall have the power to remove an officer or agent of the organization. Any vacancy that occurs for any reason may be filled by the Board of Directors.

ARTICLE IV
CORPORATE SEAL, EXECUTION OF INSTRUMENTS

The organization shall not have a corporate seal. All instruments that are executed on behalf of the organization which are acknowledged and which affect an interest in real estate shall be executed by the President or any Vice-President and the Secretary or Treasurer. All other instruments executed by the organization, including a release of mortgage or lien, may be executed by the President or any Vice-President. Notwithstanding the preceding provisions of this section, any written instrument may be executed by any officer(s) or agent(s) that are specifically designated by resolution of the Board of Directors.

ARTICLE V
AMENDMENT TO BYLAWS

The bylaws may be amended, altered, or repealed by the Board of Directors by a two-thirds majority of a quorum vote at any regular or special meeting. The text of the proposed change shall be distributed to all board members at least ten (10) days before the meeting.

ARTICLE VI
INDEMNIFICATION

Any director or officer who is involved in litigation by reason of his or her position as a director or officer of this organization shall be indemnified and held harmless by the organization to the fullest extent authorized by law as it now exists or may subsequently be amended (but, in the case of any such amendment, only to the extent that such amendment permits the organization to provide broader indemnification rights).

ARTICLE VII
DISSOLUTION

The organization may be dissolved only with authorization of its Board of Directors given at a special meeting called for that purpose, and with the subsequent approval by no less than two-thirds (2/3) vote of the members. In the event of the dissolution of the organization, the assets shall be applied and distributed as follows:

All liabilities and obligations shall be paid, satisfied and discharged, or adequate provision shall be made therefore. Assets not held upon a condition requiring return, transfer, or conveyance to any other organization or individual shall be distributed, transferred, or conveyed, in trust or otherwise, to charitable and educational organization, organized under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, of a similar or like nature to this organization, as determined by the Board of Directors.

Certification

Douglas Bennett, President of Umatilla Basin Watershed Foundation, and Ken Thompson, Secretary of Umatilla Basin Watershed Foundation certify that the foregoing is a true and correct copy of the bylaws of the above-named organization, duly adopted by the initial Board of Directors on March 01, 2021.

I certify that the foregoing is a true and correct copy of the bylaws of the above-named organization, duly adopted by the initial Board of Directors on March 01, 2021.

By: Doug Bennett _____ Date: 03/01/2020 _____

Douglas Bennett, President

Policies and Procedures of the Umatilla Basin Watershed Council

Table of Contents:

- Location and Contact Information
- Purpose of the manual
- Fiscal management policies and procedures
    a. Purchases and disbursement procedures
    b. Procedures for receipt and deposits for checks and cash
    c. Accounts receivable procedures
    d. Billing, request for payments, fiscal reporting for funders
    e. Payroll procedures
    f. Daily cash balance
    g. General ledger
    h. Financial statements
    i. General ledger
    j. Financial statements
    k. Budget preparation and revision procedures
    l. Procurement policy and procedures
- Organizational policies and procedures
- Meetings and Council activities
- Non-Litigation policy
- Diverse geographic and community representation
- Open and inclusive organization

Location and Contact Information

Umatilla Basin Watershed COuncil
920 SW Frazer Ave, Suite 210
PO Box 1551
Pendleton, OR 97801

Phone: (541) 276-2190
Fax: (541) 276-2275

www.umatillawatershed.org

Purpose of this manual

This manual, as a supplement to the Bylaws of the Umatilla Basin Watershed Council, provides a reference to the policies and procedures adopted by the Council to guide operational affairs. This manual is intended to adapt through revision to reflect changes or clarifications in the policy

and/ or procedure. Subsequent adoptions, which occur as needed, shall replace old versions of this manual in entirety.

The Umatilla Basin Watershed Foundation, a 501 (c)(3) status non-profit organization, is the non-profit extension of the Umatilla Basin Watershed Council with the sole purpose of supporting Council work through fiscal sponsorship. Further clarification of the relationship between the Umatilla Basin Watershed Council and Umatilla Basin Watershed Foundation is defined in the Fiscal Sponsor Relationship and Fiscal Policy of the Umatilla Basin Watershed Council statement supplementing revised UBWC Bylaws.

Fiscal Management Policies and Procedures

General Fiscal Management Policies

Generally Approved Accounting Principles (GAAP): The Umatilla Basin Watershed Council and Foundation follow GAAP for non-profit organizations with the exceptiong of cash basis accountin principles (see Fiscal Management Policies and Procedures C.)

Federal Funding Standards: Pertaining to federal funding soures, UBWC incorporates Office of Management and Budget (OMB) Circular A-122.

Cash Basis of Accounting: Cash received by the Umatilla Basin Watershed Council or Foundation is recorded as income, while cash paid out for goods and services (including wages) is recorded as expenses. This practice suits the operation of UBWC, while not conforming with GAAP, such practice is currently utilized by similar organizations.

Deferred Revenue: In the event of advanced payment of restricted funds, UBWC may record this revenue as being deferred or temporarily restricted revenue prior to accumulated expenses including services.

Equipment and Property: Equipment and property of a value equal or greater than $1,000 is recorded and inventoried as an asset. The inventory shall track an item description (including serial number), date of acquisition, value or cost at acquisition, appraised or depreciated value on annual schedule, and location. Equipment with a useful life of one year or less, or a cost of $1,000 or less, shall be recorded as a supply or consumable expense.

BOARD OF COMMISSIONERS' MEETING
March 16, 2022
Umatilla County Courthouse, Room 130
9:00 a.m.

Join by Google Meets
https://meet.google.com/rzb-awbe-tna?authuser=0&hs=122

Join by phone
+1 414-909-7170
PIN: 438 416 539#

A. Call to order.

B. Pledge of Allegiance

C. Chair introductory comments, reminder that meeting is public.

D. Awards/Recognitions/Correspondence

E. Approval of minutes of previous meeting - January 28, 2022; March 2, 2022

F. Additions to Agenda

G. Public Input and Recognition of Visitors

H. Business items:

1. Umatilla Basin Watershed Council Presentation
2. Audit Presentation
3. Greater Hermiston Enterprise Zone Expansion
4. Umatilla River Trail Concept Plan - Public Hearing
5. Blue Mountain Region Trail Plan - Public Hearing
6. Sheriff Request for Vehicle Leases
7. Community Corrections Position
8. BOPTA Summary of Actions
9. AOC Federal Land Management Subcommittee
10. Board Meeting Schedule
11. Supplemental Budgets - Public Hearing
12. Budget Transfers
13. Executive Session - Employment/Real Property - ORS 192.660(2)(a,b,e,h)

I. Adjournment

"**The mission of Umatilla County is to serve the citizens of Umatilla County efficiently and effectively.**"

Oregon Watershed Enhancement Board (OWEB)
Organizational Capacity Assessment Tool

Introduction

The Oregon Watershed Enhancement Board is a state agency that provides grants to help Oregonians take care of local streams, rivers, wetlands and natural areas. Community members and landowners use scientific criteria to decide jointly what needs to be done to conserve and improve rivers and natural habitat in the places where they live. The agency is led by a 17-member citizen board drawn from the public at large, tribes, and federal and state natural resource agency boards and commissions.

Council Capacity grants help support the operating capacity of effective watershed councils. OWEB's merit review process encourages continuous improvement of watershed councils' organizational management, operating structure, and the planning and implementation of on-the-ground watershed, restoration and community engagement activities. The merit review process also ensures watershed councils are working toward strengthening their role in watersheds through activities focusing on organizational resilience, leadership, collaboration, and that the watershed council represents a balance of interested and affected persons within the watershed.

Purpose

All watershed councils that receive a Council Capacity grant are required to complete a biennial self-assessment in order to assess the organization and identify areas for improvement. This self-assessment tool was developed to help watershed councils identify strengths and challenges of their organizations, and establish capacity building goals. The assessment should be used as a learning tool for the organization. Self-assessment is critical to improvement and overall mission success. Beginning in 2017-2019 watershed councils will be required to submit the Summary Chart created at the end of the assessment. The individual answers will remain with the council. OWEB does not intend to use this tool as a formal evaluation of where individual councils land within each category. Instead, the agency encourages each council to take the evaluation process seriously, using this tool to set organizational capacity goals, and creating plans to achieve those goals over time. OWEB will use the summary information from all councils to help the agency identify common strengths and challenges across the state.

Instructions for Completing the Assessment: Please note that you will want to save a copy of this tool to your computer's desktop in order to be able to have that information available for future reference.

This workbook contains several worksheets -- one worksheet for each organizational capacity dimension and additional worksheets containing instructions. There is also a section to record general information about your organization and individuals completing the Assessment, a summary table, and a summary chart. The various worksheet tabs are located at the bottom of the screen; click on the tabs to view each worksheet.

You will be rating your organization on a variety of capacity elements:

1. Leadership: the capacity of organizational leaders to inspire, prioritize, make decisions, provide direction, and innovate.
2. Adaptive: the capacity of a nonprofit organization to monitor, assess, and respond to internal and external changes.
3. Management: the capacity of a nonprofit organization to ensure the effective and efficient use of organizational resources.
4. Operational:[3] the capacity of a nonprofit organization to implement key organizational and programmatic functions.

Who Should Complete the Assessment?

The assessment is intended for self-guided use by each watershed council. We recommend that your organization's executive director/coordinator and board chair be first to complete the assessment *individually*. Many organizations will find it useful to have other staff, board members, and/or constituents complete the assessment as well. Upon completing the assessment on an individual basis, participants should gather to discuss their ratings and reach consensus on one set of ratings that best represents the organization. Completing the assessment using a team approach improves validity and reduces individual biases. This process also serves as a catalyst for key stakeholders to engage in a rich dialogue about the organization.

Step 1: Rate Your Organization

For each capacity element (located on worksheets 1-4), identify the description that best describes your organization's status or level of performance. *You are likely to discover that, for some elements, your organization's capacity will not fully match any of the descriptions. In these instances, simply identify the description that is most suitable for your organization.* It is better to underestimate rather than overestimate your organization's capacity in a particular area. With an accurate portrait of the capacity of your organization, you will be better equipped to identify the most critical areas for improvement.

To input your selections, click on the yellow cell to the right of each capacity element. Then select the down arrow and choose from the list that appears. If a capacity element does not apply to your organization (e.g. some organizations do not have revenue generation activities or the intention to create them), select "N/A". BE SURE to provide a capacity rating (or select "N/A") for each capacity element. FAILING TO DO SO will adversely impact your summary scores. A section for comments about your ratings is included at the bottom of each capacity dimension worksheet. Use this section to include any clarifying information about the selections you made.

Step 2: Select Priority Capacity Elements

On the Summary Table worksheet, select the *four* capacity elements that your organization is most interested in strengthening over the next one to two years. Mark an "X" in the "priority" column next to the four capacity elements you chose as top priorities for your organization.

For Additional Information

If you have questions about any part of this assessment, please contact :

Courtney Shaff

Capacity Coordinator

courtney.shaff@oregon.gov

503-986-0046

http://www.oregon.gov/oweb/Pages/index.aspx

The OWEB Organizational Capacity Assessment Tool is a derivative product of the Capacity Assessment Grid created by McKinsey and Company for Venture Philanthropy Partners (www.vppartners.org), and published in Effective Capacity Building in Nonprofit Organizations (2001).

Please proceed to the General Information worksheet to begin.

General Information

NOTE: It is necessary to complete this section ONLY IF you are compiling responses from multiple stakeholders . Single person responses can proceed directly to Worksheet 1. Keep for your records. DO NOT return to OWEB.

Organization	Umatilla Basin Watershed Council
Name of person compiling final assessment ratings	Doug Bennett
Title of person compiling final assessment ratings	Doug Bennett
Phone number of person compiling final assessment ratings	541-276-2190
Email of person compiling final assessment ratings	doug@bennettgardens.com
Date final assessment ratings completed	3/1/23

Others Involved with the Capacity Assessment Process (involve board and staff)	
Name	Sarah Anderson
Title	Treasurer
Name	Lowell Taylor
Title	Board Member
Name	Carlisle Harrison
Title	Board Member
Name	Michael Ward
Title	Staff
Name	
Title	

Please proceed to Worksheet 1.

1. Leadership Capacity

Capacity Elements		Level 1	Level 2	Level 3	Level 4	Input capacity rating in this column
1.01	Mission	No written mission or limited expression of the organization's reason for existence (lacks clarity or specificity); either held by very few in organization or rarely referenced.	Some expression of organization's reason for existence that reflects its values and purpose, but may lack clarity; held by some within organization and occasionally referenced.	Clear expression of organization's reason for existence which reflects its values and purpose; held by many within organization and often referenced.	Clear expression of organization's reason for existence which describes an enduring reality that reflects its values and purpose; universally held within organization and frequently referenced.	Level Four
1.02	Strategic Plan	Strategic Plan is either non-existent, unclear, or incoherent (largely a set of scattered initiatives); Strategic Plan has no influence over day-to-day behavior.	Strategic Plan exists but is either not clearly linked to mission, vision, and overarching goals, or lacks coherence, or is not easily actionable; Strategic Plan is not broadly known and has limited influence over day-to-day behavior.	Strategic Plan has been developed and is linked to mission and vision but is not fully ready to be acted upon; strategy is mostly known, and day-to-day behavior is partly driven by it.	Clear, coherent Strategic Plan that is both actionable and linked to overall mission, vision, and overarching goals; strategy is universally known and consistently helps drive day-to-day behavior at all levels of the organization.	Level Four
1.03	Board Composition & Commitment	Membership with limited diversity in fields of practice and expertise; drawn from a narrow spectrum of constituencies relevant to the organization; little or no relevant experience; commitment to organization's success, vision, and mission is unclear; meetings are sporadic and/or attendance is sometimes poor	Some diversity in fields of practice and expertise; membership represents a few different constituencies relevant to organization; some evidence of commitment to organization's success, vision, and mission; regular meetings are well-planned and attendance is adequate; occasional subcommittee meetings	Good diversity in fields of practice and expertise; membership represents most constituencies relevant to the organization; solid evidence of commitment to organization's success, vision, and mission; regular, purposeful meetings are well-planned and attendance is consistently good; regular subcommittee meetings	Membership with broad variety in fields of practice and expertise, and drawn from the full spectrum of constituencies relevant to the organization; includes functional and issue area expertise; proven track record of learning about the organization and addressing its issues; consistently demonstrated commitment to the organization's success, mission, and vision; regular, purposeful meetings are well-planned and attendance is consistently strong; regular meetings of focused subcommittees	Level Three

1.04	Board Governance	Roles of board are unclear; board rarely scrutinizes budgets, holds ED/Coordinator and other board members accountable, or operates according to formal procedures.	Roles of board are clear; board functions according to by-laws, reviews budgets, and occasionally sets organizational direction and targets, but does not have a system to review ED/Coordinator or board performance, monitor potential conflicts of interest, scrutinize audits, or review IRS and state filings.	Roles of board are clear and function well; board reviews budgets, audits, IRS and state filings; size of board set for maximum effectiveness with formal recruiting process; board co-defines performance targets and actively encourages ED/ Coordinator and full board to meet targets; annual review of ED/ Coordinator's performance, but board not prepared to hire or fire ED/Coordinator.	Roles of board are clear and the board works well together; board fully understands and fulfills fiduciary duties; size of board set for maximum effectiveness with rigorous recruiting process; board actively defines performance targets and holds ED/Coordinator and full board fully accountable; board empowered and prepared to hire or fire ED/ Coordinator if necessary; board periodically evaluated.	Level Four
1.05	Board Involvement & Support	Provide little direction, support, and accountability to ED/ Coordinator; not fully informed about material and other major organizational matters; largely “feel-good” support.	Provide occasional direction, support, and accountability to ED/ Coordinator; generally informed about all material matters in a timely manner; input and responses often solicited.	Provide direction, support, and accountability to ED/ Coordinator; fully informed about all material matters; input and responses actively sought and valued; full participant in major decisions.	Provide strong direction, support, and accountability to ED/ Coordinator and engaged as a strategic resource; communication between board and ED/Coordinator reflects mutual respect, appreciation for roles and responsibilities, shared commitment, and valuing of collective wisdom.	Level Three
1.06	ED/ Coordinator Organizational Leadership / Effectiveness	Some difficulty building trust and rapport with others; shares little of own experiences as developmental/coaching tool; inconsistent attention to organizational vision.	Responsive to opportunities from others to work together; generally confident in others’ ability to be successful; shares own experience and expertise; visible commitment to organization and its vision.	Actively and easily builds rapport and trust with others; effectively encourages others to succeed; shares relevant experience and expertise, yet gives others freedom to work their own way, try out new ideas, and grow; shows constant commitment to organization and its vision; inspires others around vision.	Constantly establishing successful, win-win relationships with others, both within and outside the organization; delivers consistent, positive, and reinforcing messages to motivate people; finds or creates special opportunities to promote people’s development; lives the organization’s vision; compellingly articulates path to achieving vision that enables others to see where they are going.	Level Four
1.07	ED/ Coordinator Financial Judgment	Difficulty considering financial implications of decisions; limited understanding of basic financial concepts, unclear policies.	Draws appropriate conclusions after studying the facts; understands basic financial concepts; gives some consideration to financial impact of major decisions and able to explain financial information to the board.	Uses sound financial judgment; solid understanding of financial concepts; regularly considers financial impact of all decisions.	Exceptional financial judgment; deep understanding of complex financial concepts; has keen, almost innate sense for financial impact of all decisions.	Level Four

Comments:	Type comments here.

Please proceed to Worksheet 2.

2. Adaptive Capacity

	Capacity Elements	Level 1	Level 2	Level 3	Level 4	Input capacity rating in this column
2.01	Strategic Planning	Limited ability and tendency to develop strategic plan, either internally or via external assistance; if strategic plan exists, it is rarely or never referenced.	Some ability and tendency to develop high-level strategic plan either internally or via external assistance; strategic plan sometimes directs management decisions.	Ability and tendency to develop and refine concrete, realistic strategic plan; some internal expertise in strategic planning or access to relevant external assistance; strategic planning carried out on a near-regular basis; strategic plan used to guide management decisions.	Ability to develop and refine concrete, realistic, and detailed strategic plan; critical mass of internal expertise in strategic planning, or efficient use of external, sustainable, highly qualified resources; strategic planning exercise carried out regularly; strategic plan used extensively to guide management decisions.	Level Four
2.02	Organizational Evaluation / Performance Measurement	Very limited measurement and tracking of organizational performance and progress; all or most evaluation based on anecdotal evidence; no external performance comparisons made; organization collects some data on program activities and outputs (e.g., number of community events held, grants received), but has no measurement of outcomes (e.g., the number of trees that survive to free to grow).	Performance partially measured and progress partially tracked; some external performance comparisons made; organization regularly collects solid data on program activities and outputs, and has begun to measure outcomes.	Performance measured and progress tracked in multiple ways on a regular basis; effective internal and external benchmarking occurs but may be confined to select areas; multiple indicators used in evaluation, with primary focus on outcomes; some attention paid to cultural appropriateness of evaluation process/ methods; social impact measured, but longitudinal (long-term) or independent nature of evaluation is missing.	Comprehensive, integrated system (e.g., balanced scorecard) used for measuring organization's performance and progress on continual basis; internal and external benchmarking part of the organizational culture and used by staff in target-setting and daily operations; clear and meaningful outcomes-based performance indicators exist in all areas; careful attention paid to cultural appropriateness of evaluation process/ methods; measurement of social impact based on longitudinal studies with	Level Four
2.03	Program Relevance & Integration	Core programs and services vaguely defined and lack clear alignment with mission and overarching goals; programs seem scattered and largely unrelated to each other.	Most core programs and services well-defined and solidly linked with mission and overarching goals; program offerings may be somewhat scattered and not fully integrated into clear strategy.	Core programs and services well-defined and aligned with mission and overarching goals; program offerings fit together well as part of clear strategy.	All programs and services well-defined and fully aligned with mission, overarching goals, and constituency; program offerings are clearly linked to one another and to overall strategy; synergies across programs are captured.	Level Four

2.04	Assessment of External Environment & Community Needs	Planning not supported by systematically collected information about community needs or external opportunities and threats; organization has very few connections to community members and opinion leaders that can provide information about evolving community needs.	Information about community needs or external opportunities and threats used to inform planning, although collection is haphazard; organization has a few connections to community members and opinion leaders that can provide information about evolving community needs.	Information about community needs and external opportunities and threats used to inform planning; organization has many connections to community members and opinion leaders with whom they communicate about evolving community needs.	Clear, established systems regularly used to assess community needs and external opportunities and threats; information systematically collected and used to support and improve planning efforts; organization has numerous connections to community members and opinion leaders with whom they regularly communicate about evolving community needs.	Level Four
2.05	Partnerships & Alliances	No partnerships or alliances with other for-profit, nonprofit, public sector entities or state or federal agencies.	Early stages of building relationships and collaborating with other for-profit, nonprofit, public sector entities or state or federal agencies; if relations do exist, some may be precarious or not fully “win-win”.	Some key relationships with a few types of relevant entities have been built and leveraged; action around common goals is generally short term.	Strong, high-impact, relationships with variety of relevant entities have been built, leveraged, and maintained; relationships anchored in stable, long-term, mutually beneficial collaboration.	Level Three
2.06	Community Presence & Standing	Community presence either not recognized or organization is generally not regarded as a player in the community; few members of the community (e.g., other nonprofit leaders, government representatives, and academics) engage with organization; community leaders rarely call on organization for its input on issues important to organization.	Community presence somewhat recognized, and organization is generally regarded as a player in the community; some members of the community actively engage with organization; community leaders occasionally call on organization for its input on issues important to organization.	Known within the community beyond just constituents/members; perceived as open and responsive to community needs; members of larger community (including some highly respected members) actively engage with organization; community leaders often call on organization for its input on issues important to organization.	Widely known within the community, and perceived as actively engaged with and extremely responsive to it; many members of the larger community (including many highly respected members) actively engage with organization; community leaders always call on organization for its input on issues important to organization.	Level Three

2.07	Community Involvement	Community involvement is limited.	Community offered a range of roles in the organization; volunteer positions of leadership open to constituents, but rarely filled by them; constituent work mostly task-oriented; constituents trained or supported in their work on an ad hoc basis.	One or two systems in place to actively recruit and involve community; constituents take on a variety of roles in organization, including volunteer positions of leadership; training provided to constituents in some of the skill areas needed to affect change.	Variety of systems in place to actively recruit and involve community's; community members take on a wide variety of roles in organization, including volunteer positions of leadership; training is provided to community in all of the skill areas needed to affect change.	Level Three
Comments:	Type comments here.					

Please proceed to Worksheet 3.

3. Management Capacity

	Capacity Elements	Level 1	Level 2	Level 3	Level 4	Input capacity rating in this column
3.01	Staff	Interest and abilities limited to present job; little ability to solve problems as they arise.	Good capabilities, including some ability to solve problems as they arise; many are interested in work beyond their current jobs and in the success of organization's mission.	Bring a broad range of skills; most are highly capable and committed to mission and strategy; eager to learn and develop, and assume increased responsibility.	Bring broad range of skills; most are highly capable in multiple roles and committed to both mission, strategy, and continuous learning; eager and able to take on special projects and collaborate; frequent source of ideas and momentum for improvement and innovation.	Level Four
3.02	Dependence of organizations' leaders & Staff on ED/ Coordinator	Very strong dependence on ED/Coordinator; organization would cease to exist without his/her presence.	High dependence on ED/ Coordinator; organization would continue to exist without his/her presence, but likely in a very different form.	Limited dependence on ED/Coordinator; organization would continue in similar way without his/her presence but areas such as fundraising or operations would likely suffer during transition period.	Reliance but not dependence on ED/ Coordinator; smooth transition to new leader could be expected; fundraising and operations likely to continue without major interruption.	Level Four
3.03	Funding Model	Strong dependence on a few funders, largely of same type (e.g., government, foundations, corporations, or individuals).	Multiple types of funding sources with only a few funders in each type, or many funders within only one or two types of funders.	Solid base of funders from many types of funding sources; some ability to guard against market instabilities (e.g., operating reserves, small endowment) and/or has developed some sustainable revenue-generating activity.	Highly diversified funding streams; organization insulated from potential market instabilities (e.g., fully developed endowment) and/or has developed sustainable revenue-generating activities; other nonprofits try to imitate organization's fundraising activities and strategies.	Level Three

3.04	Financial Planning / Budgeting	No or very limited financial planning; general budget developed; performance-to-budget loosely or not monitored.	Limited financial plans, updated on an ad hoc basis; budget utilized as operational tool; used to guide/assess financial activities; some attempt to isolate divisional (program or geographical) budgets within central budget; performance-to-budget monitored periodically.	Solid financial plans, updated regularly; budget integrated into most operations; reflects organizational needs; solid effort made to isolate divisional (program or geographical) budgets within central budget; performance-to-budget monitored regularly.	Very solid financial plans, continuously updated; budget integrated into all operations; used as strategic tool; budget developed from process that incorporates and reflects organizational needs and objectives; well-understood divisional (program or geographical) budgets within overall central budget; performance-to-budget closely and regularly monitored.	Level Four
3.05	Financial Operations Management	Gifts and grants deposited; bills paid, though sometimes late; supporting documents sometimes misplaced.	Financial activities consistently documented and reported; appropriate checks and balances exist; activities tracked to budget.	Established internal controls govern all financial operations; activities fully tracked, supported, and reported; some attention paid to cash flow management.	Robust systems and controls govern all financial operations and their integration with budgeting, decision making, and organizational goals; cash flow actively managed.	Level Three
3.06	Standard Operating Procedures (SOPs)	No formal SOPs to capture and document internal knowledge.	SOPs exist in a few areas but are either not user-friendly or not comprehensive enough to have an impact; SOPS known by only a few people, or only occasionally used and rarely updated.	Well-designed, user-friendly SOPs in some areas; not fully comprehensive; SOPs are known by many people within organization and often used and occasionally updated.	Well-designed, user-friendly, comprehensive SOPs to capture, document, and disseminate knowledge internally in all relevant areas; all staff are aware of SOPs and trained in their use; SOPs used and updated frequently.	Level Four
3.07	Volunteer Management	No active recruitment of volunteers (only passive recruitment such as people who walk in the door); no defined roles for volunteers to fill; few systems in place to train and support volunteers.	Some active recruitment of volunteers; volunteer roles involve a range of time commitments and skill levels; volunteer work is mostly task-oriented; basic training to volunteers provided, generally on an ad hoc basis.	Active recruitment of volunteers on a regular basis; wide range of volunteer roles available; written job descriptions for most common volunteer positions; some systems exist to track and manage volunteers; volunteer orientations and trainings take place periodically, with attention paid to both skills and cultural competency; staff trained on how to manage volunteers.	Volunteer recruitment systems successfully fill organizational needs with appropriate volunteers; wide range of volunteer roles available, including positions of leadership; written job descriptions for all volunteer positions; robust volunteer management systems in place; volunteer orientations and trainings take place on a regular basis, with attention paid to both skills and cultural competency; staff experienced and/or extensively trained in volunteer management.	Level Four
Comments:	Type comments here.					

Please proceed to Worksheet 4.

4. Operational Capacity

Capacity Elements		Level 1	Level 2	Level 3	Level 4	Input capacity rating in this column
4.01	Staffing Levels	Some positions within organization (staff and board) are unfilled, inadequately filled, or experience high turnover and/or poor attendance.	Critical positions within the organization are filled, though some inappropriately; attendance problems are limited; high turnover is sometimes a challenge.	Critical positions within the organization are adequately and appropriately filled; attendance problems are rare; turnover is limited.	All positions within and the organization are adequately and appropriately filled; attendance problems are extremely rare; turnover is limited; vacancies filled immediately.	3
4.02	Skills, Abilities, & Commitment of Volunteers	Volunteers not working up to their potential or ill-equipped for work with organization; may be unreliable or have low commitment.	Many volunteers working up to their potential; mostly reliable, loyal, and committed to organization's success.	Capable set of individuals that bring required skills to organization; reliable, loyal, and generally committed to organization's success and to "making things happen"; work easily with most staff, but do not generally play core roles without staff supervision.	Extremely capable set of individuals that bring complementary skills to organization; reliable, loyal, highly committed to organization's success and to "making things happen"; often go beyond call of duty; able to work easily with wide range of staff and play core roles without special supervision.	Level Four
4.03	Board Involvement & Participation in Fundraising	Generally weak fundraising; most board members do not recognize fundraising as one of the board's roles and responsibilities; no goals or plans for board-driven fundraising activities exist; members do not generally make financial contributions to organization.	Main fundraising needs covered; board members accept that the board has some fundraising responsibilities, but some concerns exist regarding ability of board to be successful in this area; board fundraising activities are limited; some members make a personally significant annual financial contribution to organization based on their individual means.	Fundraising needs meet; many board members embrace fundraising as one of the board's core roles and responsibilities, and participate with fundraising endeavors; realistic and appropriate board fundraising goals and plans exist; fundraising activities are underway; most members make a personally significant annual financial contribution to organization based on their individual means.	Well developed staff and board fundraising plan, all needs met; all board members embrace fundraising as one of the board's core roles and responsibilities; realistic and appropriate board fundraising goals and plans in place; board actively fundraises and has achieved measurable progress towards goals; all members make a personally significant annual financial contribution to organization based on their individual means, and some contribute more	Level Three

4.04	Communications & Outreach	No marketing materials, or outdated materials; strictly internally-focused and little to no outreach to stakeholders; any materials that exist are unprofessional in presentation.	Loose collection of materials used for marketing; generic documents and not always updated to reflect current programs, activities, and outcomes; materials have a minimal degree of professionalism or consistent look and feel; a few key materials are provided in multiple languages as needed.	Packet of marketing materials used on a consistent basis; information contained in the materials is up to date and reflects current programs, activities, and outcomes; materials reasonably professional in presentation and aligned with established standards for font, color, logo placement, etc.; most materials are provided in multiple languages as needed.	Packet of marketing materials used consistently and easily updated on a regular basis; materials extremely professional in appearance and appeal to a variety of stakeholders; all materials consistently adhere to established standards for font, color, logo placement, etc.; all materials are provided in multiple languages as needed.	Level Three
4.05	Website	No individual website.	Basic website containing general information, but little information on current developments; site maintenance is a burden and performed only occasionally.	Comprehensive website containing basic information on organization as well as up-to-date latest developments; most information is organization-specific; easy to maintain and regularly maintained.	Sophisticated, comprehensive, and interactive website, regularly maintained and kept up to date on latest area and organization developments; praised for its user-friendliness and depth of information; includes links to related organizations and useful resources on topic addressed by organization.	Level Two
4.06	Databases / Management Reporting Systems	No systems for tracking clients, staff volunteers, program outcomes and financial information.	Electronic databases and management reporting systems exist in only few areas; systems perform only basic features, are awkward to use, or are used only occasionally by staff.	Electronic database and management reporting systems exist in most areas for tracking clients, staff, volunteers, program outcomes, and financial information; commonly used and help increase information sharing and efficiency.	Sophisticated, comprehensive electronic database and management reporting systems exist for tracking clients, staff, volunteers, program outcomes, and financial information; widely used and essential in increasing information sharing and efficiency.	Level Three
4.07	Buildings & Office Space	Inadequate physical infrastructure, resulting in loss of effectiveness and efficiency (e.g., unfavorable locations for clients and employees, no possibility of confidential discussions, insufficient workspace for individuals, no space for teamwork).	Physical infrastructure can be made to work well enough to suit organization's most important and immediate needs; a number of improvements could increase effectiveness and efficiency.	Fully adequate physical infrastructure for the current needs of the organization; infrastructure does not impede effectiveness and efficiency.	Physical infrastructure well-tailored to organization's current and anticipated future needs; well-designed to enhance organization's effectiveness and efficiency; favorable locations for clients and employees; plentiful space encourages teamwork; layout increases critical interactions among staff.	Level Four

4.08	Management of Legal & Liability Matters	Legal issues not anticipated; issues addressed individually when they arise; insurance coverage not regularly reviewed.	Legal support resources identified, readily available, and employed on "as needed" basis; major liability exposures managed and insured.	Legal support regularly available and consulted in planning; occasional review of insurance.	Well-developed, effective, and efficient internal legal infrastructure for day-to-day legal work; additional access to general and specialized external expertise to cover peaks and extraordinary cases; regular evaluation of insurance.	Level Four
Comments:	Need to continue improvement of website					

Please proceed to the Summary Table to review your responses and select priority capacity elements for your organization

OWEB
Organizational Capacity Assessment Summary

		Capacity Element Rating Levels	Prioritization of Capacity Elements		
Select any capacity element link below to return to that section in the assessment.		NOTE: A zero (0) score indicates a MISSING response from Worksheets 1-4	Indicate the 4 (out of 29 total) Capacity elements your Organization is most interested in strengthening (Place an 'X' in the appropriate cells)	Capacity Dimension Averages	Level One
1. LEADERSHIP CAPACITY					
1.01	Mission	4			0
1.02	Overarching Strategy	4			0
1.03	Board Composition & Commitment	3			0
1.04	Board Governance	4		3.71	0
1.05	Board Involvement & Support	3			0
1.06	CEO/ED Organizational Leadership / Effectiveness	4			0
1.07	CEO/ED Financial Judgment	4			0
2. ADAPTIVE CAPACITY					
2.01	Strategic Planning	4			0
2.02	Evaluation / Performance Measurement	4			0
2.03	Program Relevance & Integration	4			0
2.04	Assessment of External Environment & Community Needs	4		3.57	0
2.05	Partnerships & Alliances	3			0
2.06	Community Presence & Standing	3			0
2.07	Constituent Involvement	3			0
3. MANAGEMENT CAPACITY					
3.01	Staff	4			0
3.02	Dependence of Management Team & Staff on CEO/ED	4			0
3.03	Funding Model	3			0
3.04	Financial Planning / Budgeting	4		3.71	0
3.05	Financial Operations Management	3			0
3.06	Knowledge Management	4			0
3.07	Volunteer Management	4			0

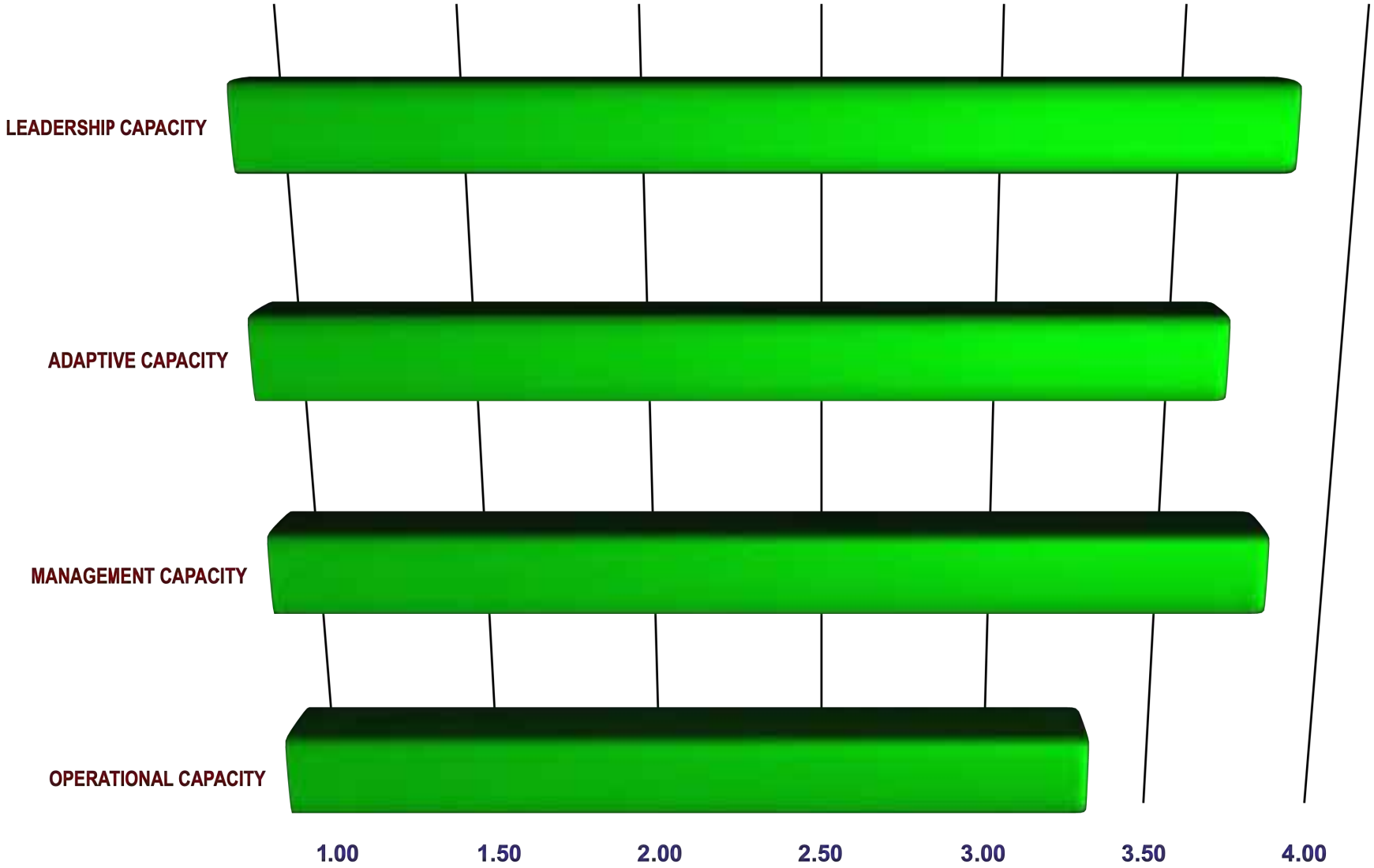
4. OPERATIONAL CAPACITY					
4.01	Staffing Levels	3		3.25	0
4.02	Skills, Abilities, & Commitment of Volunteers	4			0
4.03	Board Involvement & Participation in Fundraising	3			0
4.04	Communications & Outreach	3			0
4.05	Website	2			0
4.06	Databases / Management Reporting Systems	3			0
4.07	Buildings & Office Space	4			0
4.08	Management of Legal & Liability Matters	4			0

Level Two	Level Three	Level Four	N/A
0	0	1	0
0	0	1	0
0	1	0	0
0	0	1	0
0	1	0	0
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LEADERSHIP CAPACITY
ADAPTIVE CAPACITY
MANAGEMENT CAPACITY
OPERATIONAL CAPACITY
1.00
1.50
2.00
2.50
3.00
3.50
4.00

Match Funding Form

Document the match funding shown on the budget page of your grant applica7on.

OWEB accepts all non-OWEB funds as match. An applicant may NOT use another OWEB grant to match an OWEB grant; this includes ODA Weed Board projects because they are funded through OWEB grants. However, an applicant who benefits from a pass-through OWEB agreement with another state agency, by receiving either staff exper7se or a grant from that state agency, may use those benefits as match for an OWEB grant. (Example: A grantee **MAY** use as match the effort provided by ODFW restora7on biologists because OWEB funding for those posi7ons is the result of a pass-through agreement).

At the 7me of applica7on, match funding for OWEB funds requested does not have to be secured, but you must show that **at least 25% of match funding has been sought**. On this form, you do not necessarily need to show authorized signatures ("secured match"), but the more match that is secured, the stronger the applica7on. Iden7fy the type of match (cash or in-kind), the status of the match (secured or pending), and either a dollar amount or a dollar value (based on local market rates) of the in-kind contribu7on.

If you have ques7ons about whether your proposed match is eligible or not, see Allowable Match document in OGMS hVps://apps.wrd.state.or.us/apps/oweb/fiscal/nologin.aspx under Technical Assistance applica7on or contact your local OWEB regional program representa7ve (contact informa7on available in the instruc7ons to this applica7on).

Project Name: 2023-2025 Council Capacity

Applicant: Uma7lla Basin Watershed Founda7on

Match Funding Source	Type	Status*	Dollar Value	Match Funding Source Signature/Date*
Uma7lla Basin Watershed Founda7on	Cash	Secured	$435.00	Doug Bennett - President
Uma7lla County	Cash	Secured	$20,000.00	
Uma7lla Basin Watershed Founda7on	In-Kind	Secured	$2,560.00	Doug Bennett - President
Confederated Tribes of the Uma7lla Indian Reserva7on	Cash	Pending	$5,000.00	
Stewards of the Uma7lla River	In-Kind	Pending	$25,000.00	

*** IMPORTANT:** If you selected "secured" in the Status column for any match funding source, you must provide either the signature of an authorized representa7ve of the match source in the Match Funding Source Signature/Date column, or aVach a leVer of support from the match funding source that specifically men7ons the dollar amount you show in the Dollar Value column.

UMATILLA BASIN WATERSHED COUNCIL ("UBWC")
BOARD MEETING MINUTES
2nd and 3rd Quarter 2022

CALL TO ORDER
Doug Bennett called the meeting of the UBWC Board meeting to order at 6:00 p.m. on 2nd & 3rd Quarter 2022.

Held by Zoom video conference & in-person at 27 SE 3rd Street, Pendleton, Oregon

Present:
Doug Bennett, President
Lowell Saylor, Vice President
Sarah Anderson, Secretary-Treasurer

Regrets:
Carlisle Harrison
Ken Thompson

Staff:
Michael Ward, Executive Director

Guests:
None

Quorum present: Yes

2.0 PROJECT UPDATES

West Birch Creek
It was reported that the West Birch Creek project has been going smoothly and that the necessary funding has been secured. Michael Ward recommended that the Board review the Comment Tracking form as it is a good resource for information on fishery science and how projects are conducted.

Regarding the updating of landowner agreements, Michael advised that the original landowner agreement was developed for the design of the West Birch Creek project and that with agreement from the landowners, he has been working on new landowner agreements for the restoration of the West Birch Creek project. Going forward, he noted that future landowner agreements will include everything for the design and the restoration work and with all parties, such as the county, Niva Hascal, and her cousin Carrie.

Michael reminded the Board that Permit Package/joint permit application was distributed to the Board and encouraged the Board to read through the package to learn more about the project.

Michael responded to questions from the Board regarding timing and providing progress photos.

2.0 OLD BUSINESS

Motion 1: Doug Bennett made a motion to elect Lowell Saylor as Vice President of the Umatilla Basin Watershed Foundation and to serve as co-chairman of the Board of the Umatilla Basin Watershed Council. Sarah Anderson seconded the motion. Motion carried unanimously, pending a vote from Carlisle Harrison.

The Board confirmed that:

- Doug Bennett is the current President of the Umatilla Basin Watershed Foundation and co-chairman of the Board of the Umatilla Basin Watershed Council; and
- Sarah Anderson is the Secretary-Treasurer of the Umatilla Basin Watershed Foundation and the Board of the Umatilla Basin Watershed Council.

It was further confirmed that the President, Vice President and Secretary-Treasurer are the three signing authorities for the organization's banking.

3.0 CURRENT BUSINESS/GRANTS

3rd Quarter OWEB Funding Request – Council Capacity 21-23

Michael provided an update on the submission of the quarterly OWEB funding requests, noting that the paperwork will be circulated to the Board for review and approval prior to submitting at the end of this month.

NOAA & ODFW Summer Grant Cycles

Michael reported that there were no submissions to the NOAA and ODFW Summer Grants as there were two NOAA grants specific to fish passage: a tribal specific and a non-tribal specific. He highlighted that upon review, the tribes would have a higher chance of success with the tribal specific grant, and as a result, UBWC's project load, letters of support and budget request were included in their grant submission.

Fall Grant Cycle Submission

Michael provided an overview of S. Patawa 1 and 2 designs, noting that two design are being bundled into one submission and that there are funds set aside by the tribes for this, but there could be additional funds if the tribes receive the NOAA grant.

Michael reported that he will be making a submission to the Stakeholder Engagement Grant as the criteria changed over the last three years and applications tend to be low. If successful, the grant would fund discussions with SWCD and Morrow County about UBWC involvement. Further information to be provided by email for the Board's review.

Regarding new grants and programs, Michael mentioned that water land acquisition programs will be brought forward for discussion at a future meeting.

4.0 NEW BUSINESS

UBWC, Parks & Rec, & East Oregonian hosting SOLVE (Tuesday the Aug 30th) in Pendleton

It was reported that the new partnership with Amazon on the cleanup has been a success and that they are interested in funding other projects, such as planting and weeding for the West Birch project and others. Michael reported that corporate sponsorships for the cleanup projects has been working well and that he will be looking for other corporate sponsorship opportunities in the future.

5.0 ANNOUNCEMENT

OCEANS Connect 2022 – Seaside Oregon on Sep 6-8
Michael provided an update on his attendance at the OCEANS Connect 2022 conference, noting that he connected with individuals from Morrow County and University of Oregon and that he was asked to serve on the state board again to focus on onboarding watershed council staff and board members across the state.

Rattlesnake or Bull Snake?
Michael reported that a snake was found in the office. It was confirmed to be a bull snake.

Wage/Salary Increase
The President advised that the Board discussed Michael's wage request. Michael provided an overview of his rationale for requesting a wage increase after close to six years at UBWC. He explained that his proposal considered the budget, cost-of-living changes since joining, current market comparable wages across the state, lack of backpay or retirement contributions, and the importance of creating a position that is competitive and attractive. As one Board member, Carlisle Harrison, was absent at the meeting, the Board agreed to make a decision by email so that Carlisle may have an opportunity to ask questions and vote on the matter.

Michael also provided an overview of his long-term vision on what staffing and Board composition could look like in order to best position the UBWC for success.

In terms of Board recruitment, he advised that a schedule of UBWC's quarterly meetings and cleanups should be set for the coming year so that it can be advertised on social media. The Board discussed its plans in the next year, including increasing the size of the Board to at least six or eight members by utilizing social media to attract Board members, having a presence at farmer's markets, writing editorials for the newspapers, etc.

1.0 TREASURER'S REPORT
Sarah Anderson provided a brief overview of the Treasurer's Report, which was circulated by email. There were no concerns raised by the Board.

6.0 PUBLIC FORUM
There were no public comments.

7.0 4TH QUARTER WILL BE HELD ON OCTOBER TBD
Michael advised that a meeting calendar from December 2022 to December 2023 will be circulated by email to the Board for their review and agreement.

ADJOURNMENT
The UBWC Board meeting was adjourned at **7:18 p.m. on 2nd & 3rd Quarter 2022.**

_____
Board Chair

(Date of approval)

Prepared by: Michael Ward

Action Items:

- Michael Ward to obtain vote from Carlisle Harrison on the motion to elect Lowell Saylor as Vice President of the Umatilla Basin Watershed Foundation and to serve as co-chairman of the Board of the Umatilla Basin Watershed Council.
- Michael to circulate the 3rd Quarter & Final OWEB Funding Request to the Board for review and approval by the end of September 2022.
- Michael to send information about the Stakeholder Engagement Grant submission to the Board for review.
- Michael to add an agenda item for water land acquisition programs at a future meeting.
- Sarah Anderson to draft an email to the Board to electronically vote on Michael Ward's wage increase.

September 23, 2019 Agenda
Athena, Oregon
City Hall
Community Room

6:00 PM- Call Meeting to Order

6:05 PM- Approval of November Meeting Minutes

6:10 PM- Treasure's Report

6:15 PM- Old Business

6:20 PM- Current Business/Grants

Wildhorse Creek Fish Passage Project (Tour & Project Update)

7:25 PM- New Business

Stanley Creek Culvert & Hascell Dam Fish Passage Design (Fall TA OWEB)

7:35 PM- Announcement

OWEB Fall Grant Deadline – Oct 28th

McKay Creek Solutions Committee

7:45 PM- Public forum

7:49 PM- Next meeting will be held on October 28th in Pendleton, Oregon

7:50 PM- September Meeting Adjournment

P.O. Box 1551 Pendleton, OR 97801 541.276.2190 [Office] 541.276.2275 [Fax] 920 SW Frazer Ave.

September Minutes –

Meeting focused on site tour of the Athena project site on Wildhorse Creek

No Minutes were taken, agenda items “New Business” were moved to the October agenda.

October 28, 2019 Agenda
Athena, Oregon
City Hall
Community Room

6:00 PM- Call Meeting to Order

6:05 PM- Approval of September Meeting Minutes

6:10 PM- Treasure's Report

6:15 PM- Old Business

6:20 PM- Current Business/Grants

Wildhorse Creek Fish Passage Project (Project Update)

Stanley Creek Culvert & Hascell Dam Fish Passage Design (Vote)

7:25 PM- New Business

Future Direction/Director of the UBWC (Presentation Ward)

7:35 PM- Announcement

Oregon Water Vision (Public Input)

7:45 PM- Public forum

7:49 PM- Next meeting will be held on TBD

7:50 PM- October Meeting Adjournment

P.O. Box 1551 Pendleton, OR 97801 541.276.2190 [Office] 541.276.2275 [Fax] 920 SW Frazer Ave.

October 2019 Board Meeting Minutes

Athena City Hall, Athena, OR
October 28, 2019

UBWC Board Members Present: Carlisle Harrison, Lowell Saylor, Doug Bennett (chair), Sarah Anderson, and Dick Nichols

UBWC Board Members Absent: JD Tovey, Terry Warhol, Ken Thompson, Kaisa Phillips-Hill

UBWC Staff Present: Michael Ward (Executive Director)

Others Present: Tonya Dombrowski

6:07 PM – Meeting Called to Order – Doug Bennett (chair)

Michael Ward (Executive Director) cleared the agenda immediately after the meeting was called to order. Michael tabled all agenda items until the next Board meeting.

Michael Ward opened discussion by asking the Board Members why the Board Members were in the room. He asked what was the reason for the Watershed Council. Michael quoted the OWEB webpage section on Council Capacity Grants:

"These grants help support the operations of councils that engage people and communities in their watershed to participate in collaborative, voluntary restoration and protection of native fish or wildlife habitat and natural watershed functions to improve water quality or stream flows."

Michael informed the Board that OWEB provides no base funding for outreach activities outside of what is submitted in our statement of work. He stated that outreach funding is very difficult to find. Michael indicated that the role of watershed councils has changed over the past few years and is now project-based. The outreach work that UBWC participated in historically (like Watershed Field Days) is now being done by the SWCD and the outreach coordinator at Walla Walla Basin Watershed Council under a contractual agreement that includes the Salmon in Schools program for Umatilla Basin schools.

Dick Nichols asked about the OWEB Council Capacity Grant funding for UBWC. Michael Ward reported that UBWC received $122,200 from OWEB which covers two years.

Michael Ward indicated that the article in the paper about the Athena Bridge project was excellent outreach and that the Council has transitioned to using electronic media like Facebook for outreach.

Michael provided a brief overview of all of the documents that provide direction and contain requirements for Council operation and actions. Michael discussed the Oregon Plan for Salmon and Watersheds, the Umatilla River TMDL, the Mid-Columbia Steelhead Recovery Plan and others. He stated that each of these plans contain specific actions that are required of the Council and that his actions as Executive Director have been specific to these requirements.

Michael identified the difference in requirements stated in these plans for the SWCD and the Watershed Council. He presented a listing of the different funders which support the work of the Council including OWEB, ODFW, DEQ (SEP program), Economic Development grants, Wildhorse Foundation, BPA funding (goes through CTUIR because UBWC has elected not to take BPA funding) and other funders. Michael described a Walmart grant for $1000 that was awarded to UBWC for the 97 hours of service rendered at the Umatilla River Clean-up.

Michael stated that all of these programs require dedication and accountability on the part of the Watershed Council and that he has been working to provide that accountability. He told the Board Members that it is a very large responsibility to maintain the Council image and improve Council visibility.

Michael further stated that each biennium 2 or 3 watershed councils in Oregon are dropped from OWEB funding and another 2 or 3 have their funding reduced because they are not getting funded grants. Michael stated that because of the pressure to get funded projects, and the wide scope and nature of the job of Executive Director, he puts in a lot of extra hours and overtime in order for the Council to be successful. He indicated that he has been unable to spend the time he needed for the birth of his newest child because he has been working on Council business, writing grant applications and that he was missing an important family event in order to attend the Board meeting tonight. He identified the requirements for six weeks of paid leave called for under HB 2005 and stated that a similar time of family leave should be extended to him as Executive Director of the UBWC. He stated that he was upset over the discussion of unpaid family leave as identified in the Employee Policy Manual for UBWC.

Sarah Anderson stated that the Board was sympathetic to Michael's need for family leave with the birth of his child but that the Board had not had the opportunity to formally discuss family leave (paid or unpaid) and how to address the question of paid or unpaid leave relative to the fact that Michael has worked so much overtime. She stated that there is a formal process for this type of discussion and decision making.

Michael stated that he has not taken a sick day or any leave days this year (2019). He further stated that he has not had a raise in 30 months and has been using his own vehicle for Council business which has put 17,000 miles on his personal vehicles since he was hired.

Michael Ward asked the Board directly for a 15% raise, six weeks of paid paternity leave and a vehicle stipend as identified in the OWEB Council Capacity Grant (currently $4,000 every 2 years).

Doug Bennet asked if Michael has been charging mileage to the UBWC and Michael responded that he has not unless there is a grant that specifically has mileage or gasoline as a project line item. Sarah Anderson suggested that he should use the federally approved mileage rate for mileage accrued when he used his personal vehicle on Council business. Michael declined this suggestion and stated that he "has never used a dollar of the money in the Council budget" because he wanted to keep that money for the Council.

Doug Bennet stated that it was a problem that he was unaware of the hours Michael was working and his vehicle expenses. He said that he and the Board needed to know what Michael was doing but the information was not reaching them. If they had known, the situation would not have gotten this far out of hand. Other Board Members agreed that they had not known that Michael was working such long

hours under difficult conditions and missing family time. Doug stated that Michael needed to provide more direct information to the Board on what he is doing.

Michael Ward stated that it would be helpful for Board Members to attend some of the other meetings that he has to attend. The Council serves 10 towns in the Basin and they are not all being served equally. He stated that the Council has commitments in the TMDL and the Salmon and Watersheds plans that we are not fulfilling. The only commitment of this kind that the Council has fulfilled has been the annual water quality report. Board Members could help the Council in fulfilling these commitments.

Dick Nichols asked Michael for some information on how the six-week paternity leave would work so that the Board would know how basic UBWC functions (like mail pickup and bill pay would be handled. Michael Ward responded that he would need 2 weeks to get ready to take the leave because he had to arrange site visits for all of the OWEB grant applications he had just submitted and take care of some other operational details. He would then plan to be on leave for the remainder of 2019 but would continue to check emails and to answer the phone for Council business. Michael reminded the Board that the hours posted for UBWC on social media are 7 days a week, 8AM to 6PM. Sarah Anderson asked if anyone needed to check on the office while Michael was out on leave. Michael responded that there were no other tenants in the building and that the building manager could watch the office. Dick asked about access to project files if a question came up while Michael was on leave. Michael responded that there is a hard copy of everything in the office and he has an electronic copy available through his phone if anything came up. The Board discussed different options for paternity leave. Board Members were supportive of approving paternity leave but there were questions on whether the leave should be specifically recorded (for example: approve paternity leave from 11-15-2019 to 12-31-2019, where the start and end date of the leave were clearly defined) or if the leave should be more informal (for example: approve six weeks of paternity leave to be completed no later than 01-15-2021, where Michael could keep track of his leave as it was taken and have a more flexible schedule). Sarah stated that the Employee Policy Manual for UBWC is older and needs to be reviewed. Changes need to be voted on by the Board.

Dick Nichols asked Michael for some additional detail on the vehicle stipend he had requested. Michael stated that the OWEB Council Capacity Grant allowed (currently) for $4,000 ($2,000/year) for a vehicle stipend.

Dick Nichols asked Michael what was the basis of the 15% raise he had requested. Michael responded that it was based on 5% per year backtracked for the 30 months where Michael had not received a raise, on competitive wages from other similar positions and on the fact that he receives no benefits. Dick asked what amount a 15% raise would equate to. Michael responded that it would be equal to a final salary of $60,000 per year. Sarah Anderson asked when the raise would be effective.

Sarah Anderson moved that the Board approve six weeks of paid paternity leave from mid-November to the end of 2019, and a 15% raise effective November 1, 2019 and a vehicle stipend to be paid every two years, amount contingent on the OWEB Council Capacity Grant (currently $4,000/biennium). Carlisle Harrison seconded the motion. The motion passed with no dissenting votes.

The Board discussed that the Council bylaws will need to be reviewed and may need to be updated.

Treasurer's Report (Sarah Anderson)

Financial reports and associated information were emailed to all Board Members prior to the meeting. Sarah stated that since the reports were mailed out, an additional $78,000 has been deposited to the Council's account (from OWEB project reimbursements and the SEP funds) so the total balance is now $111,000. Sarah reported that she has been working on the SAMS registration (System for Award Management) which is required for award funding. She indicated that the registration process is very cumbersome but that it is almost complete. She also informed the Board that the accounting firm contracted by UBWC has finished with the taxes and they are ready for signing (there was an extension for 2019). Insurance payments have been added to the debit account so the total amount in that account has been increased by about $1,500 to cover these additional charges.

Dick Nichols asked for some additional detail on the budgets that had been emailed. He asked about the "other expenses" for $1591 and the "miscellaneous expenses" for $2300. He was not sure what charges these categories represent. Sarah said she would send some additional detail by email. Dick also asked about the $5891 rent payment, what time period this represented. Sarah said she would send some information on the rent payment as well.

Sarah Anderson suggested that the Board should have a discussion about project contracts and liabilities at the next meeting.

Doug Bennett asked about the timing of the next meeting, when it was scheduled and Michael Ward suggested that the next meeting should be held the fourth week of January 2020.

Sarah Anderson suggested that it may be appropriate to have a Board meeting to discuss policy and potential changes. She indicated that this meeting would not require Michael to attend as he may be on paternity leave. Michael Ward stated that new policy discussions could wait until next year.

Partner Report

There were no partners attending.

Public Forum

No public comment was presented.

Meeting Adjourned by Doug Bennett at 8:09 PM

Next Meeting: 6 PM, January 27, 2020. The meeting will be held in Pendleton, location to be announced.

Approval of September 2019 Meeting Minutes (tabled until next meeting)

Old Business (tabled until next meeting)

Current Business (tabled until next meeting)

New Business (tabled until next meeting)

January 27th Agenda
Pendleton, Oregon
UBWC Office
920 SW Frazer Dr #210

6:00 PM- Call Meeting to Order

6:05 PM- Approval of October Meeting Minutes

6:10 PM- Treasure's Report

6:15 PM- Old Business

6:20 PM- Current Business/Grants

UBWC Meeting Schedule

UBWC Office Location

Stanley Creek & Hascall Dam project

7:25 PM- New Business

UBWC Programs (Past & Present)

7:35 PM- Announcement

April 18th, 2020 Umatilla River Cleanup

EC3 Climate Change Forum

Brown Bag Seminar

7:45 PM- Public forum

7:49 PM- Next meeting will be held on TBD in Hermiston, Oregon

7:50 PM- January 2020 Meeting Adjournment

January 2020 Board Meeting Minutes

UBWC office, Pendleton OR
January 28, 2020 6:01 pm – 8:01 pm

UBWC Board Members Present: Terry Warhol, Doug Bennett, Sarah Anderson, Lowell Saylor, Carlisle Harrison

UBWC Board Members Absent: JD Tovey, Ken Thompson

UBWC Staff Present: Michael Ward

Others Present: None

6:01 PM – Meeting Called to Order – Doug Bennett (chair)

Approval of October 2019 Meeting Minutes
Meeting minutes will be approved by email, since they require edits and review by the group.

Treasurer's Report (Sarah Anderson)

Current funds are: $80,378,32 ($2,377.38 available in account for credit card for cloud payments; $78,000.94 in separate, main account). Sarah transferred $3,000 to debit account on 1/6 to replenish funds (do this once or twice a year). Our SAM's registration was active as of Nov. 6.

Michael requested that Sarah rerun and reshare the financial reports for November, December, & January, since he will be updating financials from when Lorie stopped working for the Watershed Council in late summer.

Sarah asked what level of use the Watershed Council should make of LegalZoom. This was originally leveraged by Michael for its templates, but the group discussed that the possibility of using higher levels of these services (including DUNS, SAMS annual updates, annual state and federal non-profit and charitable donations reporting) could be a beneficial, efficient use of funds and volunteer time and could improve long-term communication within the council. RBH group costs currently include our QuickBooks software. We spend ~$2500 on administrative work. There may also be other perks with LegalZoom to make sure we have all our paperwork in order as a non-profit. The Board approved trying the services for one year at that level, to then be reassessed.

Regarding Sarah's question on a central location for important documents, Michael noted that he will be making sure the updated website has important reference documents there. The Board discussed the potential for using the Council's website to host key Council documents behind an internal Board member log-in, in addition to the planned scanned documents to be hosted on the site.

Old Business

The Athena bridge railings have been installed. The group is glad to see this project completed.

Doug asked if there was any feedback on the Athena project. Michael replied that he had heard from Graham Banks, the Walla Walla full time outreach personnel that we partnered with for Salmon in the Classroom. He had gone out there, and the kids were asking about it. Graham may be trying to coordinate a field trip to the site, where Michael could talk about the project.

Generally, Michael noted the positive experiences of working with Rod Anderson and TetraTech on the Athena project.

Current Business/Open Grants

UBWC Meeting Schedule

Michael brought up the UBWC meeting schedule, wondering if there are ways to improve it, to better match the schedule of Council activities. He wondered what the schedule prioritized when it was originally created and brought up the challenges we have with Mondays (often holidays), as well as how we start up meetings again in September when things are busy with the October grant submission schedule. Then we often do not have much to discuss in November. He also asked about how the OWEB submission deadlines match up with our schedule. He asked if the 2nd or 3rd week might be better, or a different day.

The group generally voiced support for reviewing the schedule and agreed that while Mondays still seem to work the best for them, a different week in the month could work better. Normally we have 7 meetings. Michael raised the idea of moving November to August, to accommodate grants, taking one other meeting and make it the Annual River Clean Up, and doing another meeting that's more of an annual round-up/recap. He would like to also update the venue to a more welcoming, relaxed atmosphere, like the Prodigal Son in Pendleton and somewhere similar in Hermiston. The group voiced general support for these ideas.

Michael will send out the updated schedule by email for a vote. Once an updated schedule for the year is approved, he will take it the rest of the way to update it in all the official and public documents/announcements.

UBWC Office Location

Currently, UBWC pays approximately $660/month rent, ~$900/month with utilities. Michael would like to review location options (similar to the meeting schedule – to see if the current approach still is the best fit for UBWC's needs). Downtown has become more affordable, so Michael raised the question of whether it be a better location. While the current workspace is nice (room, parking, etc.), a different location may be able to support more community involvement/drop-in activity. Folks don't generally come by the UBWC office looking to do projects. In addition, there are some safety concerns with the current location along the railroad. However, moving to a new location wouldn't necessarily guarantee it doesn't have similar issues. Perhaps a downtown location might increase foot traffic but also increase distractions. In general, Michael would like to ask what our office space wants to achieve.

Terry asked about possibility of sharing a site. Michael replied that some shared spaces are going for $500 for just a room, while our current office has 4 rooms for not much more than that. He suggested we think outside the box in terms of office space. Would there even be the potential for a business that helps fund the organization? Doug commented appreciation for Michael is thinking outside the box.

The group agreed to keep thinking of ideas and to discuss more in the future. UBWC would still require some storage areas, as well as work areas in an office solution. Michael just trying to figure out how to better serve the community.

Stanley Creek & Hascall Dam Project

The grant application was ranked 2 out of 5 and is now out of Region 6 review hands. They recommended to fund the full $40K (Michael already secured the other $60K). The OWEB final decision is in April (at the OWEB Board State meeting). In total, all applications came to ~$1.7 million, with only a million in the pool. Being number 2 is a good spot to be in. Our application is for addressing two barriers in one project, both of which are statewide priorities. Looking ahead, Michael hopes to be able to achieve a 60% design by summer then do an RFP. There's the potential for the project to take place in 2021. If that happens, we'll have been involved with removing 5 dams in 4 years. Our next step is to wait for the April final decision. Michael noted that any design will also need to include the appropriate permits. If a 60% design is achieved by August, then we would be in a good place to apply for restoration funds in October.

New Business

UBWC Programs (Past & Present)

Michael brought up the importance of revisiting what the council is aiming for, in terms of future projects. We're currently focusing on restoration projects, cleanup and some small grants, whereas in the past there was more on monitoring and the Watershed Field Days. Outreach funding has become limited. Monitoring has been heavily scrutinized, since there's the question of what is then done with all the data collected. Funding programs available currently are different than they were.

Doug noted the outdoor camp through Hermiston. The group brought up some school programs as well, wondering if some of UBWC's former activities are covered by other entities/programs and whether we should focus on areas where we are uniquely poised to address issues. This will also be a topic of continued discussion for the Council.

Announcement

April 18th, 2020 will be the Umatilla River Cleanup. It was rescheduled to be closer to Earth Day. We could have this be one of our meetings, either meeting before or after. We could float through, check in on people, be out and about, cleaning with different groups at different times.

Other Discussion

Several Board members attended the EC3 Climate Change Forum. It's a non-profit formed about three years ago that is getting more active. The Blue Mountain climate change report came out 3 years ago. This group formed itself to coincide with that.

Public Forum

No public comment was presented.

Next Meeting: TBD – Meeting dates and locations for the next year will be approved by email.

Meeting Adjourned at 8:01 PM by Doug Bennett

January Board Meeting - UBWC
Agenda updates:

Small Grants:
Current Window January 21-Feb 1st

List all pending large grants:

U.S Fish & Wildlife:
Umatilla Assessment
OWEB:
Umatilla Assessment (TA Grant) "Do not Fund"
Note* We should have applied for a stakeholder engagement grant and left the assessment cost to other funding sources and the tribes.
Wildhorse Creek Fish Passage (Restoration Grant) "Fund"
Reith Dam Removal Design (TA Grant) "Fund"
ODFW R&E Grant:
Umatilla Assessment
Reith Dam Removal
Northwest Ecological Research Institute (NERI)
Umatilla Main-stem Assessment

Upcoming Grant Possibilites:

OWEB:
2019-2021 Council Capacity (March 2019 due date)
May Grants Possibilities:
OXBOW (TA Grant) for Long Term Conservation Plan; upland, aquatic, and invasive species assessment.
Whitney Easement (Land Conservation Partnership)
Long Term Monitoring Plan (TA)
Reith/Browns Dairy Dam Removal (Restoration Grant)

CTUIR:
Haskell Dam Removal & Stanley Creek Culvert (Design)

ODFW Restoration & Enhancement Program
Reith/Browns Dairy Dam Removal (Restoration)

ODOT/ODFW Fish Passage Compensation Program (Dec 2019 Deadline)
Haskell Dam Removal & Stanley Creek Culvert (Restoration)

OWEB:
Stakeholder Engagement Grant Possibilites
Umatilla Mainstem Assessment
Birch Creek Barriers landowner engagement

February 24th Agenda

UBWC February Board Meeting
Mon, Feb 24, 2020 6:00 PM - 6:45 PM (PST)

You can also dial in using your phone.
United States: +1 (646) 749-3122

Access Code: 572-949-493

6:00 PM- Call Meeting to Order

6:05 PM- Approval of October Meeting Minutes

6:10 PM- Treasure's Report

6:15 PM- Old Business

6:20 PM- Current Business/Grants

Approve 2020 UBWC Meeting Schedule

EO Press Release (Current Floods)

7:25 PM- New Business

Watershed Field Days (McKay May 7-8)

7:35 PM- Announcement

April 18th, 2020 Umatilla River Cleanup

February 24th - Brown Bag Seminar

7:45 PM- Public forum

7:49 PM- Next meeting will be held on March 23rd in Hermiston, Oregon @ BMCC Room 134

7:50 PM- February 2020 Meeting Adjournment

BOARD OF COMMISSIONERS' MEETING
February 20, 2019
Umatilla County Courthouse, Room 130
9:00 a.m.

A. Call to order.

B. Pledge of Allegiance

C. Chair's introductory comments, reminder that meeting is public.

D. Awards/Recognitions/Correspondence

E. Acknowledgment of minutes of previous meeting

F. Additions to Agenda

G. Public Input and Recognition of Visitors

H. Business items:

1. McKinney Avenue - Public Hearing
2. Umatilla Basin Watershed Council Presentation
3. STF Grants
4. Copier Purchase
5. Vehicle Purchase
6. Roof Payable
7. Property Contract
8. Creation of Positions 2019-20 FY
9. CBA Ratification
10. Eurus CBP Board Appointment

11. NEACT Appointment
12. Executive Session - Employment - ORS 192.660(2)(a,b,h)

I. Commissioners' Reports

J. Adjournment

“The mission of Umatilla County is to serve the citizens of Umatilla County efficiently and effectively.”

Umatilla Basin
WATERSHED COUNCIL

March 16th Agenda


UBWC March Board Meeting
Mon, Mar 16, 2020 6:00 PM - 7:00 PM (PDT)

Please join my meeting from your computer, tablet or smartphone.
https://www.gotomeet.me/MichaelWard1/ubwc-march-board-meeting

You can also dial in using your phone.
United States: +1 (646) 749-3122

Access Code: 922-262-405

6:00 PM- Call Meeting to Order

6:05 PM- Approval of October Meeting Minutes

6:10 PM- Treasure's Report

6:15 PM- Old Business

6:20 PM- Current Business/Grants

Stanley Creek & Hascall Project

-OWEB TA Application

-Contracts (Tetra Tech & CTUIR)

-Landowner Agreements

7:25 PM- New Business

2020 OCEANS CONNECT Conference (Board Approval)

Bill Duke Retirement Gift from the UBWC (Board Approval)

Gotomeeting.com Added to Annual Approved Payments (Board Approval)

7:35 PM- Announcement

Umatilla County Commissioners – UBWC

Oregon Symphony – S.U.R.E March 14th

2020 Annual Umatilla River Cleanup

Watershed Field Days (McKay May 7 – 9)

Bill Duke Retirement Party @ Sisters Café

7:45 PM- Public forum

7:49 PM- Next meeting will be held on April 18th @ 2020 Annual River Cleanup!

7:50 PM- March 2020 Meeting Adjournment



Bill Is Retiring!

Yes, it is true! After 35 years of service, BILL DUKE is retiring at the end of March. Please join us in sending him off to new adventures.

- **When:** Friday, March 27th 2020
- **Where:** Sister's
  308 S Main St
  Pendleton OR 97801
- **Time:** 5:00 PM to 7:00 PM (presentation at 6:00 PM)
- **Buffet:** $25.00/person (Adult beverages will be "no host")

Umatilla Basin
WATERSHED COUNCIL

March 16th Agenda


UBWC March Board Meeting
Mon, Mar 16, 2020 6:00 PM - 7:00 PM (PDT)

Please join my meeting from your computer, tablet or smartphone.
https://www.gotomeet.me/MichaelWard1/ubwc-march-board-meeting

You can also dial in using your phone.
United States: +1 (646) 749-3122

Access Code: 922-262-405

6:00 PM- Call Meeting to Order

6:05 PM- Approval of October Meeting Minutes

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-OWEB TA Application

-Contracts (Tetra Tech & CTUIR)

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Umatilla County Commissioners – UBWC

Oregon Symphony – S.U.R.E March 14th

2020 Annual Umatilla River Cleanup

Watershed Field Days (McKay May 7 – 9)

Bill Duke Retirement Party @ Sisters Café

7:45 PM- Public forum

7:49 PM- Next meeting will be held on April 18th @ 2020 Annual River Cleanup!

7:50 PM- March 2020 Meeting Adjournment

Umatilla Basin
WATERSHED COUNCIL

April 20th Agenda

6:00 PM- Call Meeting to Order

6:10 PM- Treasure's Report

6:15 PM- Old Business

6:20 PM- Current Business/Grants

Re-Assess March Agenda Items Impacted by Covid-19

7:25 PM- New Business

Operating Safely during Covid-19

7:35 PM- Announcement

Office Closed Until Further Notice

7:45 PM- Public forum

7:49 PM- Next meeting will be held on May 18th @ Call-In

7:50 PM- Apri 2020 Meeting Adjournment

P.O. Box 1551 Pendleton, OR 97801 541.276.2190 [Office] 541.276.2275 [Fax] 920 SW Frazer Ave.

April 2020 UBWC Board Meeting Minutes

@ Conference Call-In

UBWC Board Members Present: Sarah Anderson, Doug Bennett, Ken Thompson, Carlisle Harrison, Lowell Saylor

UBWC Board Members Absent: J.D. Tovey, Terry Warhol

UBWC Staff Present: Michael Ward

Others Present:

6:00 PM – Meeting Called to Order – Doug Bennett (Chair)

Approval of March 2020 Meeting Minutes (Doug Bennett)

Ken Thompson moved to approve the March meeting minutes. Doug Bennett seconded and the motion passed unanimously to approve the March meeting minutes approved.

Treasurer's Report (Sarah Anderson)

Financial reports and associated information were sent out to all board members prior to the meeting. Sarah Anderson stated that $2000 was transferred to the debit account (Business Checking) to cover online/automatic payments coming up throughout the summer.

Old Business (Doug Bennett)

The board re-assessed the March agenda that was highly impacted by the Covid-19. The board decided to table rescheduling the canceling spring Umatilla River Cleanup and wait for more information regarding safety and liability in bring large groups of people together.

Current Business (Doug Bennett)

Doug Bennett and Sarah Anderson inquired about operating remotely and if we are set up to do so? Michael Ward responded that most everything is in place and that he only needed to buy a basic black & white printer for home use; Michael informed the board the he had already made this purchase and was able to match the office printer so that ink could be shared. Michael also stated that he had been having issues with the work cell phone and that he will most likely need to replace it soon. The board expressed their support for looking into any needed supplies for temporarily remote work. Ken Thompson asked if any items in the office could be temporarily removed and used at home. Michael responded that he would like to take a desk and computer home.

New Business (Michael Ward)

Until further notice the board instructed Michael to not attend any in-person meetings and/or facilitate any in-person meetings. The board approved the online subscription for Zoom and Gotomeetings.com to be paid monthly out of the Business Checking account.

Announcements

Partner Report

Public Forum

Meeting Adjourned

Next Meeting TBD

Umatilla Basin
WATERSHED COUNCIL

May 18th Agenda

6:00 PM- Call Meeting to Order

6:10 PM- Treasure's Report

6:15 PM- Old Business

6:20 PM- Current Business/Grants

How to Reopen the UBWC

7:25 PM- New Business

Rescheduling Canceled/Impacted Events

OWEB Funds (Delayed Stanley Creek & Hascall Dam Contracts)

7:35 PM- Announcement

Office to Reopen in June

7:45 PM- Public forum

7:49 PM- Next meeting will be held on TBA

7:50 PM- May 2020 Meeting Adjournment

P.O. Box 1551 Pendleton, OR 97801 541.276.2190 [Office] 541.276.2275 [Fax] 920 SW Frazer Ave.

Umatilla Basin
WATERSHED COUNCIL

May 2020 UBWC Board Meeting Minutes

@ Conference Call-In

UBWC Board Members Present: Sarah Anderson, Doug Bennett, Ken Thompson, Carlisle Harrison, Lowell Saylor, J.D Tovey, T. Warhol

UBWC Board Members Absent:

UBWC Staff Present: Michael Ward

Others Present:

6:00 PM – Meeting Called to Order – Doug Bennett (Chair)

Approval of April 2020 Meeting Minutes (Doug Bennett)

Sarah Anderson moved to approve the April meeting minutes. Doug Bennett seconded and the motion passed unanimously to approve the April UBWC Board Meetings

Treasurer's Report (Sarah Anderson)

Financial reports and associated information were sent out to all board members prior to the meeting. Sarah Anderson stated that the main account had $56,108.62 in the 'BShort' Checking Account and $5,602.33 in the 'Business Checking' account. Sarah stated that Michael updated her that he was working on wrapping up late reports and funding request for the Wildhorse Creek project and the Council Capacity 2019-2021 FR#1.

Old Business (Doug Bennett)

Continue discussion(s) of moving forward with the current/new updates with Covid-19.

Current Business (Doug Bennett)

The board tabled the May meeting to have an open (non-voting) meeting discussion regarding Covid-19 and how office space, events, and day-to-day operations will/could be forced to change in pandemic situation that might last longer than expected.

New Business (Michael Ward)

No New Business

Announcements

Partner Report

Public Forum

Meeting Adjourned

Next Meeting – June 14th Exec. Committee Meeting for OWEB grant agreement updates

May Board Meeting Minutes

Hamley's Steak House, President's Room, Pendleton, OR
May 20, 2019

UBWC Board Members Present: JD Tovey, Terry Warhol, Lowell Saylor, Ken Thompson, Doug Bennett (chair), Sarah Anderson, and Dick Nichols

UBWC Board Members Absent: Carlisle Harrison, Kaisa Phillips-Hill

UBWC Staff Present: None

Others Present: Tonya Dombrowski

6:20 PM – Meeting Called to Order – Doug Bennett (chair)

Approval of April 2019 Meeting Minutes (Doug Bennett)
Dick Nichols moved that the April 2019 minutes be approved as written. Terry Warhol seconded. Motion passed unanimously.

Treasurer's Report (Sarah Anderson)
Financial reports and associated information were disseminated to all Board Members. Sarah Anderson provided the Board with an update on current finances. The Council currently has $27,886 in the bank. The only major paid expenses to report for April are payroll and office rent. Dick Nichols asked if the existing funds were sufficient to cover the rest of the current biennium. Sarah responded that the existing balance should be sufficient. Sarah further reported that there are two pending payments to the Council: $11,000 from the Birch Creek grant and $56,000 from the existing Council Capacity grant. The Council also has three pending funding requests: Supplemental Environmental Project (SEP), USFW Mainstem Umatilla project and ODFW Reith Dam Removal project. The Birch Creek payment is for outreach work. The grant is closed. This will be the final payment. The Board Members reviewed the information that was presented.

Old Business (Doug Bennett)

<u>Elder Ditch</u>

The Board discussed the Elder Ditch. UBWC originally signed the license for the ditch to cross US Bureau of Reclamation (USBR) property specific to legal access for maintenance. The license expired in 2013. USBR would like someone to be accountable for potential problems in the future. The Board discussed the concern that the ditch is not UBWC's ditch or responsibility. There was consensus that UBWC should not sign a new license. The license should be signed by the landowners whose water rights are served by the ditch. The Board discussed the concerns associated with the very rainy spring, over three inches of rain falling in the span of two-three days and the remaining six to seven feet of snow in the headwaters. The Board again recognized USBR's position but encouraged USBR to follow-up with the

contact provided previously by Terry Warhol. The Board felt strongly that UBWC should not sign a new license.

Current Business (Doug Bennett)

Board Elections

Doug Bennett reviewed the positions up for election: President, Vice-President and Secretary/Treasurer for the Umatilla Basin Watershed Foundation. (These same elected officials will also represent the Umatilla Basin Watershed Council.)

President

Doug Bennett called for nominations for President of the Umatilla Basin Watershed Foundation. Ken Thompson nominated Doug Bennett (currently serving as interim Chairman of the Board). Dick Nichols seconded. Hearing no further nominations, the nominations were closed. The vote was called and passed unanimously. Kaisa Phillips-Hill was removed from status as President of the Umatilla Basin Watershed Foundation. Doug Bennett was elected as President of the Umatilla Basin Watershed Foundation, effective immediately. Doug will also serve as Chairman of the Board for the Umatilla Basin Watershed Council, pursuant to the charters for both organizations.

Vice-President

Dick Nichols requested to know specifically what the duties and responsibilities of the Vice-President are. Ken Thompson stated that the Vice-President was to act in the stead of the President if or when the President was unable to serve. He further explained that the Vice-President would be called upon to lead meetings in the President's absence. Several Board members indicated that they would be willing to serve as Vice-President including Terry Warhol and JD Tovey. The Board agreed that both would be excellent candidates.

Doug Bennett called for nominations for Vice-President of the Umatilla Basin Watershed Foundation. Dick Nichols nominated Terry Warhol. Ken Thompson seconded. Hearing no further nominations, the nominations were closed. The vote was called and passed unanimously. Ken Thompson was removed from status as Vice-President of the Umatilla Basin Watershed Foundation. Terry Warhol was elected as Vice-President of the Umatilla Basin Watershed Foundation, effective July 1, 2019. Terry will also serve as Co-Chairman of the Board for the Umatilla Basin Watershed Council, pursuant to the charters for both organizations.

Secretary/Treasurer

Doug Bennett called for nominations for Secretary/Treasurer of the Umatilla Basin Watershed Foundation. Dick Nichols nominated Sarah Anderson (currently serving as Secretary/Treasurer of the Foundation and the Council). Lowell Saylor seconded. Hearing no further nominations, the nominations were closed. The vote was called and passed unanimously. Sarah Anderson was elected for a second term as Secretary/Treasurer of the Umatilla Basin Watershed Foundation, effective July 1, 2019. Sarah will also serve as Secretary/Treasurer of the Board for the Umatilla Basin Watershed Council for a second term.

Ken Thompson acknowledged Sarah's outstanding work on behalf of the Foundation and Council as Secretary/Treasurer. He reminded the Board that the Foundation/Council's books have been much

better organized and that the fiscal reports have been tremendously improved since Sarah took over the job. The Board extended a heartfelt thank you to Sarah for her efforts.

New Business (Doug Bennett)

Dick Nichols requested an update on the efforts to organize a get-together to recognize Jeff Blackwood's years of service on the Foundation and Council Board. Lowell Saylor stated that he had been working to contact Jeff and set up a time to meet together. Lowell reminded the Board that Jeff had served tirelessly and very effectively led the Council through some very challenging times. Dick Nichols offered to make a wooden box with the Council logo and a recognition of Jeff's service engraved on the lid. The box would be fashioned out of the kinds of wood from trees that grow in the Umatilla Basin. Sarah Anderson asked about the time frame for making a box and Dick said that it could be ready in four weeks (the engraving will take two weeks to complete). The Board was supportive of Dick's idea of the box and recommended that he go ahead with it. Dick will send out a mock-up of the engraving for Board approval via email within the next two days.

The Board discussed the opportunity to meet for Jeff's get-together sometime in late June. After some consideration of possible venues, it was decided that the get-together should be at the Prodigal Son Brewery. Lowell offered to bring this up with Jeff and coordinate with the Board members relative to Jeff's schedule. Dick offered to reserve the private room at Prodigal Son when Lowell finds a date that will work for Jeff. Additional information will be disseminated via email to Board members as it comes available.

Announcements

Following this meeting, the Council will adjourn for the summer break. Next meeting will be in September. There were no other announcements.

Partner Report

There were no partners attending.

Public Forum

No public comment was presented.

Next Meeting: 6 PM, September 23, 2019 at the Athena City Hall Meeting Room, 302 East Currant Street, Athena Oregon.

Meeting Adjourned by Doug Bennett at 7:01 PM

Umatilla Basin
Watershed Council

2014 Action Plan



Umatilla Basin Watershed Council
P.O. Box 1551
Pendleton, OR 97801
(541) 276-2190

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UBWC Mission

"To foster cooperation among watershed users & provide education to people interested in watershed health; and to develop, support, implement, and monitor activities that improve and maintain water quality and water quantity for all uses within the Umatilla Basin"

Chapter 1: Introduction

1a Purpose

The 2014 Umatilla Basin Watershed Council (UBWC) Action Plan identifies organizational goals & program objectives as they pertain to overall watershed health, water quality & quantity, ecological restoration, and community outreach priorities throughout the Umatilla River Basin.

The Umatilla Basin Watershed Council operates through a combination of grants and annual Umatilla County support funding. An important component of this funding comes from the Oregon Watershed Enhancement Board through the Council Capacity and Support Grant, allowing UBWC to secure quality staff and leverage funds to conduct restoration projects, feasibility studies, and educational programs.

1b Description of the Watershed

The Umatilla River Basin (HUC 17070103) covers approximately 2,550 square miles (1.6 million acres) in northeastern Oregon, flowing through the namesake Umatilla River in a generally northwesterly direction. The Umatilla River flows through a course of 90 miles out of the Blue Mountains before joining the Columbia River (river mile 289) near Umatilla, Oregon. Within this vast area there is approximately 5,600 feet of elevation difference from the summit of Black Mountain to the port of Umatilla. Approximately 84% of the basin is comprised of agricultural production (irrigated, dryland, and rangeland), nearly all of the basin's public land lies within the Umatilla National Forest, and urbanized or suburban development comprises the remainder of the landscape.

Sub-basins contributing to the Umatilla River include Meacham Creek, Wildhorse Creek, McKay Creek, Birch Creek Mission Creek, Upper and Lower Butter Creeks, Sand Hollow, Cold Springs Canyon, Stage Gulch, Hunt Ditch, Alkali Canyon, and the North and South Fork headwaters areas.

Temperature and precipitation are highly influenced by elevation within the Umatilla River Basin, lower elevations average as little as eight inches of precipitation, while the higher elevations of the Blue Mountains may receive in excess of fifty inches annually.

Typically the majority of the Basin's precipitation occurs between October and April, although high intensity localized events may occur in late spring or early summer. Peak runoff events occur during periods of winter rain events over frozen ground in the upper and mid basin areas (Umatilla TMDL, 2001).

Water resource concerns occupy a broad spectrum throughout the Umatilla River Basin and include anthropocentric and biological origins. Significant human use concerns stem from water quality and quantity perspectives including agricultural production, seasonal flooding, municipal and industrial consumption, nitrate and bacterial concentration, recreational use, and cultural importance. Biological concerns include water quantity and timing, temperature and sediment thresholds, anadromous fish passage, and substantial habitat fragmentation and degradation; with the 2004 Umatilla/Willow Sub-basin Assessment prioritizing temperature and sediment reductions being the most beneficial to fish populations. The three key concepts are the timing & quantity of water presence, sediment & nutrient transportation, and the coexistence of natural and human systems.

1c Demographics

The Umatilla Basin is predominantly characterized by a rural agricultural nature. Pendleton has historically been a cultural hub for eastern Oregon, however in recent decades Hermiston has shown tremendous growth (+70% since 1990), even surpassing the population of Pendleton. In 2010 the Pendleton-Hermiston Micropolitan Statistical Area had 87,062 inhabitants. During the same census, Umatilla County, which is predominantly within the Umatilla River Basin, had 75,899 inhabitants. While approximately half of the Basin population lives within Pendleton or Hermiston, there are numerous small towns within the area.

1d Background and Historic Information

The Umatilla Basin Watershed Council was created in 1997 by the Umatilla County Board of Commissioners, as a result of the development of the Umatilla Basin Total Maximum Daily Load (TMDL) project. Initial emphasis was directed toward education and outreach, in addition to water quality monitoring that supported the Umatilla TMDL project. As time moved forward the UBWC branched into restoration activities, as well as continuing support of water quality monitoring and community outreach and education directives.

Chapter 2: Planning & Strategy

2a Watershed Action Plan Development

The Umatilla River Basin has a legacy of collaboration cultivated through stakeholder involvement and participation in the TMDL project. Through this collaboration, inroads toward effective working relationships exist within the basin. By the nature of its mission, the UBWC stands as a neutral entity providing sound, scientifically driven information supporting activities which enhance overall watershed health, functionality and community education. As a neutral entity and partner in this shared vision, the UBWC has a responsibility to facilitate and contribute to projects and supporting goals identified in the Umatilla Basin TMDL, the Umatilla/Willow Subbasin Plan (2004), and from the council itself.

Development of an Action Plan benefits the Umatilla Basin Watershed Council through organizing the over-arching, big-picture goals into desired outcomes with objective measures to reach. Further refinement of the objectives develop the strategies available to take action. A vision is meaningless without action, and action is meaningless without a vision; the Action Plan serves as guidance to organize the actions, objectives, and large scale organizational goals for the UBWC.

2b Watershed Inventory

A comprehensive watershed assessment within the Umatilla Basin is supported by two substantive existing documents, the Umatilla River Basin TMDL (2001), and the Umatilla/Willow Subbasin Plan (2004). Climatological, land use, ecological, hydrological, and conservation priorities were developed through extensive collaboration, and a wealth of information is available and is relatively current. Supplemental assessment and monitoring data collected by partnering agencies including the Oregon DEQ, the Confederated Tribes of the Umatilla Indian Reservation, and the US Forest Service are available to reinforce or update the comprehensive assessment.

Through collaboration with established partners, the Umatilla Basin Watershed Council has extensive access to beneficial data and analyses that aid in supporting Council actions. Analysis and modeling of available data sets will enable the UBWC to prioritize the actions that support the strategies, objectives, and watershed goals established in the 2014 Umatilla Basin Watershed Council Action Plan.

2c Watershed Goals, Objectives and Strategies

The Board of Directors for the Umatilla Basin Watershed Council identified guiding principles in support of the organizational mission:

- The UBWC will strive to work towards supporting, collaborating, and cooperating with partners for the overall benefit to the Basin and its communities.
- The UBWC will be a neutral, scientifically sound source for information related to watershed health, taking a professional approach to information requests and interactions on issues related to the UBWC mission.
- The UBWC will strive to have a diverse Board of Directors representing tribal, private, public, and other interests within the Basin.
- Board meetings will be a forum for information exchange between partners.
- The UBWC will continue to support and partner with the Water Quality Technical Committee and Umatilla Basin Restoration Team to further collaborative/cooperative work in meeting mutual interests.
- The Board and Executive Director will work to develop and maintain a work environment that fosters achievement, creativity, and inspiration.

The underlying purpose of the Umatilla Basin Watershed Council is to promote overall watershed health within the Umatilla River Basin through stakeholder cooperation and collaboration. Three key goals support this purpose; watershed planning, monitoring and assessment; community engagement and collaboration; and implementation of watershed restoration projects.

Goal 1: Watershed Planning, monitoring and assessment

Watershed planning, monitoring and assessment includes water quality monitoring, remote sensing and project prioritization, project effectiveness monitoring and assessment. This goal assists in the genesis of projects within the human and ecologic scopes, and directly relates to the adaptive management approach to project management. What can be learned through the process of a project is important in many ways, and generally contributes to the successful planning, implementation, and review of subsequent projects. The UBWC intends to be a dynamic organization capable of responding to changes, while remaining rooted to the core purpose and supporting goals.

Goal 2: Community Engagement and Collaboration

Community engagement and collaboration involves not only the stakeholders or partners on projects, but active engagement with the people who make the Umatilla Basin their home. Through collaboration and stakeholder involvement, UBWC can incorporate the values and

priorities of the residents and cooperating agencies of the Umatilla Basin and work toward a shared vision of what a healthy, functional watershed represents.

Goal 3: Implementation of Watershed Restoration Projects

Watershed restoration projects are the on-the-ground physical manifestation of some of our actions. Restoration projects may have community visibility, buy-in and support functions in addition to the ecological functions provided.

Chapter 3: Application

3a Implementation

Refining the outlined goals is the first step toward implementation, and is followed closely by developing objectives based on available information and organizational priorities. The Umatilla Basin is fortunate in having a high quality and relatively recent TMDL and Watershed Assessment from which to draw. From the known issues and directives of Basin-wide activities a suite of objectives were developed. Strategies for attaining the specific objectives listed below were then identified, as were supporting parties, stakeholders, and a relative priority timeline.

Goal 1: Watershed Planning, Monitoring and Assessment

Objective	Action Item	Stakeholders	Partners	Priority Ranking	Indicators of Success
Reduce sediment load from agricultural runoff	Identify partnership opportunities with NRCS, & SWCDs	Ag landowners throughout the Umatilla Basin	NRCS, SWCDs, UBWC	**High** - continuing basis	Develop common goals between NRCS, SWCDs, UBWC Identify landowners interested in BMP or site restoration projects.
	Quantify extent of headwater erosion area	Ag landowners throughout the Umatilla Basin	NRCS, SWCDs	**High -** near term focus	Develop a baseline map of HES & sources of headwater sub-basin erosion concern areas.
	Assist landowners with buffer and restoration projects	Ag landowners throughout the Umatilla Basin, CTUIR, UBWC, ODFW	NRCS, SWCDs, UBWC, OSU Extension, DEQ	**Moderate** - partner led	Installation of erosion BMP projects, additional interest in participation. Landowner participation survey.
Reduce summer temperatures in identified critical salmonid spawning reaches	Analyze existing data sources, and gaps in existing data	UBWC, CTUIR, ODFW, NOAA	UBWC, CTUIR, USFS	**High** - near term focus	Map of temperature logged reaches of the Umatilla River and its tributaries.
	Continue temperature monitoring	UBWC, CTUIR, ODFW, NOAA, USFS	UBWC, CTUIR	**High** - continuing basis	Temperature profiles for project effectiveness monitoring pre & post restoration implementation.
	Voluntary projects in temperature sensitive reaches	UBWC, CTUIR, ODFW, NOAA, Umatilla Basin Residents	UBWC, SWCDs, CTUIR, NRCS	**High** - coordinate with partners	Implementation of voluntary projects to reduce summer temperatures on thermally impaired reaches.
	Landowner engagement and education	Landowners throughout the Umatilla Basin	UBWC, SWCDs, TU	**Moderate** - coordinate with partners	Develop landowner workshops, provide technical assistance, and distribute information.

Goal 1: Watershed Planning, Monitoring and Assessment, *continued*

Objective	Action Item	Stakeholders	Partners	Priority Ranking	Indicators of Success
Prioritize Umatilla Basin Watershed Council restoration focus areas	Develop GIS overlay model to target high priority focus areas	Ag landowners throughout the Umatilla Basin	NRCS, SWCDs, UBWC	**High** - near term focus	Develop a prioritized map using McHargian overlays to identify key areas to direct on the ground and education efforts within the Umatilla Basin.
Continued support of Umatilla Basin TMDL planning, monitoring, and implementation	Sediment and temperature monitoring & analysis	DEQ, UBWC, CTUIR, USFS Residents throughout the Umatilla Basin	DEQ, UBWC, CTUIR, USFS, SWCDs	**High** - continuing basis	Statistically sound database within SOP requirements supporting consistent data analysis evaluation of composite project effectiveness in supporting all beneficial uses.
Fish passage survey	Analyze existing data sources, and gaps in existing data	UBWC, CTUIR, ODFW, NOAA, ODOT	UBWC, CTUIR, NRCS, ODOT	**Moderate** - coordinate with partners	Map of known fish passage barriers within the Umatilla Basin including natural barriers, dams, and culverts.
	Improve fish passage plan development	UBWC, CTUIR, ODFW, NOAA, USFS, ODOT	UBWC, CTUIR, NOAA, NRCS	**Long Term** - progress dependent	Strategic, coordinated plan for implementing passage improvement across agencies.
Floodplain planning and hydrologic background survey	Floodplain mapping, community engagement, project planning	Residents of the Umatilla Basin, UBWC, ODFW, NRCS	UBWC, NRCS, ODFW, NRCS	**High** - build from current project progress	Identification of future projects with potential to improve groundwater recharge, reduce fragmentation, and reduce flood damages.
	Discharge histogram	Residents of the Umatilla Basin, DWR, DEQ	UBWC, DWR	**Moderate** - supplemental information	Gain background knowledge of ungagged sources of interest to restoration and conservation practices.

Goal 2: Community Engagement and Collaboration

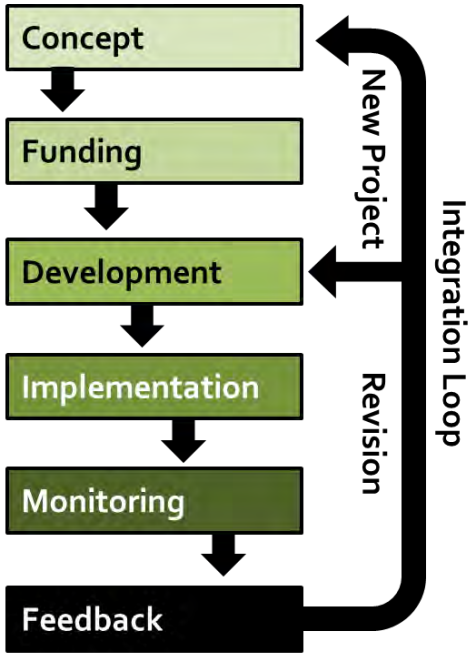
Objective	Action Item	Stakeholders	Partners	Priority Ranking	Indicators of Success
Build visibility and rapport within communities of the Umatilla Basin	Accessible, forum – based meetings on a spatial rotation	UBWC, Residents of the Umatilla Basin Watershed	Community	**High** - continuing basis	Continue to hold monthly meetings which rotate to the distributed communities within the Umatilla Basin.
	Implement high visibility projects and events with volunteer opportunities	UBWC, Residents of the Umatilla Basin Watershed	Community	**High** - continuing basis	Select high impact—high visibility projects that involve schools, local service organizations, municipalities, retirees, and other interested residents to encourage participation.
	Sponsor youth and resident education projects and events	UBWC, SWCDs, Residents of the Umatilla Basin Watershed.	UBWC, SWCDs, OSU Extension	**Moderate** - build quality materials through community and partner relationships	Workshops, demonstration site projects, digital and print informational media development and distribution.
	Sponsor a watershed festival event	Residents of the Umatilla Basin Watershed	UBWC, CTUIR, SWCD, OSU Extension	**Long Term** - Build partner and community support to ensure success	Recurring festivals drawing more participants.

Goal 3: Implementation of Watershed Restoration Projects

Objective	Action Item	Stakeholders	Partners	Schedule	Indicators of Success
Sediment Reduction Projects	Sedimentation Basins	NRCS, SWCD, UBWC, Rural landowners	UBWC, SWCD, ODFW, OSU, NRCS	Year 2 - 3+	Installations of engineered agricultural sedimentation basins in designated high priority areas.
	Cattle exclusion fencing installations	NRCS, SWCD, UBWC, Rural landowners	UBWC, SWCD, OSU, NRCS	Year 1 - 3+	Installations of riparian cattle exclusion fencing & alternative stockwater options.
	Urban runoff pre-treatment elements	Basin municipalities, SWCD, UBWC, DEQ	UBWC, DEQ, SWCD	Year 2 - 3+	Planning, development, and implementation of greenways & stormwater management features and ordinances.
Habitat Restoration Projects	Revegetation and stabilization of banks and floodplains	UBWC, CTUIR, BOR, Public and private landowners	UBWC, CTUIR, BOR	Year 1- 3+	Installation of riparian revegetation projects and demonstration sites.
Fish Passage Projects	Dam removals	UBWC, ODFW, CTUIR	UBWC, ODFW, CTUIR	Year 1 - 3+	Broun Dam, Peterson Dam, Dillon Dam removed and enhanced.
Groundwater recharge projects	Culvert survey & replacement	ODFW, CTUIR, UBWC	UBWC, ODFW, CTUIR	Year 2 - 3+	Prioritized culvert replacement project installations.

3b Plan Updates and Revisions

Adaptive Management Framework



Through adopting an Action Plan, the UBWC is building a holistic model tying the key organizational goals into a cohesive plan for a healthy, functional Umatilla River Basin. The 2014 Umatilla Basin Action Plan is not meant to be a prescriptive document. This plan serves as guidance for Umatilla Basin Watershed Council actions, while remaining adaptive to future concerns and integrating feedback to continually improve project success. Adaptive Management is a systemic process or model that has seen increasing use through natural resource disciplines since inception in the 1970's. The main premise of the Adaptive Management is that management practices and policies can continually improve, refine and evolve through the application of lessons learned through past and present experiences. By implementing an Adaptive Management approach to decision-making and planning, an organization is better prepared to handle internal and external changes including technology, personnel, and partnering agencies.

Action Plan updates are anticipated as the strategies are implemented and objectives are met, allowing further refinement to accommodate revised Council priorities and staffing capabilities. A set schedule for revision is not set, relying on successive annual work plans to track fine grain adjustments and progress toward organizational objectives. The work plan will be developed annually and approved by the Umatilla Basin Watershed Council Board of Directors. This annual work plan will allow Board members to track progress on individual projects contributing to the strategies, objectives, and goals of the UBWC.

Chapter 4: Summary

4a What makes UBWC successful?

Success of the Umatilla Basin Watershed Council depends on many factors, but being a result driven organization and an active community resource stand out among the most important. Being an operation almost entirely funded on grant based projects means that the UBWC must be driven to produce results in every project. Granting bodies want to see an organization make effective use of funding, and producing quality deliverables is critical to the success of future funding.

Communities are the component that brings the Umatilla Basin to life. Creating lasting relationships and building rapport with residents is an important factor in the success of the UBWC to support outreach functions. Effective community engagement encompasses volunteerism, collaboration in board meetings, landowner recruitment, and educational outreach projects spanning generations while fostering a mentality that we are all part of a shared watershed. Through outreach UBWC gains local buy-in and support of projects affecting the watershed as a whole.

4b The future of UBWC

To be successful as an organization, it is important for the Umatilla Basin Watershed Council to adopt and update strategic planning efforts, such as the 2014 Action Plan. An important component of this plan is collaboration with partnering agencies to coordinate efforts and maximize returns on conservation and outreach actions. The future of the Umatilla Basin Watershed Council lies in forging resilient working relationships with collaborators, and in gaining strong community support through participation and projects reflecting the interests of basin residents.

Equal Employment Opportunity and Anti-Discrimination Policy

I. OVERVIEW & SCOPE

Umatilla Basin Watershed Council of 27 SE 3rs St, Pendleton, Oregon 97801, has established an Anti-Discrimination and Equal Employment Opportunity Policy ("EEO"). This EEO policy applies to all aspects of the relationship between Umatilla Basin Watershed Council and its employees, including, but not limited to, employment, recruitment, advertisements for employment, hiring and firing, compensation, assignment, classification of employees, termination, upgrading, promotions, transfer, training, working conditions, wages and salary administration, and employee benefits and application of policies. These policies apply to independent contractors, temporary employees, all personnel working on the premises, and any other persons or firms doing business for or with Umatilla Basin Watershed Council. Disciplinary action will be taken against any employee or agent in breach of this policy.

II. POLICIES

1. DISCRIMINATION. Umatilla Basin Watershed Council shall not tolerate, under any circumstances, without exception, any form of discrimination based on race, creed, religion, color, age, disability, pregnancy, marital status, parental status, veteran status, military status, domestic violence victim status, national origin, political affiliation, sex, predisposing genetic characteristics, sexual orientation, gender identity and gender expression, and any other status protected by the law. This list is not exhaustive. Job promotions will be offered to employees based on merit, experience, and other job-related criteria. For qualified people with disabilities, Umatilla Basin Watershed Council will make every effort to provide reasonable workplace accommodations that comply with applicable laws. All employees, managers, stakeholders, and agents at Umatilla Basin Watershed Council will comply with these anti-discrimination policies. In some cases, local laws and regulations may provide greater protections than those described in this policy.

2. HARASSMENT. Umatilla Basin Watershed Council is committed to providing a work environment that is free from harassment. Any behavior that is unwanted and offensive to the recipient, which creates an intimidating, hostile, or humiliating work environment for that person violates Umatilla Basin Watershed Council's policy. Harassment can occur between members of the opposite sex or the same sex. Harassment, verbal or non-verbal, explicit or implicit, based on an individual's sex, race, ethnicity, national origin, age, religion or any other legally protected characteristics will not be tolerated. All employees, including supervisors, other management personnel, and independent contractors, are required to abide by this policy. No person will be adversely affected in employment with Umatilla Basin Watershed Council as a result of bringing complaints of harassment.

3. SEXUAL HARASSMENT. Unwelcome sexual advances, requests for sexual favors, and

other verbal or physical conduct of a sexual nature constitute harassment when (1) submission to such conduct is made either explicitly or implicitly a term or condition of employment; (2) submission to or rejection of such conduct by an individual is used as a basis for employment decisions, promotion, transfer, selection for training, performance evaluations, benefits, or other terms and conditions of employment; or (3) such conduct has the purpose or effect of creating an intimidating, hostile, or offensive work environment or substantially interferes with an employee's work performance . Umatilla Basin Watershed Council prohibits inappropriate conduct that is sexual in nature at work, on Company business, or at Company-sponsored events including the following: comments, jokes, degrading language, sexually suggestive objects, books, or any form of media electronic or in print form. Sexual harassment is prohibited whether it is between members of the opposite sex or members of the same sex.

4. STATEMENT ON AFFIRMATIVE ACTION. An affirmative action program has been developed where Umatilla Basin Watershed Council seeks to increase the representation and participation of minorities.

5. REPORTING DISCRIMINATION & HARASSMENT. If an employee feels that he or she has been harassed as described in this policy, they should immediately report the matter to management or Douglas Bennett through any verbal or written means. If that contact is not available, or if the employee is not comfortable informing this contact, the employee should immediately inform any other manager or supervisor. Once the matter has been reported it will be promptly investigated and any corrective action will be taken when deemed appropriate. All complaints or unlawful harassment under this policy or otherwise will be handled in as confidential a manner as possible. Timely reporting is encouraged to prevent the re-occurrence of, or otherwise address, the behavior that violates this policy or law. Delays in reporting a complaint can limit the type of effectiveness of a response by Umatilla Basin Watershed Council. The procedure for reporting incidents of discriminatory or harassing behavior is not intended to prevent the right of any employee to seek a remedy under available state or federal law by immediately reporting the matter to the appropriate state or federal agency.

6. RETALIATION. Retaliation against any person associated with Umatilla Basin Watershed Council who reports instances of harassment - whether he or she is directly or indirectly involved - is in violation of Umatilla Basin Watershed Council's policies. All reported incidents are assumed to be made in good faith. Any allegations that are proven false will be treated as a serious matter.

7. DISCIPLINARY MEASURES FOR HARASSMENT. Any employee engaging in behavior that violates this policy will be subject to disciplinary action, including the possible termination of employment, whether or not an actual law has been violated.

8. TRAINING. All employees, supervisors, and management personnel will be required to attend mandatory anti-discrimination, anti-harassment, and/or anti-sexual harassment training of a kind as designated by Umatilla Basin Watershed Council.

9. REMEDIES. Remedies for any instances of verified employment discrimination, whether caused intentionally or by actions that have a discriminatory effect, may include back pay, hiring,

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promotion, reinstatement, front pay, reasonable accommodation, or other actions deemed appropriate by Umatilla Basin Watershed Council. Remedies can also include payment of attorney's fees, expert witness fees, court costs and other applicable legal fees.

10. POLICY IMPLEMENTATION. Implementation of this Policy will be effective as of March 01, 2021.

By: Michael T. Ward _____ Date: 01/21/2020 _____

Michael T. Ward, Director

OREGON
WATERSHED
ENHANCEMENT BOARD

Agenda Item H

Council Capacity Evaluations

Board Meeting July 25-26, 2023

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-001

Project Name: NCWA 2023-2025 Council Capacity Grant

Applicant: North Coast WS Assn

Application Description

The Council Capacity Grant funds watershed restoration planning and operational activities for the North Coast Watershed Association. Limiting factors, include: altered quality of physical habitat, historic diking and roads, disconnection from the floodplain, impaired water quality, lack of habitat complexity and large wood, lack of riparian coverage, fish passage barriers, lack of quality monitoring data, and increased erosion from land use practices.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board engages with and provides support, management, and supervision to the council coordinator. The council has demonstrated consistent governance and management during recent council coordinator transitions.

OWEB staff found the council demonstrates ***effective progress in planning*** through engagement in several local planning efforts, including the completion of the Return of the Redds Strategic Action for the Lower Columbia River Chum Salmon (2022) and active engagement with local timber companies.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and is working at a pace and scale appropriate for the current capacity of the council.

OWEB staff found the council demonstrates ***effective progress in stakeholder engagement for watershed restoration purposes***. The council has reengaged in stakeholder engagement activities with the community, including collaborating with other local natural resource organizations for outreach events at local breweries. The council has developed relationships with Chinook Tribal members.

Concerns

The council last reviewed its policies and procedures and bylaws in 2020, it must complete another review before the next council capacity application deadline in 2025 to ensure they meet the eligibility criteria of a review once every 3 years.

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board
Full base funding: meets all merit criteria

Staff Recommended Award
$166,142

Staff Conditions
None

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-002

Project Name: LCRWC Council Capacity and Support

Applicant: Columbia SWCD

Application Description

This project seeks to fund a Watershed Council Coordinator for the Lower Columbia River Watershed Council. Council-identified watershed limiting factors include habitat access – impaired access to habitat, hydrograph/water quantity – altered hydrology, knowledge gaps – lack of information, physical habitat quality – altered quality of physical habitat, water quality - altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council to ***demonstrate some progress in planning*** through the recent submittal of a monitoring application for a Rapid Bioassessment in the watershed. Besides the pending application, the council uses no other documents to plan or prioritize the work of the council. If the monitoring application is funded the council would convene a technical advisory team; however, members of the team have not yet been identified or contacted to see if they would be willing to participate.

Concerns

OWEB staff found the council ***does not demonstrate effective governance and management***. The council is currently operating with the fewest number of board members in the history of the organization. The vice chair recently resigned over the decision to submit a monitoring application and there are no candidates for chair or vice chair in the upcoming October council officer election. The council board has not demonstrated effective management of staff and it is not clear how the board participates in management and oversight of the coordinator, in collaboration with the SWCD, who is the employer.

OWEB staff found the council ***does not demonstrate effective progress in on-the-ground watershed restoration***. The council has implemented no restoration projects in the last two years and the two projects it was working on in the last biennium were transferred to the SWCD for implementation. The council has no clear vision for its restoration niche in the watershed.

OWEB staff found the council ***does not demonstrate effective progress in stakeholder engagement for watershed restoration purposes***. The council did not complete any stakeholder engagement activities during the 2021-2023 biennium and has no activities planned for the 2023-2025 biennium. The current board members have created an isolated environment that does not appear to be welcoming to the general public and is not effective at recruiting new engagement or interest in the council's activities.

Concluding Analysis

The watershed council does not demonstrate it is engaging with its local community to plan and develop restoration projects to support local, state, and federal restoration goals. The council membership does not include a diverse range of community interests and does not appear to be open and welcoming to the broader community. The review team did recognize the council

is showing some limited progress toward future planning with the recent submittal of a monitoring application for a rapid bioassessment, but the council did not meet any of the other merit criteria required by OWEB to receive funding.

Recommendations

Staff Recommendation to the Board: Do Not Fund

Staff Recommended Award: $0

Staff Conditions: N/A

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-003

Project Name: MidCoast WC Council Capacity 2023-2025

Applicant: MidCoast WC

Application Description

The MidCoast Watersheds Council, located in Newport, OR, works in an area of nearly one million acres, including all streams draining from the crest of the coast range to the Pacific Ocean, and from the Salmon River at Cascade head to Cape Creek at Heceta Head. The council relies on Council Capacity funding to maintain baseline funding for two staff positions to complete work related to watershed restoration, planning processes, community outreach, and other activities.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council regularly holds meetings and the council board reviews and updates policies and procedures as necessary to ensure the council is following good business practices. The council's board is both geographically diverse and representative of social sectors of the central coast. The council recently filled their tribal representative on the board.

OWEB staff found the council demonstrates ***effective progress in planning*** through leadership in several local planning efforts. The council continues to play an integral role in the Siletz Coho Strategic Action Plan, Central Coast Estuaries FIP and the MidCoast Water Planning Partnership.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration*** though the implementation of several large-scale restoration projects during the last biennium and projects are linked to council priorities.

OWEB staff found the council demonstrates **effective progress in stakeholder engagement for watershed restoration purposes** through a variety of in-person and online engagement opportunities including holding a Salmon River estuary clean-up event, volunteer planting and nursery events, and community meetings featuring engaging guest speakers.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-004

Project Name: Upper Nehalem Watershed Council Capacity

Applicant: Upper Nehalem WC

Application Description

The Upper Nehalem Watershed Council service area encompasses 555 square miles of temperate rain-forest. We seek capacity support to continue to advance watershed health and native salmon population recovery actions across the landscape in collaboration with partners. From this foundation we are able to maintain a viable network of supporters with whom we secure and leverage essential resources in order to implement a wide scope of actions.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council has an active and engaged board of directors and has recently recruited new members. The council also made some staffing and budgeting adjustments in response to challenges during the previous biennium. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is an active participant in several local planning efforts including the recently completed Oregon Coast Coho Strategic Action Plan and the Nehalem Basin Partnership. These planning efforts help increase the capacity of the council to engage with the local community.

OWEB staff found the demonstrated ***effective progress in on-the-ground watershed restoration*** through completion of projects and planning for future project implementation.

OWEB staff found the council demonstrates ***effective progress in stakeholder engagement*** for watershed restoration purposes. The council is hosting events and speakers that cover a variety of viewpoints and is leveraging its partnerships to increase its ability to engage the local community. The council is also working to improve outreach to area tribes.

Concerns

The council struggled with capacity and its relationship with partners, including ODF, during the last biennium. The council has worked hard to address both of these challenges and is moving in the right direction.

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-005

Project Name: Nestucca, Neskowin & Sand Lake Watersheds Council Support

Applicant: Nestucca-Neskowin Watersheds Council

Application Description

The Nestucca, Neskowin & Sand Lake Watersheds Council operates in South Tillamook County. Limiting factors include high stream temperatures due to a lack of riparian vegetation, over-appropriation of stream flow in the summer, numerous fish passage barriers, erosion and sedimentation, invasive plant species, wetland degradation, lack of habitat complexity and lack of floodplain connectivity.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council regularly holds meetings and the council board has been very engaged in the community. The council has identified gaps in representation on the board and is actively working to fill those gaps. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is leading several local planning efforts, including within the Sand Lake watershed and the Tillamook-Nestucca Salmon SuperHwy partnership. The council recently adopted a new strategic plan and is using it to plan and prioritize the work of the council.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on restoration projects that align with the strategic plan and the capacity of the council. It has a clear niche in the watershed.

OWEB staff found the council demonstrates ***effective progress in stakeholder engagement*** for watershed restoration purposes. The council is actively engaging with the local community using a variety of tools, including a newly awarded outreach grant.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-006

Project Name: Siuslaw Watershed Council Capacity 23-25

Applicant: Siuslaw WC

Application Description

The Siuslaw Watershed Council, located in Mapleton, OR, has been working with local partners to restore the Siuslaw and Coastal Lakes watersheds on the central Oregon coast since 1997. Council-identified watershed limiting factors include habitat access - impaired access to habitat, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council regularly holds meetings and works on organizational improvement. The council has a very representative board and recently reviewed its bylaws with a diversity, equity and inclusion lens and added additional positions to the board.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is leading and engaged in many planning efforts in the Siuslaw Basin, including the Siuslaw Coho Partnership. The council is using both its own and partnership planning documents to plan and prioritize the work of the council.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council has implemented numerous priority projects over the last biennium and is working on the development of future restoration projects. The council works with local tribal partners to plan and implement restoration projects.

OWEB staff found the council demonstrates ***effective progress in stakeholder engagement*** for watershed restoration purposes. The council uses a variety of stakeholder engagement activities to engage with the local community and continues a strong youth education program with non-OWEB funding.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-007

Project Name: TBWC Capacity Grant 2023-25

Applicant: Tillamook Bay WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Tillamook Bay Watershed Council. Council-identified watershed limiting factors include habitat access – impaired access to habitat, physical habitat quality – altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council has addressed most of the concerns that were raised previously during the council capacity review process. The council was re-recognized by the Tillamook County commissioners, has engaged a new board of directors that is representative of the community, regularly holds meetings, and recently updated its bylaws and policies.

OWEB staff found the council demonstrates ***effective progress in planning***. The council has continued to plan and engage with the community despite having no council capacity funding. The council recognizes the need to engage with the local community and update the strategic plan before restarting the council's restoration program.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council continued to make progress on some restoration projects, led by volunteer board members, despite having no council capacity funding. The council is working with local partners to determine future restoration priorities.

OWEB staff found the council demonstrates ***effective progress in stakeholder engagement*** for watershed restoration purposes. Council board members have worked to rebuild relationships throughout the watershed and demonstrated the council has broad support from the watershed community.

Concerns

None

Concluding Analysis

The council was without funding for two biennia and has demonstrated it has addressed OWEB's previous concerns and is making progress in all of OWEB's merit criteria. The council should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-008

Project Name: Council Capacity 2023 – Applegate Partnership

Applicant: Applegate Partnership, Inc.

Application Description

The Applegate watershed contains over 493,000 acres and is split between Jackson and Josephine Counties and Siskiyou County in northern California. The land ownership is primarily federally managed lands with rural residential and private forest making up the rest, and over 700 miles of stream habitat for winter and summer Steelhead, Coho salmon, fall Chinook salmon, and Pacific Lamprey. Through on-the-ground projects, outreach, and participation in local activities, the APWC strives to bring awareness to these communities through our work that mutually benefits the landowners, community and our natural resources.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council regularly holds meetings and has a very engaged board actively working to support the organization and staff. The council recently updated its strategic plan and is using it to guide board recruitment and organizational capacity building.

OWEB staff found the council demonstrates ***effective progress in planning***. The council recently updated its strategic plan and it is using it to guide the work of the council.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and planning for future restoration projects. The council is working with landowners to address difficult water diversion projects and developing solutions that are good for both fish and landowners.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council uses numerous stakeholder engagement methods to engage a broad diversity of community members and is working to improve its relationships with local tribes, which is challenging considering the limited capacity of all partners.

Concerns

The council last reviewed its policies in late 2021 and its bylaws in late 2022, it must complete another review before the next council capacity application deadline in 2025 to ensure they meet the eligibility criteria of a review once every 3 years.

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

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Application # 224-010

Project Name: Coos Watershed Association 23-25 Capacity

Applicant: Coos Watershed Association

Application Description

The mission of the Coos Watershed Association is to support environmental integrity and economic stability within the Coos watershed by increasing community capacity to develop, test, promote, and implement management practices in the interest of watershed health. This project seeks to fund a Watershed Council Coordinator for the Coos Watershed Association. Council identified watershed limiting factors include habitat access - impaired access to habitat, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council regularly holds meetings, and the council board reviews and updates policies and procedures as necessary to ensure the council is following best business practices. The council has two tribal positions on its board.

OWEB staff found the council demonstrates ***effective progress in planning***. The council and its partners use both the Coos Basin Coho Strategic Action Plan and the Tioga Action Plan to plan and prioritize the work of the council.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is engaged in many restoration efforts, including leading the work of the Coos Coho Basin FIP.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council uses a variety of stakeholder engagement methods to reach a broad diversity of community members and has prioritized working with youth from marginalized communities in its youth outreach efforts.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-011

Project Name: Coquille Watershed Association Council Capacity Application

Applicant: Coquille Watershed Association

Application Description

This council capacity grant will support the work of the Coquille Watershed Association. The mission of the Association is to work collaboratively with landowners to develop and implement voluntary watershed restoration, enhancement, and engagement activities that promote healthy and resilient ecosystems and economies in the Coquille watershed. Council identified watershed limiting factors include hydrograph/water quantity - altered hydrology, knowledge gaps - lack of Information, physical habitat quality - altered quality of physical habitat, water Quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council regularly holds meetings, and the council board is active in the management and oversight of the council and significantly stepped up during recent staffing transitions. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is leading several local assessment and planning efforts that are engaging local partners and taking the lead in the development of the Coho Business Plan.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing projects and planning for future restoration projects in considering of staffing capacity. The council coordinates closely with tribes on cultural resource work related to their restoration efforts.

OWEB staff found the council demonstrates ***effective progress in community engagement for watershed restoration*** **purposes**. The council is working to engage stakeholders related to tidegate work within the watershed.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-012

Project Name: Illinois Valley WC Council Capacity_2023-25

Applicant: Illinois Valley WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Illinois Valley Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council regularly holds meetings and is working improve overall organizational operations and create a clear distinction between the council and district operations. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council recently adopted a new three-year strategic plan and is using it to plan and prioritize future restoration actions. The council is also involved in fire response planning efforts.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing projects and planning for future restoration projects using its newly adopted strategic plan.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council adopted a new outreach plan last biennium and is using the plan to implement a variety of stakeholder engagement activities.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

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Application # 224-014

Project Name: Lower Rogue Watershed Council Capacity 2023-2025

Applicant: Curry SWCD

Application Description

The Lower Rogue Watershed includes all lands and waters of these lands that drain into the Rogue and Illinois rivers. Our purpose is to protect, enhance, and restore long-term natural resources and economic stability of the Lower Rogue Watershed and the near shore environment. Watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council regularly holds meetings, reviews and updates council documents. The council has worked to make its meetings more inclusive and has identified several areas for board improvement based on its most recent self-evaluation. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council recently completed a planning process with Curry County. The council has a very thoughtful work plan development process which involves board members and community input.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing projects and planning for future restoration projects. The council recently completed upland restoration work and worked with the tribal fire crew to develop a burning plan to be implemented this biennium.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council has developed relationships with local tribes and is actively engaging them in future restoration planning and implementation. The council has updated its outreach materials and is working to engage beyond its traditional partners with new outreach events in the community.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-016

Project Name: South Coast Watershed Council Capacity 2023-2025

Applicant: Curry SWCD

Application Description

The South Coast Watershed Council encompasses 10 coastal watersheds on the southern Oregon coast that support coho salmon, Chinook salmon, and/or steelhead. Limiting factors vary across these watersheds, but all are impaired by elevated summer stream temperatures, an overabundant supply of coarse grained sediment, invasive plants, small estuaries, loss of floodplain connectivity and off-channel habitat, and the oversimplification of the low gradient stream network.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council regularly holds meetings, reviews and updates council documents. The council has worked to update how it runs its meetings to improve board engagement. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is involved in organizational and partnership strategic planning efforts and recently completed a new five-year strategic plan, which will guide the council's future actions.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing projects and planning for future restoration projects that involve both upland and in-stream priorities.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council has worked hard to improve engagement with local tribes and has begun working with a DEI consultant to engage with non-traditional partners, including low-income communities.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

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Application # 224-017

Project Name: Tenmile Lakes Basin Partnership Council Capacity 2023-2025

Applicant: Cascade Pacific RC&D

Application Description

The Tenmile Lakes Watershed is a coastal lake system that contains 113 stream miles and over 3,000 surface acres of Lakes that provide high priority habitat for native Coho Salmon, Winter Steelhead, Coastal Cutthroat Trout and Pacific Lamprey. Limiting factors identified include nonnative fish predation, multiple fish passage barriers, increases sedimentation resulting in toxic algae blooms and nuisance aquatic plant growth, and reduced riparian zone functions. Funding will coordinate and support the TLBP and Partners in implementing multiple projects prioritized within the assessment and action plans.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board consists of many long-serving members who take an active role in leadership and management of the organization. The council is working to recruit new members to fill identified gaps.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is undertaking a significant planning effort in coordination with local tribal partners.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and has many projects currently in development including projects with new partners and projects that address specific priorities identified in local planning documents.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council is very active in the community and prioritizes stakeholder engagement activities to support its wetland restoration priorities.

Concerns

The council last reviewed its policies and bylaws in 2021, it must complete another review before the next council capacity application deadline in 2025 to ensure they meet the eligibility criteria of a review once every 3 years.

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

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Application # 224-018

Project Name: Partnership for the Umpqua Rivers Council Capacity 2023-2025

Applicant: Partnership for the Umpqua Rivers

Application Description

This project is located in the Umpqua Basin and is focused on working with willing landowners to improve stream habitat and water quality throughout the project location area. This project seeks to fund a Watershed Council Coordinator for the Partnership for the Umpqua Rivers Watershed. Council-identified watershed limiting factors include habitat access - impaired access to habitat, physical habitat quality - altered quality of physical habitat, water quality - altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board is very engaged and the recent transition to a new Executive Director has gone well. The council continues to look for ways to engage its board and recruit new board members.

OWEB staff found the council demonstrates ***effective progress in planning***. The council has been engaged in several local planning efforts focused on Umpqua Basin oak and tidegates. The council uses several documents, including its strategic plan, Umpqua Basin Action Plan and Project Work plan to plan and prioritize the work of the council.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing projects and planning for future restoration projects and is engaged in the fire recovery from the Archie Creek fire, estuary restoration work and oak restoration. The council works closely with local tribal partners to plan and implement restoration projects.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council is partnering with the University of Oregon Center for Science Communication Research to improve its outreach efforts.

Concerns

The council last reviewed its bylaws in 2020, it must complete another review before the next council capacity application deadline in 2025 to ensure they meet the eligibility criteria of a review once every 3 years.

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-019

Project Name: Rogue River Watershed Council Capacity 2023-2025

Applicant: Rogue River WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Rogue River Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality –altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board is very engaged and recently added two new members to increase the diversity of the board. The council recently reviewed its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is leading several local planning efforts and using the draft Upper Rogue Coho Strategic Plan to plan and prioritize work. The council is engaging with drinking water providers to ensure they are considering source water quality in future restoration actions.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing projects while planning for both upland and instream restoration projects and is working with tribal partners to incorporate first foods plants into future restoration work.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council, with its partners, is using planning documents to guide outreach. The council continues to engage with community members to encourage restoration as a tool to build community resilience in response to growing wildfire threats.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $415,355
At the April 2019 Board meeting the Board discussed providing on-going merger support to watershed councils that have successfully merged. Additional merger funding is calculated by multiplying 1.5 times the council's base award. ($166,142 + (($166,142x1.5=$249,213)) =$415,355)

Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-021

Project Name: Elk Creek Watershed Council Support 2023

Applicant: Elk Creek WC

Application Description

Project will provide funding for the Coordinator/Executive Director, and operations of the Elk Creek Watershed Council in the northern part of Douglas County. The Council will work with local landowners and state and federal agencies to plan, develop, and implement on-the-ground projects to benefit fish and wildlife, and water quality in the Elk Creek Watershed, and in the Umpqua basin. Key partners are local landowners, Douglas and Umpqua SWCD, ODFW, Roseburg District BLM, and others.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board is engaged and supportive of the council and has recently recruited a new board member. The council recently reviewed its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council recently completed bioassessment surveys, which were used to inform the newly adopted restoration action plan, which will guide future restoration actions.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council focuses its restoration efforts on private lands and is making progress on existing restoration projects.

OWEB staff found the council demonstrates some ***progress in community engagement*** for watershed restoration purposes. The council has struggled to restart its usual stakeholder engagement approaches post-COVID and is reaching out to landowners to discuss restoration opportunities as its primary outreach tool.

Concerns

The council continues to struggle to recruit a board member from the industrial timber industry, which should be an organizational priority during the next biennium.

The council is using limited approaches to outreach and engage the broader watershed community. Broader stakeholder engagement may lead to increased council participation and help with future board recruitment.

Concluding Analysis

The council has demonstrated progress in all merit criteria and is recommended for full funding. However, the council needs to focus on improving both organization governance and management and stakeholder engagement in the 2023-2025 biennium to ensure it continues to demonstrate process in those two merit criteria areas. The council should consider reviewing its approach to board meetings, including location and time, to make the meetings more accessible to all community members and working to engage with a broader aspect of the watershed.

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Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: 1) The council must submit a progress report by July 1, 2024 reporting on the following:

- Progress toward engaging an industrial timber industry member on the board, including a description of what outreach efforts were taken and the result of those efforts.

- Progress in current stakeholder engagement activities and the development of new approaches and efforts to make the council meetings more available to the community at large.

Oregon Watershed Enhancement Board
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Application # 224-022

Project Name: 23-25 CWC Capacity

Applicant: Calapooia WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Calapooia Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council has successfully recruited three new board members and the board continues to be engaged in governance and management. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is actively using its monitoring activities and local, state and federal plans to inform and plan future restoration actions.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is implementing existing restoration projects based on watershed priorities and has some projects currently in development. It will be important for the council to use its planning efforts and partnerships to make progress on future on-the-ground restoration actions.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council has partnered with the Mid-Willamette Partnership to increase its capacity for outreach and partnership collaboration. The council is developing new tribal partnerships through its engagement in the Mid-Willamette Beaver Partnership.

Concerns

The council is relying on its participation in partnerships to advance its community engagement priorities. The council should continue to evaluate its approach to engagement and find ways to prioritize stakeholder engagement as well as restoration actions.

The council has been focused on restoration projects developed by partners or previous staff; the council does not have a lot of new priority projects on the horizon.

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-023

Project Name: Clackamas River Basin Council Capacity

Applicant: Clackamas River Basin Council

Application Description

This project seeks to fund a Watershed Council Coordinator for the Clackamas River Basin Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality –altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council is actively engaged in council management and continues to work on improving board governance with a focus on being a welcoming and inclusive organization.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is actively engaging in multiple planning processes, including the Clackamas Basin Partnership, and is using local, state and federal plans to plan and prioritize its work.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and has many projects currently in development through the Clackamas Basin Partnership FIP.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council, with its partners, is using multiple stakeholder engagement methods to engage the local community, including events spread throughout the watershed and focused on a diversity of community groups.

Concerns

The council last reviewed its policies and bylaws in 2019. The council must complete another review before the next council capacity application deadline in 2025 to ensure they meet the eligibility criteria of a review once every 3 years.

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-024

Project Name: Coast Fork Willamette Watershed Council Capacity 23-25

Applicant: Coast Fork Willamette WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Coast Fork Willamette Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality - altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board is actively engaged in council management and governance and regularly reviews and updates its policies and procedures. The council has a diverse board that is representative of the watershed community. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is actively engaging in multiple planning processes, including engagement with the Upper Willamette Stewardship Network. The council regularly updates and seeks input on its planning documents to ensure they are living documents.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and is strategic in its restoration efforts. The council leverages its partnerships to help increase its capacity to achieve restoration outcomes in the watershed.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council uses multiple stakeholder engagement methods to engage the local community. The council leverages its partnerships to help increase its capacity to engage broadly within the watershed. The council is engaged with the Upper Willamette Stewardship Network to explore and learn how to be more inclusive and increase its engagement with non-traditional partners.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-025

Project Name: CSWC GCS 2023-25

Applicant: Columbia Slough WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Columbia Slough Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board has focused on justice, equity, diversity and inclusion training and creating a more inclusive board and organization. The board has been very engaged during several recent staff transitions. The council recently updated it policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council has a Stewardship Action plan that it uses to plan and prioritize its work. The council is successfully engaging under-represented communities in planning efforts.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council has worked to define its restoration niche in the watershed and is making progress on restoration projects appropriate to the urban landscape.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council uses multiple stakeholder engagement methods to engage the diverse watershed community, including bilingual events.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-026

Project Name: Johnson Creek Watershed Council Capacity 2023-2025

Applicant: Johnson Creek WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Johnson Creek Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council meets on a regular basis and regularly reviews and updates council documents. The council board has focused on board recruitment and recently added a new member from the upper watershed. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is actively engaging in multiple planning processes, including the implementation of the Clackamas Partnership SAP. The council will be working to develop a new Action Plan during the 23-25 biennium.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and has many projects currently in development both within and outside the new Clackamas Basin Partnership FIP.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council, with its partners, is using multiple stakeholder engagement methods to engage the local community, including citizen science events spread throughout the watershed. The council is planning broad outreach in coordination with the development of its new Action Plan.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-027

Project Name: Long Tom Watershed Council Support 2023-2025

Applicant: Long Tom WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Long Tom Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board has taken a leadership role during the executive director transition. The council board has focused on board recruitment and is working to address geographic, racial and ethnic diversity on the board and within the organization. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council uses multiple documents to plan and prioritize the work of the council. The council is currently updating its Strategic Plan to inform its next 20 years. The council is actively engaging in multiple planning processes, including the Willamette Oak Partnership, and is working to expand its work with tribal partners.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and is working on new, innovative restoration approaches in urban settings and related to fire. The council leverages its partnerships, including the Upper Willamette Stewardship Network, to help increase its capacity to achieve restoration outcomes in the watershed.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council, with its partners, is using multiple stakeholder engagement methods to engage the local community. The council leverages its partnerships, including the Upper Willamette Stewardship Network, to help increase its capacity to explore and learn how to be more inclusive and increase its engagement with non-traditional partners.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-028

Project Name: Marys River Watershed Council - Council Capacity 2023-2025

Applicant: Marys River WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Marys River Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board is engaging with and providing support, management, and direction to the council. The council board has prioritized DEI training and awareness, moving the council towards a more inclusive organization.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is actively engaging in multiple planning processes across the watershed and using monitoring data to help inform future restoration actions.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and is focusing on strategic areas within the watershed to do both stakeholder engagement and restoration.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council, with its partners, is using multiple stakeholder engagement methods to engage the local community, including events spread throughout the watershed. The council's engagement with the Mid-Willamette Partnership is helping to expand its capacity to engage and partner in the watershed.

Concerns

The council last reviewed its bylaws in 2021. The council must complete another review before the next council capacity application deadline in 2025 to ensure they meet the eligibility criteria of a review once every 3 years.

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
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Application # 224-029

Project Name: Middle Fork Willamette Watershed Council Capacity Application 2023-2025

Applicant: Middle Fork Willamette WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Middle Fork Willamette Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality - altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board is engaging with and providing support, management, and direction to the council during the recent staff transitions. The council recently updated its policies and procedures.

OWEB staff found the council demonstrates ***effective progress in planning***. The council recently updated its Strategic Plan, is actively engaging with multiple planning processes across the watershed, and is working with a diversity of partners within the Upper Willamette Stewardship Network as well as other local partnerships to plan the work of the council.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and has limited future restoration projects identified at this time. It will be important for the council to use its new strategic plan to identify and prioritize future restoration actions.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council, with its partners, is using multiple stakeholder engagement methods to engage the local community. The council leverages its partnerships, including the Upper Willamette Stewardship Network, to help increase its capacity to engage with the entire watershed community.

Concerns

During recent staffing transitions the council has made progress on existing restoration projects and focused on organizational governance and management. It is important that the council thinks strategically about what comes next related to on-the-ground restoration and continues to pursue projects that align with the new strategic plan.

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-030

Project Name: 2023-2025 North Santiam Watershed Council Capacity Grant

Applicant: North Santiam WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the North Santiam Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board is engaging with and providing support, management, and direction to the council. The council board provided leadership during recent staffing transitions and challenges. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council purposefully adjusted the priorities of the council to support communities impacted by the fall 2020 fires. It is important for the council to begin to plan for council priorities post-fire recovery.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council has focused its restoration efforts on post-fire recovery in the area impacted by the 2020 fires. The council needs to plan and prioritize future restoration actions as it moves past fire recovery.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council has partnered with the Mid-Willamette Partnership to increase its capacity for outreach and partnership collaboration. The council needs to plan and prioritize future stakeholder engagement actions as it moves past fire recovery.

Concerns

The council has been very focused and engaged with post-fire recovery in the watershed. The council needs to think strategically about what comes next for the council in relation to on-the-ground restoration and stakeholder engagement.

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-031

Project Name: Pudding River Watershed Council Capacity Grant 2023-2025

Applicant: Pudding River WC

Application Description

This project will enable the council to continue partnership support to various state and federal agencies currently relying on the Council for their role in organizing the grassroots in an otherwise difficult to access demographic area. Limiting factors include high stream temperatures due to a lack of riparian vegetation, over-appropriation of stream flow in the summer, numerous fish passage barriers, erosion and sedimentation, invasive plant species, wetland degradation, lack of floodplain connectivity and low public engagement.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board is engaging with and providing support, management, and direction to the council. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council recently adopted a new strategic plan, after significant stakeholder engagement, and is using the plan to prioritize the work of the council.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and has projects currently in development that are in support of its strategic plan.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council is working with partners in the watershed to expand its engagement opportunities and develop a communication strategy.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-035

Project Name: Scappoose Bay Watershed Council, Capacity 23-25

Applicant: Scappoose Bay WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Scappoose Bay Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board is engaging with and providing support, management, and direction to the council. The council board has provided leadership and support during recent staffing transitions. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is using local, state and federal plans and an existing council strategic plan to guide its restoration work.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council has made great progress on existing restoration projects despite council staffing turnover and has projects currently in development that are in support of council priorities.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council has a strong outreach program and regularly hosts community events, including work with its native plant nursery.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-036

Project Name: South Santiam Watershed Council Capacity 23-25

Applicant: South Santiam WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the South Santiam Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board is engaging with and providing support, management, and direction to the council. The council recently reviewed and updated it policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is using local, state and federal plans and an existing council strategic plan to guide its restoration work.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and has limited future restoration projects identified. It will be important for the council to use its planning documents and partnerships to make progress on future on-the-ground restoration actions.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council has partnered with the Mid-Willamette Partnership to increase its capacity for outreach and partnership collaboration.

Concerns

As a result of staffing transitions the council struggled with meeting reporting requirements at the beginning of the biennium, which impacted the ability of the council to get new grant agreements. The council coordinator has worked with OWEB staff to resolve the reporting issues.

The council has focused on operations during recent staff transitions, the council needs to think strategically about what comes next in relation to on-the-ground restoration and stakeholder engagement.

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-037

Project Name: Building the Tualatin River Watershed Council's Organizational Capacity

Applicant: Tualatin River WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Tualatin River Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board is engaging with and providing support, management, and direction to the council. The council is focusing on DEI principles, recently updated its policies and bylaws, and is working to recruit new board members.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is leading and engaging in both organizational and local planning efforts. The council is using data from recent Rapid Bio-Assessments to update restoration action plans.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and has projects currently in development that are in support of its planning efforts.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council, with its partners, is using multiple stakeholder engagement methods to engage the local community and is planning for future stakeholder engagement actions. The council has adopted an equity action plan to help guide the council's future outreach actions.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-038

Project Name: McKenzie Watershed Council Capacity 2023-2025

Applicant: McKenzie Watershed Alliance

Application Description

This project seeks to fund a Watershed Council Coordinator for the McKenzie River Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board is engaging with and providing support, management, and direction to the council. The council board has continued to work to diversify its board membership and recently added new members. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council continues to be engaged in planning and project implementation through the Pure Water Partnership. The council is using the assessment documents that were generated in response to the Holiday Farm Fire to plan and prioritize its work.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and has projects currently in development that are in support of its planning efforts. The council continues to develop new restoration projects based on assessments from the Holiday Farm Fire.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council is collaborating with the Upper Willamette Stewardship Network and Pure Water Partners to expand its ability to engage with the watershed community. The council continues to engage with the watershed community in a variety of ways.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-039

Project Name: Greater Yamhill Watershed Council Capacity 2023-2025

Applicant: Greater Yamhill Watershed Council

Application Description

This project seeks to fund a Watershed Council Coordinator for the Greater Yamhill Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***some governance and management***. The council board provided oversight of the council during a period of staff transition and is working to improve governance and management. The council has contracted with a CPA to improve its fiscal management. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***some progress in planning***. The council has identified the need for a new strategic plan to guide its work and is working to secure funding and support to complete the plan early in the next biennium.

OWEB staff found the council demonstrated ***some progress in on-the-ground watershed restoration***. The council has worked with BLM to implement restoration in the watershed.

OWEB staff found the council demonstrates ***some progress in community engagement*** for watershed restoration purposes. The council worked to build connections with private landowners and industrial timber companies.

Concerns

The council struggled with meeting OWEB reporting requirements throughout the biennium. The board recently hired a new coordinator and needs to develop a governance and management structure that provides adequate staff oversight.

The council has not pursued any of its own restoration work and it is not clear what the council's restoration niche is in the watershed.

The council has no clear strategy for stakeholder engagement and completed limited activities during the biennium.

Concluding Analysis

The council did not demonstrate through the application materials and the secondary interview that it meets all the merit criteria. The council has struggled for multiple biennia to demonstrate effective governance and management. The council did demonstrate some progress in all merit criteria, but needs to work on governance and management, identifying a clear restoration and stakeholder engagement niche for the council in the watershed, and being strategic in its future actions.

Oregon Watershed Enhancement Board
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Recommendations

Staff Recommendation to the Board: Reduced funding for 1 year. The second year of funding is contingent on the council meeting the conditions described below. Staff will come to the board in July 2024 with a funding recommendation.

Staff Recommended Award: $66,467

Staff Conditions

- All watershed council approved meeting minutes must be posted on the council's website within 30 days of the meeting at which they were approved.
- All council meeting agendas must be posted on the council's website at least 24 hours before the scheduled council meeting.

Progress Report Requirements

Quarterly Progress reports are required to be submitted to the OWEB Project Manager. Reports must address the progress the council is making to meet OWEB's five merit criteria. The council must demonstrate it is making progress in merit criteria by May 2024 or OWEB staff will not recommend a second year of funding to the OWEB Board. The progress reports must include the following information:

Merit Criteria #1: Effective governance and management:

Actions the council is taking to ensure effective governance and management of the council, including: 1) management of the council coordinator, and 2) sound fiscal and project management reporting.

Merit Criteria #2: Progress in planning:

A description of progress the council is making on updating its strategic plan, including how the council is engaging with the community during the strategic plan development process.

Merit Criteria #3: Progress in on-the-ground restoration:

Actions the council is taking to plan and implement on-the-ground restoration including the number of applications submitted.

Merit Criteria #4: Progress in community engagement for watershed restoration purposes:

Actions the council is taking to engage with the watershed community. Including events held and attendance at the events and attendance at board meetings.

Oregon Watershed Enhancement Board
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Application # 224-040

Project Name: Klamath Watershed Partnership Council Capacity 2023-2025

Applicant: Klamath Watershed Partnership

Application Description

The project seeks to fund a Watershed Council Coordinator position and operating expenses for the Klamath Watershed Partnership. Council-identified watershed limiting factors include knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality-altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board is engaging with and providing support, management, and direction to the council. The council board recently added a new member from the Klamath Tribes.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is using the Upper Klamath Basin Watershed Action Plan to guide its work and has been involved in post-fire recovery in the watershed. The council is also involved in other planning efforts, including the Klamath Lake Forest Health Partnership.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council has a clear restoration niche in the watershed and is making progress on existing restoration projects and has projects currently in development that are in support of its planning efforts. The council is involved in restoration work as a result of recent fires.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council is actively working on stakeholder engagement within the basin and has played a significant role in stakeholder engagement in the local SIA work with the SWCD.

Concerns

The council last reviewed its policies and bylaws in early 2022. The council must complete another review before the next council capacity application deadline in 2025 to ensure they meet the eligibility criteria of a review once every 3 years.

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-041

Project Name: Council Capacity Grant 2023-2025

Applicant: Crooked River WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Crooked River Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, physical habitat quality - altered quality of physical habitat.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council regularly holds meetings and makes the information available to the general public. The council has a large board that is representative of the watershed.

OWEB staff found the council demonstrates ***effective progress in planning***. The council uses local, state, federal and its own council action plan to plan and prioritize the work of the council.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and has a clear niche in the watershed. The council is using its planning documents to guide future restoration work in the watershed.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council is actively working on stakeholder engagement within the basin and is targeting landowner outreach in specific basins for the purposes of implementing future restoration actions.

Concerns

The council last reviewed its policies and bylaws in early 2022. The council must complete another review before the next council capacity application deadline in 2025 to ensure they meet the eligibility criteria of a review once every 3 years.

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-042

Project Name: Gilliam-East John Day Watershed Council Capacity 2023-2025

Applicant: Gilliam SWCD

Application Description

This project seeks to fund a Watershed Council Coordinator for the Gilliam-East John Day Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, physical habitat quality - altered quality of physical habitat, water quality - altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board engages with and provides support, management, and supervision to the council coordinator. The council board has continued to be engaged and to take a leadership role throughout recent coordinator transitions and staffing challenges. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council has a clear niche in the watershed and works closely with the SWCD and other partners to plan and prioritize the work of the council.

OWEB staff found the council demonstrates ***some progress in on-the-ground watershed restoration***. The council is a key partner is many restoration efforts by assisting in outreach, planning and coordination. The council is not taking an active role in implementation.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council has a clear niche in the watershed and is actively working on stakeholder engagement within the basin and is targeting landowner outreach in relation to RCPP and other programs.

Concerns

The council is not actively engaged in on-the-ground restoration and needs to better define its niche related to restoration work in the watershed.

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-043

Project Name: Hood River Watershed Group Council Capacity 2023

Applicant: Hood River WS Group

Application Description

This project seeks to fund a Watershed Council Coordinator for the Hood River Watershed Group. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board engages with and provides support, management, and supervision to the council coordinator. The council became a non-profit during the biennium and updated it bylaws and other governing documents in the process.

OWEB staff found the council demonstrates ***effective progress in planning***. The council worked with local partners to complete the Hood River Partnership SAP and is using the document to plan and prioritize its work.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and planning for future projects. The council has a clear restoration niche in the watershed.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council is actively working with a variety of stakeholders in the watershed and has created some new partnerships to expand its presence in the community.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-044

Project Name: Middle Deschutes Watershed Council Capacity 2023-2025

Applicant: Jefferson SWCD

Application Description

This project seeks to fund a Watershed Council Coordinator for the Middle Deschutes Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality - altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board engages with and provides support, management, and supervision to the council coordinator. The council coordinator and board are working to fill positions on the board, including the tribal representative.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is working to update its Trout Creek Action Plan with National Water Quality Institute funding and will use the updated plan to guide future restoration work.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council's new coordinator is working to complete existing restoration projects and planning for future restoration projects in the Trout Creek and Willow Creek watersheds.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council recruited new members and is holding tours and other community events to engage a broad representation of the watershed.

Concerns

The council last reviewed its policies in 2021. The council must complete another review before the next council capacity application deadline in 2025 to ensure they meet the eligibility criteria of a review once every 3 years.

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-045

Project Name: Council Capacity - Lake County Umbrella Watershed Council 23-25

Applicant: Lake County Umbrella Watershed Council

Application Description

This project seeks to fund a Watershed Council Coordinator for the Lake County Umbrella Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality - altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board consists of many long-serving members who take an active role in leadership and management of the council. The council was recently able to recruit a new board member and updated its bylaws and policies.

OWEB staff found the council demonstrates ***effective progress in planning***. The council does a great job planning and collaborating with partners. The council is involved in many planning efforts, including SIAs, Warner Basin FIP, and forest health.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and has many projects currently in development that support their ongoing planning efforts. The council has done a good job managing both post-fire recovery work as well as its other existing restoration commitments.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council is very active in the community and uses diversity outreach methods to engage the local community.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-047

Project Name: Upper Deschutes Watershed Council

Applicant: Upper Deschutes WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Upper Deschutes Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality - altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board demonstrated strong leadership and effective governance and management during executive director transition. The board is working to diversify the board and is working to update its bylaws and policies and procedures. The council is working on updates to its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is working with multiple partners throughout the basin on a variety of planning efforts, including leading the development of a SAP for the Upper Deschutes basin.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and planning for future projects linked to current planning efforts.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council offers a variety of outreach and engagement opportunities spread throughout the watershed.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-048

Project Name: Wasco County Area Watershed Councils 2023-2025

Applicant: Wasco SWCD

Application Description

This project seeks to fund a Watershed Council Coordinator for the Wasco Area Watershed Councils. Council-identified watershed limiting factors include habitat access -impaired access to habitat, hydrograph/water quantity - altered hydrology, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council coordinating board is very active and engages both in organizational governance and management as well as outreach to the individual watersheds. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is working with multiple partners throughout the basin on a variety of planning efforts including on SIAs, East Cascades Oak FIP, and the forest collaborative. The council is currently working to update its action plan.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council has developed a clear niche in the watershed and collaborates with the SWCD to plan and implement restoration projects that align with the council's priorities.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council is actively working on engaging with community members throughout the watershed and offered several in-person outreach events during the last biennium.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-049

Project Name: Grande Ronde Model Watershed 2023-25

Applicant: Grande Ronde Model WS Foundation

Application Description

This project seeks to fund a Watershed Council Coordinator for the Grande Ronde Model Watershed. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board demonstrated strong leadership and effective governance and management and recently updated its bylaws and policies and procedures. The council has a representative board and includes tribal membership. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is working with multiple partners throughout the basin on a variety of planning efforts. The council uses its restoration atlas to plan and prioritize the work of the council.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and planning for future projects linked to current planning efforts.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council is actively working on a variety of community engagement activities spread throughout the watershed.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-050

Project Name: Harney County WC Council Support 2023-25

Applicant: Harney County Watershed Council

Application Description

This project seeks to fund a Watershed Council Coordinator for the Harney County Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board consists of many long-serving members who take an active role in leadership and management of the council. The council recently updated its bylaws and policies and procedures.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is working with multiple partners throughout the basin on a variety of planning efforts including Placed Based Planning work. The council has used its strategic plan and its collaborative relationships to plan the work of the council.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is a key partner in many restoration efforts by assisting in stakeholder engagement, planning and coordination. The council is not taking an active role in implementation.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council is very active throughout the watershed in a variety of stakeholder engagement activities. The council uses its updated outreach plan to plan and prioritize its outreach activities.

Concerns

The council is not actively engaged in on-the-ground restoration and needs to better define its role related to restoration work in the watershed.

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-051

Project Name: Malheur Watershed Council

Applicant: Malheur WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Malheur Watershed Council. Council-identified watershed limiting factors include hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board consists of many long-serving members who take an active role in leadership and management of the council. The council has recently recruited new members. The council recently updated its bylaws and policies and procedures.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is using monitoring data and a variety of local, state, federal and council plans to help inform future restoration actions.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and planning for future projects linked to current planning documents and data collection efforts.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council worked with a communications consultant to update its outreach materials and is planning for tours in 2023.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-052

Project Name: North Fork John Day Watershed Council Capacity

Applicant: North Fork John Day WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the North Fork John Day Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality - altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board engages with and provides support, management, and supervision to the council coordinator. The council has a large and engaged board with tribal representation and is working to fill identified caps. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is engaged in multiple planning efforts and uses local, state, federal and council plans to plan and prioritize the work of the council.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and planning for future projects linked to current planning and data collection efforts.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council is actively working on engaging local community members throughout the watershed. The council is working with a local veterans group.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
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Application # 224-053

Project Name: Council Capacity 2023-2025

Applicant: Umatilla Basin WS Foundation

Application Description

This project seeks to fund a Watershed Council Coordinator for the Umatilla Basin Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

OWEB staff found the council demonstrates ***some progress in planning***. The council is working with landowners to identify and prioritize barriers for future removal and is planning on reengaging the Umatilla Basin Technical Team.

The council demonstrates ***some progress in on-the ground watershed restoration*****,** the council completed 100% designs for two future restoration projects.

OWEB staff found the council demonstrates ***some progress in community engagement*** for watershed restoration purposes. The council completed two river clean-up events during the biennium.

Concerns

The council continues to struggle with ***effective governance and management.*** Despite many reminders and grant agreement conditions, the council coordinator continues to miss OWEB grant fiscal and project reporting deadlines. The council is struggling to have a quorum at board meetings and is not consistently taking and approving minutes. The council does not have a plan for recruiting new board members or addressing the current organizational challenges.

The council is relying on planning documents completed by local partners, the council would benefit from completing its own strategic plan in the 2023-2025 biennium that could be used to guide the council in its restoration and outreach efforts.

The council completed no restoration projects in the 2021-2023 biennium, and it is not clear what the restoration niche is for the council or how it is identifying and prioritizing its restoration work.

Concluding Analysis

The council has not met all of OWEB's merit criteria. The council does not demonstrate effective governance and management and has not addressed the concerns identified in the 2021-2023 council capacity evaluation. In addition, the council has made limited progress toward on-the ground restoration.

Recommendations

Staff Recommendation to the Board: Reduced funding for 1 year. The second year of funding is contingent on the council meeting the conditions described below. Staff would come to the board in July 2024 with a funding recommendation.
Staff Recommended Award: $66,457

Oregon Watershed Enhancement Board
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Staff Conditions

- All watershed council approved meeting minutes must be posted on the council's website within 30 days of the meeting at which they were approved.
- All council meeting agendas must be posted on the council's website at least 24 hours before the scheduled council meeting.
- The OWEB Project Manager must receive, via email, agendas and minutes of all meetings.

Progress Report Requirements

Quarterly Progress reports are required to be submitted to the OWEB Project Manager. Reports must address the progress the council is making to meet OWEB's five merit criteria. The council must demonstrate it is making progress in merit criteria by May 2024 or OWEB staff will not recommend a second year of funding to the OWEB Board. The progress reports must include the following information:

Merit Criteria #1: Effective Governance and Management
Actions the council is taking to ensure effective governance and management of the council, including 1) management of the council coordinator, 2) sound fiscal and project management reporting, 3) copies of all meeting minutes and agendas from the previous quarter.
Merit Criteria #2: Progress in planning:
An update on the status of reconvening the Umatilla Basin Tech Team, including membership, meeting notes, and meeting agendas.
An updated council work plan.
Merit Criteria #3: Progress in on-the-ground restoration:
Actions the council is taking to plan and implement on-the-ground restoration, including number of applications submitted.
Merit Criteria #4: Progress in community engagement for watershed restoration purposes:
Actions the council is taking to engage with the watershed community. Including events held and attendance at the events and attendance at board meetings.

Oregon Watershed Enhancement Board
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Application # 224-054

Project Name: Walla Walla Basin Watershed Council 2023-2025 Council Capacity

Applicant: Walla Walla Basin Watershed Foundation

Application Description

This project seeks to fund a Watershed Council Coordinator for the Walla Walla Basin Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality - altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board engages with and provides support, management, and supervision to the council coordinator. The council has recently recruited new board members and updated its bylaws and policies and procedures.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is using monitoring data to inform its future restoration actions.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and planning for future projects linked to current planning and data collection efforts.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council is actively working on engaging local community members throughout the watershed and has developed a good working relationship with the tribes.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-055

Project Name: Mid John Day Watershed Council

Applicant: Bridge Creek WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Mid John Day-Bridge Creek Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board engages with and provides support, management, and supervision to the council and spent significant time on organizational governance and management this biennium. The council recently updated its bylaws and policies and procedures and recruited three new board members.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is engaged in multiple planning efforts throughout the basin and is using partnership plans and its own action plan to plan and prioritize the work of the council.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and planning for future projects linked to current planning and data collection efforts.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council participates in a variety of events throughout the watershed to connect with the community.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-056

Project Name: Owyhee Watershed Council Capacity 23-25

Applicant: Owyhee WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Owyhee Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board engages with and provides support, management, and supervision to the council. The council recently updated its bylaws and policies and procedures and will be focusing on board recruitment during the next biennium.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is using local, state, federal and its own action plan to guide its work. The council will be working with local partners to develop a rangeland strategy in the next biennium.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and planning for future projects linked to current planning and data collection efforts.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council worked to engage local partners in a variety of ways and develop a new website. In the next biennium the council will tie its engagement to the development of a local rangeland strategy.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
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Application # 224-057

Project Name: Powder Basin Watershed Council Capacity Grant 23-25

Applicant: Powder Basin WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Powder Basin Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board engages with and provides support, management, and supervision to the council, especially during a period of recent staff transition. The board recently completed a review of its bylaws and policies and procedures.

OWEB staff found the council demonstrates ***effective progress in planning***. The council recently received funding to develop a Powder Basin Action Plan, which will guide the council's future work.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and planning for future projects linked to current planning and data collection efforts. The council partners with local state and federal partners on restoration projects.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council is actively working with the local community and will incorporate stakeholder engagement in the development of the Powder Basin Action Plan.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Application # 224-058

Project Name: Luckiamute Watershed Council

Applicant: Luckiamute WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Luckiamute Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board engages with and provides support, management, and supervision to the council. The council is actively working on board DEI training and continuous on-board recruitment. The board reviewed its bylaws and policies and procedures during the 21-23 biennium.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is engaged in multiple planning efforts and uses local, state, federal and its own action plan and project review committee to plan and prioritize its work.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and planning for future projects linked to current planning and data collection efforts.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council is actively working on engaging local community members throughout the watershed and is working with the River Network to engage with the community around climate change and urban watershed issues. The council has partnered with the Mid-Willamette Partnership to increase its capacity for outreach and partnership collaboration. The council is developing new tribal partnerships through its engagement in the Mid-Willamette Beaver Partnership.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-059

Project Name: Greater Oregon City Watershed Council Capacity Grant Application 2023-2025

Applicant: Greater Oregon City WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Greater Oregon City Watershed Council. Council-identified watershed limiting factors include habitat access - Impaired access to habitat; hydrograph/water quantity - altered hydrology; knowledge gaps - lack of information; physical habitat quality - altered quality of physical habitat; water quality - altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board engages with and provides support, management, and supervision to the council. The council recently updated it policies and bylaws and is looking to see how collaboration across organizations can increase its capacity.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is engaged in multiple planning efforts with a focus on Abernethy Creek and is an active participant in the Clackamas Basin FIP.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects as a member of the Clackamas Basin FIP and planning for future projects linked to current planning efforts.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council is actively working on engaging local community members throughout the watershed and is working with a neighboring watershed council on a cooperative outreach grant.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-060

Project Name: Smith River Watershed Council

Applicant: Smith River WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Smith River Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council is made-up of many long-serving board members who provide support, management, and supervision to the council. The council recently updated its policies and procedures.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is engaged in multiple planning efforts and has recently updated its strategic plan to guide its future restoration work.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on a diversity of restoration projects and planning for future projects linked to current planning and monitoring efforts.

OWEB staff found the council demonstrates some ***progress in community engagement*** for watershed restoration purposes. The council continued its relationship building with local tribes but engaged in limited outreach during the biennium. The council does have several outreach activities planned for the end of this biennium and early next biennium.

Concerns

The council engaged in limited stakeholder engagement during the last biennium. It is important for the council to engage broadly with the watershed community throughout the next biennium.

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-061

Project Name: Lower Nehalem Watershed Council

Applicant: Lower Nehalem WC

Application Description

This project will fund a Watershed Council Coordinator for the Lower Nehalem Watershed Council (LNWC). The Council has identified several limiting factors for watershed health including hydrologic alterations, impaired habitat access, water quality degradation, and knowledge gaps. These limiting factors impact a wide variety of fish and wildlife species.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board engages with and provides support, management, and supervision to the council. The council recently updated its policies and bylaws. The council continues to work on board recruitment, with both short-term and long-term strategies.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is engaged in multiple planning efforts with a focus on anchor habitat and recently completed the Strategic Action Plan for Nehalem River coho.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing complex restoration projects and working with local partners to plan and implement future projects.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council is actively working on engaging local community members throughout the watershed and with a variety of engagement methods. The council is also collaborating with other local councils to increase their collective capacity for stakeholder engagement on the North Coast.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
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Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-062

Project Name: Necanicum Watershed Council OWEB Capacity Funding 23-25

Applicant: Necanicum WC

Application Description

The grant will provide operating capacity support for the Necanicum Watershed Council, located in Seaside, Oregon. The Necanicum watershed contains 86 miles of stream habitat for Coho, Chum, fall Chinook, winter steelhead, resident cutthroat trout, brook and Pacific lamprey. Limiting factors include impaired access to habitat, high stream temperatures due to a lack of riparian vegetation, numerous fish passage barriers, erosion and sedimentation, and lack of floodplain connectivity.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board engages with and provides support, management, and supervision to the council. The council recently updated it policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council has recently updated its Strategic Action Plan, which will guide the council's future restoration efforts.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and has begun planning for some future projects linked to the new strategic plan.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council is actively working on engaging local community members throughout the watershed and with a variety of engagement methods. The council significantly increased its online presence during the biennium and is looking to increase its presence in the community next biennium.

Concerns

The council has been very involved in planning and needs to think strategically about what comes next for the council in relation to on-the-ground restoration work.

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-063

Project Name: South Fork John Day Watershed Council 2023-2025

Applicant: South Fork John Day WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the South Fork John Day Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality - altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board engages with and provides support, management, and supervision to the council. The council recently updated its policies and bylaws and continues to work on recruiting new members and plan for transitions.

OWEB staff found the council demonstrates ***effective progress in planning***. The council is engaged in multiple planning and monitoring efforts throughout the basin and uses local, state, federal and its own action plan to plan and prioritize its work.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects and planning for future projects linked to current planning and data collection efforts.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council is actively working on engaging local community members throughout the watershed.

Concerns

None

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
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Application # 224-064

Project Name: Molalla River Watch Council Capacity

Applicant: Molalla River Watch Inc

Application Description

This project seeks to fund a Watershed Council Coordinator for the Molalla River Watch. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board engages with and provides support, management, and supervision to the council. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council used monitoring data to update its strategic plan and uses local, state, and federal plans to inform its work.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council is making progress on existing restoration projects in collaboration with local partners and is planning for future projects linked to current planning and watershed needs in response to fires.

OWEB staff found the council demonstrates ***effective progress in community engagement*** for watershed restoration purposes. The council has partnered with other local organizations to host events and engage with the watershed community.

Concerns

The council has been in emergency response mode since the Labor Day weekend fires and would benefit from an outreach plan to help prioritize outreach activities in the broader watershed community.

Concluding Analysis

The council demonstrated it meets all of OWEB's merit criteria and should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item H

Council Capacity Grant Awards

Board Meeting July 25-26, 2023

Oregon
Tina Kotek, Governor

OREGON WATERSHED ENHANCEMENT BOARD

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

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Courtney Shaff, Monitoring and Reporting Program Manager
Brian Wolcott, Water Acquisition Coordinator

SUBJECT: Agenda Item H – Council Capacity Grant Awards
July 25-26, 2023 Board Meeting

I. Introduction

This staff report provides an overview of the 2023-2025 Council Capacity grant cycle process and outlines staff recommendations for grant awards. Staff recommend funding 56 watershed councils for $9,220,881. Fifty-four are recommended for full funding, two are recommended for reduced funding and one is not recommended for funding. Evaluations may be found in Attachment A.

II. Background

Council Capacity grants are within the Operating Capacity category of the Board's spending plan and help support the operating costs of effective watershed councils. OWEB has provided Council Capacity grants for more than 20 years. Watershed councils are located throughout the state (Attachment B). OWEB does not create or oversee councils; they are locally designated watershed restoration organizations, but OWEB may provide grants to councils in support of those actions described in Measure 76.

Council Capacity grants are awarded biennially and support engagement with local communities around voluntary restoration projects to protect and restore native fish or wildlife habitats and watershed functions to improve water quality or stream flows. The Board adopted administrative rules and guidance for council capacity grants in 2014. These grants are intended to help support the operating capacity of effective watershed councils. The Council Capacity grant process includes an eligibility determination as well as initial and secondary merit reviews.

III. Merit

Merit criteria evaluate watershed councils for performance and progress including how they addresses challenges.

A. Initial Merit Review. OWEB staff completed the initial review of all fifty-seven councils that applied for funding. Staff reviewed application materials and considered their

knowledge of each council's performance history over the last two years, progress towards meeting the merit criteria, and the council's ability to meet reporting and fiscal requirements of OWEB grants when making the initial merit determination. Five watershed councils did not meet all merit criteria and were referred to the secondary review and interview process.

B. Secondary Review and Interview. The secondary review panel consisted of OWEB staff and external reviewers with expertise in watershed council operations. Reviewers considered: 1) application materials and supplemental materials provided by the council; 2) reviewers' knowledge of the council; 3) OWEB staff input; and 4) an interview with council staff and board officers. Application materials for the councils that participated in the secondary review process are available online for review.

C. **Staff Funding Recommendations**

A. Staff funding recommendations are based on the results of the initial and secondary reviews and available funding. The evaluations for councils recommended for full funding are provided via link in Attachment A. Staff recommend full funding for 54 councils that meet all merit criteria, reduced funding with conditions for two councils that met some, but not all the merit criteria, and a do not fund recommendation for one council that demonstrated inadequate progress across all the merit criteria. In addition, staff recommend one council receives continued merger funding on top of the base award as approved in previous biennia.

B. Reduced Funding. Staff recommend two councils, Greater Yamhill and Umatilla Basin, receive reduced funding because they met some but not all of the merit criteria. In addition to reduced funding, staff also recommend both councils be funded only for one year and grant agreements would include specific benchmarks each council needs to meet in order to receive the second year of funding. The evaluation summaries describing the rationale for the staff recommendations and the grant agreement conditions are provided in Attachment A, pages 10-13.

C. Do Not Fund. Staff recommend Do Not Fund for one council, Lower Columbia River WC. The evaluation summaries describing the rationale for the staff recommendations is provided in Attachment A, page 5. Given the significance of the Do Not Fund recommendation for the council, their council capacity application is found in Attachment C. It is important to note that the Do Not Fund recommendation is not permanent, and the council may submit a council capacity grant application in future cycles.

D. **Recommendation**

Staff recommend the board award council capacity grants as described in Attachment D with an award date of July 1, 2023.

Attachments

A. Council Capacity Evaluations
B. Map of Locally Recognized Watershed Councils
C. Lower Columbia River Watershed Council 2023-25 Council Capacity Application
D. Staff Funding Recommendations

2023-2024 Council Capacity Evaluations

Councils Referred to Secondary Review Process

Page	5	224-002	Lower Columbia River SWCD
Page	7	224-007	WC Tillamook Bay WC
Page	8	224-021	Elk Creek WC
Page	10	224-039	Greater Yamhill WC
Page	12	224-053	Umatilla Basin WC

Link to all Watershed Council evaluations

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-002

Project Name: LCRWC Council Capacity and Support

Applicant: Columbia SWCD

Application Description

This project seeks to fund a Watershed Council Coordinator for the Lower Columbia River Watershed Council. Council-identified watershed limiting factors include habitat access – impaired access to habitat, hydrograph/water quantity – altered hydrology, knowledge gaps – lack of information, physical habitat quality – altered quality of physical habitat, water quality - altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council to ***demonstrate some progress in planning*** through the recent submittal of a monitoring application for a Rapid Bioassessment in the watershed. Besides the pending application, the council uses no other documents to plan or prioritize the work of the council. If the monitoring application is funded the council would convene a technical advisory team; however, members of the team have not yet been identified or contacted to see if they would be willing to participate.

Concerns

OWEB staff found the council ***does not demonstrate effective governance and management***. The council is currently operating with the fewest number of board members in the history of the organization. The vice chair recently resigned over the decision to submit a monitoring application and there are no candidates for chair or vice chair in the upcoming October council officer election. The council board has not demonstrated effective management of staff and it is not clear how the board participates in management and oversight of the coordinator, in collaboration with the SWCD, who is the employer.

OWEB staff found the council ***does not demonstrate effective progress in on-the-ground watershed restoration***. The council has implemented no restoration projects in the last two years and the two projects it was working on in the last biennium were transferred to the SWCD for implementation. The council has no clear vision for its restoration niche in the watershed.

OWEB staff found the council ***does not demonstrate effective progress in stakeholder engagement for watershed restoration purposes***. The council did not complete any stakeholder engagement activities during the 2021-2023 biennium and has no activities planned for the 2023-2025 biennium. The current board members have created an isolated environment that does not appear to be welcoming to the general public and is not effective at recruiting new engagement or interest in the council's activities.

Concluding Analysis

The watershed council does not demonstrate it is engaging with its local community to plan and develop restoration projects to support local, state, and federal restoration goals. The council membership does not include a diverse range of community interests and does not appear to be open and welcoming to the broader community. The review team did recognize the council

is showing some limited progress toward future planning with the recent submittal of a monitoring application for a rapid bioassessment, but the council did not meet any of the other merit criteria required by OWEB to receive funding.

Recommendations

Staff Recommendation to the Board: Do Not Fund

Staff Recommended Award: $0

Staff Conditions: N/A

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-007

Project Name: TBWC Capacity Grant 2023-25

Applicant: Tillamook Bay WC

Application Description

This project seeks to fund a Watershed Council Coordinator for the Tillamook Bay Watershed Council. Council-identified watershed limiting factors include habitat access – impaired access to habitat, physical habitat quality – altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council has addressed most of the concerns that were raised previously during the council capacity review process. The council was re-recognized by the Tillamook County commissioners, has engaged a new board of directors that is representative of the community, regularly holds meetings, and recently updated its bylaws and policies.

OWEB staff found the council demonstrates ***effective progress in planning***. The council has continued to plan and engage with the community despite having no council capacity funding. The council recognizes the need to engage with the local community and update the strategic plan before restarting the council's restoration program.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council continued to make progress on some restoration projects, led by volunteer board members, despite having no council capacity funding. The council is working with local partners to determine future restoration priorities.

OWEB staff found the council demonstrates ***effective progress in stakeholder engagement*** for watershed restoration purposes. Council board members have worked to rebuild relationships throughout the watershed and demonstrated the council has broad support from the watershed community.

Concerns

None

Concluding Analysis

The council was without funding for two biennia and has demonstrated it has addressed OWEB's previous concerns and is making progress in all of OWEB's merit criteria. The council should be recommended for the highest level of funding.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: None

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-021

Project Name: Elk Creek Watershed Council Support 2023

Applicant: Elk Creek WC

Application Description

Project will provide funding for the Coordinator/Executive Director, and operations of the Elk Creek Watershed Council in the northern part of Douglas County. The Council will work with local landowners and state and federal agencies to plan, develop, and implement on-the-ground projects to benefit fish and wildlife, and water quality in the Elk Creek Watershed, and in the Umpqua basin. Key partners are local landowners, Douglas and Umpqua SWCD, ODFW, Roseburg District BLM, and others.

Review

Strengths

OWEB staff found the council demonstrates ***effective governance and management***. The council board is engaged and supportive of the council and has recently recruited a new board member. The council recently reviewed its policies and bylaws.

OWEB staff found the council demonstrates ***effective progress in planning***. The council recently completed bioassessment surveys, which were used to inform the newly adopted restoration action plan, which will guide future restoration actions.

OWEB staff found the council demonstrates ***effective progress in on-the-ground watershed restoration***. The council focuses its restoration efforts on private lands and is making progress on existing restoration projects.

OWEB staff found the council demonstrates some ***progress in community engagement*** for watershed restoration purposes. The council has struggled to restart its usual stakeholder engagement approaches post-COVID and is reaching out to landowners to discuss restoration opportunities as its primary outreach tool.

Concerns

The council continues to struggle to recruit a board member from the industrial timber industry, which should be an organizational priority during the next biennium.

The council is using limited approaches to outreach and engage the broader watershed community. Broader stakeholder engagement may lead to increased council participation and help with future board recruitment.

Concluding Analysis

The council has demonstrated progress in all merit criteria and is recommended for full funding. However, the council needs to focus on improving both organization governance and management and stakeholder engagement in the 2023-2025 biennium to ensure it continues to demonstrate process in those two merit criteria areas. The council should consider reviewing its approach to board meetings, including location and time, to make the meetings more accessible to all community members and working to engage with a broader aspect of the watershed.

Recommendations

Staff Recommendation to the Board: Full base funding: meets all merit criteria
Staff Recommended Award: $166,142
Staff Conditions: 1) The council must submit a progress report by July 1, 2024 reporting on the following:

- Progress toward engaging an industrial timber industry member on the board, including a description of what outreach efforts were taken and the result of those efforts.

- Progress in current stakeholder engagement activities and the development of new approaches and efforts to make the council meetings more available to the community at large.

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-039

Project Name: Greater Yamhill Watershed Council Capacity 2023-2025

Applicant: Greater Yamhill Watershed Council

Application Description

This project seeks to fund a Watershed Council Coordinator for the Greater Yamhill Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

Strengths

OWEB staff found the council demonstrates ***some governance and management***. The council board provided oversight of the council during a period of staff transition and is working to improve governance and management. The council has contracted with a CPA to improve its fiscal management. The council recently updated its policies and bylaws.

OWEB staff found the council demonstrates ***some progress in planning***. The council has identified the need for a new strategic plan to guide its work and is working to secure funding and support to complete the plan early in the next biennium.

OWEB staff found the council demonstrated ***some progress in on-the-ground watershed restoration***. The council has worked with BLM to implement restoration in the watershed.

OWEB staff found the council demonstrates ***some progress in community engagement*** for watershed restoration purposes. The council worked to build connections with private landowners and industrial timber companies.

Concerns

The council struggled with meeting OWEB reporting requirements throughout the biennium. The board recently hired a new coordinator and needs to develop a governance and management structure that provides adequate staff oversight.

The council has not pursued any of its own restoration work and it is not clear what the council's restoration niche is in the watershed.

The council has no clear strategy for stakeholder engagement and completed limited activities during the biennium.

Concluding Analysis

The council did not demonstrate through the application materials and the secondary interview that it meets all the merit criteria. The council has struggled for multiple biennia to demonstrate effective governance and management. The council did demonstrate some progress in all merit criteria, but needs to work on governance and management, identifying a clear restoration and stakeholder engagement niche for the council in the watershed, and being strategic in its future actions.

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Recommendations

Staff Recommendation to the Board: Reduced funding for 1 year. The second year of funding is contingent on the council meeting the conditions described below. Staff will come to the board in July 2024 with a funding recommendation.

Staff Recommended Award: $66,467

Staff Conditions

- All watershed council approved meeting minutes must be posted on the council's website within 30 days of the meeting at which they were approved.
- All council meeting agendas must be posted on the council's website at least 24 hours before the scheduled council meeting.

Progress Report Requirements

Quarterly Progress reports are required to be submitted to the OWEB Project Manager. Reports must address the progress the council is making to meet OWEB's five merit criteria. The council must demonstrate it is making progress in merit criteria by May 2024 or OWEB staff will not recommend a second year of funding to the OWEB Board. The progress reports must include the following information:

Merit Criteria #1: Effective governance and management:

Actions the council is taking to ensure effective governance and management of the council, including: 1) management of the council coordinator, and 2) sound fiscal and project management reporting.

Merit Criteria #2: Progress in planning:

A description of progress the council is making on updating its strategic plan, including how the council is engaging with the community during the strategic plan development process.

Merit Criteria #3: Progress in on-the-ground restoration:

Actions the council is taking to plan and implement on-the-ground restoration including the number of applications submitted.

Merit Criteria #4: Progress in community engagement for watershed restoration purposes:

Actions the council is taking to engage with the watershed community. Including events held and attendance at the events and attendance at board meetings.

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Application # 224-053

Project Name: Council Capacity 2023-2025

Applicant: Umatilla Basin WS Foundation

Application Description

This project seeks to fund a Watershed Council Coordinator for the Umatilla Basin Watershed Council. Council-identified watershed limiting factors include habitat access - impaired access to habitat, hydrograph/water quantity - altered hydrology, knowledge gaps - lack of information, physical habitat quality - altered quality of physical habitat, water quality -altered physical, chemical, or biological water characteristics.

Review

OWEB staff found the council demonstrates ***some progress in planning***. The council is working with landowners to identify and prioritize barriers for future removal and is planning on reengaging the Umatilla Basin Technical Team.

The council demonstrates ***some progress in on-the ground watershed restoration*****,** the council completed 100% designs for two future restoration projects.

OWEB staff found the council demonstrates ***some progress in community engagement*** for watershed restoration purposes. The council completed two river clean-up events during the biennium.

Concerns

The council continues to struggle with ***effective governance and management.*** Despite many reminders and grant agreement conditions, the council coordinator continues to miss OWEB grant fiscal and project reporting deadlines. The council is struggling to have a quorum at board meetings and is not consistently taking and approving minutes. The council does not have a plan for recruiting new board members or addressing the current organizational challenges.

The council is relying on planning documents completed by local partners, the council would benefit from completing its own strategic plan in the 2023-2025 biennium that could be used to guide the council in its restoration and outreach efforts.

The council completed no restoration projects in the 2021-2023 biennium, and it is not clear what the restoration niche is for the council or how it is identifying and prioritizing its restoration work.

Concluding Analysis

The council has not met all of OWEB's merit criteria. The council does not demonstrate effective governance and management and has not addressed the concerns identified in the 2021-2023 council capacity evaluation. In addition, the council has made limited progress toward on-the ground restoration.

Recommendations

Staff Recommendation to the Board: Reduced funding for 1 year. The second year of funding is contingent on the council meeting the conditions described below. Staff would come to the board in July 2024 with a funding recommendation.
Staff Recommended Award: $66,457

Oregon Watershed Enhancement Board
2023-2025 Council Capacity Grant
Evaluation for March 15, 2023 Operating Capacity Applications

Staff Conditions

- All watershed council approved meeting minutes must be posted on the council's website within 30 days of the meeting at which they were approved.
- All council meeting agendas must be posted on the council's website at least 24 hours before the scheduled council meeting.
- The OWEB Project Manager must receive, via email, agendas and minutes of all meetings.

Progress Report Requirements

Quarterly Progress reports are required to be submitted to the OWEB Project Manager. Reports must address the progress the council is making to meet OWEB's five merit criteria. The council must demonstrate it is making progress in merit criteria by May 2024 or OWEB staff will not recommend a second year of funding to the OWEB Board. The progress reports must include the following information:

Merit Criteria #1: Effective Governance and Management
Actions the council is taking to ensure effective governance and management of the council, including 1) management of the council coordinator, 2) sound fiscal and project management reporting, 3) copies of all meeting minutes and agendas from the previous quarter.
Merit Criteria #2: Progress in planning:
An update on the status of reconvening the Umatilla Basin Tech Team, including membership, meeting notes, and meeting agendas.
An updated council work plan.
Merit Criteria #3: Progress in on-the-ground restoration:
Actions the council is taking to plan and implement on-the-ground restoration, including number of applications submitted.
Merit Criteria #4: Progress in community engagement for watershed restoration purposes:
Actions the council is taking to engage with the watershed community. Including events held and attendance at the events and attendance at board meetings.

Oregon Watershed Councils

Updated December 2022

North Coast Watershed Association

NCWA Coastal Council
*a. Ecola Creek WC

NCWA River Council
*b. Nicolai-Wichiup WC
*c. Skipanon WC
*d. Youngs Bay WC

e. Columbia Slough WC
f. Greater Oregon City WC
g. Johnson Creek WC
*h. Oswego Lake WC
*i. N. Clackamas WC
*j. Tryon Creek WC

Salem Keizer Area Watershed Councils

*k. Claggett Creek WC
*l. Pringle Creek WC
*m. Mill Creek WC

*n. Spring Valley WC
*o. Rickreall WC
*p. Glenn-Gibson WC

†The North Santiam Watershed Council is also locally recognized in the Mill Creek watershed.

Wasco County Watershed Councils

*Bakeoven WC
*Fifteenmile WC
*Mosier WC
*The Dalles WC
*White River WC

Necanicum WC
*a
*b
*c
*d
Lower Columbia WC
Upper Nehalem WC
Lower Nehalem WC
Scappoose Bay WC
Tillamook Bay WC
Tualatin River WC
e
f
g
*h
*i
*j
Sandy River WC
Hood River WG
Nestucca/ Neskowin WC
Greater Yamhill WC
Pudding River WC
Molalla River Watch
Clackamas River WC
Wasco County WCs
Sherman County WC
Gilliam-East John Day WC
Walla Walla WC
Umatilla Basin WC
Grande Ronde Model Watershed
*k
*l
*m
*n
MidCoast WC
Luckiamute WC
†North Santiam WC
Middle Deschutes WC
Mid John Day / Bridge Creek WC
North Fork John Day WC
Powder Basin WC
Marys River WC
Calapooia WC
South Santiam WC
Siuslaw WC
Long Tom WC
McKenzie River WC
Upper Deschutes WC
Crooked River WC
South Fork John Day WC
*Lower Willow Creek Working Group
*Bully Creek Watershed Coalition
Malheur WC
Smith River WC
Elk Creek WC
Coast Fork Willamette WC
Middle Fork Willamette WC
Tenmile Lakes Basin Partnership
Coos Watershed Assoc.
Coquille Watershed Association
Partnership for the Umpqua Rivers
Harney County WC
Owyhee WC
Lake County WCs
*Silver Lake WC
*Upper Sycan WC
*Upper Chewaucan WC
Klamath Watershed Partnership
Lower Rogue WC
Rogue River WC
Illinois Valley WC
Applegate River WC
*Williams Creek WC

South Coast Watersheds Council

The South Coast Watersheds Council is also locally recognized for the Chetco Basin.

*** Indicates locally recognized watershed councils that have never received their own individual Council Support Grant and are not eligible for a Council Capacity Grant.**

For Purposes of OAR 695-040-0030(2)(a) Geographic Eligibility Criteria: Boundaries of Councils which received a Watershed Council Support Grant Before July 1, 2013.

Area with no watershed council

Oregon Watershed Enhancement Board
775 Summer St. NE Suite 360
Salem, OR 97301-1290
www.oregon.gov/OWEB

Updated by Troy Wirth January 2015 using ESRI ArcMap 10.2.2 Oregon Lambert Projection, NAD 83 SRID 2992

C:\Users\PAULA\GIS C Drive\GIS_Files_on_Z_Drive\Projects\WatershedCouncil\Projects\Watershed_Council_Boundaries_WebsiteMap_2019.mxd

Application Name: LCRWC Council Capacity and Support

Application Number: 224-002-22857

By: Columbia SWCD

Offering Type: Council Capacity Grants

Application Type: Council Capacity

OWEB Region: North Coast
County: Columbia
Coordinates: 45.8069396068955,-123.058408981136

Applicant:
Malyssa Legg
35285 Millard Road
St Helens OR 97051-3224
503.433.3205
malyssa.legg@columbiaswcd.com

Payee:
Malyssa Legg
35285 Millard Road
St Helens OR 97051
503.433.3205
malyssa.legg@columbiaswcd.com

Project Manager:
Henry Franzoni
335 Spruce Creek Rd
Longview WA 98632
3603530937
hjfranzoni3@gmail.com

Budget Summary:
OWEB Amount Requested: $131,738
Total Project Amount: $133,938

Administrative Information

Abstract

Provide an abstract statement for the project. Include the following information: 1) Identify the project location; 2) Briefly state the project need; 3) Describe the proposed work; 4) Identify project partners.

LCRWC is located in Columbia and Clatsop Counties, Oregon.
The project need is capacity funding for the council, to continue watershed restoration activities within the basin and to continue stakeholder and local landowner outreach activities.

Capacity funds will dedicate resources to strengthen ongoing organizational efforts to develop new partnerships, recruit new watershed council members and continue internal board development activities. Capacity grant addresses need to expound on ongoing strategic planning efforts and expand current project portfolio. The results of an intended Rapid Biologic Assessment will guide the council going forward. component of the plan includes outreach to broaden community involvement in the watershed council mission to stakeholders and community groups. Capacity grant will also provide resources to develop technical proposals that address data gaps and existing uncertainties about watershed processes and function. Examples of these investigations include anchor habitat identification, flood profiles, rapid bio-assessments, water quality data analysis, and groundwater studies.

Capacity grant will be used to leverage additional funding authorities and expertise to maximize restoration effort needed to manage project complexities. This will contribute to shaping project concepts in collaboration with stakeholders and community groups for future feasibility inquiries and preliminary design.

CSWCD, ODFW, OWEB, Columbia County, and the City of Clatskanie are key project partners.

Location Information

Current Location:

What is the ownership of the project site(s)?

✓ *Public land (any lands owned by the Federal government, the State of Oregon, a city, county, district or municipal or public corporation in Oregon)*

What agency(ies) are involved?

City of Clatskanie, Columbia County, Evenson Logging Company, Oregon State Extension, Clastkanie Public Utilities District, City of Rainier, Oregon Department of Fish and Wildlife, Soil and Water Conservation District, Rainier High School, Clatskanie High School, North Coast Watershed Council, Scappoose Bay Watershed Council, Scappoose Sand and Gravel, Oregon Department of Environmental Quality.

❑ *Tribal lands (any lands owned/managed by a Tribal government)*

✓ *Private (land owned by non-governmental entities)*

Please select one of the following Landowner Contact Certification statements:

❍ I certify that I have informed all participating private landowners involved in the project of the existence of the application, and I have advised all of them that all monitoring information obtained on their property is public record.

● I certify that contact with all participating private landowners was not possible at the time of application for the following reasons: Furthermore, I understand that should this project be awarded, I will be required by the terms of the OWEB grant agreement to secure cooperative landowner agreements with all participating private landowners prior to expending Board funds on a property.

Please List your reasons

Scope of grant proposal is not project specific and does not involve contact with specific landownerships other than through project development and outreach activities described in work plan.

❑*Not applicable to this project*

✓*This grant will take place in more than one county.*

List the counties affected:

Columbia and Clatsop County

Permits

Other than the land-use form, do you need a permit, license or other regulatory approval of any of the proposed project activities?

❍ Yes

● No

Racial and Ethnic Impact Statement

Racial and Ethnic Impact Statement

❍ The proposed grant project policies or programs could have a disproportionate or unique POSITIVE impact on the following minority persons. (indicate all that apply)

❍ The proposed grant project policies or programs could have a disproportionate or unique NEGATIVE impact on the following minority persons. (indicate all that apply)

● The proposed grant project policies or programs WILL HAVE NO disproportionate or unique impact on minority persons.

Insurance Information

If applicable, select all the activities that are part of your project - These require a risk assessment tool unless otherwise noted (check all that apply).

❑*Working with hazardous materials (not including materials used in the normal operation of equipment such as hydraulic fluid)*

❑*Earth moving work around the footprint of a drinking water well*

❑*Removal or alteration of structures that hold back water on land or instream including dams, levees, dikes, tidegates and other water control devices (this does not include temporary diversion dams used solely to divert water for irrigation)*

❑*Applicant's staff or volunteers are working with kids related to this project (DAS Risk assessment tool not required, additional insurance is required)*

❑*Applicant's staff are applying herbicides or pesticides (DAS Risk assessment tool not required, additional insurance is required)*

✓*Insurance not applicable to this project*

Additional Information

❑*This project affects Sage-Grouse.*

Problem Statement

Does the watershed council have a fiscal sponsor?

● Yes
❍ No

For Details If yes, upload your fiscal sponsorship agreement.

Is the council a membership organization?

● Yes
❍ No

Date of last annual membership meeting.
11/12/2019

The council is a group of councils operating collectively.

❍ Yes
● No

Is the applicant a group of councils operating independently?

❍ Yes
● No

For Details Upload the council's most recent bylaws.

Councils are required to review their council's bylaws once every three years, provide the date of the last time the council's governing body reviewed the council's bylaws?

03/20/2023

Councils are required to review their policies and procedures once every three years, provide the date of the last time the council's governing body reviewed the council's policies and procedures?
03/20/2023

For Details Upload the council's most recent policies and procedures.

For Details Upload the council's local government designation

For Details Upload the council's policies and procedures.

Date of the council's 2021-2023 self assessment?
03/31/2021

Date of last council officer elections.
11/12/2019

For Details Upload the minutes from the board meeting documenting the results of the officer election.

Does the council have written position descriptions for council board officers?

● Yes
❍ No

Does the council have written roles and responsibilities for council governing body members?

● Yes
❍ No

How many times did/will the council governing body meet between July 1, 2021-June 30, 2023?

22

How many times will the council governing body meet between July 1,-June 30, of the upcoming biennium for which you are seeking funding?

4

Describe how the council advertises its general council meetings.

Regular postings are made through local newspapers, council website, e-mail lists, and through one on one outreach with council partners when guest speakers are on the agenda.

Do council governing body meetings have agendas, sign-in sheets, and minutes?

● Yes
❍ No

Describe how your board membership includes a diverse range of geographic areas and community interests in the watershed.

Current board membership is at a nadir. The current council consists of:

Four landowners along the Clatskanie River, one of whom is a county commissioner, one who does habitat restoration projects, and two timber land owners...

Three others... the county road dept manager, the city manager of Clatskanie, and the OSU extension Service person for the county.

The council currently has these seven members.

However a new person came to the monthly meeting on March 13th, 2023, a new landowner along Carcus Creek. We hope this continues.

The council passed a motion on March 13th, 2023 to review and revise the policies and procedures at the next monthly meeting scheduled for April 10th, 2023. It is hoped this revision might lead to larger membership.

Describe any board membership and recruitment challenges and actions being taken to address those challenges.

The council has been named by locals as "K.C.'s playhouse".
Locally the council is perceived as having lost its way and become ineffective and a waste of time and money. This presents recruitment challenges.
The council is addressing this challenge by attempting to renew it's direction and get some projects done on the ground.
The council is addressing this challenge by the resignation of the Vice Chairman, Gary Soderstrom.

Are projects of the council, including those identified in the work plan, identified in a council action plan or strategic plan?

● Yes
❍ No

Provide the name and date of the most recent action plan or strategic plan.

Lower Columbia River Watershed Strategic Action Plan (Review Draft) 2012

Is the work of the council specifically designed to benefit salmon or steelhead?

● Yes
❍ No

✓Columbia River - Chum Salmon
✓Lower Columbia River - Coho Salmon
✓Lower Columbia River - Chinook Salmon

Describe how the resulting council capacity grant will benefit salmon or steelhead or their habitat?

The Lower Columbia River watershed contains 36 square miles of watershed area supportive of coho, chinook, steelhead, and chum salmon populations. Watershed landscape is unique in its large expanse of private ownership which includes industrial timberlands, legacy local logging companies, small woodlots, and agricultural interests.

The council's emerging strategic action plan (SAP) is intended to capture demographics shifts in landownership from expanding exurban area and increase in visitors from tourism. SAP will select limiting factors that can be managed at local level. This includes impaired habitat complexity, access to off channel habitats, excessive fine sediment deposition, and seasonal water quality degradation. The coordinator will utilize watershed assessments, stream surveys, spatial datasets, water quality data information, and recovery plans updates to inform a prioritized list of key uncertainties and range of restoration strategies. This will be reflected in action plan drafts for council meeting discussion and engagement with council partners. SAP intends to expand diversity of project types to support broader expression of life history strategies needed for salmon recovery. This includes floodplain reconnection to side channel wetland, estuary rearing areas, and identification of anchor habitats .

Regional Assessments or Recovery Plans
ESA Recovery Plan for Lower Columbia River Coho Salmon, Lower Columbia River Chinook Salmon, Columbia River Chum Salmon, and Lower Columbia River Steelhead
Northwest Power and Conservation Council Lower Columbia Province Plan

Council Capacity Metrics:
https://www.oregon.gov/oweb/Forms/OC-Application-Watershed-Council-Metrics-23-25.xlsx

Input the total acres encompassed by this watershed.
23040

Input the Federal Recovery plan applicable to your watershed council.
ESA Recovery Plan for Lower Columbia River Coho Salmon, Lower Columbia River Chinook Salmon, Columbia River Chum Salmon, and Lower Columbia River Steelhead

Input the description of the plan implemented that outlines the need for this activity
ESA Recovery Plan for Lower Columbia River Coho Salmon, Lower Columbia River Chinook Salmon, Columbia River Chum Salmon, and Lower Columbia River Steelhead

Proposed Solution

Community Engagement

Briefly describe the council's stakeholder engagement accomplishments from the 2021-2023 biennium.

This coordinator has not been able to identify any stakeholder engagement accomplishments that occurred during this period.

Briefly describe the council's stakeholder engagement challenges from the 2021-2023 biennium

The stakeholder engagement challenges from this period resulted in the previous coordinator and council chairman resigning, as well as the previous SWCD director..

Briefly describe the council's stakeholder engagement plans for the 2023-2025 biennium.

Three landowners who own property on the banks of the Clatskanie River are Council members. They can provide introductions to other landowners along the Clatskanie River.

The Council is in the process of assembling an OWEB monitoring grant application for a rapid biological assessment which engages Bio Surveys Northwest to perform an outreach function with each property holder along the Clatskanie River and its tributaries in the survey area as part of the Rapid Biological Assessment (RBA).

As part of the RBA every landowner along the Clatskanie River and ten of it's key tributaries will be contacted.

Describe the council's efforts to engage with local tribes present in the council's geography.

The current coordinator has reached out to Lamprey Coordinator - Lori Porter of the Columbia River Inter Tribal Fish Commission and obtained a white paper describing lamprey passage criteria involved in evaluating lamprey passage barriers.

The current Chairman and coordinator attended the Connect+ conference and heard the Chairman of the Chinook Tribe give his keynote address.

Describe the council's efforts to engage with non-traditional partners.

None that I am aware of.

Restoration

Provide a brief summary of the council's 2021-2023 restoration accomplishments.

There are no restoration accomplishments by the council per say during this period. Two project were initiated by the council during this period,
1) A lamprey barrier survey project, and 2) a large wood placement in Carcus Creek.
The project management of both these projects were turned over to CSWCD before the current coordinator was engaged. Initiating the projects was accomplished. Management for finishing the projects was turned over to CSWCD.

Briefly describe the council's restoration challenges from the 2021-2023 biennium

Loss of morale, changed coordinators 3x in 3 years, chairman resigned, SWCD director resigned, COVID.

Three 60% design choices were completed for a channel widening and riparian restoration project on Conyer's Creek. As funding was sought, it became obvious that there was no justification for prioritizing funding for this project within the Clatskanie basin. There was no strategic plan for the basin, no action plan, no current prioritization of what needs to be done across the council's area of responsibility.

Provide a brief summary of the council's restoration plans for 2023-2025.

The coordinator is preparing a monitoring grant application for the OWEB spring funding cycle in hopes of success. Project staff will meet with Ken Fetcho (OWEB) on March 24th, 2023 to coordinate monitoring activities.

This project would fund a Rapid Biological Assessment (RBA) of the Clatskanie River Basin, including 20 of its tributaries, which would include a landowner outreach component.
This project would allow the council to prioritize restoration activities across the basin, and understand where the remaining habitat is fixable and where the remaining species of concern are located.

After over two decades of previous restoration activities, the council can identify what remains to be done in the watershed and how to prioritize the work.

The council has no current strategic plan nor a current work plan. The Rapid Biological Assessment would provide the data to create a sound scientific basis for restoration plans going forward.

Planning

Describe how the council uses planning documents to identify and implement on-the-ground watershed restoration and stakeholder engagement projects.

At this time, the council's planning documents need to be re-created and/or reviewed and revised from a 2012 plan.

The current coordinator is expecting to use the results of the Rapid Biologic Assessment (RBA) to create new planning documents and start planning, prioritizing, and providing a plan to fix the degraded habitat.

Enclosed is a draft action plan plan from 2012 found in the Council's files which has been uploaded. This plan was approved on 3/12/2012 but revisions since then have not been approved. It was under review in 2014 and 2019 during the last funding cycle, at that time submitted as a pending strategic plan/action plan.

It was pointed out at the monthly meeting last by the current chairman, who wasn't chairman at the time, that the lack of a vote recorded in the minutes could mean the current strategic plan was left unchanged by the 2014 and 2019 review cycles. Nevertheless, the plan needs drastic review and likely complete replacement.

Are projects of the council identified in a council action plan or strategic plan?

❍ Yes
● No

Wrap-Up

List the watershed council staff (or contractors), their roles, affiliation (staff or contractor), length of time in position (use the Qualifications space), and contact information.

Role	Name	Affiliation	Qualifications	Email	Phone
Coordinator	Henry Franzoni	Lower Columbia River Watershed Council	10 yrs Data Center Manager of the Fish Passage Center of the Pacific States Marine Fisheries Commission. 10 yrs project lead of the Inter-Tribal Monitoring Project of the Columbia River Inter Tribal Fish Commission. 3yrs Consulting USFWS Col. Riv.	hjfranzoni3@gmail.com	(360) 425-7140

For Details Upload a list, including contact information, for the current board officers.

Budget

Item	Unit Type	Unit Number	Unit Cost	OWEB Funds	External Cash	External In-Kind	Total Costs
Salaries, Wages and Benefits							
Coordinator Salary	Hours	2835	$39.00	$110,565	$0	$0	$110,565
			Category Sub-total	**$110,565**	$0	$0	$110,565
Contracted Services							
Marketing and outreach - newspaper, website, social media, mailings, etc	Each	1	$2,800.00	$2,800	$0	$0	$2,800
IT Maintenance	Each	1	$1,000.00	$0	$0	$1,000	$1,000
Administration Services	Each	1	$10,000.00	$10,000 *	$0	$0	$10,000
			Category Sub-total	**$12,800**	$0	$1,000	$13,800
Travel and Training							
Conference/meeting registration	Each	2	$600.00	$1,200	$0	$0	$1,200
Board Training	Each	1	$1,000.00	$1,000	$0	$0	$1,000
mileage	Miles	3035	$0.65	$1,973	$0	$0	$1,973
lodging for conferences and meetings	Days	6	$100.00	$600	$0	$0	$600
			Category Sub-total	**$4,773**	$0	$0	$4,773
Materials and Supplies							
Office Supplies	Each	1	$1,200.00	$1,200	$0	$0	$1,200
Computer Upgrades	Each	1	$1,800.00	$1,800	$0	$0	$1,800
			Category Sub-total	**$3,000**	$0	$0	$3,000
Equipment							
			$0	$0	$0	$0	$0
			Category Sub-total	**$0**	$0	$0	$0
Other							
Use of office space	Months	24	$50.00	$0	$0	$1,200	$1,200
Board Meeting Refreshments	Each	6	$100.00	$600	$0	$0	$600
			Category Sub-total	**$600**	$0	$1,200	$1,800

* = OWEB funds excluded from indirect.

			Modified Total Direct Cost Amounts	**$131,738**	$0	$2,200	$133,938
Indirect Costs							
	0%			$0	$0		$0
Post Grant							
			Total	**$131,738**	$0	$2,200	$133,938

Provide context and justification for how your budget was developed. Explain how project costs and/or rates were determined.

Budget was developed based on existing compensation amounts negotiated between Council board and Council staff. Comparables with other watershed council organization were used as a guide to inform amounts in these categories along with anticipated funding support from existing project budgets.

Does the budget identify a contingency amount for specific line item(s) within the Contracted Services and/or Material and Supplies budget category?

❍Yes

●No

Funding and Match

Fund Sources and Amounts

Organization Type	Name	Source Note	Contribution Type	Amount	Description	Status
Non-Governmental Organization	Columbia Soil and Water Conservation District		In-Kind - Materials	$2,200	Office support in the form of desk space, network maintenance, equipment and meeting room.	Secured
Fund Source Cash Total	$0		**Fund Source In-Kind Total**	$2,200		

Match

Contribution Source-Type: Description	Amount
Columbia Soil and Water Conservation District-In-Kind - Materials: Office support in the form of desk space, network maintenance, equipment and meeting room.	$2,200
Match Total	$2,200

Do match funding sources have any restrictions on how funds are used, timelines or other limitations that would impact the portion of the project proposed for OWEB funding?

❍ Yes

● No

Do you need state OWEB dollars (not Federal) to match the requirements of any other federal funding you will be using to complete this project?

❍ Yes

● No

Does the non-OWEB cash funding include Pacific Coast Salmon Recovery Funds?

❍ Yes

● No

Uploads

Policies and Procedures: LCRWC Policies and Ground Rules 9.14.16.pdf **- Amended in 2016 to describe decision making process of governing body.**

Fiscal Sponsorship Agreement: Fiscal Sponsorship and Employment agreement 2-28-2018.pdf **- Details that clarifies roles and responsibilities of LCRWC and its fiscal administrator.**

Bylaws: LCRWC Charter and Bylaws 9.14.16.pdf -

Secured Match Forms: SWCD_Match.pdf **- Cost Share Form, in-kind office support SWCD**

Local Recognition: County Charter.pdf -

Action Plan: LCRWC Action PLan CS Submission 11.14.pdf **- Draft stategic action plan has been developed and now being reviewed by TAC members.**

Policies and Procedures: officerlist.pdf -

Policies and Procedures: LCRWC draft minutes 110921.pdf -

Bylaws: LCRWC Charter and Bylaws 3_20_2023.pdf -

Policies and Procedures: LCRWC Policies and Ground Rules 3_20_2023.pdf -

Permit Page

No Permits have been identified for this application.

Lower Columbia River Watershed Council
Policies and Ground Rules

Adopted 9/7/97
Amended 7/11/00
Amended 6/12/12
Amended 9/9/14
Amended 9/13/16

LCRWC Members agree to the following policies and ground rules:

Council Decision-Making

- Robert's Rules of Order, Second Edition, will be used as a guide for conducting business.

- Before a decision is adopted by the council, sufficient time (30 days) will be provided for the members to seek advice from organizations they represent, agencies, or other experts.

- When a decision is reached, council members will advocate to their respective bodies support for the adoption or implementation of the decision.

- The watershed council may select a person to serve as facilitator.

Participation

- The Council will hold regular meetings and follow provisions of the Open Meetings Law. At least 10 minutes will be set aside at each meeting for public comment.
- Business may be conducted by council members present. In the absence of a majority of the council members or their alternates, a simple majority is required for approval of actions with a minimum of four members present.
- Council members will keep their respective agencies, organizations, or interests informed about the work of the council and bring concerns of their groups to the council.
- Council members may designate a representative of their group to serve as an alternate. Designated alternates will be listed on the membership list of the council.
- Each member will brief his/her alternate on all issues, proceedings, and notifications, prior to the alternate's attendance at council meetings.
- The public is invited to all council meetings and, upon request, provide meeting agendas and records of decisions other than personnel discussions and actions.

Organization and Procedures

Robert's Rules of Order shall be followed (see: Decision-Making/Ground Rules)

The Council will elect a chairperson and vice-chairperson to serve as spokespersons, prepare council agendas, call and manage council meetings, enforce ground rules, and perform other tasks as assigned by the council. The council may select other officers and fill vacancies as needed. The periodic election of officers shall take place at the regularly-scheduled meeting in October of odd-numbered years.

The Council may form subcommittees of its own members and task groups that include individuals not on the council to perform certain functions or focus on specific issues. The council will also identify technical advisors who can provide technical data and assistance and call on these experts as needed.

All Council members are eligible to serve as officers or committee members.

There are no term limits for officers.

The Council will hold monthly meetings on the second Tuesday of every month unless otherwise announced.

Council will seek funding for the ongoing operations.

The Columbia SWCD will act as the Council's fiscal agent and follow Generally Accepted Accounting Principles (GAAP).

The Council will not use litigation as a method to implement the Council's mission.

Amendments
A council member may propose an amendment to these Ground Rules at any regularly-scheduled meeting. A vote on the amendment shall take place at the next regularly-scheduled meeting. An affirmative vote by 10 members, or two-thirds of those members present, whichever is greater, will ratify the amendment.

FISCAL SPONSORSHIP and EMPLOYMENT AGREEMENT
Between the Columbia Soil and Water Conservation District And the Lower Columbia River Watershed Council

PARTIES. The parties to this agreement are:

A. Columbia Soil and Water Conservation District, hereafter referred to as "Columbia SWCD."

B. Lower Columbia River Watershed Council hereafter referred to as "LCRWC."

PURPOSE AND RECITALS.

The Columbia SWCD is a political subdivision of the state of Oregon organized and chartered in January of 1947, and considered a municipal corporation, a form of local government under ORS 190.003. It is governed by a host of statutes in Oregon Revised Statutes, chapter 568 and all corresponding Oregon State Laws. The Internal Revenue Service considers SWCDs as instrumentalities of state or municipal government, thus qualifying as tax-exempt under Section 115 of the Internal Revenue Code. The mission of the Columbia Soil & Water Conservation District is to provide educational, technical and financial assistance to our community for the protection, conservation and restoration of natural resources.

A. The LCRWC is an affiliation of stakeholders formed into a Watershed Council under ORS 541.910 to reflect the interests of the Lower Columbia Watershed. It was organized in July, 1997. It is one of three Watershed Councils in Columbia County. The mission of the Lower Columbia River Watershed Council is to improve watershed functionality across the watershed through education, cooperation, stewardship, and restoration/mitigation projects.

B. The parties listed above have entered into this Fiscal and Employment Sponsorship Agreement in order to: 1) formalize their existing relationship, 2) expand their respective capacities, 3) capitalize on their organizational and membership strengths, and 4) extend their missions to all members of the community and stakeholders in the natural resource arena.

AGREEMENT: The parties listed above agree to be legally bound by the following:

COLUMBIA SWCD'S RESPONSIBILITIES. The Columbia SWCD agrees to serve as the employer of staff working on behalf of the LCRWC. Employees, such as the LCRWC Coordinator, work primarily on LCRWC activities. Other employees of the Columbia SWCD may also work on LCRWC activities as part of their assigned tasks. The Columbia SWCD also agrees to act as Fiscal Sponsor for the LCRWC, to receive donations, grants and sign contracts intended to provide financial support to the LCRWC, to treat all funds intended for the LCRWC as restricted funds, and to use such grants and donations to provide funds and staff for the LCRWC so long as the LCRWC is operating in compliance with this agreement. Specifically, the Columbia SWCD agrees to:

A. Employment Management

1. Consider all employees and volunteers of the LCRWC as employees, and/or volunteers of the Columbia SWCD and require that they abide by the Personnel Policies of the Columbia SWCD and the laws governing SWCDs.
2. Provide staff sufficient to conduct the work of the LCRWC, as delineated in the LCRWC Annual Plan of Work, and as LCRWC financial support allows.
3. Provide workers compensation insurance for staff and volunteers of the LCRWC.
4. Pay all employment taxes and file all employment reports for LCRWC staff, per federal and state laws.
5. SWCD procedures and policies will be followed when recruiting and hiring watershed council staff however the hiring committee will consist of two watershed council representatives plus the SWCD District Manager.

B. Work Plan and Budget Development

1. Assist with development of the annual LCRWC Plan of Work (POW), and incorporate LCRWC POW tasks into the Columbia SWCD annual Plan of Work. Assign SWCD responsibilities to assist on LCRWC projects as SWCD staffing and financial capacities allow. All staff activities paid for by LCRWC funds, such as grants and local match, will be included in the LCRWC Plan of Work.
2. Develop an annual budget that accounts for estimated revenues and expenditures for the LCRWC, as part of the overall annual budget for the Columbia SWCD.

C. Fiscal Management

1. Manage money and assets of the LCRWC as a part of the overall money and assets of the Columbia SWCD. As such, the Board of Directors for the Columbia SWCD will approve an annual budget for the expenditures of the LCRWC and manage the funds of the LCRWC in accordance with the Columbia SWCD's Financial Policies and Procedures.
   Assume liability for any debts, obligations or liabilities of the LCRWC created by the actions or inactions of the LCRWC.
2. Clear and accurate records will be maintained by the Columbia SWCD that distinguish between the money and assets earmarked forthe LCRWC and other money and assets owned or controlled by the Columbia SWCD.

3. Contracts
   a. Assist LCRWC by writing contracts or agreements as needed to implement and continue the LCRWC's operation and projects.
   b. Manage the contracts of the LCRWC in accordance with the Columbia SWCD's Contracting Rules.
   c. Consider all contractors of the LCRWC as contractors of the Columbia SWCD.

4. Reporting and Accounting
   a. Provide funders with documentation of LCRWC expenditures in the format prescribed by the funding source.
   b. Provide to the LCRWC regular (monthly) financial reports that detail income received by the Columbia SWCD to support LCRWC staffing and activities and expenditures made by the Columbia SWCD for LCRWC expenses.
   c. Maintain accounting and other financial records for the LCRWC in accordance with generally accepted accounting principles (GAAP).

d. Conduct annual audit by a municipal auditor to meet funding and legal requirements.
e. Facilitate internal controls and authorization protocols to assure a smooth flow of funds and accurate financial tracking as described in the Columbia SWCD's Financial Policies and Procedures.
f. Request, receive, and track funds from funding sources to support LCRWC activities.
g. Account for LCRWC funds used for fiscal and employer services through monthly and yearly Columbia SWCD staff time-tracking and report annually to the LCRWC membership after the conclusion of the Columbia SWCD's fiscal year.
h. Keep all financial and grant records for at least three years or longer, if required by the Columbia SWCD's Records Retention Policy or grant requirements.
i. Provide archiving in accordance with Columbia SWCD's Records Retention Policy or grant requirements.

5. Invoices and Payments
   a. Make timely payments as authorized by the LCRWC Coordinator.
   b. Make timely payments according to the Columbia SWCD's Financial Policies and Procedures.

LCRWC'S RESPONSIBILITIES. Specifically, the LCRWC agrees to:

A. General

1. Establish an Operations Committee to provide guidance and oversight for the LCRWC Coordinator, review proposed LCRWC annual budgets, and communicate to the Board of Directors of the Columbia SWCD.
2. A member of the Operations Committee who is not a staff member of the Columbia SWCD will be designated as a liaison to the Columbia SWCD. This person will be responsible for oversight and review of LCRWC revenues and expenditures reported in the Columbia SWCD's annual financial reports.
3. Task the LCRWC Coordinator with helping to secure funds through donations, contracts, and grants in order to accomplish tasks and projects described in the annual LCRWC POW and support LCRWC operational costs. LCRWC operational costs include but are not limited to fiscal administration of grants, personnel management, rent, phones/internet, website hosting, computers/software, insurance, audits, meeting costs, travel, printing/copying, and postage.
4. The LCRWC president shall designate a special committee of at least two other individuals to participate in the hiring (ranking of applicants, interview, and final selection) and annual performance review of LCRWC staff.
5. Consider LCRWC staff, as employees of the Columbia SWCD, as "public officials" as defined in ORS 244.020(14). As such, employees must comply with the Oregon Government Ethics law regarding conflicts of interest and other matters relating to financial gain.
6. Consider its staff, as employees of the Columbia SWCD, as "public employees" according to ORS 260.432, and require that they not engage in political activity while on the job.
7. Council will abide by any and all liability requirements of the SWCD relating to LCRWC activities.
8. Abide by the following policies and rules of the Columbia SWCD:
   ✓ Personnel Policies

- ✓ Contracting Resolutions and Rules
- ✓ Records Retention Policy
- ✓ Conflict of Interest Policy
- ✓ Note: any future policies adopted by the Columbia SWCD's Board of Directors that pertain to the LCRWC will be provided to the LCRWC for similar adoption.

B. Grants and Local Match

1. Responsible for fulfilling requirements and funding specifications of all grants for LCRWC activities..
2. Provide grant applications made by the LCRWC to the Columbia SWCD for submission to third-party grantor.
3. Secure, document and report required match funds as needed.
4. Provide documentation required by the grantor for funding releases (including, but not limited to, permits, land use forms and landowner agreements).
5. Notify the Columbia SWCD of all requests for grant changes (including budget changes and time extension requests) prior to submission to a grantor.

C. Reporting and Accounting

1. Provide documentation of expenses in the format agreed upon with the Columbia SWCD and funding sources.
2. Document all "in-kind" work (e.g., match of donated materials, services, and volunteer time) as required by the Columbia SWCD and funding sources.
3. Write and submit to Columbia SWCD all all reports not related to fiscal matters to fulfill the requirements of funders

DONATIONS. All donations intended to support the LCRWC that are made by check should be made out to the Columbia SWCD with a notation about its intended purpose. Donations such as equipment may be given directly to the LCRWC and should be accounted for by the LCRWC Coordinator by labeling with permanent marker and entry onto the Columbia SWCD's non-capitol and asset list.

The parties agree that the Columbia SWCD will assist the LCRWC by receiving donations and gifts from individual donors and businesses wishing to support the activities of the LCRWC, and providing the receipts that such donors need to take tax deductions for their donations.

OTHER DUTIES OF THE COLUMBIA SWCD. In addition to the other duties imposed by this agreement, the Columbia SWCD agrees to properly maintain its legal status as a local governmental unit, and as a tax exempt organization under Section 155 of the Internal Revenue Code; to properly prepare and file its own annual reports required by the State and Federal governments; comply with all applicable laws and regulations governing SWCDs; to operate and make decisions properly as a local governmental unit; to keep the required records of its Board meetings and decisions; and to keep adequate financial records and maintain proper oversight and control over its financial activities. The Columbia SWCD shall be responsible for its own employment taxes, insurance, debts, liabilities and other legal obligations. The Columbia SWCD shall notify the LCRWC immediately of any change in its legal status or tax exempt status.

LCRWC'S ENTITY STATUS. The LCRWC is not a legally incorporated separate entity; its programs and activities are considered a project of the Columbia SWCD. However, the LCRWC directs the work of the LCRWC coordinator through the adoption of the LCRWC annual plan of work and through regular reports from the coordinator to the council at each monthly meeting. The LCRWC will notify the Columbia SWCD immediately of any change in its legal status or tax exempt status. The LCRWC agrees to not incorporate or otherwise create a legal entity without written notice to the Columbia SWCD.

All employees, independent contractors and volunteers who perform services or work for the LCRWC are and shall be the employees, independent contractors and volunteers of the Columbia SWCD. The Columbia SWCD shall be responsible for payment of all compensation to LCRWC staff and independent contractors, paying all payroll withholding taxes and payroll taxes for LCRWC employees, filing all required reports to the IRS regarding payroll taxes, and preparing and filing all W-2 forms and 1099 forms reporting the payment of compensation to LCRWC employees and independent contractors.

The Columbia SWCD shall have the sole responsibility to select, employ, supervise, evaluate, discipline and if necessary terminate the employment or services of all employees, independent contractors or volunteers associated with the LCRWC, with the exception of the hiring, supervision and evaluation of the LCRWC Coordinator, which will be done in conjunction with the LCRWC, as described under LCRWC's Responsibilities, section A.2. Discipline and/or termination of the LCRWC Coordinator shall be done by the Columbia SWCD with input from the LCRWC..

Any tangible or intangible property, including intellectual property such as copyrights, obtained or created by the LCRWC shall be the property of the Columbia SWCD. All equipment and supplies purchased with LCRWC funds are the sole property of the Columbia SWCD.

AGREEMENT TO INDEMNIFY. Because the Columbia SWCD is liable for any acts or omissions of the LCRWC, LCRWC funds may be used to defend the Columbia SWCD and its officers, directors, employees and volunteers from any liability, demands or lawsuits for any claim of loss, damage or injury that arises from any of the activities, programs, decisions or omissions of LCRWC or employees, volunteers, members or agents associated with the LCRWC.

TERMINATION OF THIS AGREEMENT. Either party may terminate this agreement at any time, with cause, by delivering a written statement of termination to the other party at least thirty (30) days in advance of the effective date of the termination. This agreement shall automatically terminate if the LCRWC incorporates as a separate legal entity. If this agreement terminates due to the LCRWC's separate incorporation as an organization qualified to receive IRS recognition of its 501(c)(3) status for purposes and activities significantly related to the activities of the LCRWC under this agreement, then the Columbia SWCD shall:

- ✓ Transfer the remaining funds to the LCRWC minus any accrued payment owed to the Columbia SWCD for its services and expenses related to the LCRWC;
- ✓ Transfer ownership of all LCRWC assets, including its name and any intellectual property developed or created by the LCRWC under this agreement, to the LCRWC.

If this agreement is terminated for any reason other than the LCRWC's separate incorporation, then the Columbia SWCD shall retain the funds held in the account for the LCRWC to be used in

accordance with the mission of the LCRWC and in accordance with any restrictions on the use of those funds.

MEDIATION AND ARBITRATION. In the event of a conflict regarding the terms of this agreement, or if the parties cannot agree to terminate this agreement without serious conflict, they will enter into a mediated conflict resolution process with a third-party mediator chosen by both parties. If resolution cannot be achieved through mediation, the parties agree to submit to binding arbitration of their differences before a single arbitrator in accordance with the arbitration rules of the American Arbitration Association. This agreement shall be governed by and construed in accordance with the laws of the State of Oregon, and any decision or award by an arbitrator shall be made in accordance with such laws.

ENTIRE, INTEGRATED AGREEMENT. This agreement, and any attached and properly executed exhibits, contains and constitutes the entire agreement of the parties with respect to the subject matter it addresses, and it supersedes any prior oral or written understandings or communications between the parties.

AMENDMENTS. This agreement may not be amended or modified, except in writing and signed by both parties.

EXECUTION OF THIS AGREEMENT HAS BEEN PROPERLY AUTHORIZED BY BOTH DECISION-MAKING BODIES. Each of the parties to this agreement certify that its own decision-making body (Columbia SWCD Board of Directors and membership of the LCRWC) has formally approved entering into this Fiscal and Employment Sponsorship Agreement, by passage and adoption of a resolution at a properly called Columbia SWCD meeting at which a quorum was present and for which proper minutes were recorded, or by consensus approval of the LCRWC membership at two properly noticed LCRWC membership meetings.

EFFECTIVE DATE AND TERM. This Agreement is effective on the date of its execution by both parties, as shown below. It shall continue in effect until either party terminates the Agreement in accordance with the provisions for termination stated above.

IN WITNESS WHEREOF, the parties have executed this Fiscal and Employment Sponsorship Agreement:

Signed on behalf of the Columbia SWCD, by:

LONA PIERCE Date: Feb. 28 '18
Print Name and Title

Signature: Lona Pierce

Signed on behalf of the Lower Columbia River Watershed Council, by:

Ian Bledsoe, President Date: 3-1-18
Print Name and Title

Signature:

LOWER COLUMBIA RIVER WATERSHED COUNCIL CHARTER and BYLAWS

*Adopted October 14, 1997
*Amended November 13, 2002
*Amended September 9, 2014
*Amended September 13, 2016

Purpose:

The Lower Columbia River Watershed Council was formed to gather and share information, to reduce duplication of activities, and to help address watershed management issues in the Lower Columbia River Watershed and in Columbia County, and to provide a framework for coordination and cooperation among key interests.

Mission:

To foster better stewardship and understanding of the Lower Columbia River Watershed resources in Columbia County, coordinate, cooperate and try to deal with issues in advance of resource degradation, encourage restoration of natural processes and functions where feasible, and help ensure sustainable watershed health, functions, and uses.

The council will work collaboratively with communities and landowners to develop and carry out voluntary watershed protection, restoration, enhancement and community engagement activities.

Vision:

A balanced ecosystem approach that supports a healthy watershed and provides for sustainable natural resources and for an economic base and viable communities.

Relationship to Decision-Making Bodies and Communities of Interest:

The Lower Columbia River Watershed Council is an advisory group to established decision-making bodies and communities of interest in Columbia County. As such, the council gathers information, facilitates stakeholder dialogue, hopefully gains consensus, and makes recommendations concerning the protection, restoration, and enhancement of the quality of the Lower Columbia River Watershed.
The council shall be non-partisan, non-political, and non-regulatory and shall not have the authority to appeal land use or other decisions of elected or appointed public bodies.

The Council will not use litigation as a method to implement the Council's mission.

The stakeholders, agencies, organizations, and public interests represented on the council are not obligated to adopt or carry out the recommendations of the council, but will give due consideration to the recommendations and take actions they consider appropriate.

These stakeholders, agencies, organizations, and interests will report back to the council on any actions taken in response to council recommendations.

The council welcomes and will respond to the requests for advice on actions affecting the watershed that are proposed by local, state, and federal agencies; organizations; and stakeholder and public interests.

Council members will keep their respective agencies, organizations, and interests informed about the work of the council and will bring their concerns to the council.

The Lower Columbia River Watershed Council shall support other watershed councils' efforts to secure funding for watershed projects and activities.

Goals and Objectives:

- Encourage coordinated efforts to increase natural resource education programs
- Improve communication among affected stakeholders, private individuals, interested citizens, business/industry, and representatives of local, state, and federal agencies
- Gather and evaluate environmental information
- Establish a framework for coordination, cooperation, and citizen involvement
- Provide a forum for resolving problems and conflicts related to the Council's mission when all parties to the problem or conflict agree to refer the matter to the council
- Formulate recommendations
- Facilitate enactment of recommendations
- Provide ongoing program evaluation during implementation
- Promote ongoing monitoring of the health of the Lower Columbia River Watershed

Specific Tasks/Responsibilities:

- Establish a public involvement program to ensure an appropriate level of citizen participation in the council's work
- Use available resource information to determine the current condition and uses of the watershed
- Identify critical information gaps
- Gather new critical information
- Identify the desired condition and uses of the watershed
- Identify high value fish and wildlife areas
- Encourage ongoing monitoring of the conditions of the watershed
- Help resolve issues among diverse interests in the watershed
- Seek funding to support program development and implementation, including funding from agencies represented on the council
- Address the needs and concerns of the respective agencies, organizations, and interests represented on the council
- Adopt and implement a work program
- Monitor work program progress and budget

- Identify ongoing education programs in the watershed

Council Members:

The Lower Columbia River Watershed Council shall at all times include representatives from the following interests: Agricultural Community; Business & Industry Community; Education Community; Public Interest Groups; Forestry Community; Sub-Basins and/or Local Watershed Councils; Countywide Organizations; Local Governments; Fishing Interests; and Mining Industry. A majority of the members shall reside in those portions of Columbia County that drain into the Columbia River.

The members shall serve at the pleasure of their respective stakeholder groups, agencies and organizations. Council members may designate an alternate who will participate on the council in their absence.

The council will act to replace members who resign or are unable to continue to serve on the council. The council will strive to maintain continuity and the balance of interests by giving preference to representation from the same agencies and organizations at a similar or higher level position. The council will request the group, agency or organization to nominate a replacement representative. If the group, agency or organization is unable or unwilling to do so, the council will seek representation from other groups, agencies, and organizations of the same community of interest. In this event the council will consult with the County Commissioners to ensure that the replacement agency or organization does represent the same community of interest. In the event the council is unable to find a replacement representative from the same community of interest, the County Commissioners shall be asked to make a replacement appointment to reflect that community of interest.

All Council members are eligible to serve as officers or committee members. There are no term limits.

MATCH FUNDING FORM

Document here the match funding shown on the budget page of your grant application

OWEB accepts all non-OWEB funds as match. An applicant may not use *another OWEB grant* to match an OWEB grant; this includes ODA Weed Board projects because they are funded through OWEB grants. However, an applicant who benefits from a pass-through OWEB agreement with another state agency, by receiving either staff expertise or a grant from that state agency, may use those benefits as match for an OWEB grant. (Example: A grantee may use as match the effort provided by ODFW restoration biologists because OWEB funding for those positions is the result of a pass-through agreement).

At the time of application, match funding for OWEB funds requested does not have to be *secured*, but you must show that at least 25% of match funding has been *sought*. On this form, you do not necessarily need to show authorized signatures ("secured match"), but the more match that is secured, the stronger the application. Identify the type of match (cash or in-kind), the status of the match (secured or pending), and either a dollar amount or a dollar value (based on local market rates) of the in-kind contribution.

If you have questions about whether your proposed match is eligible or not, see Allowable Match document in OGMS http://apps.wrd.state.or.us/apps/oweb/fiscal/nologin.aspx under Technical Assistance application or contact your local OWEB regional program representative (contact information available in the instructions to this application).

Project Name: LCRWC Coordinator and Project Management Support Applicant: LCRWC

Match Funding Source	Type (√ one)	Status (√ one)*	Dollar Value	Match Funding Source Signature/Date*
Columbia Soil and Water Conservation District	☐ cash ☒ in kind	☒ secured ☐ pending	$2200	03-07-19
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		
	☐ cash ☐ in kind	☐ secured ☐ pending		

BEFORE THE BOARD OF COUNTY COMMISSIONERS

FOR COLUMBIA COUNTY, OREGON

In the Matter of Establishing the Lower Columbia River Watershed Council	)	ORDER NO. 222-97

WHEREAS, the State of Oregon has enacted ORS 541.345 to 541.400 dealing with watershed management and enhancement; and

WHEREAS, the State has created the Governor's Watershed Enhancement Board (GWEB) to initiate a watershed management program that relies on the establishment of voluntary local watershed councils and that provides for the development of local plans that may include, but are not limited to, the assessment of the watershed condition, the creation of a watershed action plan and a strategy for implementing the action plan; and

WHEREAS, local watershed councils shall consist of a majority of local residents, including local officials, shall represent a balance of interested and affected persons within the watershed and assure a high level of citizen involvement in the development and implementation of a watershed action program, and may include representatives of local government, representatives of nongovernment organizations and private citizens, including but not limited to:

(a) Representatives of local and regional boards, commissions, districts and agencies;
(b) Representatives of federally recognized Indian tribes;
(c) Public interest group representatives;
(d) Private landowners;
(e) Industry representatives;
(f) Members of academic, scientific and professional communities; and
(g) Representatives of state and federal agencies; and

WHEREAS, local watershed councils may submit requests to GWEB or other sources for funding or advice and assistance in developing a watershed enhancement project under the program established by

GWEB, however, the local watershed council needs to be sponsored by a local governing body to be eligible for such funding; and

WHEREAS, the proposed Lower Columbia River Watershed Council has drafted a charter with statements of purpose, mission and vision, goals and objectives, tasks and responsibilities; organization and procedures, and has proposed that the membership on the Council be composed of individuals which include, but are not limited to the following interests:

Agriculture Community
Business and Industry Community
Education Community
Public Interest Groups
Forestry Community
Sub-Basins and/or Local Watershed Councils
Countywide Organizations
Local Governments
Fishing Interests
Mining Industry

NOW, THEREFORE, IT HEREBY ORDERED as follows:

1. The Lower Columbia River Watershed Council is established as a local watershed council under ORS 541.345 to 541.400.

2. The Council shall be composed of individuals representing the following interests. The list is intended to be illustrative, and not exhaustive:

Agriculture Community
Business and Industry Community
Education Community
Public Interest Groups
Forestry Community
Sub-Basins and/or Local Watershed Councils
Countywide Organizations
Local Governments
Mining Industry

3. The Council shall have all of the powers provided by ORS 541.345 to 541.400 for watershed councils and in addition shall be

subject to the following:

a. The Council shall be subject to the public records and meetings laws of ORS Chapter 192;

b. The Council may adopt its own charter and bylaws for the conduct of meetings, voting, appointment of officers, and similar matters. However, representatives of state and federal government agencies and research and technical organizations shall only have voting rights if they are responsible for land management; and

c. The Council shall report to the Board of County Commissioners at least once annually as to its activities and proposed future activities, and the status of the Lower Columbia River Watershed.

4. The Council shall endeavor to include representatives from the interests listed above. The members shall serve at the pleasure of their respective agencies and organizations. The Council shall act to replace members who resign or are unable to continue serving on the Council. The Council will strive to maintain continuity and the balance of interests by giving preference to representation from the same agencies and organizations at a similar or higher level position. The Council will request the agency or organization to nominate a replacement representative. If the agency or organization is unable or unwilling to do so, the Council will seek representation from another agency or organization of the same community of interest. In this event the Council will consult with the County Commissioners to ensure that the replacement agency or organization does represent the same community of interest. In the event the Council is unable to find a replacement representative that represents the same community of interest, the County Commissioners will be asked to make a replacement appointment to reflect that community of interest.

5. The Lower Columbia River Watershed Council shall work with other watershed councils and share information pertinent to the County's interests. The Lower Columbia River Watershed Council's jurisdiction over local watersheds which have their own watershed council, e.g., the Scappoose Bay Watershed Council, shall

be limited to providing assistance and coordination to the local watershed council. The Lower Columbia River Watershed Council shall support other watershed council's efforts to secure funding for watershed projects and activities.

6. The Council shall be non-partisan, non-political and non-regulatory and shall not have the authority to appeal land use or other decisions of appointed or elected public bodies.

7. The Board of County Commissioners reserves the authority to withdraw approval of the Council or its charter whenever, in its sole discretion, it deems it to be in the public interest to do so.

DATED this 15th day of October, 1997.

BOARD OF COUNTY COMMISSIONERS
FOR COLUMBIA COUNTY, OREGON

By: _____
Chairman

By: _____
Commissioner

By: _____
Commissioner

Approved as to form

By: _____
Office of County Counsel

LOWER COLUMBIA RIVER WATERSHED COUNCIL

ACTION PLAN

Revised and Approved 3/12/02

Lower Columbia River Watershed Action Plan
Contents

1.0 Introduction
- 1.1 Purpose
- 1.2 Background
- 1.3 Watershed Council Membership

2.0 Development of the Action Plan
- 2.1 Action Items to Meet Council Goals and Objectives
- 2.2 Action Item Tasks

3.0 Monitoring and Evaluation

4.0 Plan Evaluation and Review

Appendix I

Lower Columbia River Watershed Council
Action Plan

1.0 Introduction

1.1 Purpose

This document is the Action Plan of the Lower Columbia River Watershed Council (LCRWC). The LCRWC is a voluntary, non-regulatory group that unites the diverse interests to improve and preserve watershed health. The Action Plan is based on the Council's goals and mission statement (Charter). The Action Plan takes a watershed-wide approach and strives to integrate existing plans and efforts. This Plan is a working document that will be updated and reevaluated, as information becomes available.

The LCRWC depends on voluntary efforts. The Council is not a regulatory or enforcement agency, nor does the Council adopt plans or rules in a legal sense. The Council makes recommendations to decision-makers, landowners, and managers on ways to protect and enhance the watershed resources of the Lower Columbia. Implementation of the recommendations in the Action Plan will be completely voluntary. The Council provides a framework for communication, collaboration, and cooperation among its member organizations and others.

The LCRWC Action Plan is a resource guide to better understand the nature of the Lower Columbia watershed.

1.2 Background

The Lower Columbia Watershed is located in northwestern Columbia County and northeastern Clatsop County. It is approximately 215,000 acres, which drain into the Lower Columbia River. Its uses are, and historically have been, timber and agriculture. 90.9% of the land is under private ownership. There is a growing rural residential population. The beneficial uses of the watershed include timber, agriculture, recreation, fish and wildlife populations. Beneficial uses are defined by Oregon Water Quality Rules OAR 340.41 for the North Coast Basin as: domestic water supply, industrial water supply, irrigation, livestock watering, anadromous fish passage, salmonid fish rearing, salmonid fish spawning, resident fish and aquatic life, wildlife and hunting, fishing, boating, water contact recreation, and aesthetic quality. The most sensitive of these uses are fish, wildlife, domestic, and recreational use.

1.3 Watershed Council Membership

The Lower Columbia River Watershed Council includes representatives from the following interests:

- Agriculture Community
- Business/Industry Community

- Education Community
- Public Interest Groups
- Forestry Community
- Sub-Basins or Local Watershed Councils
- Countywide Organizations
- Local Governments
- Fishing Community
- Mining Industry

2.0 Development of the Action Plan

Development of the Action Plan began with the adoption of the Charter October 14, 1997. The goals of the Council are:

- Promote sustainable watershed health
- Provide a forum for watershed issues
- Provide education and outreach on watershed issues

To achieve these goals the Council developed preliminary Action Items.

2.1 Action Items to Meet Council Goals and Objectives

The preliminary Action Items identified by the LCRWC (not prioritized):

Action #1: Develop history of watershed

Action #2: Assess watershed conditions

Action #3: Develop and Implement a Water Quality Monitoring Plan, initial focus on 303d listed streams

Action #4: Identify restoration and enhancement sites

Action #5: Implement restoration projects

Action #6: Develop, support and implement a broad-based education/outreach program

Action #7: Develop demonstration projects in priority areas to encourage restoration on Private lands

Action #8: Secure funding for Council support and projects

2.2 Action Item Tasks

Action #1: Develop history of watershed, Watershed Assessment 8/2001, completed

- Personal interviews
- Collect historical data

Action #2: Assess watershed conditions, Watershed Assessment 8/2001, completed
- Secure funding for assessment
- Secure personnel to conduct assessment using OWEB Assessment Manual
- Develop and maintain GIS database for LCRWC

Action #3: Develop and implement WQMP, initial focus on 303d listed streams, Ongoing
- Secure funding for monitoring
- Develop Water Quality Monitoring Plan with Quality Assurance/Quality Control
- Secure equipment for monitoring
- Obtain procedural training
- Identify sites
- Implement monitoring

Action #4: Identify restoration and enhancement sites, Ongoing
- Identify priority restoration issues based on Assessment
- Identify priority sites based on landowner willingness

- Action #5: Implement restoration projects, Ongoing
- Develop implementation strategy based on Action #4
- Develop plans
- Secure funding
- Undertake project and monitor outcome

Action #6: Develop, support and implement a broad-based education/outreach program
- Work with landowners and interest groups on watershed issues
- Work with local schools to enhance stewardship and science education on watershed and natural resource issues
- Conduct workshops on riparian area management
- Submit news articles to local newspapers
- Presentations at local groups
- Maintain a webpage

Action #7: Develop demonstration projects in priority areas to encourage restoration on Private lands
- Work with local groups to identify and recruit landowners
- Assist landowners with implementation
- Monitor effectiveness of demonstration projects
- Provide information on costshare programs

Action #8: Secure funding for Council support and projects

- Identify funding sources
- Match sources to projects
- Submit grants
- Develop partnerships

3.0 Monitoring and Evaluation

The LCRWC is committed to meaningful and successful restoration activities and to promoting sound management practices in the watershed. Monitoring is an important component in determining the success of a restoration project or management practice and whether the desired results are being achieved.

Monitoring requires a long-term commitment of time and resources. The Council will work with project sponsors to develop a monitoring plan for each action item where appropriate.

4.0 Plan Evaluation and Review

This Action Plan will be periodically reviewed.

- Reviewed at completion of the Watershed Assessment
- Reviewed at the request of the Council

Appendix I
Identified Projects

Revised November 9, 2004

- Monitoring of 303d listed streams: *Completed*
- Westport Slough/Clatskanie River Reconnection Project, Completed
- Temperature monitoring of riprap areas, Completed
- Clatskanie River Riparian Planting, Completed
- Beaver Creek Riparian Planting
- Shallow Water Habitat Restoration
- Flume Creek restoration: *Completed*
- Invasive species
    - Purple loosestrife
    - Japanese Knotweed
- Long term monitoring and evaluation, watershed
- Fox Creek, further restoration: *Completed, lg wood*
- Nice Creek, restoration
- Artificial Barrier Assessment; *Habitat Assessment completed*
- Artificial Barrier Removal: Ongoing
- Merrill Creek Culvert, Completed
- Concrete Bridge Removal/Clatskanie River, Completed
- Page Creek Fish Barriers, Completed
- Miller Creek Fish Barrier: *Completed*
- Clatskanie River Culvert Replacements; 5 sites; *2 Completed*
- Kloppman Large Wood; *Completed*
- Louisiana Swamp Wetland Restoration; *Completed*
- Batwater Station Wetland Restoration
- Clatskanie Flood Plain Restoration; 2 sites

Italicized notations added post 11/9/04

These projects will be prioritized as additional information becomes available to the Council.

LCRWC Current Officer's List

Chairman – K.C. Van Natta – kcvn35@gmail.com – 503-313-7298

Secretary – Marilyn Baker – marilynviola@gmail.com – 503-313-7298

Gary Soderstrom officially resigned as Vice Chairman on March 13th, 2023.

Lower Columbia River Watershed Council

Working toward balanced ecosystems that support healthy watersheds and sustainable natural resources
To support an economic base and viable communities

Draft
Meeting minutes
November 9th, 2021
7:00 pm by Zoom

Attendance by Zoom: Ian Bledsoe, Marilyn Van Natta, K.C. Van Natta, Allan Whiting, Margaret Magruder, Harpiar Gandhi, Mike Russell, Pat Welle, Sephe Fox, and Chip Bubl.

All introduced themselves.

Public Comment: None

Pat Welle Presentation: Pat has a long history with restoration projects in the Lower Columbia River landscape. She described the challenges and opportunities that remain to bring some semblance of the biology and the beauty to the Lower Columbia River estuary. She described the positive level of commitment needed to learn and adapt projects for the best outcomes for the fish. Pat is also a fine writer and excellent photographer and showed many slides of her favorite places in the region and some successful projects. Her "Nature's View" web page is https://www.patwelle.com/ . The site is well worth exploring.

Mike Russell moved and Harpiar Gandhi seconded to approve the September, 9, 2021 minutes. Motion carried.

The financial report was in the packet and reviewed by the Board.

The Council Coordinator's report was also in the packet. Allan noted some of the highlights:

- Technical Assistant Grant submitted to OWEB for a flood plain targeted restoration plans. 60-70% of the ownership is interested. However, there are 7 other TAGs in the same pool. There is a lot of concern about why so few Chinook are in the Clatskanie system. These floodplain locations are crucial to their success.

President's message: Nothing to report.

New Board appointments: None

Officer Elections: Margaret Magruder guided the process with the following that agreed to serve:

President:	Ian Bledsoe
Vice President:	K.C. Van Natta

Secretary: Chip Bubl

President Bledsoe asked if there were any further nominations. Hearing none, President Bledsoe closed the nominations and they were all elected to serve another term.

Reports from partner organizations:

Friends of Fox Creek: Having an abridged Zoom meeting on 11/15 at 6:30 to meeting on future governance and plan for next year's Annual Meeting in February.

Scappoose Bay W.C.: No report.

Columbia County: Mike Russell noted that his crews were getting into winter planning and preparation mode. Most road work done for the year.

City of Clatskanie: Harpiar Gandhi discussed the waterline blowout which lost ~200,000 gallons of water and almost led to a road washout. Both the pipe and the road damage has been repaired.

Next meeting: January 11th, 2022 at 7:00pm by Zoom once again

Meeting adjourned by President Bledsoe.

Respectfully submitted by
Chip Bubl
Secretary

LOWER COLUMBIA RIVER WATERSHED COUNCIL CHARTER and BYLAWS

*Adopted October 14, 1997
*Amended November 13, 2002
*Amended September 9, 2014
*Amended September 13, 2016
*Amended March 20, 2023

Purpose:

The Lower Columbia River Watershed Council was formed to gather and share information, to reduce duplication of activities, and to help address watershed management issues in the Lower Columbia River Watershed and in Columbia County, and to provide a framework for coordination and cooperation among key interests.

Mission:

To foster better stewardship and understanding of the Lower Columbia River Watershed resources in Columbia County, coordinate, cooperate and try to deal with issues in advance of resource degradation, encourage restoration of natural processes and functions where feasible, and help ensure sustainable watershed health, functions, and uses.

The council will work collaboratively with communities and landowners to develop and carry out voluntary watershed protection, restoration, enhancement and community engagement activities.

Vision:

A balanced ecosystem approach that supports a healthy watershed and provides for sustainable natural resources and for an economic base and viable communities.

Relationship to Decision-Making Bodies and Communities of Interest:

The Lower Columbia River Watershed Council is an advisory group to established decision-making bodies and communities of interest in Columbia County. As such, the council gathers information, facilitates stakeholder dialogue, hopefully gains consensus, and makes recommendations concerning the protection, restoration, and enhancement of the quality of the Lower Columbia River Watershed.
The council shall be non-partisan, non-political, and non-regulatory and shall not have the authority to appeal land use or other decisions of elected or appointed public bodies.

The Council will not use litigation as a method to implement the Council's mission.

The stakeholders, agencies, organizations, and public interests represented on the council are not obligated to adopt or carry out the recommendations of the council, but will give due consideration to the recommendations and take actions they consider appropriate.

These stakeholders, agencies, organizations, and interests will report back to the council on any actions taken in response to council recommendations.

The council welcomes and will respond to the requests for advice on actions affecting the watershed that are proposed by local, state, and federal agencies; organizations; and stakeholder and public interests.

Council members will keep their respective agencies, organizations, and interests informed about the work of the council and will bring their concerns to the council.

The Lower Columbia River Watershed Council shall support other watershed councils' efforts to secure funding for watershed projects and activities.

Goals and Objectives:

- Encourage coordinated efforts to increase natural resource education programs
- Improve communication among affected stakeholders, private individuals, interested citizens, business/industry, and representatives of local, state, and federal agencies
- Gather and evaluate environmental information
- Establish a framework for coordination, cooperation, and citizen involvement
- Provide a forum for resolving problems and conflicts related to the Council's mission when all parties to the problem or conflict agree to refer the matter to the council
- Formulate recommendations
- Facilitate enactment of recommendations
- Provide ongoing program evaluation during implementation
- Promote ongoing monitoring of the health of the Lower Columbia River Watershed

Specific Tasks/Responsibilities:

- Establish a public involvement program to ensure an appropriate level of citizen participation in the council's work
- Use available resource information to determine the current condition and uses of the watershed
- Identify critical information gaps
- Gather new critical information
- Identify the desired condition and uses of the watershed
- Identify high value fish and wildlife areas
- Encourage ongoing monitoring of the conditions of the watershed
- Help resolve issues among diverse interests in the watershed
- Seek funding to support program development and implementation, including funding from agencies represented on the council
- Address the needs and concerns of the respective agencies, organizations, and interests represented on the council
- Adopt and implement a work program
- Monitor work program progress and budget

- Identify ongoing education programs in the watershed

Council Members:

The Lower Columbia River Watershed Council shall at all times include representatives from the following interests: Agricultural Community; Business & Industry Community; Education Community; Public Interest Groups; Forestry Community; Sub-Basins and/or Local Watershed Councils; Countywide Organizations; Local Governments; Fishing Interests; and Mining Industry. A majority of the members shall reside in those portions of Columbia County that drain into the Columbia River.

The members shall serve at the pleasure of their respective stakeholder groups, agencies and organizations. Council members may designate an alternate who will participate on the council in their absence.

The council will act to replace members who resign or are unable to continue to serve on the council. The council will strive to maintain continuity and the balance of interests by giving preference to representation from the same agencies and organizations at a similar or higher level position. The council will request the group, agency or organization to nominate a replacement representative. If the group, agency or organization is unable or unwilling to do so, the council will seek representation from other groups, agencies, and organizations of the same community of interest. In this event the council will consult with the County Commissioners to ensure that the replacement agency or organization does represent the same community of interest. In the event the council is unable to find a replacement representative from the same community of interest, the County Commissioners shall be asked to make a replacement appointment to reflect that community of interest.

Titles of Officers, How officers are selected, Length of service for officers, Powers of officers, Minimum number/frequency of meetings of governing body

The Council will elect a chairperson and vice-chairperson to serve as spokespersons, prepare council agendas, call and manage council meetings, enforce ground rules, and perform other tasks as assigned by the council. The council may select other officers and fill vacancies as needed. The periodic election of officers shall take place at the regularly-scheduled meeting in October of odd-numbered years.

The Council may form subcommittees of its own members and task groups that include individuals not on the council to perform certain functions or focus on specific issues. The council will also identify technical advisors who can provide technical data and assistance and call on these experts as needed.

All Council members are eligible to serve as officers or committee members. There are no term limits.

Lower Columbia River Watershed Council
Policies and Ground Rules

Adopted 9/7/97
Amended 7/11/00
Amended 6/12/12
Amended 9/9/14
Amended 9/13/16
Amended 3/20/23

LCRWC Members agree to the following policies and ground rules:

Council Decision-Making

- Robert's Rules of Order, Second Edition, will be used as a guide for conducting business.
- Before a decision is adopted by the council, sufficient time (30 days) will be provided for the members to seek advice from organizations they represent, agencies, or other experts.
- When a decision is reached, council members will advocate to their respective bodies support for the adoption or implementation of the decision.
- The watershed council may select a person to serve as facilitator.

Participation

- The Council will hold regular meetings and follow provisions of the Open Meetings Law. At least 10 minutes will be set aside at each meeting for public comment.
- Business may be conducted by council members present. In the absence of a majority of the council members or their alternates, a simple majority is required for approval of actions with a minimum of four members present.
- Council members will keep their respective agencies, organizations, or interests informed about the work of the council and bring concerns of their groups to the council.
- Council members may designate a representative of their group to serve as an alternate. Designated alternates will be listed on the membership list of the council.
- Each member will brief his/her alternate on all issues, proceedings, and notifications, prior to the alternate's attendance at council meetings.
- The public is invited to all council meetings and, upon request, provide meeting agendas and records of decisions other than personnel discussions and actions.

Organization and Procedures

- Robert's Rules of Order shall be followed (see: Decision-Making/Ground Rules)
- The Council will hold monthly meetings on the second Monday of every month unless otherwise announced.
- Council will seek funding for the ongoing operations.
- The Columbia SWCD will act as the Council's fiscal agent and follow Generally Accepted Accounting Principles (GAAP).
- The Council will not use litigation as a method to implement the Council's mission.

Amendments

A council member may propose an amendment to these Ground Rules at any regularly-scheduled meeting. A vote on the amendment shall take place at the next regularly-scheduled meeting. An affirmative vote by 10 members, or two-thirds of those members present, whichever is greater, will ratify the amendment.

OWEB STAFF FUNDING RECOMMENDATION
2023-2025 COUNCIL CAPACITY GRANTS

Staff Recommended Funding Level	Part of Secondary Review	App#	Watershed Council	21-23 Award	23-25 Staff Funding Recommendation
Full Funding		224-001	North Coast WS Assn	$ 131,465	$166,142
Full Funding		224-003	MidCoast WC	$ 131,465	$ 166,142
Full Funding		224-004	Upper Nehalem WC	$ 131,465	$166,142
Full Funding		224-005	Nestucca-Neskowin Watersheds Council	$ 131,465	$166,142
Full Funding		224-006	Siuslaw WC	$ 131,465	$166,142
Full Funding	Y	224-007	Tillamook Bay Watershed Council	$ -	$166,142
Full Funding		224-008	Applegate Partnership & WC	$ 131,465	$166,142
Full Funding		224-010	Coos Watershed Association	$ 131,465	$166,142
Full Funding		224-011	Coquille Watershed Association	$ 131,465	$166,142
Full Funding		224-012	Illinois Valley WC	$ 131,465	$166,142
Full Funding		224-014	Lower Rogue WC	$ 131,465	$166,142
Full Funding		224-016	South Coast WC	$ 131,465	$166,142
Full Funding		224-017	Tenmile Lakes Partnership	$ 131,465	$166,142
Full Funding		224-018	Partnership for the Umpqua Rivers	$ 131,465	$166,142
Full Funding		**224-019**	**Rogue River WC**	**$ 395,185**	**$415,355**
Full Funding	Y	224-021	Elk Creek WC	$ 131,465	$166,142
Full Funding		224-022	Calapooia WC	$ 131,465	$166,142
Full Funding		224-023	Clackamas River Basin Council	$ 131,465	$166,142
Full Funding		224-024	Coast Fork Willamette WC	$ 131,465	$166,142
Full Funding		224-025	Columbia Slough WC	$ 131,465	$166,142
Full Funding		224-026	Johnson Creek WC	$ 131,465	$166,142
Full Funding		224-027	Long Tom WC	$ 131,465	$166,142
Full Funding		224-028	Marys River WC	$ 131,465	$166,142
Full Funding		224-029	Middle Fork Willamette WC	$ 131,465	$166,142
Full Funding		224-030	North Santiam Watershed Council	$ 131,465	$166,142
Full Funding		224-031	Pudding River WC	$ 131,465	$166,142
Full Funding		224-035	Scappoose Bay WC	$ 131,465	$166,142
Full Funding		224-036	South Santiam WC	$ 131,465	$166,142
Full Funding		224-037	Tualatin River WC	$ 131,465	$166,142
Full Funding		224-038	McKenzie WC	$ 131,465	$166,142
Full Funding		224-040	Klamath Watershed Partnership	$ 131,465	$166,142
Full Funding		224-041	Crooked River WC	$ 131,465	$166,142
Full Funding		224-042	Gilliam East John Day WC	$ 131,465	$166,142
Full Funding		224-043	Hood River Working Group	$ 131,465	$166,142
Full Funding		224-044	Middle Deschutes WC	$ 131,465	$166,142
Full Funding		224-045	Lake County Umbrella Watershed Council	$ 131,465	$166,142
Full Funding		224-047	Upper Deschutes WC	$ 131,465	$166,142
Full Funding		224-048	Wasco Area WC	$ 131,465	$166,142
Full Funding		224-049	Grande Ronde Model WS Program	$ 131,465	$166,142
Full Funding		224-050	Harney Watershed Council	$ 131,465	$166,142
Full Funding		224-051	Malheur WC	$ 131,465	$166,142
Full Funding		224-052	North Fork John Day WC	$ 131,465	$166,142
Full Funding		224-054	Walla Walla Basin WC	$ 131,465	$166,142
Full Funding		224-055	Mid John Day-Bridge Creek WC	$ 131,465	$166,142
Full Funding		224-056	Owyhee WC	$ 131,465	$166,142
Full Funding		224-057	Powder Basin WC	$ 131,465	$166,142
Full Funding		224-058	Luckiamute WC	$ 131,465	$166,142
Full Funding		224-059	Greater Oregon City WC	$ 131,465	$166,142
Full Funding		224-060	Smith River WC	$ 131,465	$166,142
Full Funding		224-061	Lower Nehalem WC	$ 131,465	$166,142
Full Funding		224-062	Necanicum WC	$ 131,465	$166,142
Full Funding		224-063	Upper South Fork John Day Watershed Council	$ 131,465	$166,142
Full Funding		224-064	Molalla River Watch Inc	$ 131,465	$166,142
Reduced Funding	Y	224-039	Greater Yamhill Watershed Council	$ 131,465	$66,457
Reduced Funding	Y	224-053	Umatilla Basin WC	$ 131,465	$66,457
Do Not Fund	Y	224-002	Lower Columbia River WC	$ 131,465.00	$0
Total			**Staff Recommended Amount**	**$ 7,494,295**	**$9,054,739**

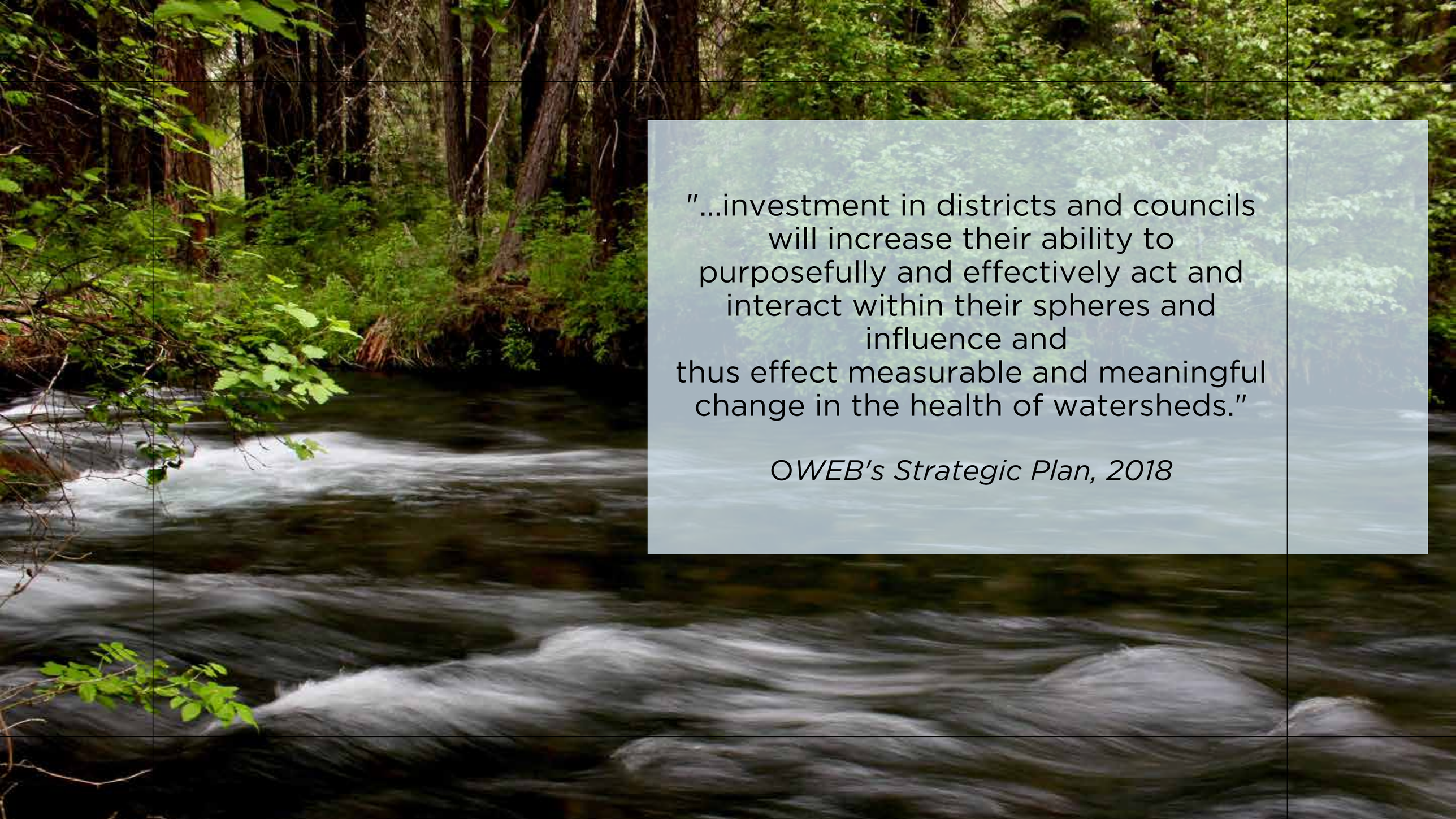
Capacity Matters:

A 20-Year Review of the Oregon Watershed Enhancement Board's Operating Capacity Investments

Jess Downey
Dr. Emily Jane Davis
Dr. Rich Margerum

July 26th, 2023

Oregon State University
UNIVERSITY OF OREGON



"...investment in districts and councils will increase their ability to purposefully and effectively act and interact within their spheres and influence and
thus effect measurable and meaningful change in the health of watersheds."

OWEB's Strategic Plan, 2018

Research Questions

01 How do organizations use capacity grants?

02 How do these grants leverage partnerships?

03 What builds or reduces organizational capacity?

04 What best practices increase capacity and overcome challenges?

05 How can capacity monitoring and tracking be refined?

06 How can future funding strategies sustain and build operational capacity?

Methods

Project Phases

Online survey
(Apr-May 2022)

Phased case study
(June 2022 - Feb 2023)

Capacity Dimensions

- Internal governance and operational practices
- Resources obtained and leveraged
- Adaptive and resilient governance
- Types of partners engaged
- Partnership types engaged in

Findings

1. Capacity grant uses
2. Top governance challenges
3. Top funding strategies



#1: Capacity Grant Uses



CAPACITY GRANT USES

Districts

- Project development - KEY
- Operational support (e.g., admin staff time, rent, utilities, etc.)
- Staff and board training



Councils

- Project development - KEY
- Initial funds for cash match for restoration projects (e.g., federal)
- Board member recruitment through local boards/committees
- Staff and board training
- Operational support (e.g., admin staff time, rent, utilities, etc.)
- Revising and updating operational policies/procedures



"My **other wildlife areas that don't have an active watershed council, it's a lot harder** to get large projects done. The watershed council and ODFW have all these projects that we're working on, and **it's benefiting the wildlife area and its neighbors, and we are able to combine our budgets to make a larger difference.**"

#2: Top Governance Challenges

1. Lead staff capacity and turnover
2. Board recruitment
3. Strategic planning

TOP GOVERNANCE CHALLENGES

Lead Staff and Board Complement Each Other

Essential Lead Staff Skills

- Leadership/Strategist
- Relationship Building
- Personnel Management
- Fiscal Management
- Grant Writing

Board Leadership Areas

- Diverse Skill set
- Strategic Plan
- Organizational Policies / Procedures
- Fiscal Responsibilities
- Personnel Management of Lead Staff

TOP GOVERNANCE CHALLENGES

Lead Staff Capacity and Turnover

Balanced Board Engagement

- Incorporation of **15-minute educational content and skills training** into board meetings
- **Inviting agency partners and experts to board meetings** to help boards understand regional priorities to make informed decisions
- **Development of strategic plans** to co-establish organizational and watershed priorities
- **Proactive recruitment** of board members
- **Annual retreats for board and lead staff** to discuss accomplishments and priorities

TOP GOVERNANCE CHALLENGES

Lead Staff Capacity and Turnover

Regional Networks

(supported by FIP, P-TA, RCPP)

- **Increased points of connection** between local partners for shared peer learning
- **Increased transparency** of how other organizations operated/managed finances
- **Leveraged group knowledge and experiences** for lead staff mentorship



TOP GOVERNANCE CHALLENGES

Board Recruitment

Lead staff proactively shaped organizations through targeted recruitment:

- Participation in **local boards and committees** and attendance at community events
- Support **strategic plan goals** and strengthen cross-organizational information sharing
- **Districts also recruited non-landowners** to become at-large or associate directors



Strategic Plan Functions Vary

TOP GOVERNANCE CHALLENGES



Detailed

- Incorporated **diverse perspectives and needs**
- Included **relevant technical expertise**
- Identified **geographic project priorities** with clearly measurable objectives
- **Short, medium, and long-term project priorities**
- Identified **potential partnerships and funding**

Broader

- **Organizational history, land uses, limiting factors**
- Developed **balanced board engagement** through joint priority setting
- Streamlined pursuit of **key partnerships and funding**

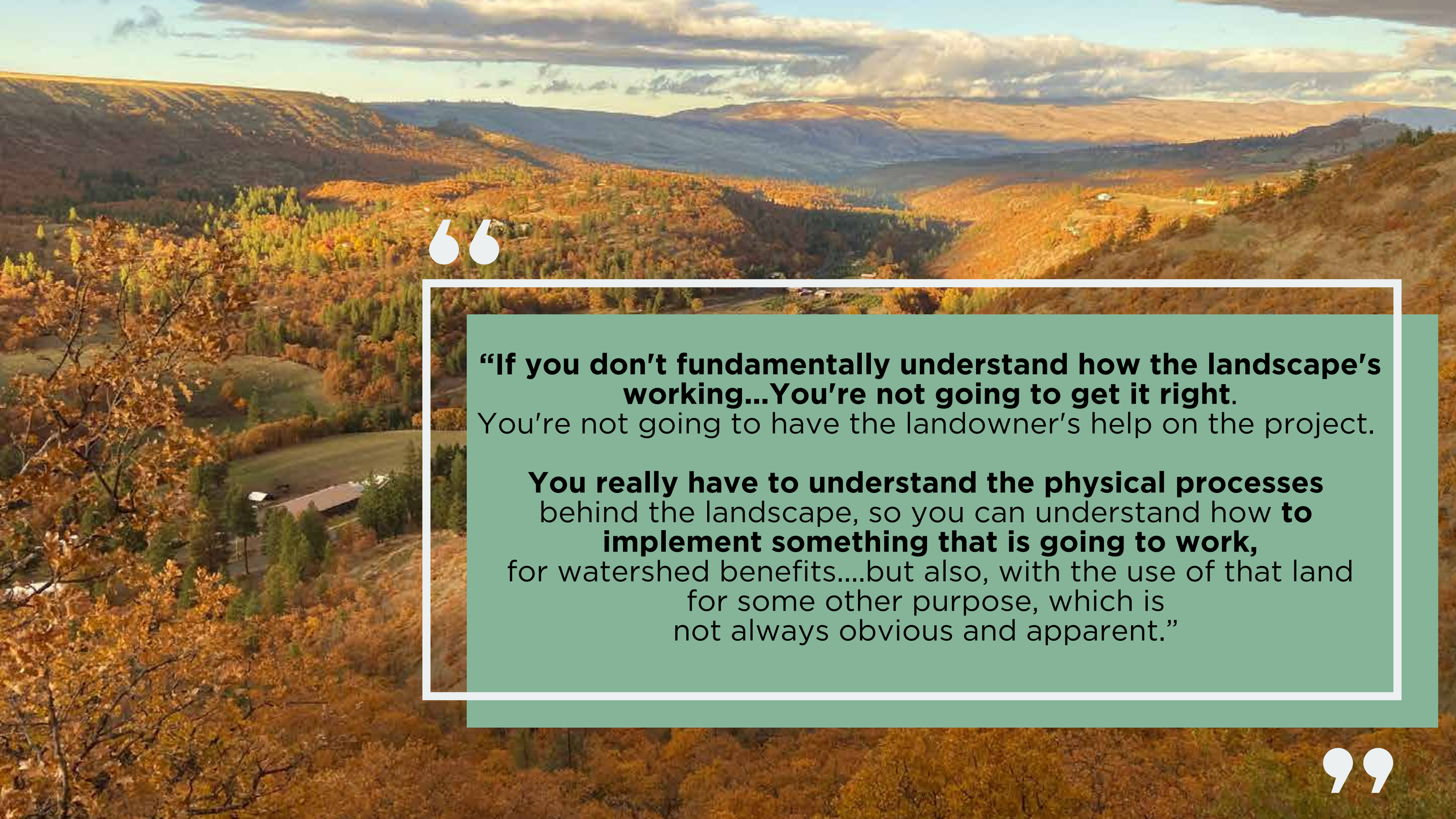
Strategic Plans + Annual Work Plans Work Together

TOP GOVERNANCE CHALLENGES

Supported Organizational Efficiencies

- Created a shared understanding of **manageable project workload**
- Developed **balanced board engagement** through joint priority setting
- Streamlined pursuit of **key partnerships and funding sources**

Organizations that develop strategic plans actively implement them.
The plans don't just sit on the shelf.
They are used as ways to work through complex problem solving.

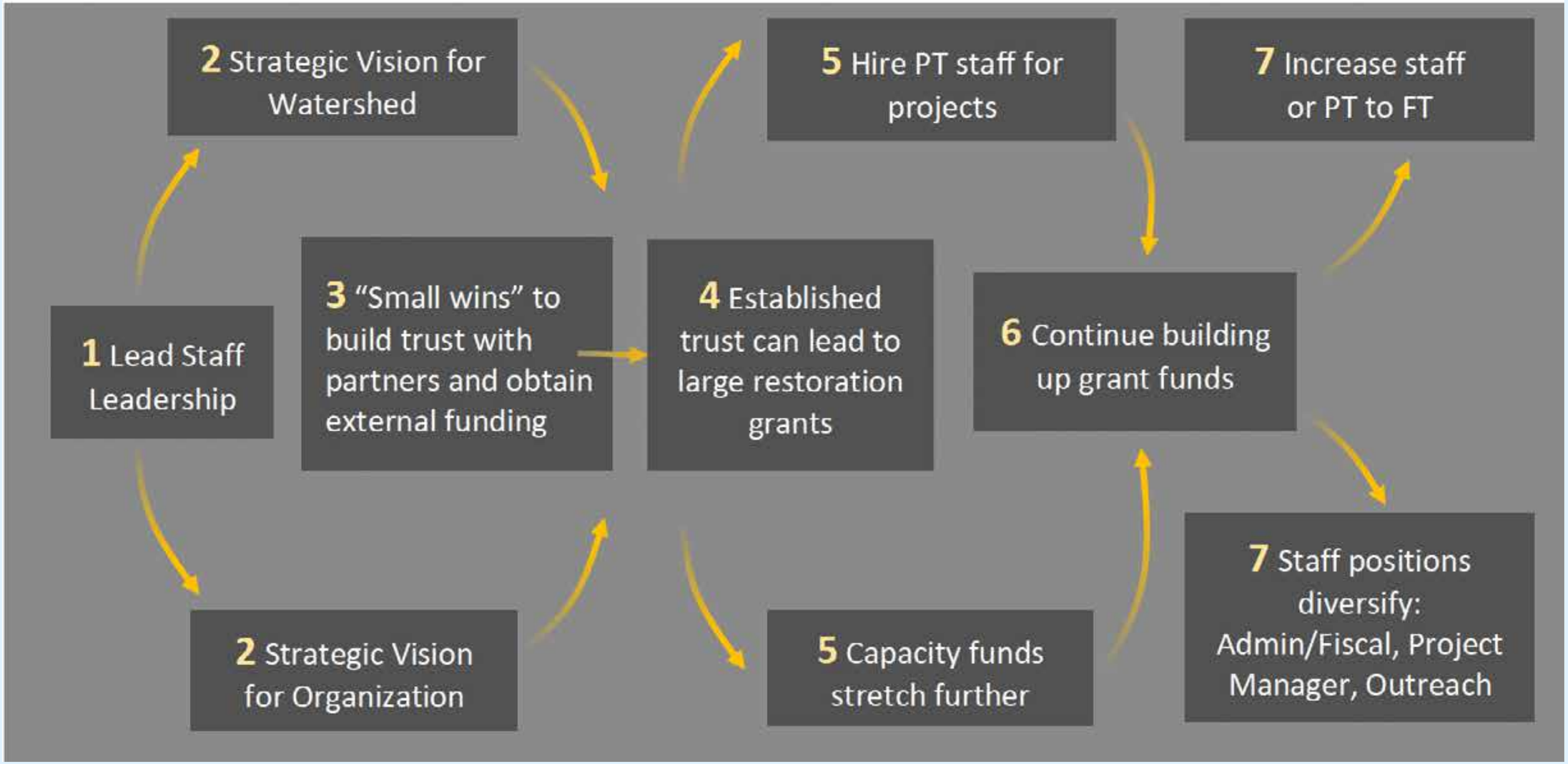


“**If you don't fundamentally understand how the landscape's working...You're not going to get it right**.
You're not going to have the landowner's help on the project.

You really have to understand the physical processes
behind the landscape, so you can understand how **to implement something that is going to work,**
for watershed benefits....but also, with the use of that land for some other purpose, which is not always obvious and apparent.”

How Do These Work Together?

TOP GOVERNANCE CHALLENGES




BAR
CAT
BEER



#3: Top Funding Strategies

Funding Strategies

- **Assessing staffing capacity**, budgeting more project time into grant applications, accounting for future costs
- **Strategic plans** identified priorities and improved grant proposals
- **Funding opportunities spreadsheet**
- Sought out **long-term funding strategies** via networks
- Fostered **regional networks** using partnership grants

Summary and Implications

Capacity Grants Have:

- Supported completion of on-the-ground restoration projects
- Helped build local partner capacity
- Enabled progress towards state-wide restoration goals
- Positively affected local economies

Lead Staff Capacity and Turnover

Board education to develop organizational management → Balanced board engagement

Regional networks → Leverage group knowledge for lead staff mentorship

Board Recruitment

Connected to strategic plan goals → Community network to cultivate a pool of candidates

Strategic Planning

Understand regional priorities →
- Create manageable workload
- Balanced board engagement
- Streamline pursuit of partners/funders

Roles for Agencies and Service Providers

- **Coordinating** and **improving understanding** of needs
- Requiring greater **specificity in strategic plans**
- Offering **support for strategic planning**
- Providing **board management training**
- Offering toolkits on s**taff benefits and retirement**
- Coordinating with and educating external funders on **significance of longer-term funding**


07/21/2





Capacity matters...

Thank you!

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Oregon State University

UNIVERSITY OF OREGON

Photos: Coast Fork Willamette Watershed Council, South Fork John Day Watershed Council, North Coast Watershed Association, Curry Soil and Water Conservation District, Upper Willamette Stewardship Network, Emily Jane Davis



CAPACITY MATTERS

A 20-Year Review of the Oregon Watershed Enhancement Board's Operating Capacity Investments



Range monitoring. *credit: South Fork John Day WC.*

JUNE 2023

Authors: Jess Downey, Dr. Emily Jane Davis, Dr. Rich Margerum

Author Affiliations

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We thank the grantee organizations who participated in the survey and interviews for their time. We also wish to particularly thank our Core Project Committee, consisting of key Oregon Watershed Enhancement Board and Oregon Department of Agriculture project support leads (Courtney Shaff, Ken Fetcho, Eric Nusbaum, Marganne Allen, and Karin Stutzman). We also thank the Advisory Group, chaired by OWEB and ODA, which consisted of a selected group of council and district leadership, including Kyle Waggoner (Umatilla SWCD), Rob Hoshaw (Long Tom WC), Amy Stiner (South Fork John Day WC), Herb Winters (Gillam SWCD), Dave Downing (Upper Willamette SWCD), and Kelly Timchak (Lower Rogue WC/Curry Watersheds). Anna Santo and Heidi Huber-Stearns of the Ecosystem Workforce Program at the University of Oregon assisted with initial project concepts and secondary data collection. Lauren Nguyen of the University of Oregon assisted with data collection and management. Eric M. White of the USDA Forest Service Pacific Northwest Research Station assisted with estimation of the economic contribution of operating capacity grants. This project was funded in whole by the Oregon Watershed Enhancement Board.



Marganne Allen, the Agricultural Water Quality Program Manager with ODA, played an essential role in supporting this project with her expertise and experience in water quality management. She passed away in March 2023. We are grateful for the opportunity to have worked with her.

Acronyms

BEF **B**onneville **E**nvironmental **F**oundation

BIPOC **B**lack, *I*ndigenous, and **P**eople **o**f **C**olor

BPA **B**onneville **P**ower **A**dministration grant

DEI **D**iversity, **E**quity, and **I**nclusion

DEQ **O**regon **D**epartment of **E**nvironment **Q**uality

DM **D**istrict **M**anager

ED **E**xecutive **D**irector

FAAP **F**ocus **A**rea **A**ction **P**lan

FIPs OWEB's **F**ocused **I**nvestment **P**artnership program

FTE **F**ull-**T**ime **E**quivalent

GIS **G**eographic **I**nformation **S**ystems

GWEB **G**overnor's **W**atershed **E**nhancement **B**oard

HR **H**uman **R**esources

JDBP **J**ohn **D**ay **B**asin **P**artnership

MOU **M**emorandum **o**f **U**nderstanding

NGO **N**on-**G**overnmental **O**rganization

NOAA **N**ational **O**ceanic & **A**tmospheric **A**dministration

NOWC **N**etwork of **O**regon **W**atershed **C**ouncils

NRCS **N**atural **R**esources **C**onservation **S**ervice

OACD **O**regon **A**ssociation of **C**onservation **D**istricts

OCEAN **O**regon **C**onservation **E**ducation and **A**ssistance **N**etwork

ODA **O**regon **D**epartment of **A**griculture

OGMS **O**regon Watershed Enhancement Board's **G**rant **M**anagement **S**ystem

OPSW **O**regon **P**lan for **S**almon and **W**atersheds

OrCP **O**regon **C**onservation **P**artnership

ORS **O**regon **R**evised **S**tatutes

OSU **O**regon **S**tate **U**niversity

OWEB **O**regon **W**atershed *E*nhancement **B**oard

OWRI **O**regon **W**atershed **R**estoration **I**nventory

PCSRF **P**acific **C**oastal **S**almon **R**ecovery **F**unds

P-TA OWEB's **P**artnership **T**echnical **A**ssistance program

RCPP **R**egional **C**onservation **P**artnership **P**rogram (NRCS grant program)

SIA **S**trategic **I**mplementation **A**rea

SOW **S**cope **o**f **W**ork

SWCC **S**oil and **W**ater **C**onservation **C**ommission

SWCD **S**oil and **W**ater **C**onservation **D**istrict

TMDL **T**otal **M**aximum **D**aily **L**oads

UO **U**niversity of **O**regon

UWSN **U**pper **W**illamette **S**tewardship **N**etwork

WA **W**atershed **A**ssociation

WC **W**atershed **C**ouncil

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EXECUTIVE SUMMARY

for A 20-Year Review of the Oregon Watershed Enhancement Board's Capacity Investments



Outreach table at City of Cottage Grove Tree Giveaway Arbor Day Celebration. *credit: Coast Fork Willamette WC.*

Executive Summary

Over the past 20 years, the Oregon Watershed Enhancement Board (OWEB) has provided Operating Capacity grants to watershed councils ("councils"), and in close coordination with Oregon Department of Agriculture (ODA), to Soil and Water Conservation Districts ("districts") across the state.

> The underlying theory for this capacity funding assumes "*that investment in districts and councils will increase their ability to purposefully and effectively act and interact within their spheres and influence and thus effect measurable and meaningful change in the health of watersheds*."[1]

[1] Request for Proposals #691-1013-19, p. 5

OWEB's 2018 Strategic Plan further emphasizes the importance of community capacity and strategic partnerships. To evaluate the impact of this funding on councils and districts and help inform future capacity-building investments, OWEB engaged a team from Oregon State University and the University of Oregon to conduct a 20-year programmatic review of Operating Capacity grants provided to councils and districts. A secondary intent of this evaluation is to support best practices for capacity investment funding and identify potential needs for training and guidance for lead council and district staff and boards. We found that many challenges and opportunities were common across councils and districts, and as such, we only point to differences between these when relevant. To better understand factors affecting organizational capacity, we gathered data across five capacity dimensions of (1) internal governance and operational practices, (2) resources obtained and leveraged, (3) adaptive and resilient governance, (4) types of partners engaged, and (5) partnership types engaged in.

From 2011 to 2021, OWEB has provided over $80 million in Operating Capacity grants to councils and districts. With this essential funding, councils and districts have leveraged over $140 million from OWEB's Open Solicitation grants alone to engage in restoration and conservation projects, which supports state agencies in meeting state-wide restoration and conservation goals; and have leveraged multiple other sources of public, private, and philanthropic funds. These initial OWEB funds generated additional economic activity as councils and districts purchased products and services; and as employees of councils, districts, suppliers, and service providers spent their income. The initial investments for councils supported $64.5 million of total economic activity (the original investment plus additional multiplier effect economic activity) and initial investments in districts translated into $64.1 million of economic activity.

Given the influx of federal funding from the 2022 Inflation Reduction Act (P.L.117-18) and the 2021 Bipartisan Infrastructure Law (P.L.117-58), it is particularly important to understand what helps build or reduce organizational capacity at the local level to better position grantees for these resources, since community-based organizations are essential partners in implementing federally funded restoration and conservation work on the ground.

Figure 1. *Summary of Operating Capacity Investments to Councils and Districts from 2011 to 2021.*[2]

Operating Capacity Grants (July 2011-December 2021) **$82,013,681**

Funds Leveraged from OWEB's Open Solicitation Grants (January 2011-December 2021) **$142,730,455**

[2] We chose to calculate OWEB's total operating capacity investments from 2011 to 2021 because in July 2011 OWEB began to provide capacity funds directly to districts, so we could easily track how much funding each district and council has received, over a consistent time period.

Approach

This project applied a mixed-methods and participatory approach including:

- an online survey
- a phased case study process
- capacity programs review with partner and advisory input

Online Survey

From April - May 2022, a survey was administered to all councils and districts that have received Operating Capacity grants from OWEB and ODA. We had an 81% response rate from councils and a 91% response rate from districts. We collected data on number of employees and shared staffing arrangements for the purpose of arranging grantees into similar organizational types (i.e., capacity typology) to frame sampling of case study grantees. We also gathered data on factors affecting organizational capacity including: (1) internal governance and operational practices, (2) resources obtained and leveraged, (3) adaptive and resilient governance, (4) types of partners engaged, and (5) partnership types engaged in.

Phased Case Studies

From June 2022 - February 2023, we engaged in a phased case study approach examining a selection of councils and districts with different staffing levels, in rural and urban contexts, and with varying resource classes. To categorize grantees by resource classes, we looked at Oregon Watershed Restoration Inventory (OWRI) and OWEB Grant Management System (OGMS) data from 1997 to 2019, calculated total cash spent and in-kind contributions for each grantee, and used quartile statistical breakpoints to define resource classes. Then, we conducted a 20-year grant document review of 20 selected grantees, to develop in-depth organizational profiles to identify common themes. Using these profiles, we further selected seven case study grantees for in-depth interviews with lead staff, board members, and partner organizations. These strategies helped us create a process that was achievable within our project timeline, while improving the applicability of results.

Capacity Programs Review

We gathered available information about similar capacity-building programs that invest in local organizational capacity (i.e., administrative, financial, technical) in natural resources and conservation management in the United States to identify appliable lessons learned for OWEB's capacity grant context (Refer to Appendix 5).

These findings are intended to provide useful knowledge about what fosters and impedes local organizational capacity, and how these factors can lead to upward or downward trajectories for organizational health. They are relevant to lead staff and board members of councils and districts, OWEB and ODA staff, conservation-focused statewide service providers, the OWEB Board, the Soil and Water Conservation Commission (SWCC), and other state agencies and external funders interested in collaborating to ensure that collective investments and capacity resources are coordinated and effective.

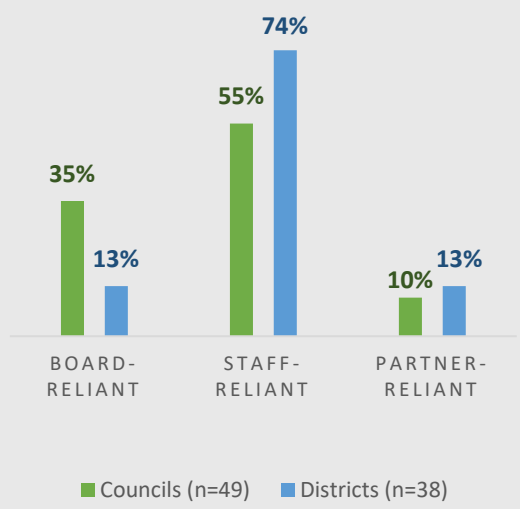
Grantee Organizational Models

We used Dr. Margerum's "Reliance Model of Collaborative Capacity" to categorize grantees into three broad types based on staffing levels and shared staffing arrangements (journal article in review).

Board-reliant indicates lower staffing levels with a greater reliance on a working board. **Staff-reliant** indicates higher staffing levels where staff fulfill more management capacity and boards are encouraged to take a more strategic role. **Partner-reliant** indicates shared staffing arrangements with another organization, with staff also fulfilling more management roles.

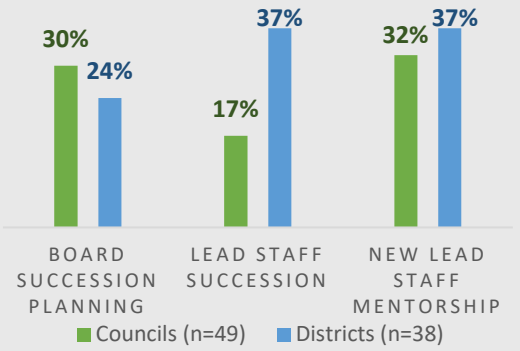
Most grantees were staff-reliant **(Figure 2).** Most districts were staff-reliant, including all districts with a permanent tax rate. This may indicate that tax bases may help districts shift towards greater staffing capacity. However, it is important to acknowledge that while taxes serve as an ongoing base of support, organizational management is just as essential.

Figure 2. Comparing Council and District Typology Results



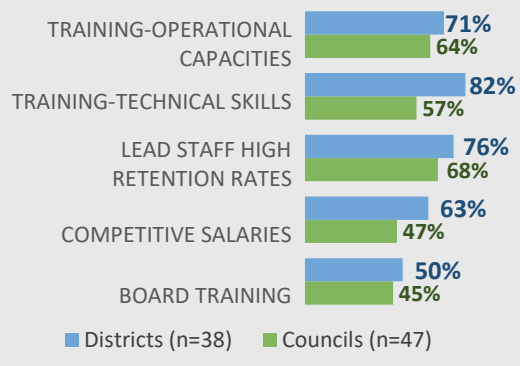
Overall, most councils and districts responded that they had written personnel and operational policies (>95%) with clear position descriptions for staff (>83%) and board members (>76%) that were well-implemented (> 89%). Additionally, 66% of districts and 70% of councils indicated that their board took initiative in managing the organization. However, regardless of capacity typology, less than half of councils and districts indicated that they had succession planning or mentorship for lead staff, or succession planning for board members **(Figure 3).** Furthermore, only 45% of councils and 50% of districts indicated that they had board member training for financial management, facilitation, or personnel management.

Figure 3. Comparing Council and District Capacity for Board and Lead Staff Transitions



Taxing districts, which were all staff-reliant, were more likely to respond that they had competitive salaries and benefits (90%), access to adequate equipment and technology for virtual meetings (90%), and staff training on key operational capacities (e.g., project management, contracting, and administrative tasks; 80%) compared to non-taxing districts. Regardless of whether a district had a tax base, they still led councils in reported competitive salaries and benefits, staff training on technical skill building and key operational capacities, and lead staff retention rates **(Figure 4).** This may indicate that access to competitive wages and more training may support retention rates.

Figure 4. Comparing Councils and Districts in Training, Staff Salaries, and Retention Rates





Outreach and coordination with local loggers. *credit: North Coast Watershed Association.*

Operating Capacity Grant Uses

We found that councils and districts commonly used Operating Capacity grants for project development by building networks to develop joint priorities and obtain funding. This included creating ad-hoc regional groups as a collaborative approach to sharing training, information, and resources. This demonstrates the value of allowing greater flexibility for Operating Capacity funding. Additionally, it is important to recognize that project development can be a multi-year process depending on project complexity and the number of partners involved. This points to an essential function of Operating Capacity grants in providing on-going support for project development through paying staff time to meet with and coordinate with partners until they obtain a grant with these partners to engage in implementation of restoration and conservation projects. Councils also used capacity grants as cash match for restoration and conservation projects, which has helped leverage additional federal grants that require match funding. Councils also described using Council Capacity funds to participate in local boards and committees to identify and cultivate relationships with potential future board members to advance their goals. All councils and districts used the Operating Capacity grants for operational support (e.g., administrative staff), as well as training for staff and boards. This was essential for maintaining their day-to-day operations and governance. Districts indicated an interest in increased flexibility in how they could use their District Capacity funds for staffing and capacity building. Currently, 75% of District Capacity funds are directed towards districts' Scope of Work and Focus Area Action Plan, while 25% are for operations. Council Capacity grants have become more flexible over time, where any expense eligible in other OWEB grants is also eligible in a Council Capacity Grant. Councils have appreciated this flexibility and have found it extremely valuable to use funds based on their self-determined needs.

We learned that Operating Capacity grants have positively impacted communities' local economies, supported the completion of restoration and conservation projects, and helped build capacity among local partners. Investing in local councils and districts around Oregon through the Operating Capacity grants program has enabled progress toward state-wide restoration and conservation goals. Furthermore, many grantees expressed that there is insufficient external capacity-building funding in the face of rising costs and inflation. Without Operating Capacity grants, many councils and districts would not be able to maintain their operations because restoration and conservation work can require months or years of networking, planning, and leveraging projects—which cannot be charged to restoration and conservation project grants. The potential loss of councils and districts would have negative repercussions on conservation efforts throughout the state. State and federal natural resource agencies have also depended on councils and districts for their ability to leverage funding, implement projects, and provide community connections.



Aspen workshop in an old schoolhouse. *credit: South Fork John Day WC.*

Critical Governance Characteristics

Governance refers to how an organization is managed and led, which relates to board and lead staff roles and responsibilities, along with the structures and processes they use for defining priorities and making decisions. Together, these have a large influence on grantees' functioning and trajectory. Across case study grantee organizations, we found three critical characteristics that affected the operating capacity of councils and districts. These were (1) lead staff capacity and retention, (2) board composition and recruitment, and (3) strategic planning.

Key Factors in Effective Governance:

- Lead staff capacity and retention is supported by board engagement and regional networks.
- Targeted board recruitment supports organizational direction.
- Strategic and annual work plans establish and reinforce organizational priorities.

#1: Lead Staff Capacity and Retention: Board Engagement and Formation of Regional Networks Supports Lead Staff

Lead staff have played an important role in grantees' stability and overall trajectory. Crucial lead staff skills include leadership, relationship building, personnel management, fiscal management, grant writing, and conservation knowledge. Factors affecting lead staff capacity and retention include level of board engagement and supportive regional networks.

(1) **Level of board engagement:** Effectively engaged boards provided lead staff with organizational direction for strategic planning, supported lead staff decision-making and development of organizational policies/procedures, contributed guidance on lead staff work plans, and provided fiscal oversight. An effective board was one that is neither too engaged (i.e., micromanaging lead staff), nor too disengaged (i.e., not providing sufficient organizational direction and support for lead staff). Engaged boards were better able to manage lead staff turnover, often supporting operations and interim staff through the transition. Lead staff have used various strategies to improve board engagement and help train them in

their role, since not all board members have a background in organizational management. Some lead staff incorporated 15-minute educational content and skills training into board meetings to help them understand their roles and responsibilities. Other lead staff invited agency personnel or other relevant experts to provide project updates and upcoming funding opportunities to help boards understand regional priorities and inform their decision-making.

(2) **Regional networks:** In rural and urban settings, some grantees established regional networks, using OWEB Focused Investment Partnership (FIP), Partnership Technical Assistance (P-TA), or the Natural Resources Conservation Service's Regional Conservation Partnership Program (NRCS RCPP) grants, which provided additional support for grantees experiencing lead staff transitions. By building on pre-existing relationships, some grantees developed more formalized partnerships with shared by-laws, memorandums of understanding (MOUs), and other governing documents. The intentionality of these partnerships has allowed for increased points of connection between local conservation partners for shared peer learning through regular meetings. Furthermore, the consistency of these meetings and the development of group agreements built trust, which led to some grantees becoming more transparent with each other about how they operated and managed finances. This helped develop a culture that leveraged the diversity of knowledge and expertise of the group for mentorship, rather than relying solely on past lead staff or the board chair.

Challenges: Lead Staff Turnover and Capacity

Turnover of lead staff was challenging for many grantees to overcome and sometimes led to a downward cycle of additional challenges, including issues with recruitment and replacement. Precipitating factors for lead staff loss included: unsustainable workload, lack of joint organizational priority setting between staff and board for strategic plans or annual work plans, and a board that was too engaged (i.e., micromanaging of lead staff) or too disengaged (i.e., not providing sufficient organizational direction or fulfilling essential board functions as described in Table 14). Some lead staff found themselves in a position of managing a challenging workload, while navigating their concerns around pay, health, and retirement benefits, which have been affected by rising costs of living and housing in Oregon. Because of this, some lead staff have left to seek out positions with increased pay and benefits.

Other grantees experienced challenges with organizational stagnation, wherein lead staff lacked the necessary capacity, skills, or training to lead organizations at a particular point in time. In these situations, board members: (1) lacked skills or experience in personnel and organizational management, (2) were disengaged and did not recognize what skills were needed for lead staff positions, and/or (3) faced difficulties of attracting qualified candidates due to the grant-funded nature of lead staff positions, and lack of health and retirement benefits and competitive wages, coupled with the challenges of hiring in rural communities. Rural areas, like the rest of Oregon, have faced rising housing values and increased costs of living in part associated with the COVID-19 pandemic. Some interviewees indicated that effects from organizational stagnation made partners less likely to work with them, which led to missed opportunities for project work and funding. These challenges were particularly acute for board-reliant organizations, while staff and partner-reliant organizations had more opportunity to support advancement of lead staff from within.

#2: Board Recruitment: Targeted Recruitment Helps Grantee Organizations Work Towards Strategic Plan Goals

Boards have held an essential role in organizational direction setting. Essential board member skills included reviewing and updating governing policies and procedures, fiscal oversight and management, and providing guidance and support to lead staff. As part of their operational strategy, some grantees engaged in targeted board recruitment through ongoing, intentional participation in local committees, other boards, or foundations; and by attending local events. This helped access existing community networks to identify potential board members, encourage their broader involvement in projects, and cultivate future candidates. They looked for individuals who could help them move closer to the organization's strategic plan goals and strengthen communication/information sharing across agencies and industries. To pay for lead staff and other project managers' time to participate in these activities, some grantees built their operational budget over time as part of their operational strategy.

In addition, some districts have innovated around the legal requirements for board directors. Typically, to become a zone director, an individual must own or manage at least ten acres of land, while at-large or associate directors do not have these same criteria.[3] Some districts recruited non-landowners or those who own or manage less than ten acres of land to become at-large or associate directors to address issues of diversity or lack of expertise in board composition. After one year in this position, they became eligible to serve as zone director if they were a registered voter who lived within the zone they represented and had a conservation plan approved by the district.

Challenges

Common board recruitment challenges have included issues with identifying and recruiting members with the time and capacity to commit, with organizational/personnel/fiscal management skills, and from a diversity of perspectives. These were difficult to overcome since they have been a product of established OWEB and ODA board requirements or reflective of community contexts. Furthermore, when board positions were posted or spread by word of mouth only, organizations typically had a less diverse board. These challenges were particularly acute in rural areas with a limited pool of potential board members, or key potential board members were already serving in numerous community volunteer roles.

#3: Strategic Planning: Joint Priority Setting Supports an Upward Trajectory

Strategic plans support decision-making between lead staff, boards, and partners. Here, we refer to individual organizations' strategic plans, rather than strategic action plans used to coordinate goals and actions across multiple organizations for a large geographic area as part of an OWEB-FIP, P-TA, NRCS RCPP grant, or others. The planning processes for an individual organization's strategic plan are shaped by regional contexts, vary based on organizational structure, and serve distinct purposes depending on how the organization is managed. Because strategic plans have different functions depending on these factors, it is necessary to account for these nuances. For some organizations, an effective strategic planning process took a more detailed approach. The plan incorporated diverse perspectives and needs and engaged relevant technical expertise to identify geographic project and/or programmatic priorities that could result in tangible benefits or improvements with clearly

[3] Refer to ODA's SWCD Guidebook Chapter 3: Conservation District Directors (updated 12/2022) for more information as well as ORS 568.560(2) and (3) to see the eligibility requirements for a person to become a conservation district director.

measurable objectives. These priorities were sometimes laid out as short, medium, and long-term goals, with identifiable potential partners and funders. These organizations typically had access to more regional funding opportunities. For other organizations, an effective strategic planning process needed a wider scope and to be broader in nature. These plans included organizational history, land uses, and limiting factors, which allowed the organization to be more adaptable to emergent funding opportunities that arose. These organizations typically had fewer regional funding opportunities available. The annual work plans were then derived from these strategic plans to incorporate more detail to guide daily operations and establish geographic project and/or programmatic priorities between lead staff and board. Both approaches supported organizational efficiencies through joint priority setting by lead staff and board, which simultaneously led to a shared understanding of what constituted a manageable project workload based on staffing capacity. This knowledge also streamlined pursuit of key partnerships and funding sources.

However, it is important to recognize that for a strategic plan to gain momentum and foster an upward organizational trajectory, lead staff still needed to be able to move from planning to action by creating "small wins" early on that demonstrated commitment and developed trust that the organization would be reliable and consistent in following through on their plans. This was the case regardless of whether the organization had greater access to funding opportunities or not, though, of course having more funding opportunities in a geographic area was helpful for this.

Challenges

When strategic plans and/or annual work plans lacked specificity in their objectives and measures, the plans did not offer enough organizational direction setting for lead staff to develop projects, seek out partnerships, or identify funding sources. Without joint organizational priority by lead staff and board members, some organizations faced increased lead staff workload, which often led to burn-out from a lack of direction for their strategic and/or annual work plans. In other instances, some organizations faced difficulties with board micromanagement, which led to organizational gridlock and departure of lead staff.



Post-wildfire team efforts. *credit: Upper Willamette Stewardship Network.*

Building Partnership Capacity and Working through Challenges

Partnerships helped organizations to learn from the expertise and experiences of adjacent councils, districts, and other local conservation partners to develop and implement restoration and conservation projects. Over time, some partnerships evolved as they created shared understanding of needs and resources available. These types of partnerships were able to move beyond project-to-project planning and work towards the development of larger-scale restoration and conservation projects. Partnership opportunities and challenges varied in different geographic areas and landownership and land contexts. When neighboring landowners differed in their priorities, it could be challenging to implement a program of work across a landscape. However, councils and districts, as community-based organizations, were positioned to find common goals and work towards landscape-scale restoration and conservation.

Councils and districts built their partnership capacity through participation in city or county committees and other local boards to establish their local reputation and contribute to the community. They also developed strategic plans with key partners to establish priorities for their watersheds through identification of key players (e.g., landowners, city/county officials/boards, public events/outreach) and formation of joint priorities to acquire funds. Additionally, they created diverse models of partnership to meet the needs of those involved through resource- sharing arrangements (e.g., staff positions, staff expertise, equipment) and establishment of group networks.

Challenges

Common partnership challenges that councils and districts faced included partner staff transitions and challenging relationship histories. To address partner staff transitions, lead staff oriented new agency personnel to joint project grants and shared priorities. Some invited agency partners to attend board meetings or one-on-one settings. Challenging partnership histories were typically addressed by lead staff efforts to rebuild the relationship through action, such as funding to work together on a project or monitoring to collect and share information for project development. These approaches supported each other's capacity since each organization had access to complementary skills, knowledge, and community connections necessary for restoration and conservation.

Top Funding Strategies and Challenges

Councils and districts have used various strategies to acquire funding for projects and operating capacity, including from unrestricted and longer-term sources. It is important to keep in mind that these strategies vary by resources available in a given geography. To successfully obtain project funding, top strategies included assessment of staffing and organizational capacity to inform which grants to pursue and when, and development of a strategic plan and funding opportunities spreadsheet.

- To strategically pursue grants, organizations defined what a feasible project workload would look like based on their staffing and project capacity. This structure helped them to implement project work in a timely manner, which built partner trust and attracted additional funding opportunities. Additionally, some described how they learned to build additional capacity into grant applications by budgeting for more project management time and accounting for future costs and expenses (e.g., staff wages and materials), as grants allowed. Strategic plans helped to identify watershed goals and related project priorities, which then helped organizations position themselves for grant opportunities. Some organizations also created a funding opportunities spreadsheet that connected their strategic plan to various funders' priorities. They periodically updated this to keep track of grants, deadlines, and key contacts to maintain awareness of upcoming opportunities. Some also described fostering regional networks using partnership grants (e.g., OWEB-FIP, P-TA, or NRCS RCPP) to formalize partnerships, share information and resources, coordinate projects, and identify partners for project cash match. The designation of a partnership coordinator was particularly useful for identifying landscape-level restoration and conservation funding for multiple organizations.
- To develop unrestricted funding sources, organizations networked in their communities to learn about diverse funding opportunities and build partnerships helped them to find longer-term funding to supplement OWEB's Operating Capacity grants. Examples include: (1) annual federally negotiated indirect cost rate agreements, (2) local government budgets, (3) local community institutions that sponsor non-profits (e.g., local banks, grocers, breweries), and (4) fundraising.

Challenges

Councils and districts faced challenges inherent to with navigating a variable funding landscape and lack of external programmatic capacity funding not tied to specific projects. External funders' priorities change over time, which can lead to loss of reliable funding sources. Additionally, some geographic areas of the state have had greater access to funding opportunities, such as Bonneville Power Administration grants (BPA), district tax bases; species-specific funds for salmon, steelhead, and greater sage-grouse; and other agency regional funding priorities. Further, some rural communities have fewer available local organizations to partner with on projects and/or a lack of local government funding for conservation, and therefore, fewer cash match options for grants. This also ties into difficulties some rural organizations described of finding and retaining qualified staff, which had indirect impacts on their ability to manage and obtain larger restoration and conservation grants. Some have developed and participated in regional partnerships to help mitigate these challenges to the extent possible.



Golden paintbrush, Threatened and Endangered Species. *credit: John D. Anderson, cc.*

Proposed Recommendations: Agencies and Service Providers

Coordinate Across Agencies and Improve Cross-Agency Understanding of Grantees' Needs

Although several agencies and service providers offer technical assistance and support for grantees (e.g., NOWC, OrCP, OCEAN, and the SWCD Operations Specialist), there is a need to improve awareness of this. As the COIVID-19 pandemic altered what was provided over the past few years, and as more in-person events are happening, it is important to re-introduce and offer additional opportunities for peer networking and information sharing. Additionally, we heard interest from council and district staff in connecting directly with OWEB and ODA staff. Hosting regional in-person forums could be particularly beneficial for organizations in more rural areas, who typically must travel further and face greater travel costs for professional networking opportunities. Lastly, new lead staff may have different needs than those who have been in their positions longer. This emphasizes the ongoing importance of mentorship and peer learning networks to create information exchanges and learn from each other's experiences at all stages.

Potential Strategies

For councils, NOWC could play an enhanced role in supporting regional peer forums, since their board includes regional representatives, and they support regional peer networking groups open to all councils. Additionally, they have created a NOWC Insider Webinar series that covers a variety of topics (e.g., nonprofit board governance, legal issues, financial best practices, partnership opportunities, fundraising strategies, and other relevant topics) with content experts. However, these services are currently limited to councils who are paying NOWC members, because the organization depends on membership dues for funding its part-time coordinator and operations currently. OWEB could also engage with ODA's SWCD Operations Specialist's skills to develop regional round-table trainings for lead staff on management and operations for councils, in addition to those already offered to districts.

Topics for Capacity Building

Content that grantees most wanted to learn more about included OWEB-specific and general grant writing and reporting requirement courses; fiscal management and terminology; guidance on developing unrestricted funding sources to maintain critical operations; best practices or examples of organizational policies, procedures, and bylaws; board management and education; handling personnel management and lead staff transitions; and navigating the management of multiple projects, with a balanced project workload for lead staff. It is important to acknowledge that lead staff may not have a background in project management or organizational management, which are essential functions for this position, and have often needed to learn on-the-job.

Strategic Planning

Requiring greater specificity in strategic plans or annual work plans as part of OWEB Council Capacity Grant Merit Criterion 2, depending on the functions of these plans for the organization, could allow for objectives and measures for how councils are identifying and implementing watershed restoration and conservation while engaging with partners (refer to Proposed Metrics Scorecard in Section VII-C, page 52 for more nuances). It is important to acknowledge that strategic planning processes take time, energy, and resources, which can draw capacity from an organization's other activities and project work. As such, organizations may benefit from additional technical and financial support from OWEB and ODA and other supportive organizations to assist their strategic planning and annual work plan processes to incorporate diverse perspectives and needs and engage relevant technical expertise for identifying priorities. Regional peer learning forums, webinars, and conference sessions may help grantees, particularly lead staff, gain valuable insight into project development, management, and implementation, while making the best use of OWEB's various grants in project design (e.g., technical assistance, stakeholder engagement, monitoring, and restoration).

Board Management

Grantees may benefit from board training guidance, either using existing resources available from ODA, NOWC, and Oregon Conservation Partnership (OrCP), or development of new guidance through these outlets. Considering that lead staff capacity and turnover are common organizational challenges, it is important to continually promote relevant and available board resources for lead staff awareness. Offering these via webinars would allow for increased opportunities to meet the scheduling needs of retired or working board members. Key training areas included strategic plans, organizational policies and procedures, fiscal responsibilities, and personnel management of lead staff.

Staff Benefits and Retirement

A key aspect of lead staff succession planning and staff retention is pay, health and retirement benefits, which are further challenged by the rising costs of living and housing, even prior to the COVID-19 pandemic. It is challenging for councils and districts as smaller grant-funded organizations to afford group health insurance for their staff. It can be challenging to maintain organizational longevity when lead staff leaves to seek out positions with increased pay and benefits. Additionally, based on the survey results, less than half of councils and districts indicated that they had succession planning or mentorship for lead staff, or succession planning for board members. Furthermore, only 47% of councils and 63% of districts indicated that they had competitive salaries and benefits compared to similar types of organizations. Grantees may benefit from a toolkit or an online resource page (including relevant resources from OCEAN, OACD, NOWC and OrCP webinars) for how to

incorporate health and retirement benefits into their organization. Regional peer learning forums, CONNECT and OACD conference sessions, and access to legal experts may be helpful as well.

Coordinating with and Educating External Funders on the Significance of Longer-Term Funding

By reviewing other capacity building programs, we learned that other funders (e.g., the Ford Family Foundation and the Wilburforce Foundation) acknowledge the need to support long-term partnerships through long-term granting, and the importance of collaborating among funders to ensure that collective investments and capacity resources are coordinated and effective. OWEB and ODA have provided ongoing, programmatic support for 20 years to councils and districts' efforts in improving local watershed quality and health. OWEB has developed longer-term funding strategies to help support grantees in partnership capacity and larger landscape-scale restoration (P-TA and FIP grants), while NRCS has developed RCPP grants to support collaboration with other councils and districts for landscape-scale conservation projects with private landowners. External funders often see OWEB and ODA as essential funding partners in getting restoration and conservation work done on the ground through these locally based councils and districts. As such, OWEB can play a role in educating funders on the significance of longer-term grants to work toward landscape-scale restoration and conservation.



Restored floodplain in Morrow County. *credit: EJ Davis.*

CAPACITY MATTERS

REPORT

for A 20-Year Review of the Oregon Watershed Enhancement Board's Capacity Investments



Students survey macro-invertebrates during a Salmon Watch field trip on the North Santiam River. credit: Marion SWCD.

I. Introduction

Since 1997, OWEB has directly invested in the operating capacity of watershed councils (i.e., councils) and soil and water conservation districts (i.e., districts) enabling these entities to collaboratively foster locally based, voluntary restoration to protect or restore native fish or wildlife habitats or restore natural watershed functions to improve water quality or stream flows. This was generated by the Oregon Plan for Salmon and Watersheds (OPSW) which focuses on "restoring our native fish populations and the aquatic systems that support them to productive and sustainable levels that will provide substantial environmental, cultural, and economic benefits."

[1] Under ORS 541.890(15) and 541.910, councils are "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."[2] Districts are political subdivisions of state government, i.e., municipal corporations, governed by ORS 568. Districts have existed in Oregon for over 75 years, with the first established in 1939 as South Tillamook.

[1] https://www.oregon.gov/oweb/resources/pages/opsw.aspx

[2] OWEB FY 21 - 23 Spending Plan

OWEB's theory of change underpinning the provision of Operating Capacity grants:
If councils and districts receive resources to operate and meet merit criteria, they will be able to better sustain healthy watersheds.

Specifically, capacity investments will "increase [groups'] ability to purposefully and effectively act and interact within their spheres and influence."[3] With that capacity, the councils and districts pursue and achieve their mission and purposes of engaging communities, stimulating economies, mobilizing partners, affecting the systems that interact with watersheds, and ultimately achieving meaningful, measurable, sustainable improvements in the health of Oregon watersheds. OWEB's 2018 Strategic Plan further emphasizes the importance of community capacity and strategic partnerships. Strategy 3.1 recommends completing a qualitative and quantitative evaluation of past council and district capacity investments.[4] In 2020, OWEB initiated this project to evaluate these Operating Capacity grants from the past 20 years and assess what contributes to or impedes capacity, engaging a research team from Oregon State University (OSU) and the University of Oregon (UO). The intent of this evaluation is to identify best practices for capacity investment funding, as councils and districts face evolving changes and challenges in their roles and funding.

Figure 1. *Defining Organizational Capacity.*



Questions

- How have grantees used Operating Capacity grants and what are the outcomes of the Operating Capacity grant program?
- How have grantees used Operating Capacity grants to leverage partnerships?
- What can we learn about what builds or reduces an organization's capacity?
- What guidance and best practices can be developed to help councils and districts increase their capacity and overcome organizational challenges?
- How can we refine approaches for capacity investment monitoring and tracking?
- How can findings inform future funding strategies to sustain and build operating capacity, while also helping to convey to other funders the importance of programmatic capacity?

[3] Request for Proposals #691-1013-19, p. 5.
[4] https://digital.osl.state.or.us/islandora/object/osl%3A470647/datastream/OBJ/download/2018.pdf

I.A. History of Operating Capacity Grants

The majority of OWEB's grant funding comes from two sources: Measure 76 Lottery funds and Pacific Coastal Salmon Recovery Funds (PCSRF). For each biennium, OWEB's spending plan is approved by the OWEB Board in the first fiscal year of the biennium. In the second fiscal year of the biennium, the spending is updated based on updated revenues, and additional PCSRF funding awarded from NOAA. OWEB's core grant programs include: (1) Open Solicitation, (2) Focused Investments, (3) Operating Capacity, and (4) Small Grants. In this project, we focused on the Operating Capacity grants provided to councils and districts.

Council Capacity Grants

For over 20 years, OWEB has provided Council Capacity grants to watershed councils. OWEB does not create or oversee councils, but does have statutory discretion to provide Council Capacity grants based on whether councils reflect a balance of watershed interests and display the ability to both protect and improve watershed quality. Councils are also expected to engage a high level of citizen participation in developing and implementing watershed action programs based on ORS 541.910. Council Capacity grants have gone through many iterations over the past 20 years with varying criteria, evaluation metrics, and review processes (**Figure 2**). In 2014, OWEB adopted criteria that emphasized effective governance, evolving strategic plans, and action in watershed restoration and conservation activities with active partner engagement. Refer to Appendix 1 for a detailed description of how OWEB's funding has changed over time.

Figure 2. *OWEB Funding Strategies.*

BLANKET FUNDING — **1997-2003**

Evaluation Criteria: Scope of Work and Accomplishment of Descriptions.

Funding Distribution: Equal distribution across regions.

CATEGORICAL FUNDING — **2003-2005**

Evaluation Criteria: n/a

Funding Distribution: Each category had a pre-designated funding range.

DECISION MATRIX WITH RANKED SCORING — **2005-2007**

Eligibility Criteria: Introduced to provide funding only to councils that have been designated by local government, does not overlap the bounds of another OWEB council grantee, with a council that reflects or seeks to represent a balance of interests.

Evaluation Criteria: Merit based (council organization, past performance on capital and non-capital projects, proposed work plan/watershed complexity) with an intensive review process and applicant ranking system based on level of effectiveness and accomplishments.

Funding Distribution: Quantitative approach using a standard formula that resulted in a graduated point scale. For example: The highest-scoring council received the highest base funding.

MODIFIED DECISION MATRIX WITH RANKED SCORING — **2007-2015**

Eligibility Criteria: Unchanged.

Evaluation Criteria: Merit base simplified (council organization and council effectiveness) with a consensus scoring review process. Following this, OWEB staff applied weighted factors, with council effectiveness /accomplishments weighted more heavily.

Funding Distribution: Unchanged

CATEGORICAL FUNDING — **2015-Present**

Eligibility Criteria: (1) Designated as a watershed council by a local government. (2) Has previously received a Council Capacity grant, and which serves an area that is the same or larger than the geographic area served by a council or group of councils as of 2013 with only 1 applicant per geographic area & includes a minimum population of 500 within its designated boundaries. (3) Adopted action plan by a council-governing body that meets OWEB requirements. (4) 501(c)(3) registered with Oregon, or written fiscal sponsorship agreement with a 501(c)(3), SWCD, city, county, or tribal government. (5) Adopted bylaws/charter & policies/ procedures that include standard best-practice governance provisions. (See Appx. 1 for full description of eligibility criteria in rule.)

Evaluation Criteria: Merit based (effective governance/management, progress in planning, progress in on-the-ground restoration, progress in stakeholder engagement for watershed restoration) with OWEB staff review based on these criteria as well as their institutional knowledge of council, e.g., project performance history. Applications considered independently of other councils, i.e., no ranking process.

Funding Distribution: Full funding if council meets all criteria; reduced funding if council meets some criteria; no funding if council's performance is inadequate.

District Capacity Grants

District Capacity grants are provided to all 45 Soil and Water Conservation Districts. The purpose of District Capacity grant funding is to support districts' efforts to work with landowners to conserve natural resources and to help ODA implement the Agricultural Water Quality Management Program. This program was passed by the Oregon Legislature in 1993 to prevent and control water pollution on agricultural lands in support of the federal Clean Water Act. In 2011, after the passage of Measure 76, which precluded OWEB from passing Oregon Lottery funds to other state agencies, OWEB and ODA entered into an interagency agreement for the funding and oversight of District Capacity grants. OWEB administers District Capacity grants. ODA reviews and approves district work plans, assesses progress on these work plans, notifies OWEB if payments should be approved based on work progress, and provides oversight of districts.

District Capacity funds are designated for the (1) Scope of Work (SOW) and (2) District Operations Fund. SOW funds are used to directly support working with partners and landowners for the conservation and protection of natural resources. This includes "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."[5] District Operations Funds are used for capacity support to help SWCDs comply with ORS, conduct business, and provide assistance to landowners and partners. Unlike Council Capacity grants, there are no criteria or evaluation metrics to designate funding, however ORS 568 outlines criteria to be eligible for funding. This includes (1) current annual and long-range business plans submitted to ODA for comment, (2) annual reports and audits of activities, and (3) an annual meeting of the landowners of the district.

Operating Capacity Funds Distributed and Leveraged from 2011 to 2021

From 2011 to 2021, OWEB has provided over $80 million in Operating Capacity grants to councils and districts. With this essential funding, councils and districts have leveraged over $140 million from OWEB's Open Solicitation grants alone to engage in restoration and conservation projects, which supports state agencies in meeting state-wide restoration and conservation goals.

Figure 3. *Summary of Operating Capacity Investments to Councils and Districts from 2011 to 2021.*

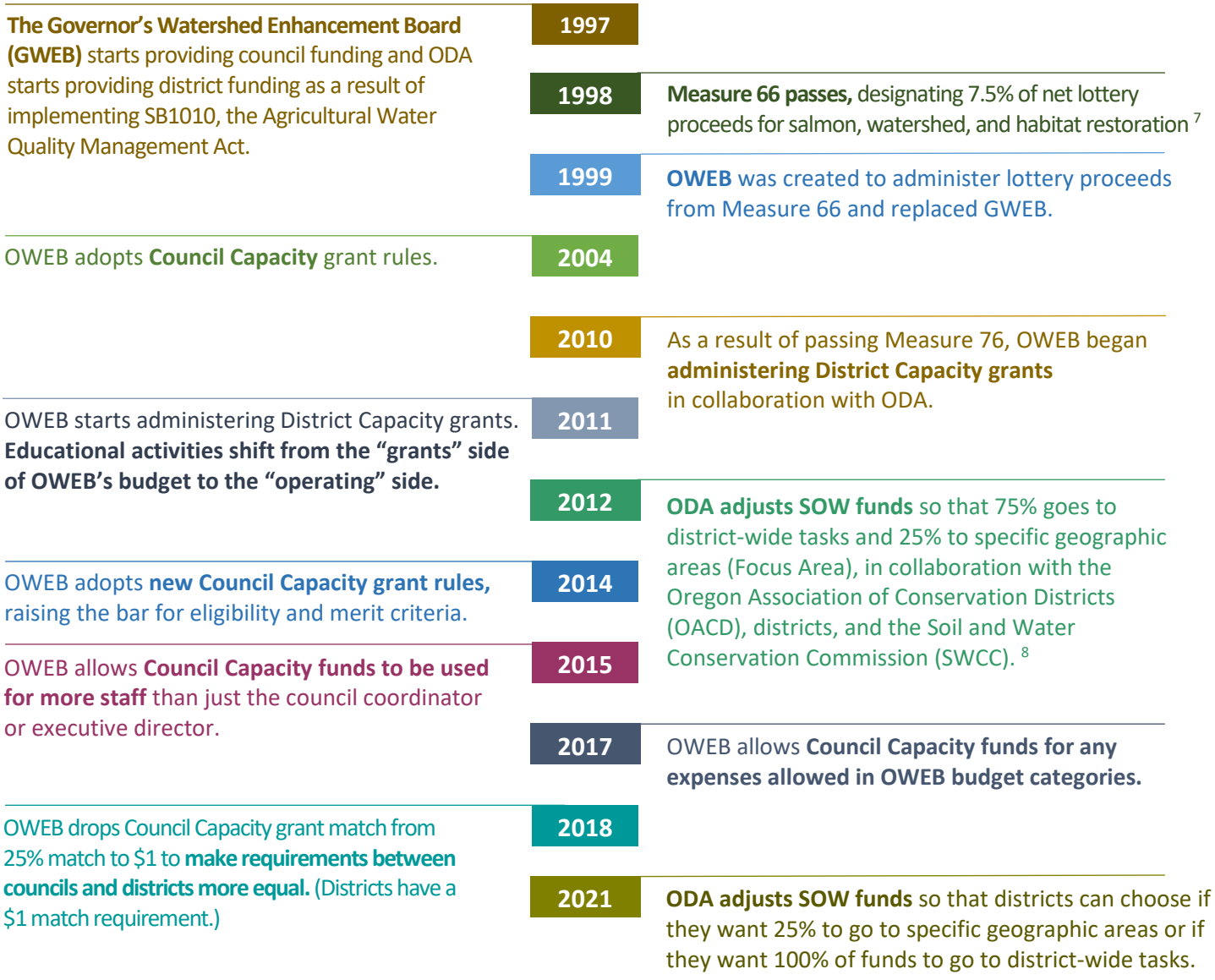


[5] OWEB FY 21 - 23 Spending Plan

Between July 2011 to December 2021, OWEB provided capacity grants of $47.4 million to watershed councils and $47.1 million to SWCDs. These initial OWEB funds generated additional economic activity as councils and districts purchased products and services; and as employees of councils, districts, suppliers, and service providers spent their income. Assuming that 80% of the spending of OWEB funds by councils and councils remained in Oregon and that the economic activity multiplier rate for these organizations is 1.7[6], the initial investments for councils supported $64.5 million of total economic activity (the original investment plus additional multiplier effect economic activity) and initial investments in districts translated into $64.1 million of total economic activity. All values are based on the value of a dollar in 2023.

I.B. Timeline of Key Points in the History of Councils and Districts

Figure 4. *History of Councils and Districts*



[6] Hibbard, M. and Lurie, S., 2006. Some community socio-economic benefits of watershed councils: A case study from Oregon. *Journal of Environmental Planning and Management*, *49*(6), pp.891-908.

[7] https://olis.oregonlegislature.gov/liz/2021R1/Downloads/CommitteeMeetingDocument/236274S

[8] OWEB FY 21 - 23 Spending Plan

I.C. Context of Capacity Funding Criteria and Service Providers

Given that this evaluation is offering a 20-year review of OWEB's Operating Capacity grants, it is important to be aware of how OWEB has modified its approach to providing Operating Capacity grants and evaluation criteria over the years (For more detail, see Appendix 1). Changes in Operating Capacity grants administration have direct impacts on grantees, and changes in evaluation criteria can affect grant distribution. Additionally, this can inform the development of recommendations for refining OWEB's future investment strategies.

In addition to providing Operating Capacity grants, OWEB and ODA staff assist local councils and districts directly, and contribute to, or partner with various forms of conservation- focused peer learning support through state-wide service providers. These include peer learning networks, affinity groups, conferences, trainings, webinars, and professional networking opportunities. It is important to understand how OWEB, ODA, and service providers contribute to peer learning to help inform and identify useful strategies that councils and districts can benefit from, while being aware of what support is already available (**Figure 5**; for more complete descriptions, see Appendix 2).

Figure 5. *Agency Staff Support and Service Providers.*

AGENCY STAFF SUPPORT	+	SERVICE PROVIDERS
OWEB Regional Program Representatives		Network of Oregon Watershed Councils (**NOWC**)
OWEB Capacity Coordinator[9]		Oregon Conservation Education and Assistance Network (**OCEAN**) Connect + Conference
ODA Regional Water Quality Specialists		Oregon Association of Conservation Districts (**OACD**)
SWCD Operations Specialist		Oregon Conservation Partnership (**OrCP**)

[9] Note: OWEB no longer has this position. This work has been incorporated into OWEB's Monitoring and Reporting Program Manager role.



Touring a restored wetland. *credit: Marion SWCD.*

II. Project Approach

Our approach was guided by our desire to produce actionable knowledge. We recognized and wanted to draw on the decades of experience and awareness that agency, council, and district staff possess. In developing a strategy for data collection, we considered the challenges and opportunities related to the COVID-19 pandemic, wildfire, drought, and other environmental issues that demand the time of local grantees, OWEB, and ODA. We focused on using existing data as a primary information source to decrease the burden of asking participants to provide information that was already publicly available. For information we could not obtain elsewhere, we carefully developed targeted approaches to new data collection. Importantly, this process aimed to be responsive to, and not extractive of, the local councils and districts who are the intended beneficiaries of this effort.

The Core Project Committee consisted of key OWEB and ODA project support leads (Courtney Shaff, Ken Fetcho, Eric Nusbaum, Marganne Allen, Karin Stutzman). We held meetings every one to two months to obtain input and refine project design, and engaged in ongoing communication as needed. Additionally, Dr. Rich Margerum, who serves as a NOWC board member, led communication with NOWC's Board. Courtney Shaff led communications with Vanessa Green, NOWC's Executive Director, as well as updating the SWCD Commission on this OWEB sponsored project that involves districts. Eric Nusbaum led communications with districts on the project during his annual district trainings.

The Council and District Advisory Group, chaired by OWEB and ODA, consisted of a selected group of council and district leadership, including Kyle Waggoner (Umatilla SWCD), Rob Hoshaw (Long Tom WC), Amy Stiner (South Fork John Day WC), Herb Winters (Gillam SWCD), and Kelly Timchak (Lower Rogue WC/Curry Watersheds). We engaged this group in April 2020 and again in April 2022 to obtain feedback on the study plan to discuss strengths, weaknesses, areas of particular interest for the agency and partners, and timelines. We focused on capacity dimensions and metrics for examination, as well as availability of proposed data sources, and feedback on proposed deliverables. In May 2023, we engaged the Advisory Group again to ground-truth our findings and recommendations, and determine the most effective ways to disseminate and apply what was learned.

II.A. Capacity Dimensions

This study took a multi-step, mixed-methods and participatory approach (**Figure 6**) to examining five dimensions of organizational and partnership capacities through a framework that tailored metrics to the watershed restoration and conservation contexts in which councils and districts work **(Table 1).** Importantly, the evaluation accounted for how grantees need different capacities at different stages of their development, in different social contexts, and for different activities.

Table 1. *Proposed Capacity Dimensions, Indicators, and Metrics.*

Capacity Dimension	Indicator	Evidence of Ability to
	ORGANIZATIONAL CAPACITY	
Internal Governance & Operational Practices	1) # of FTE staff/board members and shared staffing arrangements. 2) Presence/absence of bylaws/charter, governing policies and procedures, adopted action plans. 3) Presence/absence of functional accounting systems. 4) Grantee type (e.g., municipal, nonprofit).	Manage people and resources Have accountability
Resources Obtained & Leveraged	1) Match sources, types, and $ amounts. 2) Categorize grantees' ability to obtain and leverage resources (e.g., cash spent and # of projects completed).	Attract investment and support (crosswalk with partnership capacities)
Adaptive & Resilient Governance	1) Presence/absence/use of transition plans and practices, e.g., handover memos. 2) Documentation of institutional memory	Respond to challenges, changing needs and opportunities
	PARTNERSHIP CAPACITY	
Types of Partners Engaged	1) Extent, depth, and function of relationships with public, private, landowner, research, and other relevant entities.	Work with all necessary types of partners relevant to watershed restoration/ conservation in a given geography
Partnership Types Engaged In	1) Involvement in Focused Investment Partnerships (FIPs), Partnership Technical Assistance (P-TA), NRCS' Regional Conservation Partnership Program (RCPP), cross-boundary partnerships, etc. 2) Participation in a learning network, cooperative partnership, coordinating partnership, collaborative partnership. 3) Tie complexity of partnerships to existing funding opportunities.	Use partnership types suited to issues and needs at hand

II.B. Study Plan Steps

Figure 6. *Study Plan Steps.*

Key Informant Interviews	Interviews took place in 2020. Roles included: OWEB Regional Program Representatives, ODA Regional Water Quality Specialists, ODA's SWCD Operations Specialist, and OWEB's Monitoring and Reporting Program Manager. These interviews informed the organizational and partnership capacity dimensions and potential metrics that informed the study design, the survey questions for councils and districts, and for triangulating data from case study interviews.
Database of Council and District Characteristics	Develop baseline understanding of organizational and partnership characteristics for each included grantee to the extent possible, as well as static attributes, e.g., OWEB region, county, year formed, etc.
Develop Capacity Investments Narrative Characteristics	Document how capacity funding requirements, criteria, and distribution have changed over time, which can help inform future funding strategies to improve operating capacity.
Classify Councils and Districts by Capacity Typology	Guide classification and typology of grantees to support a representative sample of grantee capacity for case study analysis.
Survey Council and District Grantees	Conducted Qualtrics survey to collect information necessary to apply capacity typology to council and district grantees and develop a baseline of quantitative info about barriers and facilitators of capacity building across grantees.
Case Studies (phased approach)	1. Case Study Selection: Crosswalk capacity typology (3c) with OWRI and OGMS data, covering 1997 to 2019, to identify grantees with lower, medium, and higher levels of obtaining and leveraging resources. 2. Initial Document Analysis: Sample 20 grantees that are a representative percentage of councils and districts across capacity typology, resource class, and OWEB region to create an in-depth profile using existing data, e.g. OGMS grant documents over 20 years (including council support, restoration, technical assistance, monitoring, education, outreach, stakeholder engagement), SOW, FAAP, FIPs, P-TA, OWRI, organizational documents available on council and district websites. 3. In-depth Interviews: Select 7 grantees for interviews that are representative of councils and districts across OWEB's six regions in consultation with the Core Project Committee. Interview questions are informed by in-depth organizational profiles from the initial document analysis. Interviewees included: executive directors, district managers, staff, board members, partner organizations.
External Capacity-Building Program Review	Review of other existing capacity-building programs that invest in local organizational capacity for examples and potential lessons learned.

III. Methods

Table 2. *Typology Classifications.*

Board-Reliant Lower staff levels (<3.0 FTE) →	Staff delivers primary capacity with greater reliance on working board.
Staff-Reliant Higher staff levels (>=3.0 FTE) →	Staff fulfills most management capacity roles with board taking on more strategic activities.
Partner-Reliant Varied staffing shared with another organization →	

Data were collected through a survey and a phased case study process. The survey took place between April – May 2022 and was sent out to all 58 councils and all 42 districts in Oregon that receive or have received Operating Capacity grants using OSU's Qualtrics online survey platform. We designed the questionnaire to collect data on (1) the number of employees and shared staffing arrangements for the purpose of arranging organizations into similar types using Dr. Margerum's "Reliance Model of Collaborative Capacity**" (Table 1) and (2)** factors affecting organizational capacity. Data analysis occurred in two phases. First, we categorized grantees into the capacity typology by adding the number of staff over the past 12 months, including the executive director, district manager, or coordinator; and if these positions were permanent; contracted; and temporary. We also used the organization's self-description to understand shared staffing arrangements and whether they shared a physical location with another organization. This framed the sampling of grantees for the case studies. Next, we looked at the organizational capacity factors. We used descriptive statistics to examine the percentage of respondents in each response category by: (1) councils and districts, (2) capacity typologies, and (3) taxing and non-taxing districts. Additionally, we calculated the average (mean) response to determine if there was a statistical difference between typologies. Refer to Appendix 3 for more complete descriptions of the methods, as well as for the questionnaire, statistical analysis, and datasets.

Next, we implemented a phased case study approach that took place from June 2022 to February 2023. Refer to Appendix 4 for more complete descriptions, as well as for the interview guides.

- **Case Study Selection:** We cross walked the capacity typology with OWRI and OGMS data from 1997 to 2019 to categorize grantees by resource classes using quartile statistical breakpoints.
- **Initial Document Analysis:** We sampled 20 grantees (i.e., 10 councils and 10 districts) that were representative across capacity typologies, a representative proportion of resource classes, and representative across urban and rural areas. To categorize grantees by resource classes, we gathered OWRI and OGMS data from 1997 to 2019, added up total cash spent and in-kind contributions for each organization, and then used quartile statistical breakpoints to define resource classes. Then, we conducted a 20-year grant document review of 20 case study organizations using OGMS grant documents from 1997 to 2019; as well as SOW and FAAP documents from 2015 to 2019; OWEB FIPs, P-TA, and OWRI data, and other documents accessible on organizations' websites. From this, we created in-depth organizational profiles that summarized the history and trajectory of each organization relative to the capacity dimensions described in **Table 1**.
- **In-depth Case Studies:** We selected seven grantees as case studies that were roughly representative of our selection criteria for the initial document analysis in consultation with the Core Project Committee (See Appendix 4, **Table 14**). Interviewees included: current and past lead staff, as well as project managers, administrative assistants, board and vice chairs, and top partners.
- **Interview Analysis:** We analyzed the interviews to see how Operating Capacity grants were used related to themes from the capacity dimensions. (See Appendix 4, **Table 15**). To validate the findings, we triangulated this data with the key informant interviews and the organizational profiles.

IV. Overall Survey Findings

Respondent Population and Capacity Typology Classification

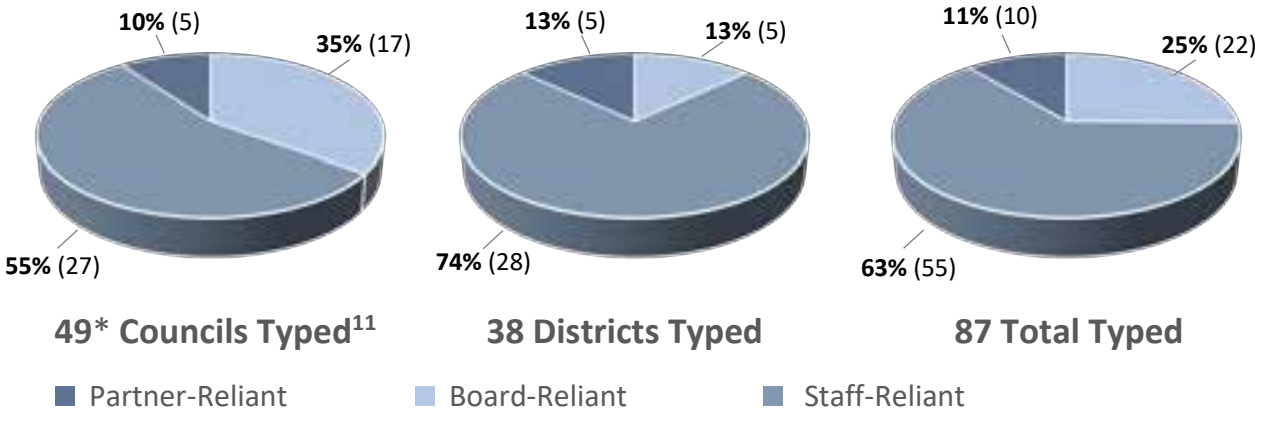
We had a high response rate from councils and districts (85%). There are more councils than districts; however, proportionately more districts responded to the survey (**Figure 6**). Additionally, ten districts have received local taxes, while 18 have not. Refer to Appendix 3 for the full datasets.

Figure 6. *Survey Response Rates.*



Overall, 87 councils and districts were typed according to the capacity typology (**Figure 7**). Most organizations were staff-reliant, followed by board, and partner types. We expected that partner-reliant organizations would be the least common type given the complexity of sharing staff with another organization, developing joint MOUs, and the degree of commitment that is involved in this kind of partnership. Most districts were classified as staff-reliant and included all districts with a permanent tax rate. In discussion with the Core Project Committee, we discussed that this validated the data based on the working assumption that tax bases help districts shift towards a staff-reliant model. Additionally, it is important to note that because there were a small number of board-reliant districts, as well as partner-reliant types for councils and districts, assessment findings for the level of agreement with statements on factors affecting organizational capacity should be viewed through this lens.

Figure 7. *Council and District Capacity Typology Results.*



[10] Note: Two additional councils were included in the capacity typology as partner-reliant based on how other respondents answered, but did not complete the survey questions, so they were not included in the overall response rate. Furthermore, three councils stated they were not currently receiving OWEB Operating Capacity grants. These include: Tyron Creek WC, Glenn-Gibson WC, and North Clackamas Urban WC. We included their responses to these questions since it still added relevant knowledge for our study purposes.

[11] Note: Two additional councils were included in capacity typology as partner-reliant based on how other respondents answered, which is why this number reflects a higher total than the survey response rate.

Organizational Operations

Overall, most councils and districts responded that they had written personnel and operational policies with clear position descriptions for staff and board members that were well-implemented. Additionally, 66% of districts and 70% of councils indicated that their board took initiative in managing the organization. However, regardless of capacity typology, less than half of councils and districts indicated that they had succession planning or mentorship for lead staff, or succession planning for board members Furthermore, 45% of councils and 50% of districts indicated that they had board member training for financial management, facilitation, or personnel management. These suggest areas for improving organizational capacity building. Taxing districts, which were all categorized as staff-reliant based on the typology methodology, were more likely to have competitive salaries and benefits (90%), have access to adequate equipment and technology for virtual meetings (90%), and staff training on key operational capacities (e.g., project management, contracting, and administrative tasks; 80%) compared to non-taxing districts, which did not include any staff-reliant types. Regardless of whether a district received local taxes or not, they still led councils in competitive salaries and benefits, staff training on technical skill building and key operational capacities, and lead staff retention rates. This may indicate that access to competitive wages and more training may support retention rates.

Working with Other Local Partners

The majority of councils and districts reported working with other councils, districts, and local partners most of the time to accomplish their goals. Staff-reliant districts and councils were more likely to do so, which may be related to their staff capacity to work with partners compared to board- and partner-reliant types.

Leveraging Operating Capacity Grants

Most councils and districts were seeking opportunities to leverage Operating Capacity grants for additional funding for other OWEB grants (e.g., stakeholder engagement, monitoring, technical assistance, restoration) and to build cooperative partnerships with councils, districts, or other local organizations. Districts more commonly reported leveraging District Capacity grants for stakeholder engagement, monitoring, technical assistance, and restoration grants. However, this was likely because of how District Capacity grants have been structured compared to councils. District Capacity funds have a greater emphasis on the implementation of the Agricultural Water Quality Management Program, with 75% of funds designated toward this. Additionally, based on comments by councils and districts in the survey, there may be an opportunity to help organizations develop unrestricted funding sources, which can help maintain critical operations. Some examples to note included the development of an annual federally negotiated indirect cost rate agreement as well as budgeting for more project time in grant applications to build in additional capacity for projects.

IV.A. Detailed Findings

Organizational Operations

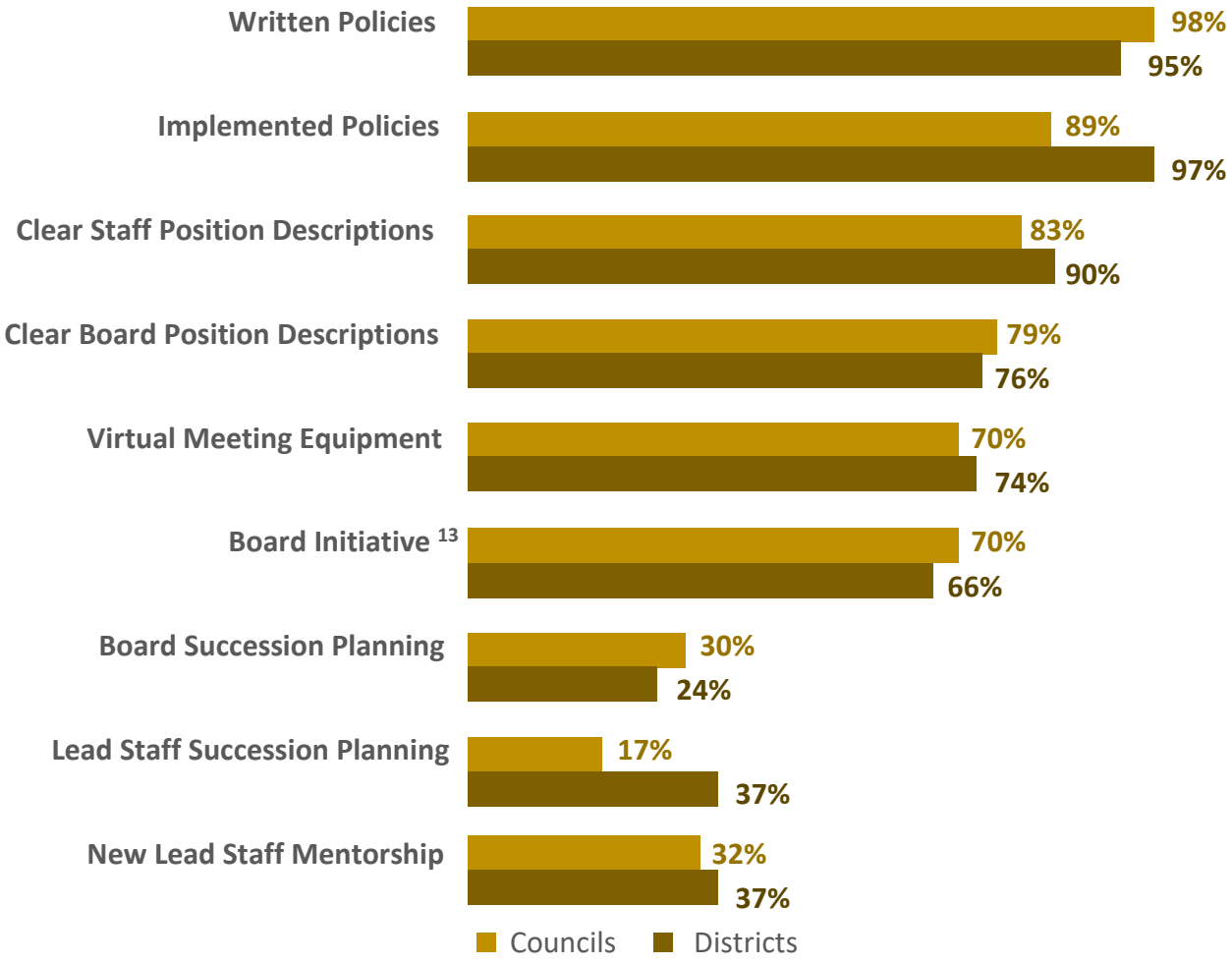
We asked organizations to indicate how much they agreed or disagreed with a set of statements focusing on operational policies and procedures. Respondents could choose from “strongly agree” to “strongly disagree” on a 5-point Likert scale.[12] Next, we compare findings for councils and districts as well as across capacity typologies, and compare differences between districts that received local taxes with those that have not.

[12] In the survey, “agree” was broken down into “strongly agree” and “somewhat agree”. For analysis, these categories were simplified into a single category, “agree”.

Comparing Council and District Operations

Overall, councils and districts were fairly similar in their use of organizational policies and procedures (**Figure 8**). Most councils and districts reported that they had clear board and staff position descriptions, as well as written and implemented policies for personnel and operations. This is likely because OWEB and ODA require grantees to have these in order to receive Operating Capacity grants. Furthermore, by having written policies, policies are more likely to be implemented. In contrast, most organizations did not have written policies or strategies for succession planning or established mentorship structures. Given that these organizations are typically smaller, this was perhaps not surprising. Although many organizations were classified as staff-reliant, it is important to remember that staff-reliant indicated an organization had at least 3 staff members, which is still a small organization. This could also be in part due to the location of these organizations, which are often in more rural areas and may face challenges with hiring staff. Over half of councils and districts stated that their board was actively engaged in managing the organization, which is defined as "Board Initiative" in **Figure 8** below. This may be because over half the organizations were classified as staff-reliant, which can potentially indicate the degree of involvement of the board. When an organization is staff-reliant, the board can engage in the overall direction setting, while staff can focus on the daily tasks. Additionally, most reported having adequate technology for virtual meetings. This is likely a result of adapting to remote work.

Figure 8. *Councils' and Districts' Organizational Capacities.*



[13] "Board Initiative" was defined as the Board being actively engaged in managing the organization.

Lastly, since councils and districts' legal organizational structure differed, we asked councils whether they had term limits for board members. 49% of councils had board term limits, while 36% did not. One council respondent commented that term limits greatly improved their board management, compared to other organizations they worked with that experienced leadership stagnation.

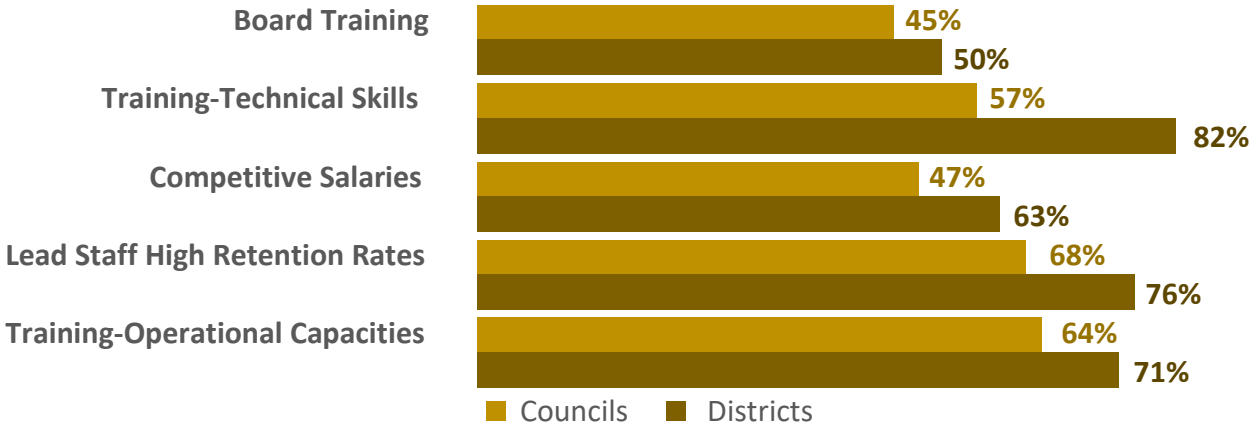
Comparing Council and District Training, Staff Salaries, and Retention

Less than half of councils and districts indicated that their boards received sufficient training for financial management, facilitation, or personnel management (**Figure 9**). District board members have served in elected positions, and typically consist of working landowners who may have insufficient time to participate in trainings. Additionally, they have not been required to participate in the trainings ODA offers to new board members.

Council boards, in contrast, are composed of volunteers. OWEB has required councils to work towards diversification of board members to support organizational management by having members with a varied set of skills, backgrounds, and experiences. However, board recruitment has been challenging in some areas due to a lower number of available and interested participants, which has also made board diversification challenging. Additionally, because board members have served in a volunteer capacity, they have not been required to participate in trainings. Board members may have also lacked the time to engage in trainings, such as agency staff working full-time at another organization or working landowners. Lastly, this may have been because lead staff lacked the time or skills to train board members in these areas.

Less than half of councils indicated that they had competitive staff salaries and benefits compared to similar organizations. This is likely because councils are 501(c)(3) non-profit organizations, and as such, rely on grant funds for much of their services, which can make providing competitive wages challenging. Additionally, with rising housing prices and other costs of living, it can be hard for these smaller organizations to provide competitive wages. More districts than councils had competitive staff salaries and benefits. This was likely influenced by whether or not a district had a tax base. 90% of taxing districts, which included all staff-reliant types based on the typology, responded that they had competitive wages compared to those without a tax base (67%). District staff also more commonly reported receiving training for technical skill building (e.g., GIS) and on key operational capacities (e.g., project management) compared to councils. This could be due to differences in the types of work councils and districts engage in and how their District Capacity funds are structured. District Capacity funds have a greater emphasis on implementing their Agricultural Water Quality Management Program through providing technical assistance with partners and landowners for restoration and conservation projects, with 75% of District Capacity funds directed towards their SOW or FAAP. Additionally, ODA's Regional Water Quality Specialists have provided districts with technical assistance to implement this program. Lastly, districts also had higher retention rates for lead staff than councils, which was likely tied to having more competitive salaries and benefits, and perhaps from receiving more training.

Figure 9. *Comparing Councils and Districts in Training, Staff Salaries, and Retention*



Comparing Operations across Capacity Typologies

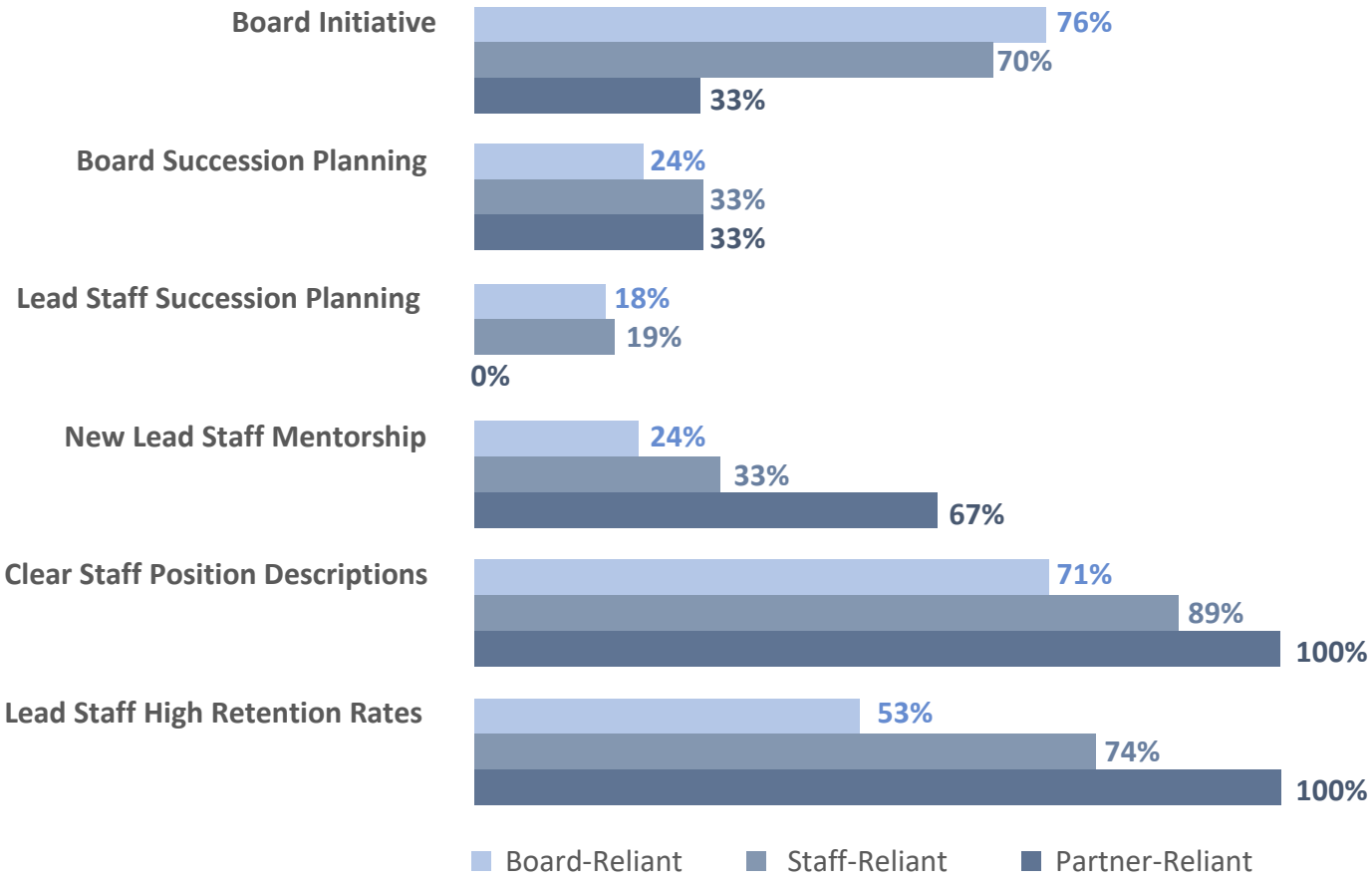
Next, we compared organizations across capacity typologies by looking at the percentages for each type as well as determining the statistical significance for each of these statements. Because of the differences between councils' and districts' legal organizational structure, we compared councils to councils and districts to districts. When we calculated the average (mean) response for each of the statements, the averages were different for several variables, but only a handful of the differences were statistically significant due to the small sample size and variation within the samples. In other words, even though the average scores were different, as a group, the respondents cannot be described as statistically different because there was too much variation within the group.

When comparing staff-reliant, board-reliant, and partner-reliant councils, several averages were statistically different (**Figure 10**).

- Board initiative, or "a board that actively engages in helping manage our organization", was lowest among partner-reliant councils and significantly different from board- and staff-reliant.
- There were significant differences among the three groups in relation to whether they had clear staff position descriptions, with partner-reliant councils most likely to agree.
- There were also significant differences with respect to retention rates, with partner-reliant councils being significantly higher than both staff- and board-reliant councils.

Although not significantly different from each other, many respondents noted that they lacked board and staff succession planning and new coordinator mentorship.

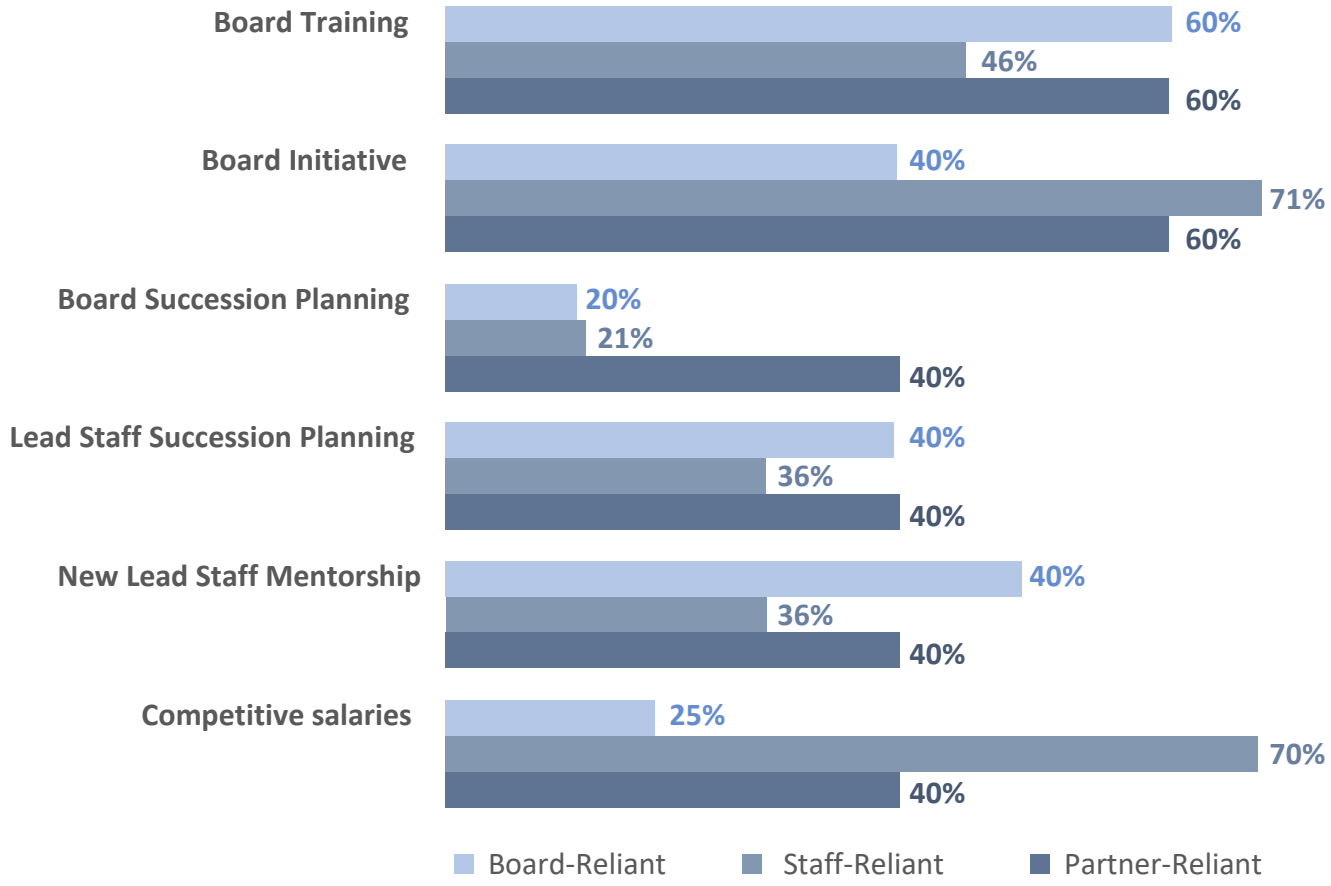
Figure 10. *Differences in Organizational Capacity between Board, Staff, and Partner- Reliant Councils.*



Due to the small sample of some groups and variability for districts, there were fewer statistically significant differences to note from the survey, but several trends were worth highlighting (**Figure 11**).

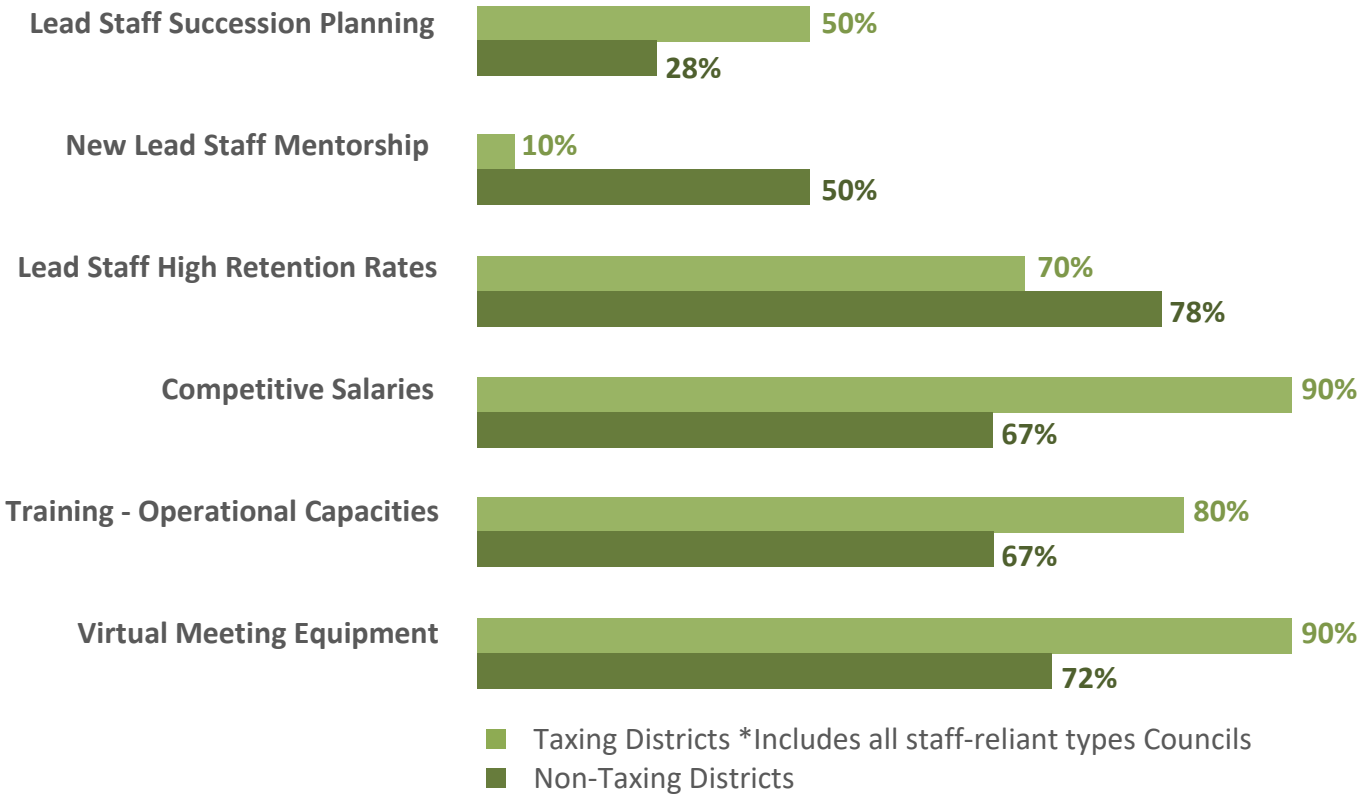
- Among all district respondents, there was a moderate level of board training and initiative.
- Although not significantly different from each other, many respondents indicated a lack of board and staff succession planning and new district manager mentorship.
- For salary competitiveness, there were significant differences in responses between staff-reliant districts and their board- and partner-reliant counterparts.

Figure 11. *Differences in Organizational Capacity between Board, Staff, and Partner- Reliant Districts.*



Additionally, we analyzed for differences between districts that have a local tax base and those that do not (**Figure 12).** Taxing districts, which were all categorized as staff-reliant based on the typology method, were more likely to have competitive salaries and benefits, have access to adequate equipment and technology for virtual meetings, and staff training on key operational capacities (e.g., project management, contracting, and administrative tasks). These results were not unexpected since having access to unrestricted funds likely provides organizations with opportunities to improve their operations. Interestingly, non-taxing districts, which did not include any staff-reliant types, were slightly more likely to have higher lead staff retention rates. This seemed surprising, given that taxing districts have more competitive salaries and provide more training opportunities on key operational practices. However, other factors may affect this result. For example, 60% of taxing districts, which included all staff-reliant types, responded that board members had clear positions describing their roles and responsibilities, compared to 89% for non-taxing districts. Having clear position descriptions can support understanding of roles, which can have a significant impact on organizational management and relationships between board and staff.

Figure 12. *Differences in Organizational Capacity between Taxing and Non-Taxing Districts.*



Working with Other Local Partners

We asked how often organizations worked with other councils, districts, and/or other local partners. Respondents could choose from "most of the time" to "never" on a 4-point Likert scale. We discuss findings for councils and districts as well as across capacity typologies. When we looked at capacity typologies, we compared councils to councils and districts to districts. We also compared the differences between districts that have received local taxes with those that have not.

Comparing Councils and Districts

92% of districts and 75% of councils indicated that they worked with councils, districts, and other local partners most of the time. We found that districts shared more resources with other local partners compared to councils. For districts, 58% shared office and other administrative costs with local partners most of the time. Additionally, 74% stated they shared staff expertise with local partners most of the time. This included technical skills, GIS, and outreach to landowners or farmers. By comparison, 68% of councils responded that they seldom or never shared office space and other administrative costs with local partners. Additionally, 45% of councils said they shared staff expertise most of the time and 49% said some of the time. However, it is important to keep in mind that many districts have a history of sharing office space with NRCS, which likely extended to sharing resources with this agency as well, and may have affected these results.

Comparing Capacity Typologies and Taxing Districts v. Non-Taxing Districts

We noted that the only statistically significant finding for districts was that there was less sharing of office space among board-reliant districts compared to staff-reliant districts, which is not surprising given that many board-reliant districts have few staff. The majority of staff-reliant types (96% for districts and 85% for councils) reported that they worked with councils, other districts, or local partners most of the time. For both board- and partner-

reliant districts, 80% indicated the same; while for councils, partner types responded similarly at 67% and board types at 56%. Staff-reliant organizations likely have more capacity to work with partners compared to board- and partner-reliant types. 67% of partner-reliant councils shared staff expertise between councils, districts, and other local partners most of the time, compared to staff- (52%) and board-reliant (31%) council types. All partner-reliant councils (100%) also shared office space and other administrative costs with councils, districts, and other local partners most of the time compared to staff- (19%) and board-reliant (13%) types. This was likely a product of their organizational structure, which may have also influenced how they worked with other partners in a geographic area to have more emphasis on sharing expertise. There were no major distinctions between taxing and non-taxing districts.

Leveraging Operating Capacity Grants

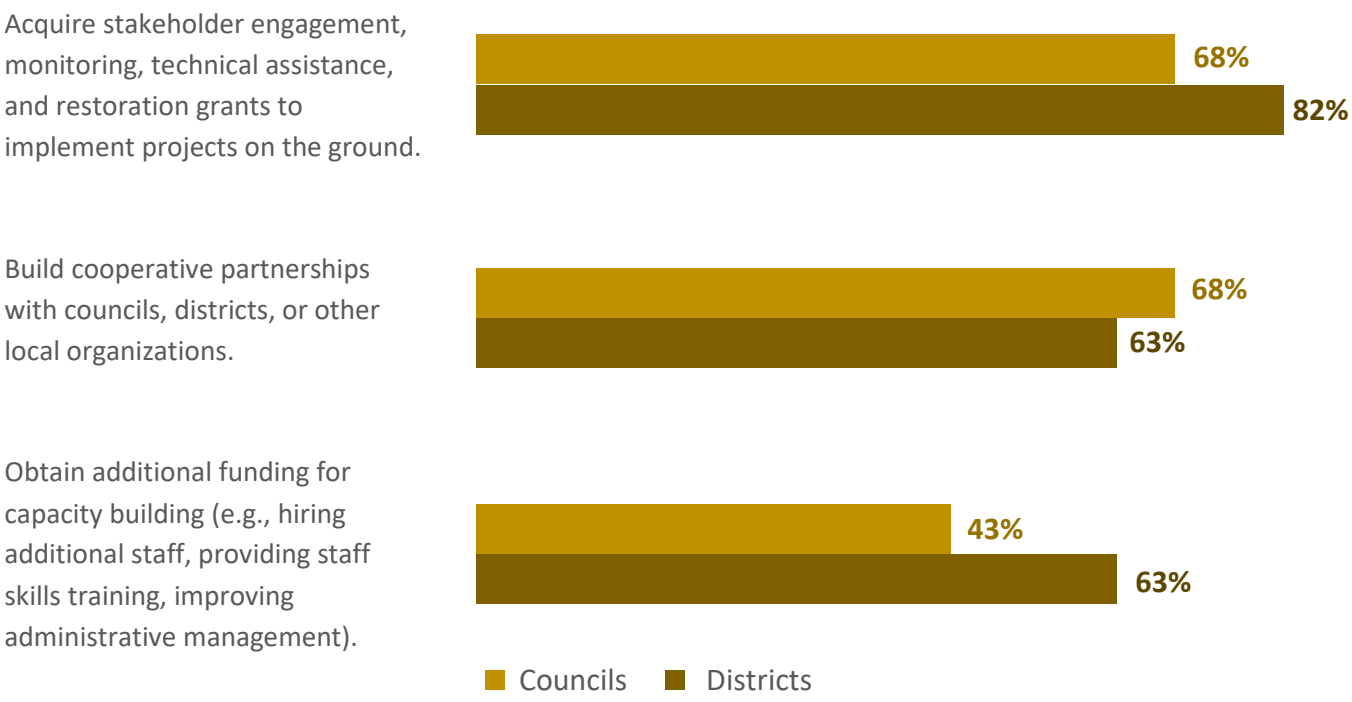
We also asked how often councils and districts looked for opportunities to leverage Operating Capacity grants to sustain and grow organizational capacity, build partnerships, and obtain additional funding. We asked them to rate how often they worked with other local groups. Respondents could choose from "most of the time" to "never" on a 4-point Likert scale. Below, we discuss findings for councils and districts as well as across capacity typologies. When we looked at capacity typologies, we compared councils to councils and districts to districts. We also compared the differences between districts that have received local taxes with those that have not.

Comparing Councils and Districts

Most councils and districts reported seeking opportunities to leverage additional funding (**Figure 13**). More districts than councils obtained additional funding for capacity building to hire additional staff, provide training, and improve administrative management compared to councils. This may be tied to higher retention rates for lead staff and having more competitive salaries. This may create greater stability for an organization through the preservation of institutional knowledge and support an organization in working towards ongoing improvements. Additionally, more districts than councils also used District Capacity grants to acquire grants for stakeholder engagement, monitoring, technical assistance, and restoration for projects compared to councils. This was likely because of how District Capacity grants have been structured compared to those for councils. As described earlier, District Capacity funds have a greater emphasis on the implementation of the Agricultural Water Quality Management Program, with 75% of funds designated for this.

Some additional open-ended comments on the survey provided further insight into what has helped keep organizations healthy and functional to address challenges in sustaining operating capacity. To maintain organizational financial management, most described diversifying funding revenues beyond OWEB and identified a need for unrestricted funds, not tied to project grants, to support critical operations. Some specific examples of funding diversification included: participation in programs (e.g., OWEB's FIP and BPA's Fish & Wildlife), maintaining strong partnerships with other organizations and entities focusing on conservation, (e.g., local counties, councils, districts, and Tribes), and development of an annual federally negotiated indirect cost rate agreement. Lastly, some respondents mentioned learning to budget for more project management time in their grant applications, which built in additional operational capacity for projects.

Figure 13. *Leveraging Operating Capacity Grants.**



* These results included respondents who indicated "most of the time" to each of the statements.

Comparing Capacity Typologies and Taxing Districts v. Non-Taxing Districts

Partner-reliant councils (100%) responded that most of the time they looked for opportunities to leverage Council Capacity grants to acquire stakeholder engagement, monitoring, technical assistance, and restoration grants to implement projects on the ground. Staff-(67%) and board-reliant (63%) councils did not seek these out as much as partner-reliant types, but a majority did. However, staff- (70%) and board-reliant (69%) councils sought out Council Capacity grants to build cooperative partnerships with councils, districts, and other local organizations, in comparison to partner-reliant types (33%). Partner-reliant councils engaged less often in building cooperative relationships and seeking stakeholder engagement—likely due to the built-in collaboration with their district partner. This was statistically significant. There were no major differences between districts based on capacity typology or whether they received local taxes.



Youth volunteers at Riley Creek. credit: Curry SWCD.

V. Case Study Findings

Case studies provide detailed understanding of how organizations operate within their contexts, and what facilitates and impedes capacity. We selected seven case study organizations across Oregon with different staff sizes across typologies, in rural and urban contexts, and with varying levels of resources obtained and leveraged, which increases the applicability of findings for organizations across the state. However, we recognize that councils and districts have a diversity of experiences and contexts within which they function. To address this, we used the survey findings, which had an 85% response rate across all councils and districts that have received Operating Capacity grants, to develop a sense of the typical issues that organizations have faced. We also used the 20 in-depth organizational profiles to identify common themes across the capacity dimensions. Lastly, we included input from the breadth of experiences of the Core Project Committee. Together, these approaches informed our case study design and bolstered the findings to be more generalizable across organizations. We also kept in mind that we needed to create a process that could be reasonably achieved within the project timeline, since examining all organizations in Oregon through an interview process would not be possible. For a list of case study organizations, see Appendix 4.

In the following paragraphs, we review the findings from our analysis of case study organizations.

- Section A considers the impacts and uses of Operating Capacity grants.
- Section B looks at common governance challenges and strategies to address these.
- Section C addresses partnership development, challenges and strategies, and models used.
- Section D focuses on funding strategies and challenges.

V.A. How Were Operating Capacity Grants Used?

All interviewees acknowledged the essential need for the Operating Capacity grant program for councils and districts. Many said that councils and districts across the state would no longer exist if they did not receive Operating Capacity grants. A few indicated they could manage without it, if they had access to other funding sources (e.g., taxing districts, local foundations, local government budgets, endangered species, and BPA funds). However, they said they would function at a much lower level and would not be able to complete most of the restoration and conservation work they were currently doing. Additionally, it is important to recognize that project development can be a multi-year process depending on the complexity of the project and number of partners involved. Because of this, many interviewees pointed to Operating Capacity grants as vital to continue project development, which brought additional funding to the organization. Some interviewees noted the positive impact that Operating Capacity funds had on their community's local economy and how their organization's presence supported other local conservation partners. Additionally, all interviewees pointed to the fundamental need for the Operating Capacity grant program due to changing funding priorities from other agencies, the lack of consistency in external funders' grant deadlines, and a general lack of programmatic capacity funding elsewhere. All highlighted their appreciation for the provision of the Operating Capacity program and how the program's reliability has served as an essential strategy for supporting councils and districts' operations, which has supported state agencies in meeting state-wide restoration and conservation goals.

Councils

Case study councils primarily used their Council Capacity grants as follows (order based on frequency reported):

1. **Project development through relationship/partnership building** through paid staff time to participate in local committees, boards, and foundations; event attendance to build an organizational reputation in the community; and meeting with landowners. Through these avenues, staff have developed joint priorities and project concepts with these partners, and acquired funds. Other than Council Capacity grants, most grants have been tied to project work itself, aside from allowable indirect, and there has been a lack of programmatic capacity grant support.
2. **Initial funds for cash match for restoration and conservation projects** which helped bring in additional project funding. OWEB grants were particularly useful for federal grant match because federal grants cannot be matched with other federal grants. This has also supported use of federal dollars for restoration and conservation work, since federal agencies have often faced challenges in spending all of their allocated dollars on implementation. Councils have also used other OWEB grants for cash match.
3. **Board member recruitment** through paid staff time for participating in local boards and committees, as well as attending community events to develop relationships with potential new board members for current or future board vacancies.
4. **Ad-hoc regional groups as a collaborative approach** to meet the needs of local partners, including training, information sharing, and resource sharing.
5. **Staff and board training** for professional development and networking opportunities through conferences (e.g., CONNECT), technical skills-building courses, and workshops.
6. **Operational support** for rent, utilities, administrative staff time, etc.
7. **Staff time on revising and updating operational policies and procedures, strategic plans, and annual work plans.**

Overall, councils appreciated the current flexibility of the Council Capacity funds and how OWEB's changes over time have made it easier to use the funds in an unrestricted manner. Many appreciated that OWEB removed the match component to obtain the Council Capacity grant and has allowed councils to use the funds as they best deem fit. Any expense eligible in other OWEB grants has been considered an eligible expense for Council Capacity grants. **Many interviewees stated that Council Capacity grants were not able to fund community outreach and education activities due to statute,**[14] but were interested in funding for this. As one interviewee said, "Communications, outreach, and education funding are small pots of funding, so you have to write numerous applications just to get one project funded. Additionally, these types of grants are typically offered annually or bi-annually, so the amount of work adds up quickly."

Additional needs that interviewees expressed included:

- **The ability to use Council Capacity funding for the purchase of vehicles**, which has not been allowed by statute, e.g., ATVs or trucks for site visits, particularly in rural areas.
- **More guidance from OWEB on how to write a successful grant and adhere to reporting requirements.** Some commented that OWEB grants have a steep learning curve, which has been particularly challenging to navigate with lead staff turnover. Some commented on the administrative burden of reporting requirements, but understood the need for state agencies to ensure accountability and effective use of public funds. One interviewee mentioned that it could be helpful to have OWEB new grantee training sessions scheduled periodically throughout the year, instead of once a year. Considering staff transitions and the need for repetition when learning new information, some stated that an OWEB-hosted workshop would be useful.
- **Ways to make funding more equitable for geographic areas that have fewer funding opportunities** (e.g., agency regional funding priorities, lack of endangered or threatened species, fewer available local organizations to partner with on projects, less local foundations). However, they recognized the challenges OWEB has faced in balancing fairness with managing a statewide grant program.
- **A regional forum to learn from other councils or districts.** Suggestions included a show and tell with an OWEB Regional Program Representative that could help organize groups by region. Interestingly, this mimicked what some groups have done already, e.g., the Upper Willamette Stewardship Network or the John Day Basin Partnership. A regional forum could be useful for geographic areas that have faced challenges in working with local partners and developing joint priorities.

Districts

Case study districts primarily used their District Capacity grants as follows (order based on frequency):

(1) Project development through relationship/partnership building through paid staff time to participate in local committees, boards, and foundations; event attendance to build an organizational reputation in the community; and landowner meetings. Through these avenues, staff have developed joint priorities and project concepts with these partners, and acquired funds. Other than District Capacity grants, most

[14] Refer to Measure 76 and ORS 541.956, which authorize OWEB to make grants available for outreach activities that are necessary for carrying out eligible restoration and acquisition projects that protect or restore native fish or wildlife habitat, or that protect or restore natural watershed or ecosystem functions to improve water quality or stream flows. To qualify as necessary for restoration or acquisition, the project must be tied to a specific geography, address clearly articulated habitat or watershed or ecosystem function goals for that geography, and identify a clear path toward achieving the restoration or acquisition measurable outcomes within a reasonable and specific timeframe. Projects with a primary purpose of education are not eligible.

grants have historically been tied to project work itself, aside from allowable indirect, and there has been a lack of programmatic capacity grant support.

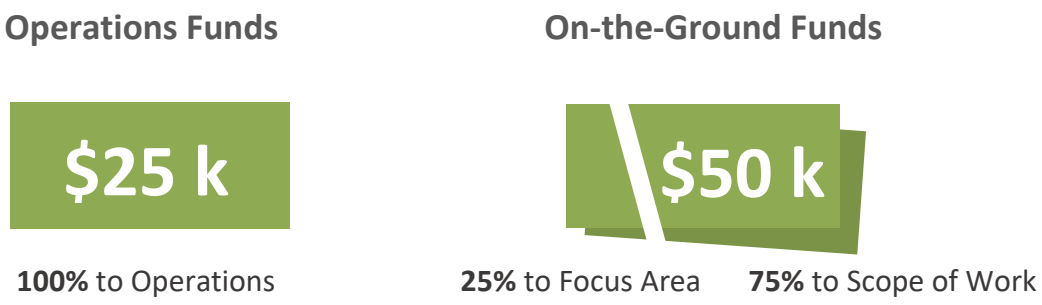
(2) **Operational support** for rent, utilities, administrative staff time, etc.

(3) **Ad-hoc regional groups as a collaborative approach** to meet the needs of local partners, including training, information sharing, and resource sharing.

(4) **Staff and board training** for professional development and networking opportunities through conferences (e.g., CONNECT, OACD), technical skills-building courses, and workshops. Networking has allowed them to see how other districts operate, what structures others have used, and what staff positions they have and the roles/responsibilities associated with them.

Compared to Council Capacity grants, District Capacity funds have been more limited in their use (**Figure 14**). Many interviewees mentioned an **interest in increased flexibility in spending District Capacity funds so that more funding could be spent on staffing and capacity building, rather than for restoration and conservation projects.** As one interviewee said, "If we invested more in staffing, we would get more conservation on the ground. We need to have the capacity to be able to apply for the grants, and right now, that's lacking." Additionally, a district discussed how the tax base funded its own grant program and supported operational costs, while the District Capacity grants paid for grant program administration.

Figure 14. *Breakdown of District Capacity Grants.*



V.B. What Governance Challenges Have Organizations Faced?

Individuals play an important role in maintaining an organization's longevity while engaging in strategic watershed restoration and conservation planning. Councils and districts are typically small organizations facing large-scale issues and needs, and as such, the individuals on the staff and the board need to use their skill sets, backgrounds, and perspectives for the organization to achieve its goals. Through our case studies, we found that the top common governance challenges and opportunities were:

(1) **Lead staff capacity and turnover.** This includes the key role lead staff play and the necessary skills they use to manage the organization, how they support development of an effectively engaged board, and what happens during times of lead staff transition.

(2) **Board recruitment.** This encompasses common challenges in recruitment, as well as essential board member skills. Skills of particular importance included organizational direction setting, reviewing and updating governing policies and procedures, fiscal oversight and management, and providing guidance to lead staff.

(3) **Strategic planning**. This pertains to the significance of the process of creating plans, as well as the level of detail needed to beneficially guide an organization's priority-setting.

How Has Lead Staff Capacity and Turnover Affected Organizations?

Lead staff have played an important role in an organization's stability and overall trajectory. This position has a high learning curve and has required someone who is either competent or quickly able to become competent in multiple skill sets. Lead staff that performed particularly well in this role tended to have years of experience working in a natural resource-focused agency or were strategic in building partnerships and successfully identified how to learn the information they needed. Skills needed for lead staff include leadership, relationship building, personnel management, fiscal management, grant writing, and conservation knowledge (**Table 3**). Additionally, some interviewees described the significance of lead staff's development of board relationships in providing guidance, education, and training to support each in their respective roles, so they could mutually guide the organization's trajectory. This will be discussed in more detail in the section about strategies used by case study organizations. Specific to councils, we noted that as an organization grows, the lead staff role evolves from a Watershed Coordinator to an Executive Director. The change in the skills of this position has also been affected by how OWEB has modified its granting criteria over time to support organizational structure (See Appendix 1).

Table 3. *Key Lead Staff Roles.*

Lead Staff Skills Needed	Components
Leadership/Strategist	• Development of a vision for the organization and the watershed that identifies how partners and funders fit into this. • Effective project management skills and project schedule management. • Incorporation of content training and educational talks by agency experts into board meetings to help board make informed decisions on project and funding priorities. • Engagement in creative problem solving, extended work hours, and driven by concern for land and people.
Relationship Building	• Communication skills with partners and providing updates. • Actively and visibly engaged in the community to discover joint priorities to acquire funds for project development through participation in local committees and boards, event attendance, and meetings with landowners. • Identification of key contacts and development of a community network to obtain multiple perspectives on how to develop and implement projects.
Personnel Management	• Ability to make challenging HR decisions, (e.g., need to lay off staff for fiscal reasons, management and firing of staff for substandard performance, and recognition of need for a different staff skill set as organizational and funding priorities shift). • *This was especially challenging in smaller communities and smaller organizations that have built up relationships among staff and/or board members.*
Fiscal Management	• General knowledge of funding sources, ensuring consistent revenue streams, and development of a plan to diversify funding streams. • *Someone also needed to know financial budgeting, which could be the lead staff or the fiscal manager.*
Grant Writing	• Ability to write a grant proposal that told a story, while integrating the priorities of the organization and potential funder. • Grant cycles from external funders have varied, which created a sense of pressure with constant deadlines.
Conservation Knowledge	• Without a conservation background, it was challenging to lead an organization in strategic planning for the watershed.

Impacts of Lead Staff Turnover

From the case study interviews, we found that the top issue that councils and districts faced with their lead staff was turnover of these positions. It has been challenging for organizations to find their footing when an executive director or district manager has left. Sometimes, this caused an organization to experience a downward cycle from the challenges of finding a qualified and capable candidate, particularly in more remote, rural areas. The most common reason lead staff left stemmed from the large workload for the position, which led to burn-out. Interviewees were often concerned that the highly skilled, multi-talented, motivated individuals would not last in the position for more than a few years, and would use the skills they learned to move on to a job with more stable funding, higher pay, and access to benefits. As one interviewee said, "If you get someone who's a high performer, they're going to leave because they're going to try and leverage something with better opportunities." The rising costs of living and housing in Oregon have further affected these decisions. Interviewees, including lead staff themselves, described how individuals who chose to remain in the position for a longer time, often stayed because they were from the area or had become a part of the community and integrated the job into their lifestyle.

Lead staff turnover was sometimes precipitated by a lack of sufficient board engagement. In these situations, the board was less involved with providing organizational direction through strategic plans and offered less accountability of lead staff's work plans. They were also less engaged in effective fiscal oversight and less aware of how to maintain consistent funding revenue. In these contexts, the board was more focused on project implementation than organizational management. Another reason lead staff left has been tied to board micromanagement, which can lead to organizational gridlock. Board chairs have tended to work more closely with lead staff and have often set the standard for the board's level of engagement with organizational direction-setting, which has impacts on an organization's trajectory. Additionally, lead staff shaped the relationship with the board in establishing expectations, roles, and responsibilities. Micromanagement often stemmed from a lack of priority setting and unclear board roles and responsibilities. Essential board skills and their impacts on case study organizations' capacity are described in more detail in the "Board Recruitment" section.

When lead staff left, it was often a challenge for board members to manage the organization, given the unpaid nature of board positions and the limited time these positions have been able to commit. When an organization had additional staff, they relied on their most experienced staff to fill in as interim. If they lacked additional staff, boards sometimes contacted past lead staff to act as interim or provide essential services (e.g., fiscal management, grant reporting requirements, contractor payments, and managing partner relationships for projects). Staffing transitions were particularly difficult when organizations lacked priority setting. It was challenging to properly maintain budgets, which led to missed contractor payments and project derailment, as well as missed grant reporting deadlines, and a decline in incoming grants, which significantly reduced partner trust.

Because of these struggles, the board was less strategic in hiring replacement lead staff. Although, it is important to keep in mind that many interviewees spoke to inherent hiring challenges from a lack of qualified local applicants and difficulty attracting external applicants because of competitive wages and location. Some organizations that hired from outside the community, and even the state, have dealt with additional issues of people not remaining in these positions for long, even with an actively engaged board. Due to these concerns, some interviewees spoke of difficulty establishing trust with board and staff to effectively support lead staff. It also took time to build trust with partners for project development. These realities have unintentionally raised the bar for lead staff hires to engage in substantial relationship-building and challenging work. When an organization hired lead staff locally, who was new to this level of responsibility and type of work, disengaged boards provided minimal training and guidance, while lead staff tried to get the organization afloat and manage

on-going projects and partner relationships. In both of these situations, lead staff either (1) quickly left, resulting in multiple turnovers, (2) took on the challenge of managing the organization because of personal drive and interest, or (3) remained in the position, but were not able to effectively manage the organization.

Impacts of Organizational Stagnation and Finding Qualified Staff

While many organizations faced challenges with lead staff turnover, others faced difficulties with stagnation, wherein, lead staff lacked the necessary capacity, skills, or training to lead organizations at a particular point in time. From the case study interviews, we learned that board members in these situations: (1) waited too long to fire the individual and were unsure of how to address lead staff personnel issues, (2) were not actively engaged in managing the organization, so they were unable to recognize what lead staff skills were needed, or (3) were concerned they would not find a replacement. Some interviewees indicated challenges with finding qualified candidates were also connected to the grant-funded nature of the positions, salary level, and need for benefits, coupled with challenges of hiring in rural areas, which have also faced rising housing costs and increased costs associated with the COVID-19 pandemic. Some interviewees indicated that effects from organizational stagnation made partners less likely to work with them, which led to missed opportunities for project work and funding.

Specific to districts, a key informant interview discussed how district managers sometimes delayed retirement out of concerns of not finding a qualified replacement after working at the organization for many years. Additionally, case study interviewees for councils and districts stated how there were often limited opportunities for entry-level technicians to become program managers since organizations were typically small. This could lead to a catch-22, wherein there was reduced opportunity for other staff to move up the ladder to take on new responsibilities or needed to wait until someone was ready to retire. This created inherent challenges for some organizations to hire younger staff, who wanted to grow their careers, skills, and income levels. Depending on the level of board engagement, these situations sometimes precipitated a downward cycle when lead staff retired and the board faced difficulties finding a replacement.

What strategies have been used to address these issues?

1. Development of an effectively engaged board.
2. Creation of succession plan.
3. Establishment of regional networks.

Effectively engaged boards were better able to manage lead staff turnover, often supporting operations and interim staff through the transition. Staff had relevant conservation experience and established partner relationships. Board meetings continued to run smoothly, fiscal budget and grant reporting were maintained, projects continued, and contractors received payments. Sometimes board members served on a neighboring council, district, or other local partners' boards, which supported them in finding replacement staff, as well as providing training and support for interim staff. Board members were also connected with the community and partners, who supported their efforts in finding a new lead staff through their community networks. Replacement staff received training and the organization's reputation with partners and funders was maintained.

Approaches used by lead staff to develop an effectively engaged board included:

- Incorporation of 15-minute educational content and skills training into board meetings to help boards understand their roles and responsibilities (e.g., personnel and fiscal management).
- Inclusion of agency partners and experts to board meetings for project updates and upcoming funding opportunities to help boards understand regional priorities to make informed decisions.
- Development of strategic plans to co-establish organizational and watershed priorities.
- Proactive recruitment of board members. (Refer to the "Board Recruitment" section on page 27 for details.)
- Annual retreats for board members and lead staff to discuss accomplishments and priorities.

Some organizations developed a succession plan by training someone within the organization to replace lead staff within the next few years. Typically, this person was the project manager or technician. However, since organizations have typically been small, this has been challenging to implement since a new staff person was needed to fill their role as well. Some interviewees stated that they created an online shared drive of important organizational and project documents for future lead staff to reference. This included a list of daily and annual tasks, a spreadsheet of funding sources, organizational bylaws, policies and procedures, and strategic plans.

In rural and urban settings, some organizations had established regional networks, which provided additional support for lead staff transitions. For example, a group of regional councils and districts formed the Upper Willamette Stewardship Network (UWSN) through the relationships they built over time. UWSN has a "Core Team" consisting of lead staff from each of the organizations, "Project Teams" consisting of other staff positions, and a Network Coordinator that focuses on the partnership's needs. The "Core Team" helps align organizational priorities and leverage grant opportunities, while "Project Teams" focus on various restoration/conservation topics or skills training that are based on the needs of the members involved. The UWSN has bylaws and a MOU, and the varying "Project Teams" have differing degrees of formal guiding documents based on the needs of those in the group. By creating this partnership, interviewees noted that staff transitions have been easier for organizations and, particularly, for new lead staff. This has created an easy landing for connecting with other lead staff to learn from their experiences, increased transparency of how other organizations have operated and managed finances, and supported the development of a community network of relationships with partners and colleagues. This has helped develop a culture that leverages the knowledge and expertise of the group for mentorship, rather than relying solely on past lead staff or the board chair. Furthermore, both the "Core Team" and "Project Teams" meet regularly, which has made space to obtain advice and insight for handling a variety of issues without the conversation being tied to job performance.

Another example of a regional network came from the John Day Basin Partnership (JDBP), which was generated from the relationships developed over time and more recently supported by an OWEB FIP grant. The JDBP has a partnership coordinator who hosts regional quarterly meetings to coordinate projects, bring in agency partners to discuss funding priorities, share completed projects to celebrate successes and learn from each other's experiences, and support skills development. Skills training included a GIS consultant demonstration for how to use an online ArcGIS database for quickly noting prioritized streams to inform project development and coordination. Another example included hands-on training for a rapid survey tool developed by monitoring coordinators to assess beaver habitats. These meetings have supported a network of conservation partners that can assist lead staff transitions through these overlapping points of connection and peer learning.

How does Board Recruitment Affect Organizational Capacity?

Boards have a large impact on organizations' trajectories through the composition of their members, the functions they serve, their level of engagement in organizational direction setting and watershed visioning, and most importantly, the relationships they develop with lead staff (**Table 4**). Through the case study interviews, we learned that common challenges with board guidance typically entailed:

(1) Micromanagement of lead staff, which led to organizational gridlock and departure of lead staff.
(2) Lack of sufficient engagement in establishing organizational priorities and accountability of work plans, which often led to lead staff burn-out.
(3) Board homogeneity, which sometimes led to a lack of sufficient perspectives for brainstorming and making complex land management decisions.

However, it is important to note that some interviewees in rural areas stated that their boards may have appeared "homogeneous" but had key community members with diverse skill sets from holding multiple community roles (e.g., rancher and business owner) and serving on more than one local board. Additionally, some interviewees discussed issues with boards that were mainly comprised of members with a background primarily as landowners versus members who served as landowners, but had an agency staff background. Landowner-dominant boards sometimes had issues related to a lack of understanding of agency processes or familiarity with strategic planning, although they had community trust. Agency-dominant boards sometimes lacked community trust and were viewed as enforcers based on how they served in past roles and lacked the ability to effectively overcome this perception.

Table 4. *How Boards Affected Case Study Organizations' Capacity.*

Board Leadership	How it Contributed to Case Study Organizations' Capacity
Diverse Skill Set	• Lead staff were able to engage with any of the Board members for guidance and brainstorm with their expertise and knowledge. • When there were too many people with the same knowledge and skills, there was less feedback since individuals tended to think and view problems similarly, which can cause an organization to become stuck. • Note: In more rural and remote areas, board members noted they have a diverse skill set in terms of holding multiple roles in a given community, e.g., rancher and business owner.
Strategic Plan	• Provided organizational guidance and direction, which limited micromanagement. • When a strategic plan or annual work plan lacked specificity, some boards micro-managed staff since organizational priorities were unclear.
Organizational Policies and Procedures	• Regular updates to these created accountability, supported communication, and helped boards avoid getting stuck in the day-to-day operations. • Helped organizations to remain compliant with updates in legal requirements.
Fiscal Responsibilities	• Provision of fiscal oversight, e.g., knowledge of fiscal terms, ability to read a financial report and budget, and recognition of red flags. • Identification of differences between types of funders (e.g., federal agencies, private foundations, OWEB, ODA) to understand how each distributed funds since this affected how organizations managed their operations, projects, and ability to balance budgets. • Needed training/guidance on this.
Personnel Management of Lead Staff	• Accountability of lead staff in performing duties and guidance on work plan and strategic plan. • Supported lead staff decision-making without micromanaging, (i.e., Board not overly involved in the details of running the organization). • Needed training/guidance on this.

Furthermore, we learned that the biggest challenges organizations faced with boards were tied to recruitment challenges. Interviewees discussed how these were difficult to overcome since they have been a product of board requirements established by OWEB and ODA or reflected community perspectives. Common recruitment challenges councils and districts faced are described below.

Diversity - Since board positions have been unpaid, interviewees often spoke to challenges with recruiting younger participants, as well as Black, Indigenous, and People of Color (BIPOC) residents, due to time and financial constraints. Specific to districts, they faced additional challenges based on requirements of land ownership for election eligibility, which often meant that only typically older, white men were qualified candidates.

Grant Management - Many interviewees described difficulties of finding board members that understood fiscal management principles. Although agency staff were more likely to have experience with managing budgets and projects, they lacked experience with grant management and navigating fluctuations in funding. Landowners who had experiences with business principles and ownership also lacked experience with grants and nonprofit management.

Varying Commitment - Interviewees indicated that retirees tended to remain on the board longer because they had more time, but were sometimes less engaged based on the voluntary nature of board positions. In contrast, landowners with a background as agency staff were paid, in a sense, by their agency for their time on the board, which some interviewees felt made them more dedicated, even if they had less time to engage. Landowners were typically involved if they were large landowners and/or had completed numerous restoration and conservation projects with the organization.

Challenges in Smaller Communities - Interviewees from rural communities often discussed that they had a smaller pool of potential members to draw from, who were often unable to take on additional commitments. For districts, it is not uncommon to have the bare minimum number of board positions filled to have quorum. Some interviewees described difficulties when one to two members were unable to attend a meeting, it prevented the district from conducting business and making decisions due to a lack of quorum.

Community Trust in Organization - Some spoke about issues of communities not wanting state agencies to regulate lands and practices, as well as negative past experiences with agency representatives. Interviewees sometimes discussed challenges related to lack of community awareness of conservation issues.

Level of Responsibility - Some interviewees mentioned that being a board member carried too many responsibilities and risks as an unpaid, volunteer position. Risks included: legal implications and ethics violations, mandatory reporting for abuse, and fiscal liability.

District Specific - Some interviewees described challenges with absentee landowners, in Eastern Oregon, who were frequent project partners, but have not been eligible to run for board positions, since their primary residence was outside of the community.

How have councils and districts navigated board recruitment challenges?

We learned that board diversity was important not only for skills and experiences, but also because of how this influenced organizational management. When board positions were posted or spread by word of mouth alone, organizations typically had a less diverse board. Some interviewees described how they **proactively shaped their organizations through targeted recruitment.** These are broken down by councils and districts.

Council recruitment strategies included:

Completed a needs assessment. Councils used board demographic and skills surveys to ensure a diversity of knowledges and experiences to address organizational and land use needs. Interviewees commonly mentioned looking for candidates with nonprofit management and financial knowledge, familiarity with restoration/conservation projects, and technical skills from a variety of work experiences (e.g., lawyer, environmental, livestock, and agriculture). Additionally, they recognized agency staff's familiarity with government processes, partnerships, and funding sources; while landowners had more familiarity with ranching and farming practices.

Targeted recruitment to find board members who could help them meet goals in their strategic plans and strengthen communication and information sharing across different sectors. For example, an interviewee described how they pursued a transportation department representative for their council so they could conduct a road mile inventory using the department's GIS data. This aided project and funding development, which also supported the local county. Another interviewee shared how they sought an industry representative to gain property access for projects and obtain private industry monies to leverage larger, federal grants.

Attended and hosted community events with agency partners to form a community network with the intention to identify potential board members and encourage their involvement in projects to cultivate a pool of potential candidates. Interviewees indicated that by consistently showing up and demonstrating that they were able to help troubleshoot problems and find funding to implement projects, they were able to build a positive organizational reputation and educate the public on their role. This encouraged community members to join the board because of the help they received.

District recruitment strategies included:

Recruited non-landowners or those who own or manage less than 10 acres of land to become at-large or associate directors with the intention to become zone directors. To address issues of diversity or lack of expertise in the board, some districts have engaged individuals who do not meet the zone director eligibility criteria to become at-large or associate directors, since these positions do not have the same legal requirements. It is important to note that the associate director position has no vote when the board makes an official decision, but can augment the knowledge of board members. After 1-year, these positions were eligible to become a zone director if they were also a registered voter who lived within the zone they represented, and had a conservation plan approved by the district.[15]

Encouraged frequent project partners to apply to become board members as long as they meet the election eligibility criteria for directorship. Interviewees stated that landowners were often interested in giving back and supporting the economic vitality of the community.

How Have Strategic Plans Affected Organizational Capacity?

From the case study interviews, we learned that strategic planning processes varied based on the organization's structure, management style, and the regional contexts within which they worked. Because of these realities, strategic plans served different functions. Some organizations engaged in a more detailed approach, while others needed a broader plan. In this section, strategic plans refer to an individual organization's strategic plan, rather than strategic action plans used to coordinate landscape-scale restoration and conservation across multiple organizations as part of an OWEB-FIP, P-TA, NRCS RCPP grant, or others.

[15] ORS 568.560(2) and (3) describe the full eligibility requirements to become a conservation district director.

- **Detailed strategic plans** included a variety of perspectives and needs, and incorporated relevant technical expertise, to identify geographic project and/or programmatic priorities that could result in tangible benefits or improvements with clearly measurable objectives, and designation of short, medium, and long-term priorities. Lastly, they identified potential partnerships and funding sources. *These organizations typically had more available regional funding opportunities.*
- **Broader strategic plans** focused on organizational history, land uses, and limiting factors (e.g., biological, physical, or chemical conditions that limit a species viability in a habitat). The strategic plan then functioned as a litmus test to see if emergent funding opportunities were aligned with the goals and needs described in the strategic plan. This allowed them to be better positioned for those funding sources. To guide day-to-day work, lead staff developed a detailed annual work plan from the strategic plan to help establish geographic project and/or programmatic priorities between staff and the board, along with potential partners and funders. *These organizations often had more limited regional funding opportunities.*

Strategic plans and annual work plans, together, supported organizational efficiencies and established expectations between board and lead staff through joint priority setting. By creating specific objectives and measures to reach the vision of their plans, lead staff and boards:

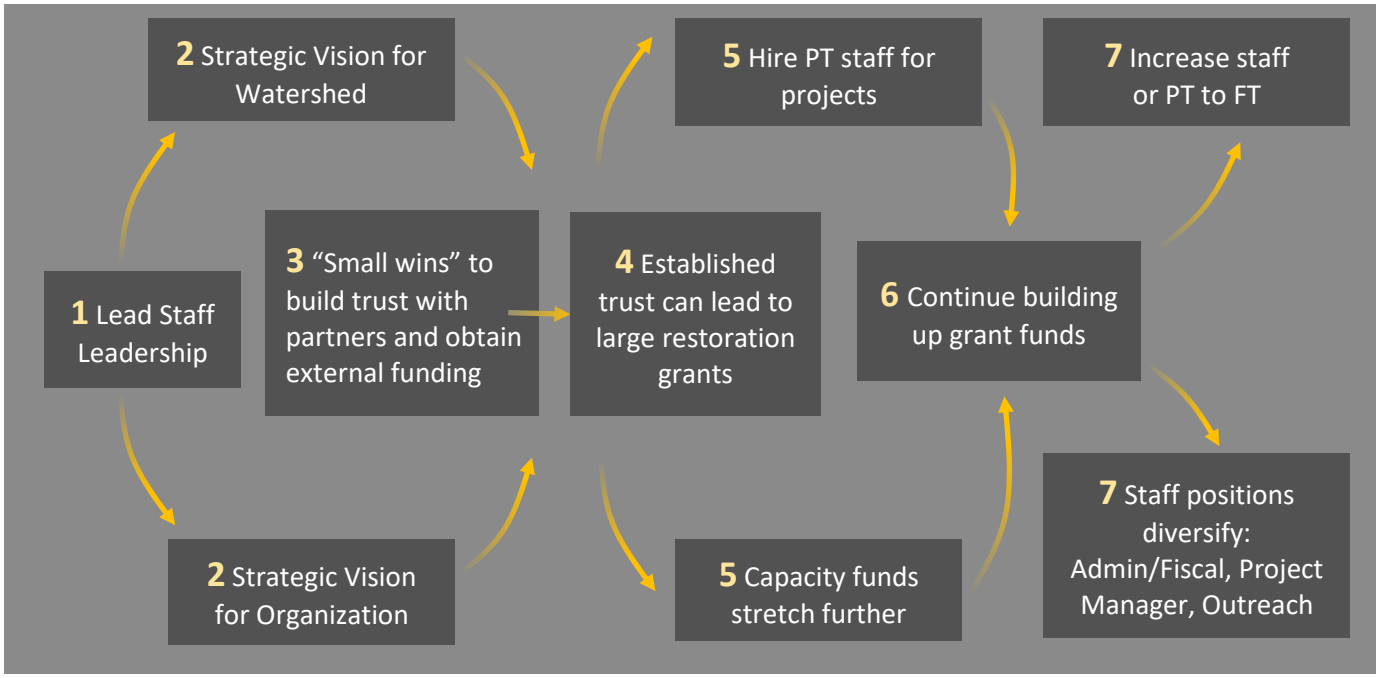
- Identified short, medium, and long-term project priorities to better sequence project timing.
- Developed a shared understanding of what amount and type of project work was manageable based on staffing capacity, which helped establish reasonable workload expectations.
- Developed a shared understanding of organizational priorities, which enabled lead staff and boards to function effectively in their respective roles.
- Guided lead staff's annual work plans and day-to-day tasks.
- Streamlined pursuit of key partnerships and funding sources for projects.
- Designed stronger grant proposals.

Over time, this created an upward organizational trajectory by supporting their ability to obtain larger grants by attracting partnerships and external funding sources (**Figure 15**). The successful execution of a plan was led by lead staff who were able to "carry the vision," engage in relationship building, and create opportunities for "small wins" early on that demonstrated commitment, which built trust with partners. Furthermore, achieving "small wins" cemented partners' faith that the organization could reliably accomplish the work, so partners were willing to put in more time and energy. This was the case regardless of whether the organization had greater access to funding opportunities or not, though, of course having more funding opportunities in a geographic area was helpful.

As more funding became available, some interviewees described how they were able to hire additional staff to work on projects and stretch the capacity grants further. Lead staff continued to build up the organization's grant application portfolio and diversified funding streams to keep funding coming in the door to increase existing staff's FTE from part-time to full-time or hire additional project staff. Over time, this allowed them to diversify key organizational staffing positions in-house as well (e.g., project manager, fiscal manager/ administrator, outreach coordinator). This allowed lead staff to delegate some of their responsibilities and expanded the organizations' capacity to gain partnerships, obtain grants, and develop projects. In watersheds with varied land uses, some interviewees also mentioned how they diversified the types of restoration and conservation projects they pursued to engage additional partners and develop more funding opportunities. Some interviewees were able to tie smaller restoration and conservation projects into landscape-scale projects, leveraging the partnerships they built, by pursuing OWEB FIP, P-TA, and NRCS RCPP grants.

> As one interviewee said, *"If you don't fundamentally understand how the landscape's working, in terms of watershed processes, land use, and the owner's objectives, you're not going to get it right and you're not going to have them helping you on the project. You really have to understand the physical processes behind the landscape, so you can understand how to implement something that is going to work, both for watershed benefits, whether it's fish, water quality, whatever it may be, but also, with the use of that land for some other purpose, which is not always obvious and apparent."*

Figure 15. *Organizational Upward Trajectory.*



What Happened Without a Detailed Strategic Plan?

Strategic plans and/or annual work plans that lacked specificity in their objectives and measures did not typically provide enough direction for lead staff to develop projects, seek out partnerships, or find funding sources. Without this, organizations struggled to develop projects efficiently and effectively and faced more challenges in pursuing partners and funding. When organizations lacked a shared understanding of priorities, this sometimes led to an imbalanced level of board engagement, with either micromanagement of lead and other staff in their daily tasks or limited input from the board with too much workload and direction setting falling on lead staff.

How Have Organizations Created Strategic Plans?

From the case study interviews, we learned that organizations that pursued multiple methods for identifying potential projects were able to develop more informed strategic plans that guided the board in making decisions on project and grant priorities. Lead staff and board members were also better able to identify whether new grant opportunities or project proposals from agency partners, landowners, and other local partners were relevant to pursue based on established priorities.

Organizations used the following information sources in developing strategic plans:

- **Conducted surveys to identify community needs and interests** to ascertain geographic areas of focus, limiting factors, and related project activities. Some interviewees described how they obtained an OWEB stakeholder engagement grant to survey private landowners on their restoration and conservation project interests and needs to establish priorities.
- **Participated in regional information-sharing groups** to remain aware of agency funding priorities and coordinate projects with agency staff and other local partners.
- **Maintained a database of potential projects** that included project priorities, potential funding sources, and landowner, agency, or county staff contact information. Some interviewees stated that they used this to quantify potentially available project work to inform board decisions.

V.C. How Have Organizations Engaged in Partnerships?

Through our case studies, we looked at how organizations typically developed partnerships, how they navigated common challenges in partnership building, and the variety of partnership models organizations engaged in through partnership-focused grants (e.g., OWEB FIP, P-TA, or NRCS RCPP) and other forms of involvement. Partnerships support organizations in leveraging experience, knowledge, and expertise with adjacent councils, districts, and other local conservation partners to plan and implement projects for restoration and conservation actions. Furthermore, partnerships can develop over time as those involved can begin to identify a common understanding of the needs of the landscape, the community, and the available resources and partners to move beyond project to project and towards development of larger-scale restoration and conservation projects. Opportunities and challenges for partnerships vary in different geographical areas and contexts. Depending on the landowners in their watershed, councils and districts need to work across boundaries of federal, state, and local government, as well as private industry (e.g., timber) and private landowners (e.g., ranching, farming). When neighboring landowners differ in their priorities, it can be challenging to implement a program of work across a landscape. However, councils and districts are in a prime position to work towards landscape-scale restoration and conservation through building relationships with the community and agency partners. Geographic areas with a fewer number of landowners may face less complexities in implementing work across a landscape, though the greatest factor still depends on the ability of the organization's lead staff or board to build partnerships.

Organizations Typically Developed Partnerships Through:

(1) Participation in city or county committees and other local boards to build a reputation in the community, while serving as a community member. This helped bring capacity to local governments, particularly smaller ones. Some organizations' programs were included in local city budgets, which helped them develop a general fund. *(Note: It took time to build a general operations budget for staff to be paid for their engagement and participation in committees.)*

(2) Development of strategic action plans with key partners. Effective organizations developed priorities for the watershed through identification of key players (e.g., main landowners, city/county officials, boards, public events/outreach) to establish joint priorities to acquire funds.

(3) Referrals from agency partners connected landowners or non-profits to councils or districts as a better avenue for project work. Councils and districts assisted landowners and other conservation partners in establishing a plan and finding funds. Additionally, councils and districts invited agency partners to board meetings to share updates on funding and project priorities.

(4) **Development of a community outreach program.** This included hosting regular community events in public spaces to engage landowners, e.g., breweries. When the event was consistent, it built reliability and improved access for community engagement. Some organizations purchased office space downtown to increase community visibility.
(5) **Sustained ties with past workplaces.** Some partnerships emerged from staff movement between organizations, who maintained connections with past agencies, as well as other councils, districts, and local partners.

Overall, organizations that consistently obtained OWEB large restoration grants or other grants, while also implementing project work in a timely manner, established themselves as reliable and capable. Partners were more willing to provide them with funding for riskier, more complex projects. As one interviewee said, "I think we make a pretty good partnership because if they can find grants, even if I have to match one to one, we can get a lot more done that way. If I just paid for it all, I'd only be able to pay for half of that. It's still done eventually, hopefully, but only at half the rate. They've been awesome, and I hope they never leave. My other wildlife areas that don't really have an active watershed council, it's a lot harder to get large projects done. The watershed council and ODFW have all these projects on the table that we're working on, and it's benefiting the wildlife area and its neighbors, and we are able to combine our budgets to make a larger difference, which is huge."

What are Common Challenges in Partnership Building?

Through our case studies, we found that common challenges organizations faced in partnership building included: (1) staff turnover at partner organizations and (2) historical challenges. In this section, we also look at how organizations navigated these challenges.

Staff Turnover at Partner Organizations

When state and federal agency partners have experienced managerial turnover or when key contacts have left, it has been challenging for councils and districts to maintain these relationships and funding sources. Continuation of partnerships depended on the priorities of new management, i.e., what kinds of restoration and conservation work they wanted to focus on and how they interpreted implementing agency work. Some interviewees discussed how some agency partners wanted to shift from monitoring to implementation, which required the council or district's staff to learn new skills or potentially hire someone with these skills. This was sometimes challenging for organizations in rural areas, which often spoke to difficulties of finding qualified staff. Additionally, some agency staff were less focused on partnership building, which hampered relationships with councils and districts. However, sometimes changes in partners' management had positive impacts if they were more partner-focused, or when the agency itself shifted its priorities to promote partnerships. Lastly, lead staff turnover in adjacent councils and districts who were key partners and experts in a particular restoration or conservation activity affected other councils' and districts' capacity.

> As one interviewee pointed out, *"We recognize that our partners' capacity has a lot to do with our capacity…A lot of our partner organizations are losing institutional knowledge, as there's been a lot of staffing changes. So, one of the things we're working on at the district is a conservation planning regional training course…We plan to include videos that talk about conservation planning specifics as well as connecting attendees with partner organizations that can talk about their programs. It would be something that we could make available to folks at the Watershed Council, neighboring SWCDs, or other partner organizations when they get new staff members."*

Protective Factors

Some interviewees spoke to the importance of maintaining connections with partners during times of staffing transitions. Council, district, or agency partners began a relationship with the new personnel by onboarding them on joint project grants, priorities, and the program of work. This included inviting agency partners to attend board meetings or meeting with them individually. One interviewee discussed how an effective strategy for introducing agency partners to councils and districts happened when agencies used their extra funding from staffing vacancies to double-fill the position for the last month. Lastly, some councils and districts participated in group information-sharing networks to stay connected to regional priorities, and project and grant opportunities. This helped them be aware of and adapt to upcoming changes.

Historical Challenges and Opportunities

Some interviewees spoke about challenges they faced in building partnerships with consecutive lead staff turnover or a history of troubled partnerships in an area.

Consecutive Lead Staff Turnover

Some interviewees mentioned how turnover of lead staff or other key staff (e.g., project manager) resulted in a decline in organizational management, particularly when a board was disengaged. Current staff stepped into the role as interim to maintain fiscal management, grant reporting, and project work. However, because of a lack of managerial direction and priority setting, reporting deadlines and contractor payments were missed, projects were derailed and partners were lost. Sometimes, however, changing staff at a council or district allowed for partnership repair by consistently following through on projects, and also established new organizational connections from their past workplaces. These staff also brought new knowledge of available funding resources and strategies for obtaining them, which allowed for organizational expansion over time.

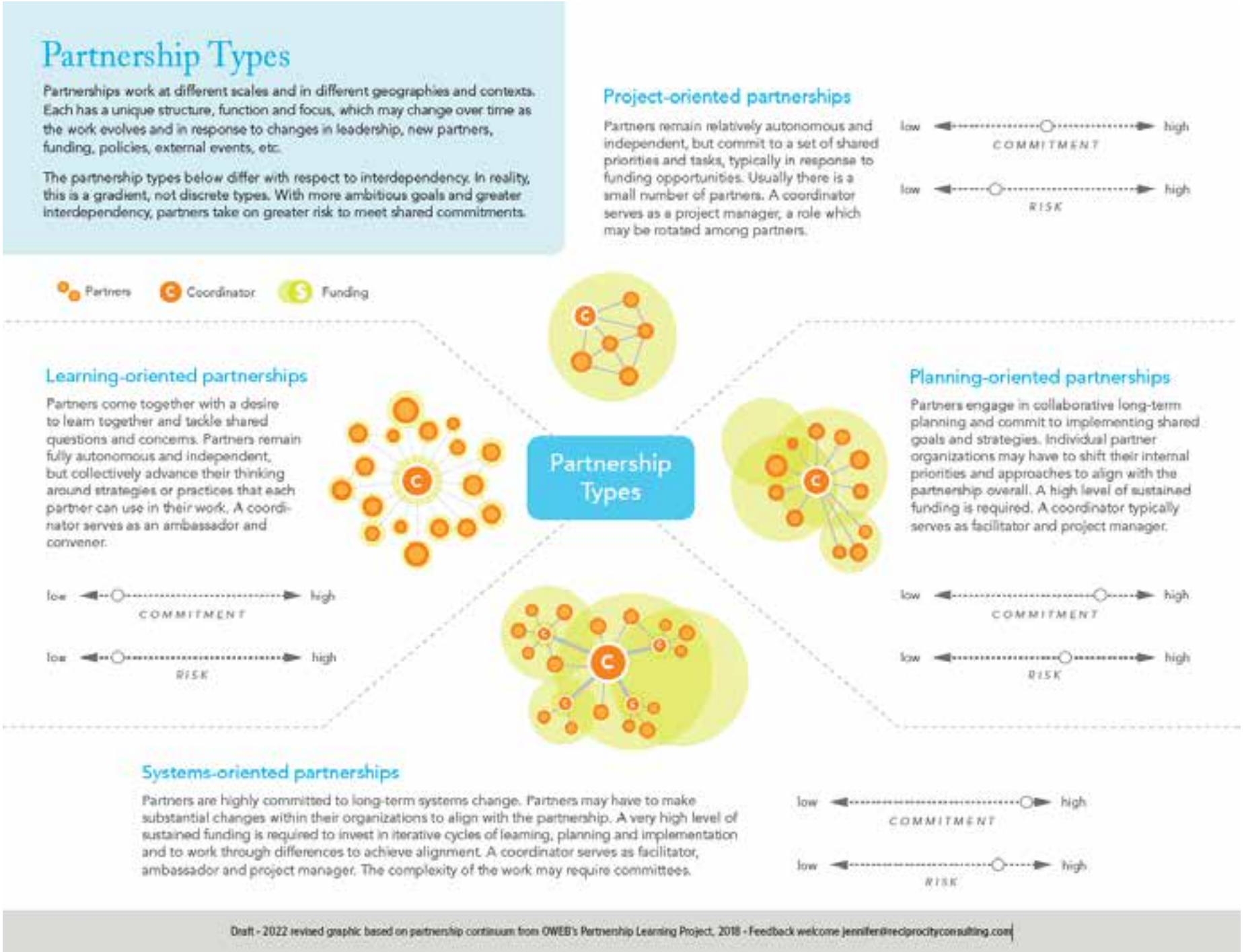
History of Troubled Partnerships

Some councils and districts have faced challenges around an ongoing history of troubled partnerships. This was sometimes challenging for new lead staff to handle; however, sometimes they brought a fresh perspective and rebuilt trust. Some lead staff interviewees engaged in partnership problem-solving by acquiring funding to work on a joint project or through obtaining a monitoring grant to gather and share information that both organizations needed to develop projects. Furthermore, some partner interviewees discussed how they offered joint project funding to organizations that had a troubled history to work together since each had access to valuable skills, knowledge, and community connections necessary to complete the restoration and conservation activities. Through this funding, change of staff, and the necessity to work together, organizations worked towards development of a new narrative. In other instances, organizations brought in outside facilitators to bridge relationships between landowners, agency partners, councils, and districts. Interviewees indicated that these facilitators served as a stepping stone to improving relationships and signified a basic agreement to work together, but a crucial factor was having a key leader who was able to make it work for everyone. Additionally, they described the need for incremental small victories to carry the momentum forward. Interestingly, some interviewees spoke about creating an external group of partners led by a community leader, who had a vision for the watershed, helped reset dynamics in an area, outside of the confines of organizations.

Partnership Models

Diverse models of partnership emerge depending on the relationships built and the needs identified by those involved, and as such, a variety of partnership structures may be best suited for different times and in varied contexts. The Partnership Learning Project referred to the "Continuum of Partnership Types" to identify what OWEB FIP partnerships "needed to be resilient and maintain a high level of performance and impact".[16] Over time, this model has evolved based on continued conversations with groups to broaden the understanding of partnerships as an evolving process that is neither discrete nor linear and to reflect the level of interdependency and degree of collaboration (See **Figure 16** below). These include learning-oriented partnerships, project-oriented partnerships, planning-oriented partnerships, and systems-oriented partnerships. Learning-oriented partnerships focus on brainstorming ways to improve strategies and practices, but have minimal formal connection or shared work. In project-oriented partnerships, responsibilities are shared for individual projects. In planning-oriented partnerships, partners are engaged in matching their strategies and actions to meet mutual needs for the partnership overall. In systems-oriented partnerships, partners are committed to working together in supportive and integral roles to accomplish a long-term shared vision.

Figure 16. *Partnership Types Model.*



Our case study interviews showed three primary ways that organizations sought partnerships:

1. **For networks:** Creation of group networks and larger scale network entities.
2. **For shared planning:** Development of cross-partner plans such as strategic plans or integrated weed management plans.
3. **For resource sharing:** Development of resource sharing arrangements.

Leveraging Networks

Some interviewees described the importance of leveraging experience, knowledge, and expertise with adjacent councils, districts, and other local partners. Some geographic areas have established regional partnerships using OWEB FIP or P-TA grants to develop governance documents (e.g., MOU and bylaws) to define roles, responsibilities, and commitments to build cross-organizational support for landscape-level restoration and conservation. For example, the Upper Willamette Stewardship Network (UWSN), a regional cooperative planning group, has built in planning efficiencies and reduced administrative burden on participating councils and districts, while providing beneficial outcomes for an individual staff member, individual organizations, and the Network as a whole. One of the councils served as the "organizational home" for the Network's Working Lands program since they had working lands expertise with a dedicated staff member. Other organizations in the Network contracted with them to provide services in their geographic area. This built in job security for the individual, and thereby, the council's funding for the position, while simultaneously contributing to other organizations' capacity for projects. Additionally, this reduced duplication of efforts; created regional consistency in program language, development, and implementation; and established a regional point of contact, which supported communication and planning with partners. Furthermore, this staff member became an expert in navigating NRCS, which increased the council's ability to obtain grants and benefited everyone in the Network to leverage additional funding. Together, this reduced the administrative burden of the involved organizations.

Shared Planning

Some interviewees participated in regional information-sharing groups, which supported streamlining of projects through identification of partners for cost-match and coordination of efforts to work towards landscape-scale restoration and conservation. Examples included council and district-led regional coordination meetings with agency partners through OWEB FIP grants, funder-led regional coordination meetings, and an annual workgroup led by a local NRCS office to provide updates on upcoming funding opportunities. Furthermore, some interviewees were involved in NRCS' RCPP program to work collaboratively with other local districts or councils on landscape-scale projects with private landowners. Additionally, one interviewee mentioned development of a cross-county regional weed management plan, which enabled the district to work on weed projects with ODA since they lacked a local weed management area.

Resource Sharing

Some interviewees engaged in resource sharing arrangements such as:

- **Split costs for drones or other equipment** that were too costly for a single organization to purchase, but could be shared between each other.
- **Shared staff expertise to provide skills training for other organizations** by contracting them for a project to engage in on-the-job learning.
- **Shared a grant writer**, whose position was housed in one organization, but was contracted out with other nearby organizations.
- **Developed a lending library of educational materials** that were available for partners to borrow, covering topics such as landowner materials, soil health, and more.



Youth outreach in Port Orford. credit: Curry SWCD.

V.D. What Funding Strategies Have Organizations Used?

This section builds on the previous section by highlighting how organizations strategically identify, obtain, and leverage available funding resources to work with partners while maintaining awareness of their own capacity. From the case study organizations we interviewed, we learned about how organizations diversified funders; how they relied on community, board, and network relationships to find additional funding; and how they navigated a variable funding landscape, while maintaining relationships with partners.

Strategic Pursuit of Grants

Lead staff described the need to assess their organizational and staffing capacity to identify what amount of grant work they can reasonably manage at a given time, the importance of strategic plan development to guide grant processes, and the creation of funding spreadsheets to track potential opportunities.

Assessment of Staffing and Organizational Capacity

Interviewees discussed the need to strategize which grants to apply for since grant writing required significant staff time, which could not be charged to another grant. Interviewees also voiced a need to not apply for more grants than they were able to manage at once, even when a grant was directly relevant to their priorities. Some mentioned learning to budget for more project management time in their grant applications, which helped build additional capacity for projects. Specific to new federal grants, some described the importance of working with partners to determine if grants were significantly aligned with their priorities and worth the "risk" of staff time to pursue these. Interviewees also described fatigue and challenges with funders only wanting to fund innovative, "new and shiny" projects. Some interviewees perceived their watershed as less competitive for funders' grant priorities and that they had less innovative or interesting projects that were still essential for their geography.

Development of Strategic Plans and Funding Opportunities Spreadsheet

Some interviewees described how strategic plans directed their pursuit of grants through identification of watershed goals and related project priorities, objectives, and measurable outcomes. By engaging in a strategic planning process, staff and boards were better positioned to recognize relevant grant opportunities and write more informed, detailed grants that were more likely to obtain funding. Alongside strategic planning, some interviewees developed a funding opportunities spreadsheet that they periodically updated to keep track of grants, deadlines, key contacts, and connections between funders' priorities and their strategic plans. Some indicated the need to develop a grant timeline to see when a funder was likely to solicit funds. These spreadsheets were created by researching opportunities online, attending webinars to learn about grants, or "cold-calling" funders to develop relationships. Lead staff interviewees indicated that it became easier to identify relevant grants over time as they built up an understanding of watershed needs through strategic plan development.

Additionally, one interviewee described how they created a simple watershed map with an overlay of funding sources (e.g., OWEB FIP, ODA Strategic Implementation Area, or NRCS RCPP) to identify needs addressed by those grants. Another interviewee discussed how they developed a regional OWEB grants database to see trends in match percentage, types of projects being awarded, and how many of each type. This informed them on what grants to apply for by learning what projects were more likely to be funded. This was particularly useful since some projects may have only required a 15% match, but some applicants have secured a much higher match, which may reduce the organization's likelihood of attaining the grant. Additionally, some interviewees spoke with funders to determine why their grant was unsuccessful (e.g., quality of grant writing or if the project was not a current priority). They saved these as "drafts" for future grants.

Diversifying Funders for Short- and Long-Term Funding Needs

Some interviewees described how they developed a funding plan to address short- and long-term needs. Short-term funding necessities included items like staff payroll, rent, and contractor payments. Long-term funding focused on the development of additional revenue streams to diversify funding sources outside of OWEB. These interviewees mentioned how strategic planning sessions with the board and lead staff were the most useful time

to discuss this. Some board and partner interviewees indicated that prior lead staff or board members lacked the skills or ability to manage this level of complexity in grant and project management, which made it challenging to obtain OWEB funding for projects. To address this, some board members shared that during times of lead staff transitions, they focused on hiring someone who was able to guide the organization in this direction. Interviewees also highlighted the importance of being networked in the community to learn about diverse funding opportunities. Examples included: federal and state agencies, private foundations, and local community institutions that sponsored non-profits (e.g., banks, grocery stores, or breweries), as well as annual fundraising events with local partners and fostering of city/county government relations for inclusion of their programs in local government budgets. Furthermore, interviewees discussed how funding from local community institutions, local government budgets, and fundraising events served as unrestricted funds to support operational costs and supplemented the Operating Capacity grants. Additionally, some organizations have maintained an annual federally negotiated indirect cost rate agreement to support critical operation costs. However, it is important to recognize that some geographic areas will likely always face challenges with diversifying funding outside of OWEB based on fewer available resources. This is described in more detail in the section, "Navigating a Variable Funding Landscape."

Relying on Community, Board, and Network Relationships

Community Focus

Some interviewees described the importance of developing landowner connections that emphasized conservation problem identification and being solution-oriented by developing plans and obtaining funding. This was especially useful in navigating community distrust of agencies, who were perceived as "enforcers" and "regulators." Some shared how this approach encouraged previously disinterested landowners to discuss issues in managing their property.

Board Connections

Specific to councils, lead staff members have often been essential for identifying potential funding sources and maintaining relationships with partners. However, some interviewees described how board connections have played a role by attending fundraising and other key events, attaching personal notes to known recipients for end-of-year fundraising letters, and reaching out to personal contacts to attain additional funding. Additionally, some board members were aware of funding sources from federal and state agencies based on their work experiences.

Network Relationships

Some interviewees mentioned participation in quarterly or annual regional information-sharing groups, led by agencies, tribes, councils, and districts, helped them learn about funding opportunities, coordinate projects, and identify partners for project cost-match. Some noted that OWEB P-TA and FIP grants helped support funding for a partnership coordinator, who helped identify larger funding opportunities for multiple organizations (e.g., JDBP and UWSN).

Maintaining Relationships with Funding Partners

Case study interviewees discussed the importance of maintaining relationships with federal, state, and local government funding partners, as well as the need to continually build relationships with new funders. Partnership building was achieved by gaining a reputation for consistently obtaining grants, reliably meeting project deadlines, communicating as changes occurred, and implementing quality work on the ground. Lead staff interviewees discussed how this led to new opportunities. They indicated that federal agencies often have

trouble getting funding on the ground, so they have sometimes asked partners to develop and apply for federal grants. Additionally, federal and state agency partners sometimes developed a pre-written OWEB grant application for lead staff to revise and submit since state and federal entities have historically been ineligible to apply for OWEB grants. Some interviewees also described the importance of establishing trust with local partners. One interviewee shared how they called their local partners when they needed project work for their staff, e.g., maintenance of past riparian or weed management projects, as well as simply asking if there was any relevant work that needed to be completed. This proactive approach helped lead staff to identify short-term funding opportunities that supported the staff member, the organization, and the partner. Additionally, interviewees spoke about the need to continue building relationships with new funders, since external funding sources have typically been tied to projects and have not been meant to serve as ongoing, programmatic support. As one interviewee said, "You're always building relationships, maintaining relationships, and ending relationships with funders." Because of this reality, they pointed to the essential need for district and Council Capacity grants to maintain a base of support.

Navigating a Variable Funding Landscape

Interviewees described challenges around changes in external funders' priorities as well as access to funding opportunities. Some discussed how they lost funding sources that were once reliable for up to 10 years after external funders shifted their focus from one particular geographic area or type of restoration/conservation work to another. Additionally, when state and federal agencies have received an increase in dollars earmarked for restoration and conservation activities, they have often depended on councils and districts as community-based partners who can expand agency capacity to develop and implement projects. As smaller organizations, it can be difficult for them to adapt to these needs and benefit from these resources. Councils and districts, particularly lead staff, have always needed to manage this consistent ebb and flow. Additionally, it is important to note that some geographic areas have had greater access to funding opportunities (e.g., taxing districts; BPA; and species-specific funds for salmon, steelhead, sage-grouse, and other agency regional funding priorities). Interviewees in some rural communities have also had fewer available local organizations to partner with on projects, little to no local foundations, and a lack of local government funding for conservation. Furthermore, they often described the difficulties of finding or retaining qualified staff, which affected their ability to manage and obtain larger grants. Some interviewees indicated that a lack of funding sources encouraged them to work with local partners more, while others spoke to the challenges of perceiving each other as competition for funding. This seemed to vary based on how an organization viewed the role of partnerships.

Lastly, taxing districts sometimes developed their own program of partner support funding to act as a "mini-foundation," which established an additional funding source for local partners or private landowners. Interviewees discussed how their taxing district-funded programs were more accessible than federal and other large funders. They described how it was easier for landowners to obtain funding and reporting requirements were less complex. This increased landowner interest in project development. Furthermore, local, non-profit partners who received these grants obtained year-round support for staff, rather than seasonal, which they viewed as providing regional uplift. Interviewees also indicated that strategic direction and leadership from the lead staff and board were necessary to effectively use these resources.



Restoration and Stewardship Team strategizing together. *credit: Upper Willamette Stewardship Network.*

VI. Discussion

In this review of OWEB's Operating Capacity investments, we learned that these grants have positively impacted communities' local economies, supported local conservation efforts in completing restoration and conservation projects, and helped build local capacity among conservation partners. Furthermore, the reliability of this grants program has served as an essential strategy for supporting council and district operations, as many grantees expressed the lack of sufficient external capacity-building funding in the face of rising costs and inflation. The Operating Capacity grant programs have supported OWEB and ODA as state agencies in meeting state-wide restoration and conservation goals. Without this funding, many councils and districts would not be able to maintain their operations because restoration and conservation activities can require months or years of networking, planning, and leveraging projects—which cannot be charged to restoration or conservation project grants. This would have negative repercussions on conservation efforts at the local level and limit the capacity of other state and federal agency natural resource partners to achieve state and federal restoration and conservation goals. Councils and districts have primarily used Operating Capacity grants for project development and partnership building, as initial funds for project cash match, and as operational support for administrative staff time and staff training. Other assessments also note that capacity investments have had positive ripple effects on watershed enhancement work more broadly. "Time, effort, and organizational capacity is needed to apply for OWEB grants. Partners that Tribes collaborate with on OWEB-funded projects often have more time and infrastructure devoted to grant writing than they do. Interviewees believed tribal contribution comes in the form of technical expertise, setting overall strategic goals, writing letters of support, and reviewing and improving existing grant applications." *- Granting Practices Impacts to Tribes: An Assessment of OWEB (2021)*

Capacity is the largest challenge that organizations face as the complexity of the issues they address are increasing from a growing understanding of the impacts of climate change, which have caused drier summers, droughts, and more frequent wildfires in geographic regions that have not typically seen this. Furthermore, the retirement of staff across multiple agencies, combined with the difficulty of offering competitive wages and benefits for staff retention, and the effects of elevated housing values and other costs of living, even prior to the COVID-19 pandemic, have further challenged councils and districts. They often serve as small, front-line organizations for large-scale issues, working across multiple agencies, non-profits, local governments, and private landowners, at the intersection of natural resource management and community outreach and education.

Additionally, during times of an influx in federal and state dollars that emphasize implementing restoration and conservation projects, agencies often rely on councils and districts as necessary community-based partners. Some communities have also seen a shift in restoration and conservation needs that are driven by changes in land use from agriculture and ranching to an increase in recreation, while needing to address the needs of existing working lands and ongoing habitat conservation for salmon, sage-grouse, and other important species. Lastly, the increasingly technical aspects of project permitting and grant reporting requirements, while improving accountability, monitoring, and performance, have increased administrative burden. All of these factors point to the essential purposes these organizations serve and the capacity challenges they face. Councils and districts rely on committed individuals who are relationship-oriented, and driven by conservation and community.

The case study approach helped us define common experiences and challenges of councils and districts. However, we recognize that councils and districts have a diversity of experiences and contexts within which they function. To improve the application of findings, we selected case study organizations across Oregon with different staffing levels across typologies, in rural and urban contexts, and with varying tiers of resources obtained and leveraged. We followed an approach that could be conducted within the timeframe of the project since it would not be possible to interview all organizations. Furthermore, during the interview process, we noted that we had identified enough common insights and themes, within and across organizations and capacity dimensions, through thematic coding and memo writing.

From this evaluation, we learned that governance is fluid because relationships are fluid. Councils and districts have often heavily depended on a single individual (i.e., the district manager or council executive director) to build relationships and develop a strategic vision for the organization and the watershed with partners and funders, while simultaneously pursuing grants and managing projects. Specific to councils, the lead staff position title itself has evolved over time to recognize the full spectrum of work that this role fulfills – from secretary to coordinator to executive director. Because these organizations have limited staffing capacity, the ways that each organization governed itself was based on an iterative process that those individuals worked through together. Some organizations needed more structure than others, depending on the communication, needs, and level of trust among the individuals involved, while some needed less. Some organizations started with more structure, but as trust was built through relationships, the need for structure decreased. This was particularly true for organizations that had multiple opportunities for communication through built structural support and proximity, within and across organizations. Peer learning networks and other partnership models eased lead staff transitions through mentorship, shared resources, and project coordination. These groups also offered overlapping points of connection and communication to create a community network of local conservation partners.

At the individual organizational level, common issues that reduced organizational capacity included: a disengaged board or board micromanagement of lead staff, lead staff turnover and capacity, and challenges with finding qualified staff.

- **A disengaged board was less involved with providing organizational direction through strategic plans and offered less accountability of lead staff's work plans.** This sometimes led to reduced lead staff capacity or burn-out. These boards were also less engaged in effective fiscal oversight and less aware of how to maintain consistent funding revenue. In these contexts, the board was more focused on project implementation than organizational management.

- **When a board micromanaged lead staff, some grantees' experienced organizational gridlock.** In these circumstances, there was a lack of joint organizational priority setting for strategic plans and/or annual work plans. This sometimes resulted in burn-out or reduced capacity of lead staff.
- **Regardless of whether a board was disengaged or micromanaging, roles and responsibilities of the board and lead staff were unclear. Additionally, board members were unsure of how to manage lead staff personnel issues or engage in organizational management.** Reduced capacity or burn-out of lead staff sometimes led to turnover of lead staff or a need for someone with a different set of skills to improve the organization.
- **Board members were concerned that they would not be able to find replacement staff** given the challenges of offering competitive wages and benefits for lead staff, given the grant-funded nature of these positions. Challenges with lead staff transitions or navigating the need for lead staff with a different set of skills sometimes caused an organizational downward cycle. This made partners less likely to work with them, which led to missed opportunities for projects and funding.

At the individual organizational level, key opportunities for building organizational capacity included: joint priority setting between lead staff and board through strategic plan development, targeted board recruitment and diversification of funding, development of an effectively engaged board, and follow-through on projects.

- **Lead staff and boards co-established organizational and watershed priorities through strategic planning processes.** This streamlined pursuit of key partnerships and funding sources for projects, improved organizational fiscal efficiency, helped organizations design stronger grant proposals, and more effectively use funders' resources. Joint-priority setting supported board and lead staff in creating a shared understanding of what a manageable project workload was while keeping everyone aligned on organizational priorities. Together these supported an effective level of board engagement. Furthermore, strategic planning sessions sometimes focused on how to diversify funders for short- and long-term organizational funding needs.
- **Lead staff engaged in targeted board recruitment by forming a network** within the community through participation and hosting of community events. These served as opportunities to identify potential board members who could help organizations meet goals in their strategic plans and strengthen information sharing across agencies.
- **Being networked in the community also allowed them to learn about diverse funding opportunities.** Examples included: federal and state agencies, private foundations, and local community institutions that sponsored non-profits (e.g., banks, grocery stores, or breweries), as well as annual fundraising events with local partners and fostering of city/county government relations for inclusion of their programs in local government budgets. Additionally, some organizations developed an annual federally negotiated indirect cost rate agreement to support critical operation costs to build administrative capacity.
- **Lead staff developed board relationships by incorporating education and training into board meetings** so they were able to mutually support each other in their respective roles to guide the organization's trajectory.

At the community level, common issues that reduced organizational capacity included: staff turnover at partner organizations, a history of troubled partnerships, and access to funding resources.

- **Capacity does not occur in a vacuum.** Lead staff turnover in adjacent councils and districts who were key partners and experts in a particular restoration or conservation activity affected other councils' and districts' capacity. This reduced their ability to leverage grants and implement project work.

- **Areas with a history of troubled partnerships were sometimes challenging to overcome** which hampered relationships with other partners and funders, who had difficulties with completing project work they were interested in and wanted to fund.
- **Access to funding resources.** As third-party researchers, it is challenging to give the full context of each region's available opportunities given the differing land uses, endangered species, and other items tied to funding sources because there are a wide variety of factors and those factors evolve over time. Additionally, funders have become interested in more innovative and collaborative projects and increased leveraging of funds, which can create a perception that councils and districts have to "keep up." Lead staff have always needed to manage this consistent ebb and flow in funders' priorities, even before the COVID-19 pandemic. Regardless, the variability of funding sources is an inherent challenge that affects community capacity.

At the community level, key opportunities for building organizational capacity included: proactively maintaining partnerships during times of staff turnover, resolving a history of troubled partnerships, and participating in various partnership models to share resources.

- **Regional network formation, shared planning, and the development of resource-sharing arrangements were the most typical ways that organizations built community capacity.** Some areas established regional partnerships using OWEB FIP or P-TA grants to develop governance documents and define commitments to build cross-organizational support for landscape-level restoration and conservation. Some participated in regional information-sharing groups, which supported streamlining of projects through the identification of partners for cost-match and coordination of efforts to work towards landscape-scale restoration and conservation. Others shared equipment costs and staffing.
- **Onboarding new personnel following staff turnover at partner organizations on their joint projects and priorities**. Lead staff that engaged in these practices were able to maintain their partnerships during these transition periods.
- **Acquisition of joint funding for a project or sharing information learned from a monitoring program helped organizations rebuild trust after a history of troubled partnerships.** This often included a change in staff leadership, as well, who were not invested in this history.



Range Monitoring Tour. *credit: South Fork John Day WC.*

VII. Considerations and Proposed Recommendations

Considerations and potential recommendations were developed for points of impact that agencies and supporting organizations can provide, as well as best practices for council and district grantees.

VII.A. Points of Impact: Agencies and Service Providers

Coordinate Across Agencies and Improve Cross-agency Understanding of Grantees' Needs

Based on the case study interviews, there is a demonstrated need to improve awareness of what NOWC, OrCP, OCEAN, and the SWCD Operations Specialist provide, particularly since the COVID-19 pandemic has altered what was offered over the last few years. Furthermore, according to the NOWC Membership Outreach Consultancy Report (2021), "less than 15% of members are aware of any of the items [NOWC provides] including document templates, which is one of the primary benefits that NOWC provides to its members."[16] Reconnecting with councils and districts to share what these organizations offer is important, especially as more in-person events are happening, which offer additional opportunities for peer networking and information sharing. Lastly, it is important to recognize that not all lead staff step into these roles with a background in project management or organizational management, which are essential functions for this position, and must learn as they go.

Topical Needs Identified by Grantees:

- OWEB-specific and general grant writing and reporting requirement courses.
- Fiscal management and terminology.
- Best practices or examples of organizational policies, procedures, and bylaws.
- Board management and education.
- Personnel management and handling lead staff transitions.
- Direction on how to develop a balanced project workload for lead staff, while also navigating the management of multiple projects.
- Guidance on developing unrestricted funding sources to help maintain critical operations (e.g., development of an annual federally negotiated indirect cost rate agreement, budgeting for more project time in grant applications to build in additional capacity for projects).

[16] NOWC Membership Outreach Consultancy Report (2021)

Potential Strategies to Address Identified Needs

Some grantees were interested in engaging in a regional forum to learn from other councils or districts. Suggestions included: a show and tell with an OWEB Regional Representative to help organize groups by region. Interestingly, this mimics what some places with a higher concentration of councils and districts are doing, (e.g., the UWSN and JDBP). This could potentially be useful if organizations are facing challenges in working with local partners and developing joint priorities.

NOWC could play a key role in supporting peer regional forums for councils, because their board includes regional representatives and they support regional peer networking groups. Additionally, they have created a NOWC Insider Webinar series addressing a variety of topics with content experts to discuss nonprofit board governance, legal issues, financial best practices, and other relevant needs. It is important to note, however, that these services would be limited to paying NOWC members, because they are dependent upon membership fees to support their operations and part time coordinator.

Another strategy could be for OWEB to engage the ODA's SWCD Operations Specialist's skills to develop regional round-table trainings for lead staff focusing on management topics. Trainings could be joint for councils and districts or separate. Additionally, interviewees were interested in being able to connect directly with OWEB and ODA staff, so it would be important to consider their involvement. Hosting regional in-person forums could be particularly beneficial for organizations in more rural areas, who typically have to travel further and face greater travel costs for professional networking opportunities. Lastly, new lead staff may have different needs than those who have been in this position longer. This emphasizes the importance of mentorship and peer learning networks to create information exchanges and learn from each other's experiences.

Strategic Planning

As part of the Council Capacity grant application and review process, requiring greater specificity in strategic plans or annual work plans, depending on the function of these plans for an organization, could allow for objectives and measures on how councils are identifying and implementing watershed restoration and conservation activities, while engaging with partners. Council Capacity grant Merit Criterion 2: Progress in Planning, currently states, "The council uses its planning documents, such as the action plan, strategic plan, and other relevant documents, to identify and implement on-the-ground watershed restoration and stakeholder engagement projects. The council regularly evaluates its action plan and work plans and makes adjustments to respond to changes and challenges."[17] Strategic plan and annual work plan guidance could account for the differences in how organizations use these plans in different ways depending on their local context, while also emphasizing how planning processes for these can help establish expectations between board and staff of what amount and type of project work is manageable based on staffing capacity, as well as create a shared understanding of priorities to promote an effective level of engagement between board and lead staff.

Technical and Financial Support

Councils and districts can benefit from technical and financial support to assist them in strategic planning processes to incorporate diverse perspectives and needs and engage in relevant technical expertise for identifying geographic priorities. Interviewees have expressed interest in live webinars and being able to address questions in real-time for learning best practices and how to improve organizational efficiencies. NOWC and OrCP currently offer ongoing webinar training opportunities. Additionally, some councils and districts engage in peer

[17] FY 21-23 OWEB Operating Capacity Grant Guidance

learning networks to learn from each other's experiences and share examples of lessons they have learned in NOWC and OrCP webinars, as well as CONNECT and OACD conferences. NOWC has self-funded a "watershed camp" for council staff that provides management peer training, mentoring for new staff, and technical training in collaboration with state and federal agency staff. Strategic planning processes could help organizations develop clearly measurable objectives; determine short, medium, and long-term project priorities; and identify potential partnerships and funding sources. This may help grantees, particularly lead staff, to gain valuable insight into project development, management, and implementation, while making the best use of OWEB's various grants in project design (e.g., technical assistance, stakeholder engagement, monitoring, and restoration).

Board Management

We heard from interviewees as well as from the survey findings that councils and districts noted challenges around board member training. We also heard webinars would allow for increased opportunities to meet the scheduling needs of retired or working board members. Key training areas included: strategic plans, organizational policies and procedures, fiscal responsibilities, and personnel management of lead staff (See Section V, **Table 14**). Additionally, lead staff that developed an engaged board often incorporated brief, 15-30 minute training modules into board meetings. Grantees may benefit from board training guidance and resources available from ODA, NOWC, and OrCP. Considering that lead staff capacity and turnover are common organizational challenges, this emphasizes the importance of continually promoting relevant and available resources for lead staff.

Staff Benefits and Retirement

We often heard from interviewees that a piece of lead staff succession planning and staff retention revolves around pay, health benefits, and retirement, which are further challenged by the rising costs of living and housing in Oregon, even before the COVID-19 pandemic. This is particularly applicable to councils, which are 501(c)(3) non-profit organizations. It can be challenging to maintain organizational longevity when lead staff leaves to seek out positions with increased pay and benefits. Additionally, based on the survey results, less than half of councils and districts indicated that they had succession planning or mentorship for lead staff, or succession planning for board members. Furthermore, only 47% of councils and 63% of districts indicated that they had competitive salaries and benefits compared to similar types of organizations. Most interviews with board members and partnering organizations recognized that lead staff often move onto conservation jobs elsewhere, while simultaneously relying on them as essential partners for watershed restoration and conservation, given their relationships with the local community.

Coordinating Across Agencies

It is challenging for councils and districts, as smaller organizations, to be able to afford the purchase of group health insurance for their staff, as they are working within a grant-funded framework. Some interviewees mentioned interest in a toolkit or an online resource page for how to incorporate health and retirement benefits into their organization. An online resource page could include relevant, available resources from the NOWC Insider Webinar Series or OrCP webinar archive. Additionally, some councils and districts have participated in peer learning networks to learn from each other's experiences and share examples of lessons they have learned in NOWC and OrCP webinars, as well as CONNECT and OACD conferences. Lastly, councils and districts may benefit from legal experts sharing their advice and tips, while answering questions in real-time.

Coordinating with and Educating External Funders on the Significance of Longer-Term Funding

As part of the external capacity-building program review, we learned that other funders (e.g., the Ford Family Foundation and the Wilburforce Foundation), recognize the need to develop longer-term funding strategies that can support longer-term partnerships. They also acknowledge the need to collaborate with other funders to ensure that collective investments and capacity resources are coordinated and effective. OWEB and ODA have provided ongoing, programmatic support for 20 years to councils and districts' efforts in improving local watershed quality and health. OWEB has developed longer-term funding strategies to help support grantees in partnership capacity and larger landscape-scale restoration (P-TA and FIP grants), while NRCS has developed RCPP grants to support collaboration with other councils and districts for landscape-scale conservation projects with private landowners. External funders often see OWEB and ODA as essential funding partners for restoration and conservation activities through these locally based councils and districts. As such, OWEB can play a role in educating funders on the significance of longer-term grants to work toward landscape-scale restoration and conservation.

VII.B. Best Practices: Council and District Grantees

Strategic Plans

Strategic plans support organizational efficiencies, can reduce lead staff burn-out through joint priority setting between staff and board, and provide a framework for developing annual work plans. The planning processes for these are shaped by their regional contexts, are varied based on the organization's structure, and serve different functions depending on how the organization is managed. Strategic plans, may have more detail or less, depending on these factors. Overall, strategic plans guide organizations by creating a vision to guide restoration and conservation priorities in the basin. Some organizations may find a more detailed strategic plan to be more useful in defining priorities between the lead staff and the board, while others may need a strategic plan with a wider scope to be able to capture funding opportunities that arise, and instead use their annual work plans to inform the more nuanced details. Regardless of which planning model that is used, identifying key partnerships and funding sources for project and/or program development, along with joint priority setting to define short, medium, and long-term priorities helps organizations to establish a shared understanding between the board and staff of what amount and type of restoration and conservation activities are achievable based on staffing capacity, and can inform which grants to pursue and when to do so. Together, these strategies can help reduce the chances of lead staff burnout and turnover.

Board Recruitment and Management

Boards affect organizational trajectory through the composition of their members, the functions they serve, their level of engagement in establishing organizational direction and priorities for the watershed, and most importantly, the relationships they develop with lead staff. Well-functioning organizations have proactively shaped the organization through targeted recruitment. Some organizations have accounted for staff time in their operational budget to participate in local boards and committees and attend community events to develop a network with the intention to identify potential board members and encourage their involvement in projects to cultivate a pool of potential candidates for current or future board vacancies. By using targeted recruitment with the intention of relationship building, some organizations have found that they were able to develop an effectively engaged board. When board positions were only posted or spread by word of mouth, organizations typically had a less diverse board. *(*It is important to note that organizations built up their operational budget over time to pay for staff time to participate in local boards and committees.)* Part of targeted recruitment included identifying potential candidates who could help them meet goals in their strategic plans or could

improve communication and information sharing across agencies and industries. Furthermore, developing board diversity allowed lead staff to engage with multiple board members for guidance and brainstorming. When there were too many people with the same knowledge and skills, there was less feedback for decision-making, which could lead to gridlock, since individuals tended to view and problem-solve similarly. In more rural and remote areas, board members noted they have a diverse skill set in terms of holding multiple roles in a given community (e.g., rancher and business owner).

Districts have faced additional challenges in board recruitment, given the legal requirements of owning or managing 10 acres of land to be eligible for zone directorship. To work around these, some districts have recruited individuals who do not meet these legal requirements to attend board meetings and become associate or at-large directors instead. This strategy can support a greater diversity of skills, knowledges, perspectives, and experiences in board composition. After one year, these positions become eligible for zone director elections as long as they are a registered voter who lives within the zone they represent, and have a conservation plan approved by the district.

To develop an effectively engaged board, lead staff included 15-30-minute skills training and educational talks (e.g., personnel and fiscal management) into board meetings. This assisted boards in understanding their roles and responsibilities and how to provide organizational direction setting. They also invited agency staff or other relevant experts to provide project updates and upcoming funding opportunities to help boards understand regional priorities. This enabled boards to make informed decisions on project and funding priorities. This helped establish a healthy relationship and better define expectations between the board and lead staff.

Education and Outreach

We often heard from councils and districts about the lack of OWEB funding for community outreach and education activities due to statute.[18] A key piece of conservation is educating the public about local resources, forming connections to the place they live, and demonstrating how they can engage the local community in voluntary watershed restoration and conservation. Furthermore, education and outreach are important ways for organizations to broaden their networks, develop partnerships, and secure funding. Funding for education and outreach supports their work with agency partners to engage the local community and host community events, which allows them to tap into other communities. To address the lack of funding, some organizations have looked to private foundations, while some districts with tax bases have developed their own grant program for education and outreach funding. Lastly, organizations can partner with OSU Extension.

Fiscal Management

Well-functioning organizations budget more project management time into grant applications to build additional capacity for projects and consider future costs and expenses (e.g., staff wages and materials). Some organizations have also developed an annual federally negotiated indirect cost rate agreement to support critical operation

[18] Refer to Measure 76 and ORS 541.956, which authorize OWEB to make grants available for outreach activities that are necessary for carrying out eligible restoration and acquisition projects that protect or restore native fish or wildlife habitat, or that protect or restore natural watershed or ecosystem functions to improve water quality or stream flows. To qualify as necessary for restoration or acquisition, the project must be tied to a specific geography, address clearly articulated habitat or watershed or ecosystem function goals for that geography, and identify a clear path toward achieving the restoration or acquisition measurable outcomes within a reasonable and specific timeframe. Projects whose primary purpose are education are not eligible.

costs. Furthermore, some organizations build their operational budget over time so they can pay lead staff and other project managers to participate in local committees, boards, and foundations, or attend local events. Through these avenues, staff can build relationships, discover joint priorities with potential partners, develop projects, and acquire funds.

Partnerships

Effective organizations assess the complexity of current projects and staffing capacity prior to pursuing additional grant funding to create a feasible project workload. Maintaining this awareness supports them in pursuing grants strategically, while being consistent in obtaining and managing grants to implement project work in a timely manner. Consistency builds trust with partners and helps them to establish themselves as reliable and capable partners, which attracts more funding from partners. By building this trust, partners may seek them out or be willing to take on riskier, more complex projects over time.

Well-functioning organizations manage staff turnover at partner organizations by orienting new personnel to the program of work, joint project grants, and priorities. This includes inviting agency partners to attend board meetings or meeting with them individually. Additionally, these organizations participate in regional group networks to share information and stay connected to regional priorities, as well as project and grant opportunities. This relationship-building can help organizations to be aware of and adapt to upcoming changes.

To work towards improving relationships with partners who have troubled histories, lead staff or partners have obtained funding to work together on a joint project or use a monitoring grant to collect and share information that both organizations need to develop projects. Through sharing knowledge and joint project funding, organizations have worked towards repairing organizational relationships. This helped support the capacity of the entities involved since each had access to valuable skills, knowledge, and community connections necessary to complete the restoration and conservation activities.

Personnel Management

Organizations with an effectively engaged board have been better positioned to make challenging HR decisions regarding the organization's budgetary and project needs and re-evaluate necessary skills for staff positions, to accommodate shifts in an organization's trajectory. Additionally, they recognize when and how to support, lay off, or fire staff as needed.

VII.C. Proposed Metrics Scorecard

This project focused on five dimensions of organizational and partnership capacities related to the watershed restoration and conservation contexts in which councils and districts work. After completing our analysis and discussions with the Core Project Committee and Advisory Group, we developed a proposed metrics scorecard that OWEB could use to strengthen tracking for the Operating Capacity grant program. These were developed from strategies used by case study organizations to improve organizational efficacy and handle common capacity issues, as well as lessons learned from analyzing the case study interviews and input from the Core Project Committee (**Table 5**). **Note: The proposed qualitative indicators are not an exhaustive list, nor are they "check boxes;" rather, they are meant to provide a more nuanced understanding of how well an organization is functioning to provide more guidance for OWEB and ODA staff engaged in supporting councils and districts.*

Table 5. *Revised Capacity Dimensions, Indicators, and Metrics.*

Organizational Capacity

Capacity Dimension:	**Evidence of Ability to:**
Internal Governance & Operational Practices	Manage people and resources Accountability
Proposed Qualitative Indicators: Well-Functioning	
Development of a strategic planning process that is adapted to the organizational structure and management, as well as available funding opportunities within organizations' regional contexts. (1) For ex: Regions with more funding opportunities may benefit from more detailed strategic plans that incorporate diverse perspectives and needs, and engage relevant technical expertise to identify geographic project and/or programmatic priorities, potential partnerships, and funding sources. These priorities could be laid out as short, medium, and long-term goals that describe how they will result in tangible benefits or improvements, along with clearly measurable objectives. (2) For ex: Regions with more limited funding opportunities may develop strategic plans that are wider in scope, while covering organizational history, land uses, and limiting factors. The strategic plan then serves as a litmus test to see if emergent opportunities fit into the strategic plan goals and needs, while accounting for constraints described in the plan. From this strategic plan, lead staff develop a more detailed annual work plan to establish geographic project and/or programmatic priorities, potential partnerships, and funding sources. These priorities could be laid out as short, medium, and long-term goals that describe how they will result in tangible benefits or improvements, along with clearly measurable objectives.	Consistent implementation of governing policies and procedures, bylaws. Revising these in regular intervals (e.g., every 5 years). Lead staff engaging in active board management through integrating educational talks by agency experts into board meetings to help boards make informed decisions on funding and project priorities. Ability to make necessary HR decisions regarding the organization's budgetary and project needs, and re-evaluating necessary skills for staff positions, to accommodate shifts in an organization's trajectory. Additionally, recognizing when and how to support, lay off, or fire staff as needed.

Capacity Dimension:
Resources Obtained & Leveraged

Evidence of Ability to:
Attract investment and support (crosswalk with partnership capacities)

Proposed Qualitative Indicators: Well-Functioning

Having a general knowledge of available funding (e.g., periodically updated spreadsheet), ensuring consistent revenue streams, and developing a long-term plan to diversify funding sources.

Assessing complexity of current projects and staffing capacity to better define a feasible project workload and avoid overcommitting. Then with this knowledge, consistently obtaining restoration and conservation grants and implementing project work in a timely fashion to build trust with partners, which can lead to more complex, riskier projects with more funding.

Budgeting for more project management time in grant applications to build additional operational capacity for projects, as well as, considering future costs and expenses (e.g., staff wages and materials).

Capacity Dimension:
Adaptive & Resilient Governance

Evidence of Ability to:
Respond to challenges, changing needs and opportunities

Proposed Qualitative Indicators: Well-Functioning

Being networked in the community through participation in local boards and committees to create a pool of potential board members for future vacancies, as well as future staff positions.

Developing a lead staff succession plan (e.g., identifying potential staff who can be trained in lead staff roles and responsibilities).

Developing an engaged board through targeted recruitment and board education training to shift from a stakeholder board to governing board.

Creating an online shared drive of important organizational and project documents to smooth lead staff transitions.

Partnership Capacity

Capacity Dimension:
Types of Partners Engaged

Evidence of Ability to:
Work with all necessary types of partners relevant to watershed restoration / conservation in a given geography

Proposed Qualitative Indicators: Well-Functioning

Building and maintaining strong relationships with funders, decision-makers, and project partners.

Increasing communication, cooperation, and collaboration with funders, decision-makers, and project partners.

Participating in local committees and boards, attending events to build an organizational reputation, and meeting with landowners to discover joint priorities to acquire funds and develop projects.

Identifying key partners who have access to the information the organization needs and developing a network of relationships to obtain multiple perspectives on how to develop and implement projects.

Diversifying and expanding types of restoration and conservation activities based on landscape needs (e.g., stream restoration, uplands, etc.) over time to engage additional partners.

Engaging key decision-makers in strategic planning processes to develop watershed priorities.

Continuing partnerships during times of turnover at partnering agencies and other local partners, e.g., introducing them to project work and grants.

Facilitating and coordinating public messaging with partners (e.g., strengthening the feedback loop between resource managers and community members).

Capacity Dimension:

Partnership Types Engaged In

Evidence of Ability to:

Use partnership types suited to issues and needs at hand

Proposed Qualitative Indicators: Well-Functioning

Diversifying and expanding types of restoration and conservation activities to increase project complexity through group partnership networks, e.g., tying smaller projects into larger, landscape-scale restoration and conservation projects. Increasing communication, cooperation, and collaboration with funders, decision-makers, and project partners.

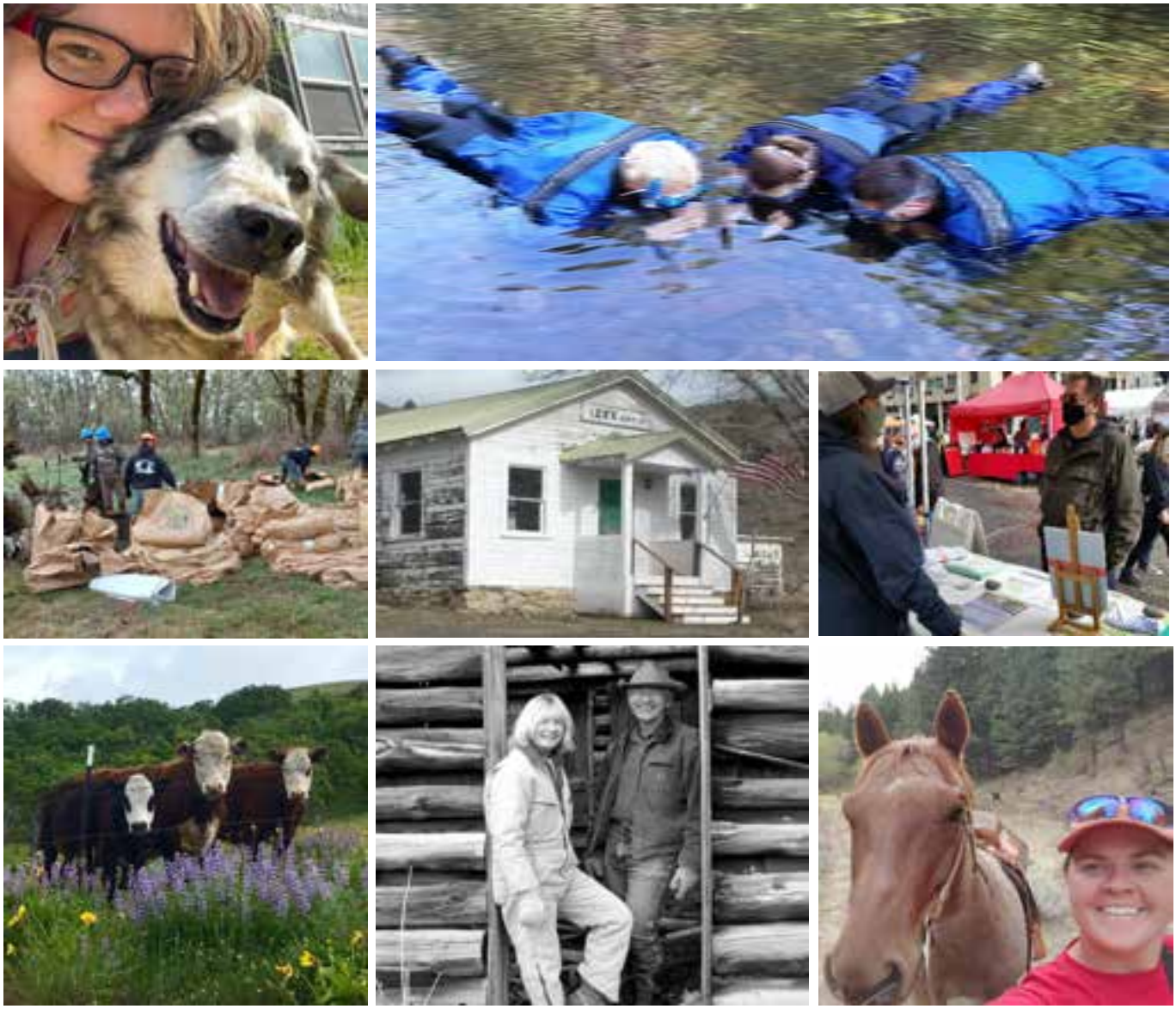
Participating in regional coordination and information-sharing groups to be connected to regional priorities, funding, and partnership opportunities, and to learn from each other's skills and experiences. Identifying key partners who have access to the information the organization needs and developing a network of relationships to obtain multiple perspectives on how to develop and implement projects.

Building on existing relationships to work towards developing collaborative governing strategies for OWEB FIPs, P-TA, NRCS RCPP, or other cross-jurisdictional partnerships to engage in landscape-scale restoration. Engaging key decision-makers in strategic planning processes to develop watershed priorities.

Serving as an information conduit, building professional capacity among partners, and fostering strong working relationships (e.g., supporting workshops and trainings to deliver technical information on topics).

Conclusion

This report reviewed the 20 years of investment that the Oregon Watershed Enhancement Board has made in the operating capacity of watershed councils and soil and water conservation districts. Our evaluation of these grants found that they have been crucial to sustaining operations, building partnerships, and developing the capacity to strategically accomplish watershed restoration and conservation on the ground. We also found that (1) lead staff capacity and retention, (2) board composition and recruitment, and (3) strategic planning were all key influences on the health and effectiveness of these organizations. We hope that our analysis and insights help grantees, agencies, community partners, and others continue to support the important work of councils and districts.



Top left to bottom right: South Fork John Day Watershed Council (SFJDWC) Office Manager Lindsay Bullock, Coast Fork Willamette Watershed Council (CFWWC) snorkeling Mosby Creek, CFWWC R Franco Restoration Crew, SFJDWC Council Meeting Schoolhouse, North Coast Watershed Association (NCWA) Outreach, beef cattle in Malhuer County, SFJDWC Phil and Kristy St. Clair (Vice Chair), SFJDWC Amy Stiner (Executive Director). *Credits: districts, councils, organizations listed.*

APPENDICES

for A 20-Year Review of the Oregon Watershed Enhancement Board's Capacity Investments

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Appendix 1. History of OWEB Funding Strategies.[1]

Funding Strategy	Biennium	Description
Blanket Funding	1997 - 2003	**Evaluation Criteria** Evaluated based on the scope of work and description of accomplishments. There was no consideration of biological or geographic values or priorities. **Funding Distribution** Equally distributed across OWEB regions. **For the 2001 - 2003 grant cycle, two regions had an increase in the number and amount of requests. New applicants in these regions were awarded half-time support.*
Categorical Funding	2003 - 2005	**Funding Distribution** Distributed grants based on funding categories. Each category had a pre-designated range of funds.
Decision Matrix with Ranked Scoring	2005 - 2007	**Eligibility Criteria** Council serves a unique geographic area (i.e., not within the bounds of another council OWEB grantee), the council reflects the balance of interests or actively seeking this, and the council has been designated by a local government. **Merit Evaluation Criteria** Elements included: (1) Council Organization, (2) Past Performance - Capital Projects, (3) Past Performance - Non-Capital Projects, and (4) Proposed Work Plan/Watershed Complexity. Reviewers looked for a balance between the two Past Performance elements. **Review Process & Ranking System** Review teams consisted of local and state perspectives. The review process consisted of reviewer evaluations, applicant interviews, and staff/reviewer discussions, followed by a review team assigning scores using a decision matrix to rank applicants. Applicants were ranked from significantly ineffective with limited accomplishments to highly effective with strong accomplishments. **Funding Distribution** OWEB provided funding based on a graduated point scale, using a standard formula, rather than a standard amount by category or a percentage of the funding requested by the applicant. Through this formula, the highest-scoring council received the highest base funding. **Start of Umbrella Councils** Some councils, i.e., "umbrella councils" received additional funding on top of the base award from 2005 - 2017.

[1] Sources include: OWEB Board Meeting Notes from 2005 - present and OWEB 2021 - 2023 Operating Capacity Grant Guidance.

		Umbrella councils were based on (1) "support and coordination of at least 3 groups, having a coordinating council, sharing staff and a single Council Support grant", (2) "providing services to a watershed area containing three or more 4th-field hydrologic units" or (3) both.
Modified Decision Matrix with Ranked Scoring	2007 - 2015	**Eligibility Criteria** Remains the same. **Merit Evaluation Criteria** Two categories (1) Council Organizational Structure and (2) Council Effectiveness. ● *Council Organizational Structure criteria included:* Organization Make-up and Citizen Involvement, Organization Improvement Efforts, Management of the Organization, and Fiscal Management. ● *Council Effectiveness criteria included:* Leadership Role in Watershed Activities, Planning Strategically, Working Collaboratively, and Accomplishments. Applications also included a "special circumstances" section to provide context for reviewers to keep in mind while looking at the accomplishments of each council. Councils could describe staffing situations and demographic and social issues that affected their work. **Review Process & Ranking System** Reviewers consisted of two teams with a representative from each OWEB region and two statewide representatives. After reviewers pre-scored the applications, they met for a facilitated "consensus scoring session". Following this, OWEB staff applied weighted factors that resulted in one merit score for each application. Council effectiveness and accomplishment criteria were weighted more heavily than council organizational structure criteria. Applications ranked by: Excellent, Very Good, Good, Satisfactory, and Needs Improvement. **Funding Distribution** Funding distribution remained the same, i.e., the highest-scoring council received the highest base funding. **For the 2013 - 2015 biennium, councils received the same level of funding as the 2011-2013 biennium based on that biennium's review and merit category placement. The purpose of this was to support OWEB staff who were in the process of developing new Council Capacity grant rules for the 2015-2017 biennium.* **Umbrella Council Awards Continue** Umbrella Council awards continue until 2017.
Eligibility Criteria Focused	2015 - Present	Due to resource-intensive staff time and council time of the previous method, OWEB adopted new Council Capacity grant rules. **Eligibility Criteria**[2] Includes: (1) designated as a watershed council by a local government, (2) previously received a Council Capacity grant, and serves an area that covers the same or larger area served by a council or group of councils as of 2013 with only one

[2] https://secure.sos.state.or.us/oard/viewSingleRule.action%3BJSESSIONID_OARD=_VLon9LnJiAMJjJkYNJha26rZ1ggeHDYseAQO-PWCFwak9LE4AU_!-2132861245?ruleVrsnRsn=180686

		applicant per geographic area and includes a minimum population size of 500 within its designated boundaries, (3) has an adopted action plan by a council-governing body that meets OWEB requirements, (4) is a 501(c)(3) registered with Oregon, or written fiscal sponsorship agreement with a 501(c)(3), SWCD, city, county, or tribal government, (5) Council's governing body has adopted bylaws or a charter that includes: (a) a declaration that the council's mission aligns with OWEB's purpose as described in the Oregon Constitution and statutes. At a minimum, the bylaws or charter shall indicate that a primary purpose of the council is to work collaboratively with communities and landowners to develop and carry out voluntary watershed protection, restoration, enhancement, and community engagement activities; (b) the eligibility, selection process, length of service, and powers for governing body and officers; officer titles, governing body's decision-making process, minimum number or frequency of governing body meetings; (c) a statement that the council intends its governing body to include a diverse range of geographic areas and community interests in the watershed in order to engage a balance of interested and affected persons within the watershed as required by ORS 541.910(2); and (d) a process for amending bylaws or charter. If the council is a membership organization, its bylaws or charter must also include: membership eligibility, when membership meetings will occur, the decision-making role of the membership, a process to remove members or terminate members' voting rights; and (6) the Council's governing body has adopted policies/procedures that include: (a) list of geographic areas and community interests the council intends to include on its governing body in order to engage a balance of interested and affected persons within the watershed pursuant to ORS 541.910(2); (b) policy that the council operates as an open and inclusive organization, including inviting the public to council meetings, and, upon request, providing the public with records of its meetings and decisions; (c) policy that the council, or its fiscal sponsor, uses Generally Accepted Accounting Principles; and (d) policy that the council does not rely on litigation to compel regulatory enforcement as a means to implement its mission. **Merit Evaluation Criteria** Criteria include: (1) Effective Governance and Management, (2) Progress in Planning, (3) Progress in On-the-Ground Watershed Restoration, and (4) Progress in Stakeholder Engagement for Watershed Restoration Purposes. **Review Process** OWEB staff evaluate Council Capacity grant applications based on the merit criteria described above as well as their institutional knowledge of the council, including the council's project performance history. Councils are not ranked, but rather each application is considered on its own basis to determine funding amount. **Funding Distribution** Funding levels include: (1) full funding if the council meets all criteria, (2) reduced funding if the council meets some criteria, and (3) do not fund if the council's performance is inadequate. **Additionally, if two or more councils have merged, they are eligible for additional funding on top of the base capacity grant award. These grant funds are used to help organizations merge together to address board and staff development, strategic planning, and other costs to support the transition from multiple organizations to a single entity. This amount varies depending on whether 2, 3, or 4 or more organizations are merging.* **Umbrella Council Awards Continue** Umbrella Council awards continue until 2017.

Appendix 2. Service Providers and Supportive Organizations.

Organization	Description
OWEB Regional Program Representatives	● Represents OWEB's programs with councils and other local conservation partners. ● Reviews, administers, and oversees the implementation of grants. ● Promotes cooperation, participation, and funding from federal, state, and local public agencies; citizens; and interest groups to assess watershed conditions, develop priority actions, and implement projects to enhance watershed conditions (e.g., attend council board meetings to support councils experiencing management challenges and sharing grant opportunities). ● Coordinates technical assistance with local partners, including councils, districts, landowners, and other stakeholders.
OWEB Capacity Coordinator[3]	● Works with the Director to improve coordination and joint investment opportunities with external funders, including other state agencies, federal agencies, private foundations, and other funders of similar conservation work. Identifies opportunities for leveraged investment; develops materials to help other funders understand OWEB's role and the types of investments the agency makes. ● Holds regular planning and coordination meetings with statewide organizations representing local organizations including, but not limited to the OACD, NOWC, OCEAN, and Coalition of Oregon Land Trusts. Works collaboratively to identify local partner problems and solutions. ● Works collaboratively with OWEB Regional Program Representatives and Grant Payment Specialist to manage, coordinate, and troubleshoot funding request process of Council Capacity grants. ● Leads coordination for Oregon Department of Agriculture to implement District Capacity program. ● Coordinates program development, assessment, and implementation with program managers, regional field staff and other agency staff. ● Develops and leads effective review teams to evaluate and makes funding recommendations for Operating Capacity grants. ● Regularly communicates with applicants and trains on the application process and materials as needed. ● Makes recommendations for other grant types that may be effective to improve local capacity.
ODA Regional Water Quality Specialists	● Provide districts with technical assistance in implementing the agricultural water quality management program. This is achieved through districts' scope of work (SOW) by "ensuring that farmers and ranchers help achieve water quality

[3] Note: OWEB no longer has this position. This work has been incorporated into OWEB's Monitoring and Reporting Program Manager role.

	standards and meet the agricultural pollutant load allocations assigned by the Department of Environmental Quality (DEQ) in its Total Maximum Daily Loads (TMDLs)."[4] ● Reviews and approves districts' SOW reporting and operational funds prior to districts' receipt of payments. ● Attends district board meetings and works with funding partners to support districts in working with local partners and share grant opportunities. ● Meets monthly with the SWCD Operations Specialist to share concerns about lower-functioning districts and will sometimes ask peers of higher-functioning organizations to work with lower-functioning ones. Time spent on this can be included in a district's capacity grant.
SWCD Operations Specialist	● Provides biennial regional board member trainings focused on newly elected or appointed board members on legal obligations of elected officials. ● Provides biennial regional district manager round-table trainings on a variety of topics (e.g., personnel management, ethics, public meeting laws). ● Offers individual onboarding training for new employees and board directors. ● Provides on-demand operational technical support (personnel management, legal obligations, ethics, public meeting law, etc.). ● Writes and updates a "District Guidebook" outlining legal and best management practices for operating a conservation district.
Network of Oregon Watershed Councils (NOWC)	● Nonprofit organization funded primarily by OWEB and membership fees, that engages in advocacy work at the state level, while also offering professional development and networking opportunities. ● NOWC Insider Webinar Series regularly features content experts who offer technical training and resources on a range of topics, including best practices for nonprofit management. ● Template Library of funding resources, sample templates, handbooks, and guides. ● Watershed Council FAQs covering meetings, contracts and bids, financials, hiring and onboarding, and community action. ● 2022 Funding Opportunities spreadsheet summarizing emerging (or enhanced) state and federal funding programs.
Oregon Conservation Education and Assistance Network (OCEAN) Connect + Conference	● Hosts the annual CONNECT conference for councils and districts with opportunities for peer learning and networking. ● Offers training and certification for districts on education and outreach training through universities, professional networks, and NOAA; as well as technical training, e.g., NRCS, GIS, and river restoration; and DEI trainings and toolkits.
Oregon Association of Conservation Districts (OACD)	● Nonprofit association of districts that partners and converses with state agencies, legislators, and statewide conservation organizations. ● Hosts the annual OACD conference which covers topics, e.g., funding opportunities, updates from partners, water quality programs, and conservation practices.

[4] https://www.oregon.gov/oda/programs/naturalresources/agwq/pages/agwqplans.aspx

Oregon Conservation Partnership (OrCP)	● Hosts affinity groups to increase collaboration to improve conservation across councils, districts, and land trusts. Groups focus on: estuaries and tide gates, journal club for aquatic habitat restoration, pollinators, and protection of working lands and easements. ● Offers monthly webinars covering fiscal management, restoration and conservation topics, outreach, partnerships, contracting, OWEB grants, and more.

Appendix 3. Survey

A. Methods

Development and Review

A survey was sent out online using Oregon State University's Qualtrics survey platform to all 58 councils and all 42 districts in Oregon that receive or have received Operating Capacity grants. The first set of questions focused on employees and shared staffing arrangements. The purpose of this was to frame the sampling of councils and districts using Dr. Margerum's "Reliance Model of Collaborative Capacity", which was developed through prior surveys of councils. This conceptual model provided a way to identify staffing models, arranging organizations into similar types. We used this to develop representative sampling for case study selection. After a discussion with key ODA staff, it was determined that this was an appropriate way to understand districts as well. Types include: (1) Board-Reliant, (2) Staff-Reliant, and (3) Partner-Reliant (Table 1).

Table 1. *Typology Classifications.*

Board-Reliant	Staff-Reliant	Partner-Reliant
Lower staff levels (< 3.0 FTE).	Higher staff levels (>= 3.0 FTE).	Varied staffing that is shared with another organization (e.g., staff, coordinator).
Staff delivers primary capacity with greater reliance on a working board.	Staff fulfills most management capacity roles.	

The second set of questions focused on the level of agreement or disagreement with statements identifying factors that build or reduce organizational capacity to obtain a consistent source of quantifiable information across council and district grantees since much of the existing data sources were inconsistent. Survey questions were informed by recurring themes from key informant interviews and discussion with the Core Project Committee.

Recruitment Process

We collected emails and phone numbers for the executive director, coordinator, or district manager, for all councils and districts using the organization's websites for councils and the annually updated Oregon SWCD Directory for districts. The survey took place between April - May 2022. The research team contacted potential respondents three times, either via email or phone call, while the Core Project Committee promoted the survey through their networks. To ensure that only qualified individuals completed the survey, we included a screening question to verify respondents were employed by a council or district and able to answer questions about their organization's staffing and capacity.

Data Analysis

Data was downloaded, cleaned, and organized in Microsoft Excel. We did not include responses that were incomplete for applying the capacity typology or for identifying factors that built or reduced organizational capacity. To categorize grantees by the capacity typology, we asked about staffing levels over the past 12 months for the executive director, district manager, or coordinator; permanent staff; contracted staff; and temporary (e.g., seasonal) staff. We then totaled these to determine whether an organization was staff- or board-reliant. There were 3 councils and 6 districts that fell on the dividing line of board-reliant vs. staff-reliant. For those, we looked at the organization's self-description and discussed with the research team what seemed the most

appropriate designation. For partner-reliant, we used the organization's self-description of its relationship with other organizations, and to what extent they shared staff and/or physical location with another organization. Additionally, we asked whether board members served on another related local organization's board and if board members or other community members (e.g., volunteers) took on essential administrative tasks. For the statements focused on organizational capacity factors, we used descriptive statistics to examine the percentage of respondents in each response category by: (1) councils and districts, (2) board, staff, and partner-reliant councils as well as districts, and (3) taxing and non-taxing districts. Additionally, the categories of "strongly agree" and "somewhat agree" were simplified into a single category "agree". This was done for the "strongly disagree" and "somewhat disagree" categories as well. Furthermore, for the capacity typologies, we calculated the average (mean) response for each of these questions to determine if there was a statistical difference between types. For the open-ended questions, we coded them qualitatively for repeated themes to find connections with the statements on organizational capacity factors.

B. Survey Questionnaire

The following questions focus on FTE and staffing arrangements.

1. What has been your organization's staff FTE at its highest level over the past 12 months for the following categories? (FTE = Full Time Equivalent. For example, two half-time positions = 1 FTE).
    a. Total permanent staff FTE (NOT including contract or temporary staff)?
    b. Total contract staff FTE?
    c. Total temporary staff FTE (e.g., seasonal)?
    d. Executive director, district manager, or coordinator FTE (as either employee or contractor)?

2. If your organization shares any staff with another organization(s), what is the shared staff FTE for each of the following categories?
    a. Total permanent staff FTE (NOT including contract or temporary staff)?
    b. Total contract staff FTE?
    c. Total temporary staff FTE (e.g., seasonal)?
    d. Executive director, district manager, or coordinator FTE (as either employee or contractor)?
    e. What is the name of this organization(s)?
    f. Is there anything else you would like to explain about how you share staff and work with this organization(s)?

3. If any of your board members serve on another related local organization's board, which of the following do they serve on?
    a. [x] Soil & Water Conservation District.
    b. [x] Watershed Council.
    c. [x] Another organization that is fiscally, or otherwise important to supporting your operational capacity.
    d. What is the name of this organization(s)?

4. Do any of your board members or other community members (e.g. volunteers) take on these tasks?
    a. [x] Staff administrative tasks.
    b. [x] Grant writing.
    c. [x] Strategic planning.
    d. [x] Other _____(please explain).

The following questions focus on finding out what factors help keep your organization functional and healthy.

1. We're interested in learning about how your organization operates. Please indicate how much you agree with the following statements for your organization. (Strongly Agree = 1, Somewhat Agree = 2, Neither Agree nor Disagree = 3, Somewhat Disagree = 4, Strong Disagree = 5, Unsure = unranked).

Our board members have clear position descriptions describing their roles and responsibilities.
Our board receives training on financial management, facilitation, and personnel management.
Our board takes initiative and actively engages in helping manage our organization.
We have written personnel and operational policies.
We implement our personnel and operational policies.
Our board members have term limits. **Since district board members are elected, we did not ask districts to respond to this.*
We have succession planning for board members in our strategic plans and/or other documents.
We have succession planning for lead staff (district manager, coordinator, and/or executive director) in our strategic plans and/or other documents.
We have mentorship structures in place to introduce new coordinators/directors to the community, agency contacts, and board members to support relationship building.
Our staff has clear position descriptions describing their roles and responsibilities.
We have competitive staff salaries and benefits compared to councils, districts, or similar types of organizations.
Our organization has high retention rates for our lead staff (district manager, coordinator, and/or executive director).
Our staff receive training on key operational capacities (e.g., project management, contracting, and administrative tasks).
Our staff receive training on technical skill-building (e.g., GIS).
We have adequate equipment/ technology for virtual meetings.

2. We're interested in learning about how your organization operates with other councils, districts, or other local partners. Please rate how often your organization works with other organizations based on the following statements. (Most of the time = 1, Some of the time = 2, Seldom = 3, Never = 4, Unsure = unranked).

We are working with councils, districts, and/or other local partners.
We share office space and other administrative costs with councils, districts, or other local partners.
We share staff expertise between councils, districts, or other local partners (e.g., technical, GIS, outreach to landowners, farmers, etc.).

We actively seek out opportunities to leverage OWEB Operating Capacity grants to acquire stakeholder engagement, monitoring, technical assistance, and restoration grants to implement projects on the ground.
We actively seek out opportunities to leverage OWEB Operating Capacity grants to build cooperative partnerships with councils, districts, or other local organizations.
We actively seek out opportunities to leverage OWEB Operating Capacity grants to obtain additional funding for capacity building (e.g., hiring additional staff, providing staff skills training, and improving administrative management).

3. (Optional): Please explain anything important that has helped keep your organization healthy and functional.

4. (Optional): What has been your most significant challenge for sustaining the work of your council/district?

C. Statistical Analysis

Table 2. *Statistical Analysis of Council Survey Results.*

Council Responses	Staff-reliant	Board-reliant	Partner-reliant	All
	N=27	N=17	N=3	
Clear Board Position Descriptions	1.78	2.18	2.67	1.98
Board Training	3.00	3.00	3.67	3.04
Board Initiative*	2.22†	2.06¥	3.33†¥	2.23
Written Policies¥	1.19*	1.47*	1.33	1.30
Implement Policies	1.41	1.65	1.33	1.49
Board Term Limits	2.74	3.06	2.67	2.85
Board Succession Planning	3.30	3.29	3.67	3.32
Lead Staff Succession Planning	3.70	3.41	4.33	3.64
New Lead Staff Mentorship	3.22	3.13	2.33	3.13
Clear Staff Position Descriptions	1.52*†	2.12*¥	1.00†¥	1.70
Competitive salaries	2.44*	3.07*	2.33	2.64
Lead Staff High Retention Rates*	1.93†	2.53¥	1.00†¥	2.09
Training–Operational Capacities	2.22	2.50	3.00	2.37
Training–Technical Skills	2.44	3.06	3.33	2.72
Virtual Meeting Equipment	1.93*	2.69*¥	2.00¥	2.20
Work with Councils, Districts, Others	1.15*	1.41*	1.33	1.26
Share Office Space	3.19†	2.88¥	1.00†¥	2.94
Share Staff Expertise	1.56	1.88	1.33	1.66
Acquire OWEB Grants for Implementation	1.33	1.69¥	1.00¥	1.43
Build Cooperative Partnerships	1.48†	1.69	2.00†	1.59
Additional Funding for Capacity Building	1.67	1.94	1.67	1.76

* statistically significant difference between Staff-reliant and Board-reliant Councils

† statistically significant difference between Staff-reliant and Partner-reliant Councils

¥ statistically significant difference between Board-reliant and Partner-reliant Councils

Table 3. *Statistical Analysis of District Survey Results.*

District Responses	Staff-reliant	Board-reliant	Partner-reliant	All
	N=28	N=5	N=5	N=38
Clear Board Position Descriptions	2.00	2.40	2.20	2.08
Board Training	2.82	2.60	2.60	2.76
Board Initiative	2.21	2.60	2.40	2.29
Written Policies	1.32	1.80	1.40	1.39
Implement Policies	1.29	2.00	1.20	1.37
Board Succession Planning	3.38	3.40	3.40	3.39
Lead Staff Succession Planning	3.00	3.40	3.40	3.11
New Lead Staff Mentorship	3.36	3.20	3.00	3.29
Clear Staff Position Descriptions	1.32	2.40	1.40	1.47
Competitive salaries	1.89*†	4.40*	3.00†	2.37
Lead Staff High Retention Rates	2.04	1.80	1.80	1.97
Training–Operational Capacities	1.93	2.40	2.00	2.00
Training–Technical Skills	1.79	2.20	2.20	1.89
Virtual Meeting Equipment	2.04	2.60	2.00	2.11
Work with Councils, Districts, Others	1.04	1.40	1.20	1.11
Share Office Space	1.79*	2.80*	1.60	1.89
Share Staff Expertise	1.25*	1.80*	1.80	1.39
Acquire OWEB Grants for Implementation	1.19	1.60	1.20	1.24
Build Cooperative Partnerships	1.54	1.80	1.40	1.55
Additional Funding for Capacity Building	1.54	1.80	2.00	1.63

* statistically significant difference between Staff-reliant and Board-reliant Districts

† statistically significant difference between Staff-reliant and Partner-reliant Districts

D. Council Databases

Table 4. *Capacity Building Factors by Councils.*

		Strongly Agree	Somewhat Agree	Neither Agree nor Disagree	Somewhat Disagree	Strongly Disagree	Unsure
Clear Board Position Descriptions	Percent	40%	38%	9%	9%	4%	0%
	Number	19	18	4	4	2	0
Board Training	Percent	9%	36%	13%	28%	15%	0%
	Number	4	17	6	13	7	0
Board Initiative	Percent	26%	45%	13%	15%	2%	0%
	Number	12	21	6	7	1	0
Written Policies	Percent	72%	26%	2%	0%	0%	0%
	Number	34	12	1	0	0	0
Implemented Policies	Percent	70%	19%	4%	4%	2%	0%
	Number	33	9	2	2	1	0
Board Term Limits	Percent	32%	17%	15%	6%	30%	0%
	Number	15	8	7	3	14	0
Board Succession Planning	Percent	11%	19%	21%	26%	23%	0%
	Number	5	9	10	12	11	0
Lead Staff Succession Planning	Percent	11%	6%	26%	23%	34%	0%
	Number	5	3	12	11	16	0
New Lead Staff Mentorship	Percent	11%	21%	32%	13%	21%	2%
	Number	5	10	15	6	10	1
Clear Staff Position Descriptions	Percent	53%	30%	11%	6%	0%	0%
	Number	25	14	5	3	0	0

Competitive Salaries	Percent	21%	26%	21%	21%	6%	4%
	Number	10	12	10	10	3	2
Lead Staff High Retention Rates	Percent	49%	19%	15%	9%	9%	0%
Training – Operational Capacities	Number	10	20	7	7	2	1
Training – Technical Skills	Percent	13%	45%	15%	17%	6%	4%
	Number	6	21	7	8	3	2
Virtual Meeting Equipment	Percent	34%	36%	13%	4%	11%	2%
	Number	16	17	6	2	5	1

Table 5. *Councils: Working with Local Partners and Leveraging Capacity Grants.*

		Most of the time	Some of the time	Seldom	Never	Unsure
Work with Councils, Districts, Other Local Partners	Percent	74%	26%	0%	0%	0%
	Number	35	12	0	0	0
Share Office Space	Percent	21%	11%	21%	47%	0%
	Number	10	5	10	22	0
Share Staff Expertise	Percent	45%	49%	2%	4%	0%
	Number	21	23	1	2	0
Acquire OWEB Grants for Implementation	Percent	68%	23%	0%	6%	2%
	Number	32	11	0	3	1
Build Cooperative Partnerships	Percent	68%	11%	11%	9%	2%
	Number	32	5	5	4	1
Additional Funding for Capacity Building	Percent	43%	43%	6%	6%	2%
	Number	20	20	3	3	1

Table 6. *Capacity Building Factors by Council Typology. (Note: B-R = Board-Reliant, S-R = Staff-Reliant, P-R = Partner-Reliant).*

		Strongly Agree		Somewhat Agree		Neither Agree nor Disagree		Somewhat Disagree		Strongly Disagree		Unsure	
		Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Clear Board Position Descriptions	B-R	7	41%	4	24%	3	18%	2	12%	1	6%	0	0%
	S-R	11	41%	13	48%	1	4%	2	7%	0	0%	0	0%
	P-R	1	33%	1	33%	0	0%	0	0%	1	33%	0	0%
Board Training	B-R	2	12%	5	29%	3	18%	5	29%	2	12%	0	0%
	S-R	2	7%	11	41%	3	11%	7	26%	4	15%	0	0%
	P-R	0	0%	1	33%	0	0%	1	33%	1	33%	0	0%
Board Initiative	B-R	5	29%	8	47%	2	12%	2	12%	0	0%	0	0%
	S-R	7	26%	12	44%	4	15%	3	11%	1	4%	0	0%
	P-R	0	0%	1	33%	0	0%	2	67%	0	0%	0	0%
Written Policies	B-R	10	59%	6	35%	1	6%	0	0%	0	0%	0	0%
	S-R	22	81%	5	19%	0	0%	0	0%	0	0%	0	0%
	P-R	2	67%	1	33%	0	0%	0	0%	0	0%	0	0%
Implemented Policies	B-R	10	59%	4	24%	2	12%	1	6%	0	0%	0	0%
	S-R	21	78%	4	15%	0	0%	1	4%	1	4%	0	0%
	P-R	2	67%	1	33%	0	0%	0	0%	0	0%	0	0%
Board Term Limits	B-R	3	18%	3	18%	5	29%	2	12%	4	24%	0	0%
	S-R	11	41%	4	15%	2	7%	1	4%	9	33%	0	0%
	P-R	1	33%	1	33%	0	0%	0	0%	1	33%	0	0%
	B-R	3	18%	1	6%	6	35%	2	12%	5	29%	0	0%

Board Succession Planning	S-R	2	7%	7	26%	4	15%	9	33%	5	19%	0	0%
	P-R	0	0%	1	33%	0	0%	1	33%	1	33%	0	0%
Lead Staff Succession Planning	B-R	3	18%	0	0%	6	35%	3	18%	5	29%	0	0%
	S-R	2	7%	3	11%	6	22%	6	22%	10	37%	0	0%
	P-R	0	0%	0	0%	0	0%	2	67%	1	33%	0	0%
New Lead Staff Mentorship	B-R	2	12%	2	12%	6	35%	4	24%	2	12%	1	6%
	S-R	1	4%	8	30%	9	33%	2	7%	7	26%	0	0%
	P-R	2	67%	0	0%	0	0%	0	0%	1	33%	0	0%
Clear Staff Position Descriptions	B-R	6	35%	6	35%	2	12%	3	18%	0	0%	0	0%
	S-R	16	59%	8	30%	3	11%	0	0%	0	0%	0	0%
	P-R	3	100%	0	0%	0	0%	0	0%	0	0%	0	0%
Competitive Salaries	B-R	2	12%	4	24%	3	18%	3	18%	3	18%	2	12%
	S-R	7	26%	7	26%	7	26%	6	22%	0	0%	0	0%
	P-R	1	33%	1	33%	0	0%	1	33%	0	0%	0	0%
Lead Staff High Retention Rates	B-R	7	41%	2	12%	3	18%	2	12%	3	18%	0	0%
	S-R	13	48%	7	26%	4	15%	2	7%	1	4%	0	0%
	P-R	3	100%	0	0%	0	0%	0	0%	0	0%	0	0%
Training – Operational Capacities	B-R	4	24%	6	35%	1	6%	4	24%	1	6%	1	6%
	S-R	6	22%	12	44%	6	22%	3	11%	0	0%	0	0%
	P-R	0	0%	2	67%	0	0%	0	0%	1	33%	0	0%
	B-R	3	18%	6	35%	1	6%	3	18%	2	12%	2	12%

Training – Technical Skills	S-R	3	11%	14	52%	5	19%	5	19%	0	0%	0	0%
	P-R	0	0%	1	33%	1	33%	0	0%	1	33%	0	0%
Virtual Meeting Equipment	B-R	4	24%	4	24%	4	24%	1	6%	3	18%	1	6%
	S-R	12	44%	10	37%	2	7%	1	4%	2	7%	0	0%
	P-R	0	0%	3	100%	0	0%	0	0%	0	0%	0	0%

Table 7. *Council Typology: Working with Local Partners and Leveraging Operating Capacity Grants.(Note: B-R = Board-Reliant, S-R = Staff-Reliant, P-R = Partner-Reliant).*

		Most of the time		Some of the time		Seldom		Never		Unsure	
		Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Work with Councils, Districts, Other Local Partners	B-R	10	59%	7	41%	0	0%	0	0%	0	0%
	S-R	23	85%	4	15%	0	0%	0	0%	0	0%
	P-R	2	67%	1	33%	0	0%	0	0%	0	0%
Share Office Space	B-R	2	12%	5	29%	3	18%	7	41%	0	0%
	S-R	5	19%	0	0%	7	26%	15	56%	0	0%
	P-R	3	100%	0	0%	0	0%	0	0%	0	0%
Share Staff Expertise	B-R	5	29%	10	59%	1	6%	1	6%	0	0%
	S-R	14	52%	12	44%	0	0%	1	4%	0	0%
	P-R	2	67%	1	33%	0	0%	0	0%	0	0%
Acquire OWEB Grants for Implementation	B-R	11	65%	2	12%	0	0%	3	18%	1	6%
	S-R	18	67%	9	33%	0	0%	0	0%	0	0%
	P-R	3	100%	0	0%	0	0%	0	0%	0	0%
Build Cooperative	B-R	12	71%	0	0%	1	6%	3	18%	1	6%

Partnerships	S-R	19	70%	4	15%	3	11%	1	4%	0	0%
	P-R	1	33%	1	33%	1	33%	0	0%	0	0%
Additional Funding for Capacity Building	B-R	7	41%	5	29%	2	12%	2	12%	1	6%
	S-R	12	44%	13	48%	1	4%	1	4%	0	0%
	P-R	1	33%	2	67%	0	0%	0	0%	0	0%

E. District Databases

Table 8. *Capacity Building Factors by Districts.*

		Strongly Agree	Somewhat Agree	Neither Agree nor Disagree	Somewhat Disagree	Strongly Disagree	Unsure
Clear Board Position Descriptions	Percent	42%	34%	5%	11%	8%	0%
	Number	16	13	2	4	3	0
Board Training	Percent	11%	39%	21%	21%	8%	0%
	Number	4	15	8	8	3	0
Board Initiative	Percent	34%	32%	5%	29%	0%	0%
	Number	13	12	2	11	0	0
Written Policies	Percent	71%	24%	3%	0%	3%	0%
	Number	27	9	1	0	1	0
Implemented Policies	Percent	71%	26%	0%	0%	3%	0%
	Number	27	10	0	0	1	0
Board Succession Planning	Percent	11%	13%	24%	24%	24%	5%
	Number	4	5	9	9	9	2
Lead Staff Succession Planning	Percent	13%	24%	16%	24%	18%	5%

	Number	5	9	6	9	7	2
New Lead Staff Mentorship	Percent	11%	26%	16%	18%	29%	0%
	Number	4	10	6	7	11	0
Clear Staff Position Descriptions	Percent	68%	21%	8%	0%	3%	0%
	Number	26	8	3	0	1	0
Competitive Salaries	Percent	39%	24%	13%	8%	16%	0%
	Number	15	9	5	3	6	0
Lead Staff High Retention Rates	Percent	55%	21%	3%	13%	8%	0%
	Number	21	8	1	5	3	0
Training – Operational Capacities	Percent	47%	24%	16%	8%	5%	0%
	Number	18	9	6	3	2	0
Training – Technical Skills	Percent	47%	34%	8%	3%	8%	0%
	Number	18	13	3	1	3	0
Virtual Meeting Equipment	Percent	45%	29%	8%	8%	11%	0%
	Number	17	11	3	3	4	0

Table 9. *Districts: Working with Local Partners and Leveraging Operating Capacity Grants.*

		Most of the time	Some of the time	Seldom	Never	Unsure
Work with Councils, Districts, Other Local Partners	Percent	92%	5%	3%	0%	0%
	Number	35	2	1	0	0
Share Office Space	Percent	58%	16%	5%	21%	0%
	Number	22	6	2	8	0
Share Staff Expertise	Percent	74%	16%	8%	3%	0%

	Number	28	6	3	1	0
Acquire OWEB Grants for Implementation	Percent	82%	11%	3%	3%	3%
	Number	31	4	1	1	1
Build Cooperative Partnerships	Percent	63%	24%	8%	5%	0%
	Number	24	9	3	2	0
Additional Funding for Capacity Building	Percent	63%	18%	11%	8%	0%
	Number	24	7	4	3	0

Table 10. *Capacity Building Factors by District Typology. (Note: B-R = Board-Reliant, S-R = Staff-Reliant, P-R = Partner-Reliant).*

		Strongly Agree		Somewhat Agree		Neither Agree nor Disagree		Somewhat Disagree		Strongly Disagree		Unsure	
		Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Clear Board Position Descriptions	B-R	0	0%	4	80%	0	0%	1	20%	0	0%	0	0%
	S-R	13	46%	9	32%	1	4%	3	11%	2	7%	0	0%
	P-R	3	60%	0	0%	1	20%	0	0%	1	20%	0	0%
Board Training	B-R	0	0%	3	60%	1	20%	1	20%	0	0%	0	0%
	S-R	3	11%	10	36%	7	25%	5	18%	3	11%	0	0%
	P-R	1	20%	2	40%	0	0%	2	40%	0	0%	0	0%
Board Initiative	B-R	1	20%	1	20%	2	40%	1	20%	0	0%	0	0%
	S-R	10	36%	10	36%	0	0%	8	29%	0	0%	0	0%
	P-R	2	40%	1	20%	0	0%	2	40%	0	0%	0	0%
Written Policies	B-R	2	40%	2	40%	1	20%	0	0%	0	0%	0	0%
	S-R	22	79%	5	18%	0	0%	0	0%	1	4%	0	0%
	P-R	3	60%	2	40%	0	0%	0	0%	0	0%	0	0%

Implemented Policies	B-R	3	60%	1	20%	0	0%	0	0%	1	20%	0	0%
	S-R	20	71%	8	29%	0	0%	0	0%	0	0%	0	0%
	P-R	4	80%	1	20%	0	0%	0	0%	0	0%	0	0%
Board Succession Planning	B-R	0	0%	1	20%	2	40%	1	20%	1	20%	0	0%
	S-R	3	11%	3	11%	7	25%	7	25%	6	21%	2	7%
	P-R	1	20%	1	20%	0	0%	1	20%	2	40%	0	0%
Lead Staff Succession Planning	B-R	0	0%	2	40%	1	20%	0	0%	2	40%	0	0%
	S-R	4	14%	6	21%	5	18%	8	29%	3	11%	2	7%
	P-R	1	20%	1	20%	0	0%	1	20%	2	40%	0	0%
New Lead Staff Mentorship	B-R	1	20%	1	20%	1	20%	0	0%	2	40%	0	0%
	S-R	1	4%	9	32%	5	18%	5	18%	8	29%	0	0%
	P-R	2	40%	0	0%	0	0%	2	40%	1	20%	0	0%
Clear Staff Position Descriptions	B-R	2	40%	1	20%	1	20%	0	0%	1	20%	0	0%
	S-R	21	75%	5	18%	2	7%	0	0%	0	0%	0	0%
	P-R	3	60%	2	40%	0	0%	0	0%	0	0%	0	0%
Competitive Salaries	B-R	0	0%	1	20%	0	0%	0	0%	4	80%	0	0%
	S-R	15	54%	6	21%	3	11%	3	11%	1	4%	0	0%
	P-R	0	0%	2	40%	2	40%	0	0%	1	20%	0	0%
Lead Staff High Retention Rates	B-R	4	80%	0	0%	0	0%	0	0%	1	20%	0	0%
	S-R	14	50%	7	25%	1	4%	4	14%	2	7%	0	0%
	P-R	3	60%	1	20%	0	0%	1	20%	0	0%	0	0%
	B-R	2	40%	1	20%	1	20%	0	0%	1	20%	0	0%

Training – Operational Capacities	S-R	15	54%	5	18%	4	14%	3	11%	1	4%	0	0%
	P-R	1	20%	3	60%	1	20%	0	0%	0	0%	0	0%
Training – Technical Skills	B-R	2	40%	2	40%	0	0%	0	0%	1	20%	0	0%
	S-R	15	54%	9	32%	1	4%	1	4%	2	7%	0	0%
	P-R	1	20%	2	40%	2	40%	0	0%	0	0%	0	0%
Virtual Meeting Equipment	B-R	3	60%	0	0%	0	0%	0	0%	2	40%	0	0%
	S-R	11	39%	11	39%	2	7%	2	7%	2	7%	0	0%
	P-R	3	60%	0	0%	1	20%	1	20%	0	0%	0	0%

Table 11. *District Typology: Working with Local Partners and Leveraging Operating Capacity Grants. (Note: B-R = Board-Reliant, S-R = Staff-Reliant, P-R = Partner-Reliant).*

		Most of the time		Some of the time		Seldom		Never		Unsure	
		Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Work with Councils, Districts, Other Local Partners	B-R	4	80%	0	0%	1	20%	0	0%	0	0%
	S-R	27	96%	1	4%	0	0%	0	0%	0	0%
	P-R	4	80%	1	20%	0	0%	0	0%	0	0%
Share Office Space	B-R	1	20%	1	20%	1	20%	2	40%	0	0%
	S-R	18	64%	4	14%	0	0%	6	21%	0	0%
	P-R	3	60%	1	20%	1	20%	0	0%	0	0%
Share Staff Expertise	B-R	2	40%	2	40%	1	20%	0	0%	0	0%
	S-R	23	82%	3	11%	2	7%	0	0%	0	0%
	P-R	3	60%	1	20%	0	0%	1	20%	0	0%
Acquire OWEB Grants for	B-R	4	80%	0	0%	0	0%	1	20%	0	0%
	S-R	23	82%	3	11%	1	4%	0	0%	1	4%

Implementation	P-R	4	80%	1	20%	0	0%	0	0%	0	0%
Build Cooperative Partnerships	B-R	3	60%	1	20%	0	0%	1	20%	0	0%
	S-R	17	61%	8	29%	2	7%	1	4%	0	0%
	P-R	4	80%	0	0%	1	20%	0	0%	0	0%
Additional Funding for Capacity Building	B-R	3	60%	1	20%	0	0%	1	20%	0	0%
	S-R	18	64%	6	21%	3	11%	1	4%	0	0%
	P-R	3	60%	0	0%	1	20%	1	20%	0	0%

Table 12. *Capacity Building Factors by Taxing vs. Non-Taxing Districts.*

		Strongly Agree		Somewhat Agree		Neither Agree nor Disagree		Somewhat Disagree		Strongly Disagree		Unsure	
		Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Clear Board Position Descriptions	Taxing	4	40%	2	20%	1	10%	2	20%	1	10%	0	0%
	Non-Taxing	9	50%	7	39%	0	0%	1	6%	1	6%	0	0%
Board Training	Taxing	1	10%	3	30%	3	30%	1	10%	2	20%	0	0%
	Non-Taxing	2	11%	7	39%	4	22%	4	22%	1	6%	0	0%
Board Initiative	Taxing	2	20%	5	50%	0	0%	3	30%	0	0%	0	0%
	Non-Taxing	8	44%	5	28%	0	0%	5	28%	0	0%	0	0%
Written Policies	Taxing	8	80%	2	20%	0	0%	0	0%	0	0%	0	0%
	Non-Taxing	14	78%	3	17%	0	0%	0	0%	1	6%	0	0%
Implemented Policies	Taxing	7	70%	3	30%	0	0%	0	0%	0	0%	0	0%
	Non-Taxing	13	72%	5	28%	0	0%	0	0%	0	0%	0	0%
	Taxing	1	10%	1	10%	2	20%	2	20%	3	30%	1	10%

Board Succession Planning	Non-Taxing	2	11%	2	11%	5	28%	5	28%	3	17%	1	6%
Lead Staff Succession Planning	Taxing	2	20%	3	30%	1	10%	1	10%	2	20%	1	10%
	Non-Taxing	2	11%	3	17%	4	22%	7	39%	1	6%	1	6%
New Lead Staff Mentorship	Taxing	1	10%	0	0%	2	20%	3	30%	4	40%	0	0%
	Non-Taxing	0	0%	9	50%	3	17%	2	11%	4	22%	0	0%
Clear Staff Position Descriptions	Taxing	8	80%	1	10%	1	10%	0	0%	0	0%	0	0%
	Non-Taxing	13	72%	4	22%	1	6%	0	0%	0	0%	0	0%
Competitive Salaries	Taxing	7	70%	2	20%	1	10%	0	0%	0	0%	0	0%
	Non-Taxing	8	44%	4	22%	2	11%	3	17%	1	6%	0	0%
Lead Staff High Retention Rates	Taxing	6	60%	1	10%	0	0%	3	30%	0	0%	0	0%
	Non-Taxing	8	44%	6	33%	1	6%	1	6%	2	11%	0	0%
Training–Operational Capacities	Taxing	7	70%	1	10%	0	0%	1	10%	1	10%	0	0%
	Non-Taxing	8	44%	4	22%	4	22%	2	11%	0	0%	0	0%
Training–Technical Skills	Taxing	6	60%	3	30%	0	0%	0	0%	1	10%	0	0%
	Non-Taxing	9	50%	6	33%	1	6%	1	6%	1	6%	0	0%
Virtual Meeting Equipment	Taxing	7	70%	2	20%	1	10%	0	0%	0	0%	0	0%
	Non-Taxing	4	22%	9	50%	1	6%	2	11%	2	11%	0	0%

Table 13. *Taxing vs. Non-Taxing Districts: Working with Local Partners and Leveraging Operating Capacity Grants.*

		Most of the time		Some of the time		Seldom		Never		Unsure	
		Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Work with Councils, Districts, Other Local	Taxing	10	100%	0	0%	0	0%	0	0%	0	0%
	Non-Taxing	17	94%	1	6%	0	0%	0	0%	0	0%

Partners											
Share Office Space	Taxing	7	70%	1	10%	0	0%	2	20%	0	0%
	Non-Taxing	11	61%	3	17%	0	0%	4	22%	0	0%
Share Staff Expertise	Taxing	8	80%	2	20%	0	0%	0	0%	0	0%
	Non-Taxing	15	83%	1	6%	2	11%	0	0%	0	0%
Acquire OWEB Grants for Implementation	Taxing	8	80%	2	20%	0	0%	0	0%	0	0%
	Non-Taxing	15	83%	1	6%	1	6%	0	0%	1	6%
Build Cooperative Partnerships	Taxing	5	50%	4	40%	1	10%	0	0%	0	0%
	Non-Taxing	12	67%	4	22%	1	6%	1	6%	0	0%
Additional Funding for Capacity Building	Taxing	6	60%	2	20%	2	20%	0	0%	0	0%
	Non-Taxing	12	67%	4	22%	1	6%	1	6%	0	0%

Appendix 4. Case Studies

A. Methods

Case Study Selection

For the organizations that responded to the survey, we crosswalked the capacity typology with Oregon Watershed Restoration Inventory (OWRI)[5] and OWEB Grant Management System (OGMS)[6] data, from 1997 to 2019, to identify grantees with lower, low to medium, medium to high, and higher levels of obtaining and leveraging resources. To define these, we added up the total cash spent and in-kind contributions for each organization and then used quartile statistical breakpoints. We compared councils to councils and districts to districts, since each differed in their organizational structure, and as such, were distinct units of measure. We also accounted for organizations' name changes to ensure we included their entire history of funding obtained. We also noted which districts received local taxes. The only districts with a tax base fell under the staff-reliant typology, which validated the data based on the working assumption that once a district obtained a tax base, they were able to operate at a higher level because of increased staffing.

Initial Document Analysis

We sampled 20 organizations, (i.e., 10 councils and 10 districts; see Table 14), using selection criteria in the following order: representative across typologies, a representative proportion of resources obtained and leveraged, and representative across urban and rural. Lastly, we consulted with the Core Project Committee to identify which of these organizations would be more likely and able to participate. For each of the selected 20 organizations, we reviewed available data from OGMS grant documents[7] and OWRI data from 1997 to 2019, as well as SOW and FAAP from 2015 to 2019, OWEB FIPs and P-TA, and other organizational documents accessible on council and district websites to create in-depth organizational profiles. These profiles summarized the history and trajectory of each organization relative to the following capacity dimensions:

- Internal governance and operational practices (e.g., organizational documents, changes in staffing and board over time, changes in organizational structure and processes)
- Adaptive governance (e.g., mention of succession planning in organizational documents)
- Resources obtained and leveraged (e.g., funding sources used most frequently, acquisition of regionally competitive funds)
- Types of partners engaged (e.g., landowners, public agencies, private, nonprofit, and research entities worked with most frequently)
- Partnership types engaged in (e.g., involvement in OWEB FIPs and P-TA, NRCS RCPP, and cross-boundary partnerships)

[5] OWRI included projects voluntarily reported that may or may not have received OWEB restoration grants. However, the purpose of this data source was to determine how many resources grantees obtained overall. Furthermore, despite the voluntary nature of reporting, this data source contained a fairly comprehensive listing of councils and districts self-reporting from 1997 to 2019.

[6] OGMS data included OWEB grants for technical assistance, monitoring, education, outreach, and stakeholder engagement from 1997 to 2019. Since the initiation of OWEB's restoration grants, grantees have been required to report receipt of these to OWRI. Therefore, we did not include restoration grants to avoid duplication.

[7] OGMS grant documents included council support, restoration, technical assistance, monitoring, education, outreach, and stakeholder engagement from 1997 to 2019. For districts that served as fiscal sponsors to a council, we also looked at council support grant documents for councils to better understand how they work together.

Table 14. *Grantees Selected for Initial Document Analysis.*

Councils	Districts
Coast Fork Willamette WC	Clackamas SWCD
Malheur WC	Clatsop SWCD
Nestucca - Neskowin WC	Crook SWCD
North Coast WA	Curry SWCD
Powder Basin WC	Douglas SWCD
Rogue River WC	Grant SWCD
South Fork John Day WC	Marion SWCD
Tualatin River WC	Siuslaw SWCD
Upper Deschutes WC	Wallowa SWCD
Walla Walla WC	Wheeler SWCD

In-depth Interviews

To select case study organizations for in-depth interviews, we developed a spreadsheet of the sampled 20 organizations, noting highlights from each capacity dimension to identify organizations that seemed likely to offer insights into these topics based on their specific experiences. Additionally, we ensured that the organizations we selected were roughly representative of a diversity of types and locations as per our selection criteria for the initial document analysis. Lastly, we considered which councils and districts were involved in the FIP Partnership Learning Project to not over-burden potential participants in a simultaneous research study. We selected 7 organizations for case study interviews in consultation with the Core Project Committee (Table 15). Interview questions were informed by the in-depth organizational profiles and discussion with the Core Project Committee. Prior to conducting interviews, we shared the organizational profile we developed with lead staff (e.g., coordinator, executive director, or district manager) for validation. Interviews were semi-structured and questions were slightly adjusted in the course of the interview based on what organization they worked for, as well as based on the expertise and role of the interviewee. Interviewees included: current and past lead staff (i.e., executive directors, coordinators, district managers), 1 to 2 other staff (e.g. project managers, administrative assistants), 1 to 2 board members (e.g., board chair/president or vice chair/vice president), and 2 to 3 top partnering organizations.[8]

[8] It was difficult to contact previous staff or board members for interviews since they were less available to participate, while some organizations were not sure of who past staff were. Interestingly, some organizations have relied on past staff during times of staffing transitions, which increased the likelihood of their participation. Additionally, when it was not possible to obtain partner contacts of a council or districts' top partnering organization because they were going through their own lead staff transition, we interviewed the organizations who were available to participate.

Table 15. *Grantees Selected for In-depth Interviews.*

Organizations	Number of Interviews
Coast Fork Willamette WC	7
North Coast WA	5
Powder Basin WC	6
South Fork John Day WC	7
Curry SWCD	7
Marion SWCD	6
Wheeler SWCD	4
TOTAL	**42**

Interview Analysis

Interviews were recorded on Zoom or by hand-held recorder for phone interviews, and transcribed using Rev transcription service. For individuals that preferred to not be recorded, we took detailed notes. Data collected during the interviews was linked only to participant names by password-protected key sheets kept on the researchers' institutional computers and password-protected cloud file sharing. Using NVivo qualitative analysis software, we analyzed the interviews by using themes related to the capacity dimensions, as well as by how grantees' used the Operating Capacity grants to identify what built or reduced organizational capacity (Table 16). Additionally, we triangulated this data with the key informant interviews that took place in 2020 with OWEB Regional Program Representatives and ODA Regional Water Quality Specialists, as well as the organizational profiles we developed in the initial document analysis, to validate findings from the case study interviews. Lastly, we discussed the findings with the Core Project Committee to verify what we found with their institutional knowledge and long history of working with councils and districts.

Table 16. *Primary NVivo Codes.*

Primary Codes	Description
Operating Capacity Grant Program	How organizations used the Operating Capacity grants, comments on the role of OWEB/ODA staff in supporting organizations, and comments about grant application or reporting requirements.
Governance	Organizational management and challenges (e.g., roles and relationships between board and lead staff, fiscal management, succession planning), strategic plans, board recruitment, staff and board transitions, and on-boarding and training for staff and board.
Partnerships	How organizations build relationships to develop partnerships with agencies, tribes, councils, districts, or other local partners to work on joint projects; sharing staff or technical skills or knowledge with these entities; involvement in OWEB FIPs, P-TA grants or NRCS' RCPP grants; and participation in regional coordination and other information-sharing groups.
Resources	Discussion of how OWEB grants have helped organizations acquire non-OWEB funding sources; how they learned about these funding sources; participation in group networks to learn about and coordinate funding; access to stable funding; geographic and other differences in funding opportunities.
Interviewee Role	Position's title and length of employment; daily tasks and level of oversight with board and staff; and past work or volunteer experiences with councils, districts, or other jobs that led them to this position.

B. Case Study Interview Guide

Introductory Question

1. What's your role in your organization? How long have you been in this position?

Operating Capacity Grant Program

For this section, we want to hear your thoughts on how to improve OWEB's Operating Capacity grant program.

2. Is there anything about the Operating Capacity grant program that you think needs to change to be more supportive of your organization?
3. Are there aspects of the Operating Capacity grant program that help or hinder your ability to build more capacity?

Internal Governance & Operational Practices

For this section, we're hoping to learn more about how your organization functions, how it has evolved over time, and what factors have contributed to your organization's resilience.

4. We have some questions about the role and culture of your board.
    a. Is your board more of a working board or a strategic board?
    b. How engaged is your board in the management of the council?
    c. Have you used onboarding or continuing education processes for your board?
        i. *PROMPT*: e.g., orientation, position descriptions, division of duties?
    d. What challenges have you had in board recruitment? What strategies have you used to overcome these?
5. *Plan to reference organizational profile:* Do you have a strategic action plan? How are you using it to build your organizational capacity? To sustain and build partnerships?
6. Can you tell me about a time when your organization faced challenges and you were able to respond to these challenges effectively?
    a. *PROMPT:* What helped make that response effective? Leadership, partners, staff?
7. Can you tell me about a time when you faced difficulties that your organization had difficulty responding to or recovering from?
    a. PROMPT: What made the response challenging? Capacity, board, partners, staff?
8. Has your council/district faced any challenging staffing or board changes?
    a. *Follow-Up:* Were these expected or unexpected changes?
    b. *Follow-Up:* Were these individuals key players in running the organization and/or had they been a part of the organization for a long time?
    c. *Follow-Up:* How did your organization navigate staffing/board transitions?
9. What kinds of strategies, resources, or guidance do you have for succession planning?
    a. *PROMPT - IF PARTNER-RELIANT:* I've heard of some organizations that work with a district or other entity as a fiscal sponsor will sometimes share staff. Does your organization do this? If so, do you have this written up in your organizational documents, or is this more informal, based on when the need arises?

Partnerships

For this section, we're hoping to learn more about how your organization partners with other organizations to build capacity in terms of skills, knowledge, and leveraging financial resources. We're also interested in learning about the types of partners you engage with on projects.

10. How do you partner with neighboring councils and/or districts to share services to meet skill and/or knowledge gaps to build capacity?
    a. *PROMPT*: For example, working with a district that has an engineer on staff and can share technical assistance, while council staff focuses on outreach or education?
11. Who are the top 3 organizations that are your most important partners? How familiar are they with how your organization functions? *(We're planning to reach out to interview these organizations to help us learn more about how your organization operates. This will give us additional insight into what builds or reduces capacity.)*
    a. *Follow-Up:* How did those partnerships develop?
12. Have you lost any partnerships recently?
    a. *Follow-Up:* Do you know why it ended?
13. *If they received an OWEB FIP or P-TA grant:* How has the use of Partnership TA or FIP grants assisted your organization in building partnerships?
    a. *PROMPT*: Based on looking through the OGMS grant applications, it seems like you had already built relationships with partners through past work together. Did anything change through the act of developing organizational documents and/or strategic action plans for P-TA grants? Did these working relationships become more intentional or was it just writing down what you were already practicing?

Resources Obtained & Leveraged

For this section, we're hoping to learn more about how your organization has leveraged funding from other sources and what challenges you've faced in acquiring those resources. We are also interested in understanding how your relationships with other organizations affect your ability to obtain funding.

14. Can you discuss how your non-OWEB funding sources have been developed and maintained?
    a. *PROMPT:* Was it personal relationships with others, networking, or informal information sharing?
    b. *PROMPT:* Has this been through staff outreach? Board connections?

15. How have OWEB Operating Capacity grants helped to leverage these other resources?
16. What kinds of ecological or regionally specific funds has your council/district received (e.g., BEF, BPA, NOAA, Meyer Memorial Trust, stewardship contracting from national forests)?
    a. *Follow-Up:* What do you think has led to your success in capturing those grants?

Closing

17. Is there anything I didn't ask you about that you think is important to this discussion?

C. Key Informant Interview Guide

1. I'd like to start by knowing about the major or most common trends in the top priorities that councils/districts deal with in your area and how this has changed over time. Can you tell me about some of the key characteristics/what is unique in your region?
2. Can you identify two or three "types" of councils/districts in your region in terms of staff size, stability, etc.?
3. What are the different needs and challenges that each "type" is confronting? How do you think they would best be supported?
    a. How do the necessary types and combinations of capacity for a council seem to vary depending on the organizational development stage, staff size, local partnership ecology, and their primary focus?

    b. If needed as another way to get them to talk about this: Walk through a story of a "high functioning" anonymous council/district in your area. How and why is it high functioning?
    c. If needed: Walk through a story of a "low functioning" anonymous council/district in your area. How and why is it low functioning?
4. What are the differences, if any, in the challenges and opportunities faced by municipal corporations (districts), nonprofits, other non-government structures (councils), or hybrid council/district organizations in your region?
5. Are there any specific ways you have seen capacity funding used in your region that have improved organizational and partnership capacity?
6. Are there any specific ways you wish you saw capacity funding being used in your region?
7. Can you think of any possible ways that OWEB could track and share quantitative and qualitative capacity measures to better support councils and districts in your area in overcoming capacity challenges?
8. What intangible or difficult-to-quantify impacts do you think that OWEB Operating Capacity grants have had on organizations that have received them?
9. Have you seen that receiving OWEB funding has led to any unintended negative consequences for recipient groups? If so, what are they?
10. Knowing that your answers will be confidential, do you have any positive or negative feedback for OWEB/ODA about their work to support councils and districts? What changes would you recommend that they make to their programs?

D. Database of Case Study Organizations

The following table is a summary of the organizational background information we collected for each of the organizations selected for in-depth interviews. The purpose of this is to highlight the context of the organizations we studied (Table 17).

Table 17. *Case Study Organizations Database.*

COUNCILS

Organization	Background	Geography	Land Ownership
Coast Fork Willamette WC	**Founding Year:** 1999 **501(c)(3) incorporation:** 2010	**Lane County, Oregon** **Service Area:** 435,000 acres **Streams:** 3,058 miles **303(d) Streams:** 111.7 miles	**Federal:** 36.2% **Private:** 33.8% **Private Industrial**: 29.49% **State & Local Government:** < 1%
North Coast WA	**501(c)(3) incorporation:** 2001	**Clatsop County, Oregon** **Service Area:** 222,720 acres **Streams:** 417 miles **303(d) Streams:** 164 miles	**Private:** 60.8% **State Government:** 39.2%
Powder Basin WC	**Founding Year:** 1996 **501(c)(3) incorporation:** 2008	**Baker County, Oregon** **Service Area**: 2,150,400 acres **Streams:** 4,833 miles **303(d) Streams:** 1,223 miles	**Private:** 49.8% **Federal:** 49.7% **State Government:** < 1%
South Fork John Day WC	**Founding Year:** 1996 **501(c)(3) incorporation:** 2018	**Grant County, Oregon** **Service Area:** 546,850 acres **Streams:** 362 miles **303(d) Streams:** 155 miles	**Federal:** 84% **Private:** 7% **State Government:** 9%

DISTRICTS

Organization	Background	Geography	Land Ownership
Curry SWCD	**Incorporation:** 1953 **Curry Watersheds Partnership Formed:** 2017	**Curry County, Oregon** **Service Area:** 1,047,707 acres **Perennial Streams:** 4,043 miles **303(d) Streams:** 336 miles **# of HUC-8 sub-basins:** 7	**Federal:** 65.4% **Private:** 33.3% **State Government:** < 1%
Marion SWCD	**Incorporation:** 1949 **Taxing District:** 2000	**Marion County, Oregon** **Service Area:** 751,594 acres **Perennial Streams:** 1,789 miles **303(d) Streams:** 291 miles **# of HUC-8 sub-basins:** 6	**Private:** 56.6% **Federal:** 30.2% **Private Industrial:** 8.2% **State Government:** 4.1% **Tribal & Local Government:** < 1%
Wheeler SWCD	**Incorporation:** 1963	**Wheeler County, Oregon** **Service Area:** 1,098,145 acres **Perennial Streams:** 937 miles **303(d) Streams:** 148 miles **# of HUC-8 sub-basins**: 6	**Private:** 71.1% **Federal:** 28.7% **State Government:** < 1%

Appendix 5. External Capacity-Building Programs Review

As part of this project, we reviewed organizational capacity-building programs that invest in local organizational capacity in natural resources and conservation management to develop recommendations for OWEB's Operating Capacity grant program (see Appx 5.C. Summary of External Capacity-Building Programs Review). We started by looking at Washington, California, and Idaho, but since there were a limited number of capacity-building programs, we expanded our search to look across the U.S. For this review, we defined organizational capacity in terms of administrative management, financial, and technical capacities (Table 18). Following this, we shared our list of inclusion and exclusion criteria.

Table 18. *Defining Organizational Capacity.*

Administrative Management	Management skill training, networking with other local partners, peer learning, and building partnerships with other organizations to share staff expertise (e.g., technical skills, outreach, and fundraising).
Financial	Pooling financial resources and financial management strategies, practices, and/or training.
Technical	Technical skills training, e.g., learning GIS.

Inclusion Criteria:

- Improves capacity for a council, district, or non-profit organization that works at local or regional scales (e.g., community, county, watershed, subregion of a state).
- Targets work that focuses on building organizational capacity. We primarily included programs focused on capacity building for natural resources and conservation management, but we also included some that worked in other areas. For example: Ford Family Foundation offers a Community Building grant that focuses on organizational capacity building in rural communities, which can include organizations that work on natural resource issues.

Exclusion Criteria:

- Programs that only provide funding for on-the-ground restoration work.
- Programs that target and invest in organizations that work at a national scale. The funder providing organizational capacity-building grants could be at the national scale, but to be included, must support regional or local organizations.

A. Program Highlights

In this section, we highlight key features and opportunities for improving OWEB and ODA capacity grant programs from the capacity-building program review. Following this, we provide potential recommendations.

Integrate Mentorship and Peer-Learning Opportunities into Program Design

The Ford Family Foundation's Community Building Grants Program supports organizations through coaching, mentoring, and connecting grantees to related ongoing efforts and relevant resources, including the foundation's own programs. During a 2019 program evaluation to identify the program's impacts and ongoing challenges to community-building work, they developed the following recommendations to improve peer support: (1) mobilize communities to reach communities (e.g., invest in an anchor person in each community, develop mentorship

groups, convene learning exchanges, etc.) and (2) clarify the confusing aspects of the community-building approach (e.g., simplify materials, develop a clear introductory path to people who are new, etc.). The Wilburforce Foundation's Capacity Building Program design focuses on providing long-term capacity-building and views organizational leadership as a key to an organization's efficiency and effectiveness. They partner with service providers that offer specialized consulting, coaching, and training on leadership development, board capacity, strategic planning, fundraising, financial management, human resource management, communications, technology, and more. Through this, they also convene organizations and partners to share knowledge to work towards advancing outcomes that benefit a regional ecosystem. Additionally, Lake Champlain Basin Program's Organizational Support Grant offers supplemental funding for professional development. Local watershed organizations can apply for an annual $500 mini-grant for professional development. This can be used for conference attendance, registration, and associated travel costs.

Offer Funding Support to Develop Strategic Plans

The Pennsylvania Department of Conservation & Natural Resources' Peer Grant offers funding to hire a professional consultant to study specialized small-scale issues to work with community leaders to develop an action plan addressing conservation needs. The maximum grant award is $10,000.

Coordinate with External Funders

The Ford Family Foundation's Community Building Grants program emphasizes the importance of working with external funders. As part of a recent self-directed evaluation, they identified the program's need to develop strategies for long-term partnerships (e.g., working with other foundations to develop tools for grant applications, demonstrating that long-term grants make a difference, etc.). Additionally, the Wilburforce Foundation's Capacity Building Program's design acknowledges the need to build and maintain strong relationships with organizations, agency leaders, decision-makers, funders, scientists, etc. to improve grantees' effectiveness. They also recognize the need to collaborate with funders to ensure that collective investments and capacity resources are coordinated and effective.

Identify Potentially Useful Indicators for Improving Capacity Program Monitoring

Types of Partners Engaged

- Builds and maintains strong relationships with grantees, funders, scientists, decision-makers, and other allies - *Wilburforce Foundation's Capacity Building Program.*
- Increases communication, cooperation, and collaboration among grantees, funders, scientists, and government decision-makers - *Wilburforce Foundation's Capacity Building Program).*
- Facilitates and coordinates public messaging with management partners (e.g., strengthening the feedback loop between resource managers and community members) - *Lake Champlain Basin Program's Organizational Support Grant.*

Partnership Types Engaged In

- Serves as an information conduit, builds professional capacity among partners, and fosters strong working relationships (e.g., supporting seminars, workshops, and conferences to deliver technical information on topics) - *Lake Champlain Basin Program's Organizational Support Grant.*
- Organizations are successful in agreeing on the design and implementation of watershed and/or landscape scale enhancement projects - *National Forest Foundation's Community Capacity & Land Stewardship Program.*

Internal Governance and Operational Practices (*Focusing on strategic planning)

- Extent to which the proposal will strengthen the capacity of eligible organizations to achieve their mission and to implement priorities detailed in the Opportunities for Action Plan- *Lake Champlain Basin Program's Organizational Support Grant.*
- Merit of the proposal and the extent to which the proposal will result in tangible benefits or improvements that can be clearly measured - *Lake Champlain Basin Program's Organizational Support Grant.*
- Appropriateness and clarity of the proposed budget, relative to project objectives - *Lake Champlain Basin Program's Organizational Support Grant.*

B. Potential Recommendations

Coordinate with Service Providers on Mentorship and Peer-Learning

OWEB and ODA can continue to support and coordinate with their service providers (e.g., NOWC, OACD, OCEAN, OrCP, and the SWCD Operations Specialist) to provide tailored services to grantees. Many of the topics mentioned in the Wilburforce Foundation's program design were also of interest to interviewees. These included: specialized consulting, coaching, and training on leadership development, board capacity, strategic planning, financial management, and HR management. Additionally, new lead staff may have different needs than those who have been in this position longer. This emphasizes the importance of mentorship and peer-learning networks to create information exchanges and learn from each other's experiences.

Mini-Grants for Professional Development

Councils and districts may benefit from mini-grants for professional development, which would particularly be useful for lead staff since they are typically funded by project grants. Providing a small grant for professional development could help support lead staff in developing new skills or improving existing ones.

Technical and Financial Support for Strategic Plan Development

Strategic planning processes are shaped by their regional contexts, are varied based on the organization's structure, and serve different functions depending on how the organization is managed. Strategic plans, may have more detail or less, depending on these factors. Councils and districts can benefit from technical and financial support from OWEB and ODA and other supportive organizations to assist their strategic planning and annual work plan processes to incorporate diverse perspectives and needs and engage in relevant technical expertise for identifying restoration and conservation priorities.

Coordinating with and Educating External Funders on the Significance of Longer-Term Funding

OWEB and ODA have provided ongoing, programmatic support for 20 years to councils and districts' efforts in improving local watershed quality and health. OWEB has also developed longer-term funding strategies to help support grantees in partnership capacity and larger landscape scale restoration through their Partnership Technical Assistance, Focused Investment Partnership grants. External funders often see OWEB and ODA as essential funding partners in getting restoration work done on the ground through these locally-based councils and districts. As such, OWEB can play a role in educating funders on the significance of longer-term grants to work toward landscape-scale restoration and conservation.

C. Summary of External Capacity-Building Programs Review.

Sponsoring Organization and Program Name	Program Design, Activities and/or Objectives	Eligibility Requirements	Match Requirement	Evaluation Criteria and Selection Process	Allowed Costs and Uses	Program Implementation and Monitoring Measures
OWEB's Council Capacity Grant Program	(1) Support organizational growth with access to diverse skill sets. (2) Develop broad and deep support from local and regional communities. (3) Engage a balance of interested and affected people, businesses, and communities in their watershed to participate in voluntary, cooperative conservation. (4) Secure diversified funding and/or build strategic collaborations with other councils and/or natural resource groups to increase collective local capacity.	(1) Designated as a watershed council by a local government. (2) Has previously received a Council Capacity grant, and which serves an area that is the same or larger than the geographic area served by a council or group of councils as of 2013 with only 1 applicant per geographic area & includes a minimum population of 500 within its designated boundaries. (3) Adopted action plan by a council-governing body that meets OWEB requirements. (4) 501(c)(3) registered with Oregon, or written fiscal sponsorship agreement with a 501(c)(3), SWCD, city, county, or tribal government. (5) Adopted bylaws/charter & policies/ procedures that include standard best-practice governance provisions. *(See Appx. 1 for full description of eligibility criteria in rule.)*	$1 match	(1) Effective Governance and Management. (2) Progress in Planning. (3) Progress in On-the-Ground Watershed Restoration. (4) Progress in Stakeholder Engagement for Watershed Restoration Purposes.	(1) Staff and contractors. (2) Audit and tax preparation costs. (3) General IT Support. (4) Contracted grant administration. (5) General office material & supplies. (6) General training. (7) Software or software subscription, free, or lease (e.g., GIS access). (8) General office rent, utilities, janitorial, yard maintenance, copier lease, P.O. box rent. (9) Insurance. (10) Banking fees, payroll service fees, business license fees, dues *Any expense eligible in other OWEB grants is also an eligible expense for Council Capacity grants.	Continued progress in meeting evaluation criteria. If the organization continues to meet eligibility criteria and makes progress in meeting evaluation criteria, the organization continues to receive funding. Funding levels include: (1) full funding if the council meets all criteria, (2) reduced funding if the council meets some criteria, and (3) do not fund if the council's performance is inadequate.
ODA's District Capacity Grant Program	Capacity funds are divided into two categories: (1) Scope of Work (SOW): Support working with partners and landowners for the conservation and protection of natural	Must be an SWCD and in compliance with legal requirements of ORS 568: (1) Current annual and long-range business plans (2) Annual audit (3) Annual report of activities	$1 match.	None.	(1) Contracted services (e.g., labor, supplies, materials, travel for project implementation). (2) Travel. (3) Materials and supplies. (4) Equipment/Software.	None.

	resources of native fish and wildlife, watersheds, and water quality through implementation of Agricultural Water Quality Management Area Plans. (2) District Operations: Help SWCDs comply with ORS, conduct business, and provide assistance to landowners and partners.	(4) Annual meeting of the landowners of the district.			(5) Other (e.g., project-specific printing, renting meeting rooms, software subscriptions, website domain, etc.).	
National Forest Foundation's Community Capacity & Land Stewardship Program	(1) Remove barriers to watershed and/or landscape scale restoration projects. (2) Facilitate job creation, retention, and business development. *Length of grant funding:* 8 months. *Can grantee apply again:* Yes. Encouraged to apply for continuing work or for new projects, contingent on demonstrated success. *Grants awarded per year:* ~10. *Award range:* Up to $20k.	501(c)(3) nonprofit; federally-recognized Native American tribes; and colleges and universities.	No cash or in-kind match is required, but applicants are encouraged to leverage additional funds to demonstrate broad project support.	(1) Tangible benefits to National Forests & Grasslands. (2) Job creation, business development, or workforce development benefits. (3) Facilitate restoration actions and treatments. (4) Support or help advance the transition to young growth-based forest management.	(1) Outreach and plan development. (2) Workshops and training for capacity building (e.g., facilitation, contracting, etc.). (3) Dissemination of best practices and tools to assist community-based nonprofits & collaborative groups in project development, implementation, and monitoring. (4) Organizational and staff support for facilitation, technical assistance, networking, & peer-to-peer evaluations for shared learning. (5) Travel for collaborative group activities. (6) Development of action plans, project strategic documents, or other collaborative process documents.	(1) Organizations are successful in agreeing on the design and implementation of watershed and/or landscape scale enhancement projects. (2) Organizations accomplish activities that directly support or help advance the transition to young growth-based forest management. (3) Organizations have developed plans for facilitating job creation and retention that will lead to improved watershed health.
Ford Family Foundation's Community	Organizations are invited to submit a grant by Rural Community Building staff.	(1) Be invited by Rural Community Building staff. (2) 501(c)(3) non-profit,	Must have >/= 50% of funding for the total	(1) Community participation is a primary	(1) Training, communications, and gatherings.	The foundation conducted a self-directed evaluation

Building Grants	The program supports organizations through coaching, mentoring, and connecting grantees to related ongoing efforts and relevant resources, including the foundation's own programs. *Program Objectives:* (1) Deepening Community Connections. (2) Strengthening Community Capacity. (3) Taking Community-led Action. (4) Fostering a Community Builder Culture. *Length of grant funding:* Typically 1 year, but offers multi-year grants on a limited basis. *Can grantee apply again:* Yes, if the organization does not have a currently active grant with the Foundation. *Grants awarded per year:* 75. *Award range:* - $2k to $350k. - Average: $50k. - Large: $100k.	governmental entity, or a federally recognized tribe. (3) Serve communities in rural Oregon or Siskiyou County, California. (4) Requests are for no more than ⅓ of the total project cost.	project budget committed before applying.	consideration, demonstrated through >/= 50% of project fundraising raised through the organization's traditional supporters, local businesses, key donors, and other foundations. (2) Involvement of the organization's board with cash or in-kind contributions. (3) Well-defined benefits or outcomes with a description of who and why the community is behind the proposal.	(2) Planning, coordination, capacity building, and regional networking. *They will not fund sponsorship of fundraising events.	in 2019, evaluating the program's impacts and ongoing challenges to community-building work. They developed the following responses to address these: (1) Mobilize communities to reach communities (e.g., invest in an anchor person in each community, develop mentorship groups, convene learning exchanges, etc.). (2) Build capacities to reach the hard-to-reach (e.g., listening sessions, relationship building, etc.). (3) Develop strategies for long-term partnerships (e.g., work with other foundations to develop tools for grant applications, show that long term grants make a difference, etc.). (4) Clarify the confusing aspects of the community-building approach (e.g., simplify materials, develop a

						clear introductory path to people who are new, etc.).
Oregon Community Foundation's Community Grants Program: Capacity-Building	To help strengthen and stabilize an organization's governance, operations, internal culture and/or community relationships. *Length of grant funding:* 1 year. *Can grantee apply again:* No, unless considered a small, rural or culturally-specific organization. *Grants awarded per year:* 370. *Award range:* - Average: $20k. - Large: $40k.	501(c)(3) organization, or fiscal sponsorship with a 501(c)(3), Tribal entity, or government entity.	No cash or in-kind match is required, but applicants are encouraged to leverage additional funds to be more competitive.	(1) Prioritizes organizations that support disproportionately impacted communities (e.g., BIPOC, immigrants, people experiencing disabilities, etc.). (2) Supports organizations that demonstrate strong community support (e.g., intentional engagement and representative support of communities being served). (3) Propose work that advances DEI.	N/A	N/A
Wilburforce Foundation's Capacity Building Program	(1) Supports organizations committed to science-driven conservation efforts and sustainable policies for critical wildlife habitat. (2) Use conservation science to identify priority regions with a focus on wildlands and habitat connections. (3) Build and maintain strong relationships with organizations, agency leaders, decision-makers, funders, scientists, etc. to improve organizations' effectiveness.	Supports current 501(c)(3) grantees.	None.	No longer accepting grant applications. They provide long-term capacity-building support to increase organizational knowledge and skills. They invest in Training Resources for the Environmental Community (TREC) to provide grantees with support for fundraising, board capacity, strategic	Programs are tailored to current grantees to meet their capacity needs. They invest in leaders, organizations, and campaigns, partnering with service providers that offer specialized consulting, coaching and training on leadership development, fundraising, financial management, human resource management, communications, strategic planning, technology, and more.	(1) Builds and maintains strong relationships with grantees, funders, scientists, decision-makers, and other allies. (2) Improves the effectiveness of grantee organizations, their leaders, conservation scientists, and other allies. (3) Increases access to and use of

	(4) Invest in the capacity of our grantees and their leaders to help them become more efficient and effective. (5) Convene organizations and partners to exchange knowledge and advance shared outcomes. (6) Collaborate with funders to ensure that collective investments and capacity resources are coordinated and effective. *Length of grant funding:* Typically, 1 year. May fund multi-year grants if they discuss with a representative why the program would benefit from this. *Can grantee apply again:* Yes, if an organization does not have a currently active grant with the Foundation. *Grants awarded per year:* 153. *Award range:* $10k - $250k.			planning, etc..		scientific, legal, political, and economic resources to advance conservation plans, policies, and practices. (4) Increases communication, cooperation, and collaboration among grantees, funders, scientists, and government decision-makers. (5) Increases conservation's social and political relevance in the communities and priority regions in which we work. (6) Decreases or mitigates threats to lands, waters, and wildlife, while improving the ecological resilience, and improving the protected status of these areas.
Lake Champlain Basin Program's Organizational Support Grant	(1) Strengthen watershed organizations during development. (2) Assist established watershed organizations in strengthening their organizational capacity.	501(c)(3) organizations or voluntary watershed associations working with an established 501(c)(3) organization.	No in-kind or cash match is required, though match will be considered favorably	(1) Impact (40 points): Extent to which the proposal will strengthen the capacity of eligible organizations to achieve their	(1) Staffing & fringe benefits. (2) Supplies (e.g., photocopying, mailing, purchasing equipment, technology, software subscriptions).	Support priorities in *Opportunities for Action Plan*. Examples include: (1) Supports local watershed groups (e.g.,

	(3) Facilitate work and communication within and among local communities to further watershed protection and restoration efforts. (4) Local watershed organizations can also apply for an additional annual $500 mini-grant for professional development. *Length of grant funding:* 1.5 years. *Can grantee apply again:* Yes, if the grant is for a new project, contingent on demonstrated success. *Grants awarded per year:* ~ 11. *Award range:* Up to $4k.		during budget review and may make proposals more competitive.	mission and to implement priorities detailed in *Opportunities for Action Plan*. (2) Merit (30 points): Merit of the proposal and the extent to which the proposal will result in tangible benefits or improvements that can be clearly measured. (3) Budget (30 points): Appropriateness and clarity of the proposed budget, relative to project objectives.	(3) Professional services (e.g., hiring a consultant to integrate DEI into organizational documents, participating in training to learn how to create online videos to improve outreach). (4) Travel costs associated with building partnerships. (5) Indirect (e.g., paying auditor, liability insurance, auto insurance). *Specific to professional development mini-grants:* (1) Meetings, conferences, and other venues' activities must be related to improving water quality and/or improving organizational capacity (e.g., fundraising, computer training). (2) Travel, meals, registration, and lodging to attend training.	providing technical assistance through meetings, workshops, presentations, and training; working with partners in priority watersheds to provide technical support and capacity building). (2) Facilitates and coordinates public messaging with management partners (e.g., strengthening the feedback loop between resource managers and community members). (3) Serves as an information conduit, builds professional capacity among stakeholders, and fosters strong working relationships (e.g., supporting seminars, workshops, and conferences to deliver technical information on topics).

Pennsylvania Department of Conservation & Natural Resources' Peer and Circuit Rider Grant Programs	*Specific to Peer Grant:* Funding to hire a professional consultant to study specialized small-scale issues to work with community leaders to develop an action plan addressing conservation needs. *Maximum grant award:* $10k. *Specific to Circuit Rider:* Annual funding gradually decreases over a 4-year period. The purpose is to hire a professional, full-time staff person (i.e., Circuit Rider) to initiate new regional programs and services that position sponsoring entities to more efficiently and effectively meet their natural resource and conservation needs. Includes training expenses (up to $2k) and mentoring expenses (up to $1.5k) for an approved mentor to assist new staff.	County or municipal government. *Specific to Circuit Rider:* Two or more municipalities must cooperate in a new intergovernmental or regional effort by adopting an intergovernmental agreement.	*Specific to Peer Grant:* 10% local cash or in-kind match. *Specific to Circuit Rider:* Must provide local funds to cover the Circuit Rider's employee benefits for all 4 years, the balance of the salary in years 2, 3, and 4, and normal support services (e.g., office space, training and travel expenses, clerical support, equipment, etc.).	Grantees must submit an evaluation of the organization's guiding documents (strategic plan, annual work plan, management action plan, interpretive plan, etc.) to determine the specific project(s), work tasks, outputs, and outcomes they would like to accomplish with grant funding.	*Specific to Peer Grant:* Hire a professional consultant. *Specific to Circuit Rider:* Hire a professional full-time staff person.	None listed for Peer Grant. *Specific to Circuit Rider:* <u>Annual Report</u> (1) Goals and objectives met or unachieved. (2) Accomplishments & challenges. (4) Programs created. (5) Marketing. (6) Budget. (7) Training programs attended. (8) Training programs requested for next year. (9) Evaluating grant program's assistance. <u>Final Report</u> How has the cooperative become a valued service? Which groups gained the most? What would happen if the agency folded? How did the cooperative effort encourage other areas of intergovernmental cooperation?
Minnesota Board of Water	Supports increased capacity by funding	Must be an SWCD.	None.	N/A	(1) Staffing (2) Office rent, utilities,	Report expenditures,

and Soil Resources' Clean Water Fund Capacity Grant	expenses in the following categories: Staffing, Cost Share/Incentives, Technology/Capital Equipment, and Operations. *Length of grant funding:* 1 year. *Can grantee apply again:* Yes, provides ongoing support. *Grants awarded per year:* 90 (Supports all SWCDs in the state). *Award range:* $108k.				and other costs associated with facility maintenance (3) Supplies and equipment. (4) Conservation practice cost-share and incentive.	measurable outcomes, and activities from the previous calendar year as outlined in the grant agreement. May withhold grant payments if the grantee is not in compliance with all reporting requirements.

OREGON
WATERSHED
ENHANCEMENT BOARD

Hybrid Board Meeting
Klamath Falls, Oregon
October 23-25, 2023

Oregon Watershed Enhancement Board Meeting Agenda Oct 23-25, 2023

Monday, Oct 23, 2023

Running Y Resort
5500 Running Y Rd
Klamath Falls, OR 97601

Business Meeting – 2:00 pm

A. Strategic Planning (2:00 pm)
Executive Director Lisa Charpilloz Hanson will join Principal Consultant Steve Patty with Dialogues in Action to seek board input on OWEB's new strategic plan. *Information item.*

Tuesday, Oct 24, 2023

Business Meeting – 8:00 am

The public is welcome to listen to the virtual meeting through the following methods:

- **YouTube Streaming**: https://www.youtube.com/channel/UC0dl-TOwLt4Sp--i1KEa_OA. Please note that there may be a slight delay when streaming the meeting content.
- **Phone**:
  - **Oct 23:** Dial 1 669 900 6833, when prompted, enter ID number: 851 7302 0607and passcode: 162756
  - **Oct 24:** Dial 1 669 900 6833, when prompted, enter ID number: 881 9760 7442 and passcode: 673912
  - **Oct 25:** Dial 1 669 900 6833, when prompted, enter ID number: 871 5457 5188 and passcode: 725146

The board materials are available at: https://www.oregon.gov/oweb/about-us/Pages/board/2023-Oct.aspx

For each agenda item, the time listed is approximate. Anyone interested in a particular agenda item is encouraged to give ample time and listen in to the meeting at least 30 minutes before the approximate agenda item time.

Public comment
OWEB encourages written or verbal public comment on any agenda item that is not marked with an asterisk. Agenda items with an asterisk (*) are not open for public comment because they were the subject of a formal public hearing that included a comment period.

All written comments and requests to make verbal comments to the board can be submitted on our website at Oregon Watershed Enhancement Board : Public Comment or can be emailed to

Nicole Bettinardi at Nicole.BETTINARDI@OWEB.oregon.gov. The deadline for submitting written comments and requests to make verbal comments is **4:00 p.m. Thursday, October 19, 2023**.

Written comments will be provided to the board before the meeting.

Verbal comments:

- Are limited to three minutes
- Will be heard in the public comment periods (**Agenda Items D, H, and I**).
- Please provide the following information:
  - Your first and last name
  - The topic/item letter of your comment
  - Whether you plan on coming to the meeting in person or virtually
  - If calling in, the phone number you will use when calling the meeting. Also, note if the phone is a landline and you prefer to be scheduled for public comment early to avoid long distance phone call charges.

B. Board Member Comments (8:05 am)
Board representatives from state and federal agencies will provide updates on issues related to the natural resource agency they represent. This is also an opportunity for public and tribal board members to report on their recent activities and share information and comments on a variety of watershed enhancement and community conservation-related topics. *Information item*.

C. Review and Approval of Minutes (9:35 am)
The minutes of the July 2023 meeting will be presented for board approval. *Action item*.

D. General Public Comment (9:40 am)
This time is reserved for the board to hear general public comments and review the written public comment submitted for the meeting. *Information item*.

E. Directors Updates (10:20 am)
Executive Director Lisa Charpilloz Hanson and staff will update the board on agency business. *Information item.*

F. Committee Updates (10:40 am)
Representatives from board committees will provide written updates on committee topics to the full board. *Information item*.

G. ODFW and PCSRF Uses (11:15 am)
Monitoring and Reporting Manager Courtney Shaff will be joined by Conservation and Recovery Program Manager (acting) Alexis Harrison with the Oregon Department of Fish and Wildlife (ODFW) to update the board about ODFW programs that will be supported by Pacific Coastal Salmon Recovery Funds during the 2023-25 biennium. *Information item.*

Board On Site Inspection – 1:00 pm

The Board will conduct an on-site inspection of the JC Boyle Dam Removal Project. This is an active construction site and not open to the public. *Information only.*

Informal Reception – 5:30-7:00 pm

The public is invited to join the OWEB Board and staff at a reception.

Running Y Resort
5500 Running Y Rd
Klamath Falls, OR 97601

Wednesday, October 25, 2023

Business Meeting – 8:00 am

H. General Public Comment (8:05 am)
This time is reserved for the board to hear general public comments and review the written public comment submitted for the meeting. *Information item*.

I. Spring 2023 Open Solicitation Grant Offering Board Awards (8:25 am)
NOTE: Verbal public comment specific to this agenda item will be heard at approximately 9:35 am

Staff Presentation
Grant Program Manager Eric Williams and Regional Program Representatives will review the Spring 2023 Open Solicitation Grant Offering and funding recommendations.

Public Comment
This time is reserved for public comment on the Spring 2023 Open Solicitation Grant Offering and funding recommendations. Only comments about this specific item will be accepted during this portion of the meeting. Any written comments about this agenda item must be received by OWEB staff by **Oct 19, 2023,** to be provided to the board in advance of the meeting. **Verbal comments should be limited to three minutes.**

Spring Open Solicitation Grant Offering Board Deliberation and Awards
The board will consider grant applications submitted through the Spring 2023 Open Solicitation Grant Offering. Applications, supporting materials, and funding recommendations will be discussed and acted on by the board. *Action Item.*

J. Focused Investment Partnership (FIP) Learning Project III (10:50 am)
Senior Policy Coordinator Eric Hartstein, Partnerships Coordinator Denise Hoffert, and Jennifer Arnold of Reciprocity Consulting will update the board on the FIP Partnership Learning Project. *Information Item.*

K. PacifiCorp Interim Measure 11 Funding (12:50 pm)
Acquisitions and Special Programs Manager Renee Davis, Drought Program Specialist Heidi Hartman, and Regional Program Representative Greg Ciannella will provide an overview of OWEB's role as fiscal agent for PacifiCorp Interim Measure 11 funding and request the board approve receipt of this funding in accordance with OWEB's 2023-2025 Legislatively Approved Budget. *Action item.*

L. Co-Chair Election (1:20 pm)
The current term of OWEB Board Co-Chair Barbara Boyer ends in 2023. Board members will consider adopting a co-chair election process and will vote to elect a Co-Chair for a two-year term. *Action item.*

M. Other Business (1:40 pm)
This item is reserved for other matters that may come before the board. *Information item.*

Meeting Rules and Procedures

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

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

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

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

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

Action on Grant Awards
Per ORS 541.360(4), special requirements apply when OWEB considers action on grant awards. This includes a special **quorum of at least 8 voting members** present to act on grant awards, and affirmative votes of at least six voting members. In addition, regardless of the number of

members present, **if 3 or more voting members** object to an award of funds, the proposal will be rejected.

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

More Information
If you have any questions about this agenda or the Board's procedures, please call Nicole Bettinardi, OWEB Board Assistant, at 503-428-1804 or send an e-mail Nicole.BETTINARDI@OWEB.oregon.gov. If special physical, language, or other accommodations are needed for this meeting, please advise Nicole Bettinardi as soon as possible, and at least 48 hours in advance of the meeting.

Oregon Watershed Enhancement Board Membership

Voting Members
Barbara Boyer, *Board Co-Chair, Board of Agriculture*
Bruce Buckmaster, *Public*
Elizabeth Agpaoa, *Board of Forestry*
Gary Marshall, *Public*
Vacant, *Environmental Quality Commission*
Jamie McLeod-Skinner, *Public*
Kelly Coates, *Public (Tribal)*
Lindsay McClary, *Public*
Liza Jane McAlister, *Board Co-Chair, Public*
Mark Labhart, *Fish and Wildlife Commission*
Meg Reeves, *Water Resources Commission*

Non-voting Members
Aaron Curtis, *U.S. Bureau of Land Management*
Chris Allen, *U.S. Fish and Wildlife Service*
Amy Hendershot, *U.S. Natural Resources Conservation Service*
Dan Brown, *U.S. Environmental Protection Agency*
Dan Shively, *U.S Forest Service*
Eric Murray, *National Marine Fisheries Service*
Stephen Brandt, *Oregon State University Extension Service*

Contact Information
Oregon Watershed Enhancement Board
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Salem, Oregon 97301-1290
Tel: 503-428-1804
Fax: 503-986-0199

www.oregon.gov/OWEB

OWEB Executive Director – Lisa Charpilloz Hanson
Lisa.CHARPILLOZ-HANSON@OWEB.oregon.gov
OWEB Assistant to Executive Director and Board – Nicole Bettinardi
Nicole.BETTINARDI@OWEB.oregon.gov

2024 Board Meeting Schedule
January 23-24 – Virtual
April 23-24 – Baker City
July 23-24 – TBD
Oct 22-23 – Medford

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

The Approach We Take

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

Our work is characterized by…

Involving stakeholders broadly and in partnership

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



Using best available science supported by local knowledge

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



Investing collaboratively with long-term outcomes in mind

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

Demonstrating impact through meaningful monitoring and evaluation

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



Reaching and involving underrepresented populations

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

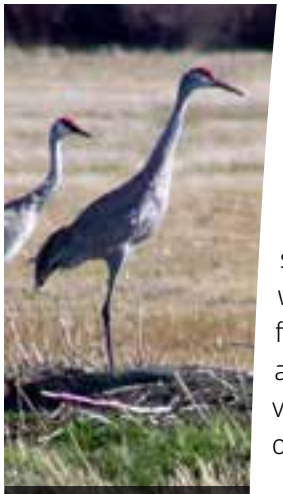


OWEB Staff Culture Statement

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

The Oregon Watershed Enhancement Board (OWEB) provides grants to help protect and restore healthy watersheds and natural habitats that support thriving communities and strong economies.

Eligible applicants include not-for-profit organizations, Soil and Water Conservation Districts, Tribes, Watershed Councils, political subdivisions of the state that are not state agencies, schools, community colleges, Oregon State institutions of higher education, and independent not-for-profit institutions of higher education. State and federal agencies are not eligible grantees but are often partners on OWEB-funded projects. In addition to those listed below, OWEB may offer grant types based on legislative priorities.



Land Acquisition

Water Acquisition

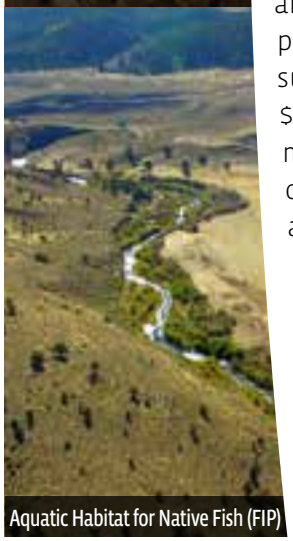
Projects that acquire interests in water from willing sellers. Acquisitions result in legally or contractually protected instream flow to maintain or restore streamflows for the benefit of watersheds and habitats for native fish or wildlife. Eligible applicants are entities qualified to develop valid water rights transactions and oversee the desired outcomes.



Coho Habitat Restoration

Focused Investment Partnerships (FIPs)

Landscape-scale restoration investments that address board-identified Focused Investment Priorities of significance to the state. Successful FIPs achieve clear and measurable ecological outcomes; use integrated, results-oriented approaches as identified through a strategic action plan; and are implemented by a high-performing partnership. Funding supports partnerships with up to $12 million over 6 years. Initiatives must support limiting factors outlined in a federal recovery and/or state conservation plan(s). Funds are awarded through project-level grants in restoration, technical assistance, stakeholder engagement, monitoring, and land and water acquisitions.



Aquatic Habitat for Native Fish (FIP)

Land Acquisition

Projects involving the purchase of interests in land from willing sellers. Projects must maintain or restore watersheds and habitat for native fish or wildlife. Interests in land include fee simple title and conservation easements.

Monitoring

Projects that monitor, gather, analyze, and share watershed data with the public. May describe current watershed conditions, establish trends about watershed conditions, or evaluate specific before-and-after effects of a restoration or acquisition project.

Restoration

Projects that protect or restore watershed functions for instream, riparian, upland, and wetland or estuarine habitat.

Stakeholder Engagement

Projects that communicate and engage with landowners, organizations, and the community about the need for, feasibility, and benefits of a specific eligible restoration, acquisition, or resource assessment/planning project(s) within an identified geography. Education projects are not eligible.

Technical Assistance

Projects that develop a technical design or implementation plan for restoration, including consideration for compliance with the National Historic Preservation Act.



Seine Net Monitoring



Sage Grouse Conservation Stakeholder Engagement



Fish Passage Technical Assistance

Small Grants

Easy-to-engage-in, competitive grant program. Awards up to $15,000 for restoration practices principally carried out on private lands.

Who may apply*: Watershed Councils, Soil & Water Conservation Districts, or Tribes may apply for a small grant on behalf of any of the following entities: Landowner, not-for-profit institution, private, state, or independent institution of education, or local, state, or federal agency.

Forest Collaboratives

Projects that increase restoration efforts on federal forests statewide by enhancing and strengthening the effectiveness of local collaboratives. This grant program was developed by OWEB and the Oregon Department of Forestry.

Who may apply*: local collaborative groups engaged in forest restoration and/or stewardship on federal forests in Oregon (forests managed by the US Forest Service or Bureau of Land Management). Eligible grantees must have 501(c)3 status or a signed agreement with an eligible fiscal sponsor. This can be a non-profit community-based organization, unit of local government or Tribal government.

Weed Board Grants

(Oregon Department of Agriculture)

On-the-ground projects to control weeds and state-listed noxious weeds. Projects may include survey, outreach, monitoring, or research if required to complete the control portion of the project.

Coastal Wetlands

These federal grant funds are awarded to OWEB to use in local grant investments for restoration partners to acquire, restore, and enhance coastal wetlands. All projects must have long-term protection in place to ensure conservation (such as a termed easement).



Small Grant Restoration



Forest Collaborative



District & Council Outreach

Council Capacity

Grants that help support the operations of effective watershed councils that engage people and communities in their watershed to participate in collaborative, voluntary restoration and protection of native fish or wildlife habitat and natural watershed functions to improve water quality or stream flows.

Who may apply*: Watershed councils that meet OWEB's eligibility criteria (OAR 695-040-0030)

District Capacity

Grants that support Oregon's 45 soil and water conservation districts to work with landowners in their communities to conserve natural resources and lend support to the Oregon Department of Agriculture's Agricultural Water Quality Management Program.

Who may apply*: Oregon's 45 soil and water conservation districts.

Partnership Technical Assistance

Grant investments that help support existing partnerships to create or enhance and existing strategic action plans, to elevate the partnership's current level of performance, and to support partnership capacity.

Conservation Reserve Enhancement Program Technical Assistance (CREP TA)

Grants that help local partners deliver the Conservation Reserve Enhancement Program, a federal-state partnership that restores streamside areas on agricultural lands. CREP TA grants support grantee costs for staffing, travel, outreach, technical planning, and project implementation.

***Note:** some grant offerings have different eligibility requirements described here.

For more information on these and additional programs, visit our website: oregon.gov/oweb

Photo credits this side: Curry SWCD, Southern Willamette Forest Collective, Curry SWCD. Photo credits other side: Oregon Desert Land Trust, USFWS, Warner Basin Partnership . Right: Coquille Watershed Association, USFWS, North Clackamas Urban Watershed Council.

OWEB 2023-2025 GRANT FUNDS SPENDING PLAN

October 2023 Board Meeting

	GRANTS	2023-2025 Spending Plan (Board Approved July 2023)	October 2023 Proposed Additions	2023-2025 Spending Plan Total	July 2023 Awards	October 2023 Proposed Awards	TOTAL Awards To-Date & Proposed Awards	Remaining Spending Plan after Awards
1	**Open Solicitation:**							
2	Restoration*	33,500,000		33,500,000		8,998,845	8,998,845	24,501,155
3	Technical Assistance						-	-
4	Restoration TA	4,897,000		4,897,000		929,070	929,070	3,967,930
5	CREP TA**	1,525,841		1,525,841	1,525,841		1,525,841	-
6	Stakeholder Engagement	2,000,000		2,000,000		298,552	298,552	1,701,448
7	Monitoring grants	4,500,000		4,500,000		2,235,398	2,235,398	2,264,602
8	Land and Water Acquisition	6,500,000		6,500,000			-	6,500,000
9	Weed Grants	3,250,000		3,250,000	3,250,000		3,250,000	-
10	Small Grants	2,800,000		2,800,000	2,800,000		2,800,000	-
11	Quantifying Outputs and Outcomes	1,000,000		1,000,000	280,000		280,000	720,000
12	**TOTAL**	**59,972,841**	**0.000**	**59,972,841**	**7,855,841**	**12,461,865**	**20,317,706**	**39,655,135**
13	**% of Total Core Programs**	**45.45%**		**45.44%**				
14	**% of OWEB Spending Plan total**	**42.54%**		**42.54%**				
15	**Focused Investments:**							
16	John Day Partnership	4,000,000		4,000,000	4,000,000		4,000,000	-
17	Baker Sage Grouse	2,348,000		2,348,000	2,348,000		2,348,000	-
18	Warner Aquatic Habitat	1,857,000		1,857,000	1,857,000		1,857,000	-
19	Rogue Forest Rest. Partnership	1,800,000		1,800,000	1,800,000		1,800,000	-
20	Clackamas Partnership	2,309,000		2,309,000	2,309,000		2,309,000	-
21	Klamath Siskiyou Oak Network	2,715,000		2,715,000	2,715,000		2,715,000	-
22	East Cascades Oak & Fire Partnership	2,433,000		2,433,000	2,433,000		2,433,000	-
23	Siuslaw Coho Partnership	4,000,000		4,000,000	4,000,000		4,000,000	-
24	Coos Basin Coho Partnership	3,859,000		3,859,000	3,859,000		3,859,000	-
25	Oregon Central Coast Estuary Collaborative	3,922,000		3,922,000	3,922,000		3,922,000	-
26	New FIP Solicitation	11,000,000		11,000,000			-	11,000,000
27	FI Effectiveness Monitoring	500,000		500,000	500,000		500,000	-
28	**TOTAL**	**40,743,000**	**0.000**	**40,743,000**	**29,743,000**	**-**	**29,743,000**	**11,000,000**
29	**% of Total Core Programs**	**30.87%**		**30.87%**				
30	**% of OWEB Spending Plan total**	**28.89%**		**28.89%**				
31	**Operating Capacity:**							
32	Capacity grants - Watershed Councils (WC)	9,486,708		9,486,708	9,204,267		9,204,267	282,441
33	Capacity grants - Soil & Water Conservation Dist (SWCD)	8,307,135		8,307,135	8,307,135		8,307,135	-
34	Statewide org partnership support	525,000		525,000	525,000		525,000	-
35	Organizational Collaboration	-		-			-	-
36	Partnership Technical Assistance	1,000,000		1,000,000			-	1,000,000
37	**TOTAL**	**19,318,843**	**0.000**	**19,318,843**	**18,036,402**	**-**	**18,036,402**	**1,282,441**
38	**% of Total Core Programs**	**14.64%**		**14.64%**				
39	**% of OWEB Spending Plan total**	**13.70%**		**13.70%**				
40	**Other-Prior Committed Funding:**							
41	CREP Costshare	750,000		750,000	750,000		750,000	-
42	Governor's Priorities	1,000,000		1,000,000	1,000,000		1,000,000	-
43	Lower Columbia Estuary Partnership	330,000		330,000	330,000		330,000	-
44	Strategic Implementation Areas	1,500,000		1,500,000	1,500,000		1,500,000	-
45	Sage Grouse Conservation Partnership	350,000		350,000	350,000		350,000	-
46	*Klamath Post Dam Removal Watershed Restoration/KRRC-Contingency	8,000,000		8,000,000	8,000,000		8,000,000	-
47	**TOTAL**	**11,930,000**		**11,930,000**	**11,930,000**	**-**	**11,930,000**	**-**
48	**% of Total Core Programs**	**9.04%**		**9.04%**				
49	**% of OWEB Spending Plan total**	**8.46%**		**8.46%**				
50	**TOTAL Core Programs**	**131,964,684**	**-**	**131,964,684**	**67,565,243**	**12,461,865**	**80,027,108**	**51,937,576**
51	**General or Other Funds:**							
52	Water Acquisitions	9,039,958		9,039,958	509,875		509,875	8,530,083
53	**TOTAL**	**9,039,958**		**9,039,958**	**509,875**	**-**	**509,875**	**8,530,083**
54	**% of OWEB Spending Plan total**	**6.41%**		**6.41%**				
55	**TOTAL OWEB Spending Plan**	**141,004,642**	**-**	**141,004,642**	**68,075,118**	**12,461,865**	**80,536,983**	**60,467,659**
56	**Other Designated Funds/Programs**							
57	Or Dept of Fish & Wildlife-PCSRF (Federal Funds)	6,443,988		6,443,988			-	6,443,988
58	Or Dept of Forestry-Forest Collaborative (Other Funds)	500,000		500,000			-	500,000
59	Pacific States Marine Fisheries Commission-Intensively Monitored Watersheds (Other Funds)	300,000		300,000	300,000		300,000	-
60	Bureau of Land Management - Good Neighbor Authority (Federal Funds)	2,161,965		2,161,965			-	2,161,965
61	Natural Resource Conservation Service - Farm Bill Technical Support (Federal Funds)	743,110		743,110			-	743,110
62	PacifiCorp Interim Measure 11 (IM11) (Other Funds)	-	6,433,500	6,433,500		6,433,500	6,433,500	-
63	**TOTAL**	**10,149,063**	**-**	**16,582,563**	**300,000**	**6,433,500**	**300,000**	**9,849,063**
64	**OWEB Spending Plan and Other Designated Funds/Programs**	**151,153,705**	**-**	**157,587,205**	**68,375,118**	**18,895,365**	**80,836,983**	**70,316,722**

* Additional funds allocated to Restoration activities through the KRRC Post Dam Removal Restoration

** Funding includes $325,841 from NRCS for CREP-TA program

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item A

Strategic Planning

Board Meeting October 23-25, 2023

Oregon
Tina Kotek, Governor

OREGON WATERSHED ENHANCEMENT BOARD

775 Summer Street NE, Suite 360
Salem OR 97301-1290
www.oregon.gov/oweb
(503) 986-0178

Agenda Item A supports all of OWEB's Strategic Plan priorities

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Eric Williams, Restoration Grants Manager

SUBJECT: Agenda Item A – Strategic Plan
October 23-25, 2023, Board Meeting

I. Introduction

OWEB's strategic plan was adopted in 2018. Consistent with Governor Kotek's directive to state agencies to update strategic plans by June 2024 and recognizing that significant work has been accomplished since the plan was adopted, OWEB has engaged a consultant, Dialogues in Action, to refresh the plan rather than create an entirely new plan. This agenda item is a board work session to provide input for the strategic plan refresh.

II. Background

The 2018 strategic plan includes foundational elements that remain both meaningful and viable. These include the first four sections of the plan: "Who We Are," "What We Believe In," "The Impact We Want to Achieve," and "The Approach We Take." This plan refresh will focus on updating the plan's priorities, strategies, and actions.

III. Status

Our consultant and staff are working through a three-part process to refresh the plan:

- "Get Clear" – calibrate and tune in to the perspectives of those who are close to the work, impacted by the work, or partner in the work, and can provide helpful insight into the work of OWEB.
- "Get Focused" – use the insights from the first phase to identify and clarify the strategic priorities.
- "Get Moving" – develop the strategies, including the intent, steps, scale, scope, outcomes, and resources for each of the key strategies. This will provide sufficient detail to transition into the development of an operational plan.

To prepare for the board work session, Steve Patty from Dialogues in Action interviewed board members, staff interviewed about 30 partners, staff provided input through internal focus groups, and strategic plan questions were added to our broadly distributed customer service survey.

This input is reflected in Attachment A, *Priorities Refresh*, which provides definition to proposed priorities for the updated strategic plan. Note that the content of the document is not intended to provide tactical specifics; instead, it is a starting point to guide development of specific actions.

IV. Work Session

Steve Patty will engage the board in a series of exercises designed to "Get Focused" by identifying and clarifying strategic priorities. In addition to the strategic plan, the priorities will also be used to inform the "Board Recommendations" element of the Oregon Plan for Salmon and Watersheds biennial report that will be submitted to the legislature in January 2024.

V. Recommendation

This is an informational item only.

Attachments

A. Priorities Refresh

How to read the proposed Priority Shifts for the Strategic Plan

In preparation for the board meeting, please review the summary of proposed shifts on the next page. Before you do, please orient yourself to the document by familiarizing yourself with the following description:

What this is about
Our aim in this document is to identify the areas of strategic priority for OWEB over the next 5 years. The ideas of this document are

- informed by extensive engagement with partners (survey, interviews), the board (interviews), and staff (focus groups);
- meant to refresh the 2018 strategic plan, to build on the fundamentals and update the areas of emphasis in the plan instead of start over;
- intended to be high-level areas of strategic focus and attention for the next five years (i.e., the bullet points are meant to define what we mean generally by the priority and not prescriptive as strategies or tactics);
- a product of a staff committee analyzing the engagement data and considering the significance of the data for the future; and
- a signal for the big-picture shifts of emphasis in our priorities going forward.

What this is not
Please bear in mind, this document does not yet represent the strategies, personnel, resources, benchmarks, timelines, outputs, outcomes, and measures of the plan. Our desire is to seek direction from the board on these priorities before building them out into an operational plan. Staff teams will develop the specifics of the plan after the priorities have been established.

What you will read
In this document, you will see

A. **Two ideas as the critical lenses**. We have placed climate change and equity as the through-lines for all that has been identified as the strategic priorities.
B. **Revised priorities.** We have reduced the 7 priorities of the 2018 plan to 5 priorities for the 2023 plan.
C. **Shifts of emphasis**. We have articulated the primary, big-picture shift in the priority from the 2018 plan.
D. **What we mean.** We have provided a list of characteristics of the priority as bullet points, not to be comprehensive but to illustrative

An invitation for the board
Please review this document with an eye toward the following:

- Do these priorities resonate with you as the most productive for our strategic direction going forward?
- Are there areas of emphasis within any of these priorities that you would like to call out for staff consideration?
- What guidance would you like to offer the staff as they begin to develop these priorities into strategies and operations?

Thank you for reviewing this document. We will have time at the October board meeting to dialogue together about the proposed priorities of the strategic plan.

OWEB Priorities Refresh (DRAFT 10-10-2023)

Woven through the plan is an emphasis on equity and climate.

Priority 1: Build broad awareness of the relationship between people and their watersheds

Shift this priority toward elevating success of watershed restoration. What we mean:

- Tell the restoration story clearly and compellingly
- Elevate the success of watershed restoration and the benefits to the people of Oregon
- Increase awareness for the long-term horizon of watershed outcomes
- Highlight the commitment of partners to watershed work

Priority 2: Reflect the diversity of Oregonians in watershed work

Shift this priority toward engagement of all communities. What we mean:

- Pursue diverse representation in watershed work through engagement grant offerings
- Thoughtfully pursue board and staff diversity
- Increase engagement with non-traditional partners on working lands and rural communities
- Engage communities disproportionally influenced by climate change

Priority 3: Strengthen community capacity to achieve healthy watersheds

Shift this priority toward strengthening community organizations to enhance the health of watersheds in their region. What we mean:

- Elevate expectations for the quality of watershed work in communities
- Provide training and technical support to increase internal capacity of organizations
- Support strategic partnerships among people, organizations, and agencies
- Promote stable funding for sustained watershed work

Priority 4: Advance learning about watershed restoration effectiveness through coordinated monitoring

Shift this priority toward communication of data, emerging insights, and promising practices. What we mean:

- Facilitate the use and development of science-based planning tools
- Facilitate the exchange of information and insight from monitoring
- Promote tools and best practices to connect the science to the practitioners
- Connect people and partners to science to enhance their effectiveness
- Monitor the effectiveness of actions in pursuit of climate objectives
- Invest in long-term monitoring efforts

Priority 5: Take bold and innovative action

Shift this priority toward important interventions to respond to climate change and emerging issues. What we mean:

- Pursue and support experimental programs
- Make room to try new techniques in restoration
- Design action to respond and mitigate the effects of climate change on watershed health
- Identify and develop new and innovative ways of pursuing watershed health and communicating climate benefits.

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item B

Board Member Updates

Board Meeting October 23-25, 2023

This item is reserved to any updates from each board member

(verbal only)



OREGON
WATERSHED
ENHANCEMENT BOARD

Agenda Item C

Board Meeting Minutes

Board Meeting October 23-25, 2023

MINUTES ARE NOT FINAL UNTIL APPROVED BY THE BOARD

Oregon Watershed Enhancement Board (OWEB)
July 25 & 26, 2023, Board Meeting

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

OWEB MEMBERS PRESENT
Agpaoa, Elizabeth
Allen, Chris
Boyer, Barbara
Brandt, Stephen
Brown, Dan
Buckmaster, Bruce
Coates, Kelly
Curtis, Aaron
Kile, Molly
Labhart, Mark
Marshall, Gary
McAlister, Liza Jane
McClary, Lindsay
McLeod-Skinner, Jamie
Murray, Eric
Owens, Cory
Reeves, Meg
Shively, Dan

OWEB STAFF PRESENT
Bettinardi, Nicole
Charpilloz Hanson, Lisa
Ciannella, Greg
Davis, Renee
Hartman, Heidi
Hartstein, Eric
Hoffert, Denise
Kershner, Jessi
Leopold, Kathy
McCarthy, Jillian
Page, Stephanie
Repplinger, Linda
Scharer, Miriam
Shaff, Courtney
Thompson, Rachel
Williams, Eric
Wolcott, Brian

OTHERS
Bailey, Josh
Barr, Brian
Bond, Jim
Davis, Emily Jane
Scott, Nell
Vradenburg, Leigh Ann
Weybright, Jared

Tuesday, July 25, 2023

The meeting was called to order at 8:00 a.m. by Barbara Boyer: Recording

A. Board Member Comments (Timestamp = 0:4:40)

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

B. Review and Approval of Minutes (Timestamp = 1:34:55)

The minutes of the April 24 & 25, 2023 meeting was presented for board approval. *Action item*.

Meg Reeves moved the board approve the minutes from the April 24 & 25, 2023 meeting. Kelly Coates seconded. Motion passed unanimously.

C. Co-Chair Election (Timestamp = 1:35:50)

Executive Director Lisa Charpilloz Hanson suggested moving this item to a future meeting and board members indicated their support for this approach. *Action item*.

D. Directors Updates (Timestamp = 1:42:50)

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

E. Committee Updates (Timestamp = 2:46:00)

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

F. General Public Comment (Timestamp = 2:56:59)

This time was reserved for the board to hear general public comments and review the written public comment submitted for the meeting. *Information item*. Written public comments available on the OWEB public comments page.

- Haley Lutz, Coos Watershed Association
- Kelley Beamer, Coalition of Oregon Land Trusts
- Andrea Kreiner, Oregon Association of Conservation Districts
- Vanessa Green, Network of Oregon Watershed Councils

G. Adopt 2023-2025 Spending Plan (Timestamp = 3:22:00)

Executive Director Lisa Charpilloz Hanson and Grant Program Manager Eric Williams provided the 2023-2025 Spending Plan for board review and approval. *Action item.*

Motion #1: Mark Labhart moved the board approve receipt of funds in the "Other Designated Funds/Programs" section of the spending plan. Jamie McLeod-Skinner seconded. Motion passed unanimously.

Motion #2: Mark Labhart moved the board delegate authority to the Executive Director to execute grant agreements and approve the spending plan items in the "Proposed 2023-2025" column of Attachment B to the staff report. Kelly Coates seconded. Motion passed unanimously.

Motion #3: Mark Labhart moved the board approve tables one and two of Attachment D of the staff report regarding spending plan policy decisions, carryforward, and delegation authorities for the spending plan. Kelly Coates seconded. Motion passed unanimously.

H. Council Capacity Grant Awards (Timestamp = 5:27:50)

Monitoring and Reporting Manager Courtney Shaff and Water Acquisitions & Capacity Coordinator Brian Wolcott provided an overview of the 2023-2025 Council Capacity grant offering and outlined staff recommendations for grant awards. *Action Item.*

Item H Public Comment (timestamp = 5:53:43)
Written public comments available on the OWEB public comments page.

- Greta Holmstrom, Greater Yamhill Watershed Council
- Jordan Anderson, Greater Yamhill Watershed Council
- Andy Bleckinger, Yamhill Soil and Water Conservation District
- Margaret Magruder, Columbia County Commissioner

Jamie McLeod-Skinner moved that the board award council capacity grants as described in Attachment D with an award date of July 1, 2023, with the exception of providing one year of full funding for the Great Yamhill WC and one year of reduced funding to the Lower Columbia River WC, to be revisited in July 2024, contingent on their performance in the coming year. The motion was not seconded; motion failed.

Mark Labhart moved the board award council capacity grants as described in Attachment D with an award date of July 1, 2023. Gary Marshall seconded. The motion failed with a vote of 7-3, with Meg Reeves, Jamie McLeod-Skinner, and Barbara Boyer opposed.

Kelly Coates moved the board award council capacity grants as described in Attachment D with an award date of July 1, 2023, with the exception of increasing the Greater Yamhill WC to 1 year of full funding, to be revisited July 2024, based on achievements and benchmarks. Jamie McLeod-Skinner seconded. Motion passed unanimously.

I. Climate-Related Evaluation Criteria Rulemaking (Recording)

Senior Policy Coordinator, Eric Hartstein and Water and Climate Programs Coordinator Jessi Kershner presented the proposed climate-related evaluation criteria for the OWEB Grant Program administrative rules for board review and approval. *Action Item.*

Jamie McLeod-Skinner moved the board approve the Climate-Related Evaluation Criteria administrative rules found in Attachment D to the staff report, as revised by the board. Bruce Buckmaster seconded. The board approved unanimously.

The meeting was adjourned at 4:00pm by co-chair Liza Jane McAlister.

Wednesday, July 26, 2023

The meeting was called to order at 8:00 by Liza Jane McAlister: Recording

J. General Public Comment (Timestamp = 0:03:50)
This time was reserved for the board to hear general public comments. *Information item*.
Written public comments available on the OWEB public comments page.

- Monica Tomosy, East Cascades Audubon Society
- Jim Greer, East Cascades Audubon Society
- Josh Collins, East Cascades Audubon Society
- Jared Weybright, McKenzie Watershed Council

K. Water Acquisition Grant Award (Timestamp = 0:16:40)
Grant Program Manager Eric Williams and Water Acquisitions & Capacity Coordinator Brian Wolcott provided an overview of the November 2022 Water Acquisitions Grant Offering process and outlined staff recommendations for grant awards. *Action item*.

Item K Public Comment (timestamp = 0:45:12)
Written public comments available on the OWEB public comments page

- Karl Wenner
- Mark Hennelly, California Waterfowl Association
- Gene Souza, Klamath Irrigation District

Mark Labhart moved the board award funding for water acquisition grants as specified in Table 1 of the staff report with an award date of July 26, 2023, including the conditions identified in the staff report and verbally provided by staff, "Funding shall be informed by the USFWS/USBOR consumptive use study of the Thomas Ranch water claim to ensure the purchase of only wet water." Jamie McLeod-Skinner seconded. The motion passed; with Gary Marshall voting no.

L. OWEB 101 Small Grants (Timestamp = 2:13:28)
Grant Program Manager Eric Williams and Small Grants Coordinator Kathy Leopold provided an 'OWEB 101' presentation highlighting the Small Grants program. *Information Item.*

M. Drought and Fire Grant Program Presentation (Timestamp = 2:45:30)
Fire, Klamath, and Drought Program Manager Renee Davis, OWEB drought and fire staff, and representatives from local organizations that are grantees in the post-wildfire recovery and drought relief grant programs joined the board for a panel discussion on the work they are implementing, and how this work addresses post-wildfire recovery and drought relief efforts. *Information Item.*

N. Council Capacity Retrospective Analysis (Timestamp = 4:21:00)
Monitoring and Reporting Manager Courtney Shaff and guest presenter Oregon State University Extension Service Interim Fire Program Director Emily Jane Davis presented to the board the results of a retrospective evaluation of OWEB's operating capacity grants. *Information item*.

O. Initiate Rulemaking – Division 35 (Timestamp = 4:28:25)
Senior Policy Coordinator Eric Hartstein requested board authorization to initiate rulemaking for the OWEB Small Grant Program and a legislatively directed new grant program related to protecting source drinking water. *Action Item*

Bruce Buckmaster moved the board authorize rulemaking for the Small Grant Program in Division 35, and to authorize rulemaking for the Source Drinking Water Protection Grant Program contingent upon the Governor signing House Bill 2010 and related funding bills. Jamie McLeod-Skinner seconded. The motion passed unanimously.

P. Other Business (Timestamp = 5:06:00)
Board members used this time to discuss ideas for future meetings. *Information Item.*

The meeting was adjourned at 1:45pm by co-chair Barbara Boyer.

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Items D and H

Public Comment

Board Meeting October 23-25, 2023

Submitted written public comment will be published in a supplemental document after the board meeting and posted on our website here: https://www.oregon.gov/oweb/about-us/Pages/board/2023-Oct.aspx

OREGON
WATERSHED
ENHANCEMENT BOARD

Submitted Written Public Comment

Supplemental

Hybrid Board Meeting

Klamath Falls, Oregon

October 23-25, 2023

Oregon Watershed Enhancement Board
Submitted Written Public Comments
Oct 23-25, 2023

Item D & H: General Public Comment

Name	Topic
Charles Rogers	Pipe Fork Land Purchase Assistance
Brenda Smith	DEI & Environmental Justice

Item I: Open Solicitation Grant Awards Public Comment

Name	Topic
Selene Keeney	Collaborative Expansion of the Columbia County Water Quality Monitoring Program 2023-2026 (OWEB Application number 223-1028-23003)
Casey Garret, Kellie Jo Smith, Margaret Magruder	Support for OWEB Application number 223-1028-23003
Eric O'Connell	Support for OWEB Application number 223-1028-23003
Casey Mitchell	Support for OWEB Application number 223-1028-23003
Jim Brick	Support for OWEB Application number 223-1028-23003
Rachell Meyers	Support for OWEB Application number 223-1028-23003
E. Elaine Placido	Support for OWEB Application number 223-1028-23003

BETTINARDI Nicole * OWEB

From: oregon-gov-web-services@egov.com
Sent: Thursday, September 28, 2023 9:44 PM
To: BETTINARDI Nicole * OWEB
Cc: REPPLINGER Linda * OWEB
Subject: Public Comment

First and Last Name	Charles Rogers
Phone Number	
Email Address	
I wish to provide (select one):	written comment
If you are providing VERBAL comment, how do you plan to attend the meeting (select one):	
I want to provide comment at (select one):	OWEB Board Grants committee
Agenda Topic / Item Letter	Pipe Fork Land Purchase Assistance
Type Comment Here (comments may also be uploaded below):	A Yellowbook Appraisal is required by the purchasers to help evaluate the monetary value of the Pipe Fork Land Sale. These appraisals help determine the price at sale and guide purchase of the real property. It is a comprehensive analysis of the land, timber, and real estate value by a qualified third party who has experience in land sale appraises. The Conservation Fund and the Bureau of Land Management required this appraisal for the land purchase. We are not involved in the real estate sale, that is done by the real estate managers at the Josephine County, the Conservation Fund, and the Bureau of Land Management real estate office. The Williams Community Forest Project is a non-profit community group that negotiated with the County and set up the land purchase and brought together the partners that are willing to complete the land purchase. The real estate land managers are skilled in this process and we are following their requirements. Our efforts are to find some funding that will help complete the land sale when it is ready. Closing costs for property managers are needed to complete the sale and are being matched by generous donations.. These costs include negotiations by the real estate managers of The Conservation Fund, a land purchasing group that provides bridge loans for these type of land purchases. The Williams Creek Watershed Council has donated many hours writing letters and articles to local newspapers and negotiating with the County to establish the land sale and will continue with this public outreach. It has measured water levels, checked the water

	quality, and conducted outreach with property owners downstream of the Pipe Fork where quality salmon habitat exists. This funding is crucial in completing the sale by providing matching funding for the bridge loans through The Conservation Fund. Please consider funding the purchase of Pipe Fork and supporting this Technical Assistance.

Submission ID: 2450c2e0-76c8-4fd9-a07d-8a16efba08d3

Record ID:

October 19, 2023

To: Oregon Watershed Enhancement Board

From: Brenda Smith, High Desert Partnership

Subject: Feedback on Attachment A OWEB DRAFT Equity Statement & DEIEJ Resolution 9.6.23

I appreciate the attention that OWEB is giving to drafting a thoughtful statement for Equity as it may be applied to fulfill the mission of OWEB to "protect and restore healthy watersheds and natural habitats that support thriving communities and strong economies'.

Today, I would like to offer a couple of “food for thought” comments as OWEB continues to refine the draft document.

In my experience in DEI work in our organization at High Desert Partnership, drafting a statement and putting it to use is an iterative process. We spent a good deal of time developing our DEI statement and reviewing our statement yearly to make sure it continues to be relevant and that we remain dedicated to the work.

A process that worked well for us as we embarked on a DEI effort and documentation for our organization was to first have our board and staff agree upon foundational definitions, in our case it was diversity, equity and inclusivity. What we found initially is there is a lot of interpretation around these words. We often think we know what the words mean but everyone has experiences and perceptions that put a different lens on the meaning of these words. Having agreement on the definition of the words allowed us to move forward on what we were hoping to achieve with a DEI statement and how we integrate it into our ongoing activities.

I would also like to bring up our publicly managed lands and how they are intrinsically linked to other land ownership and management. In Harney County, for example, over 70% of our lands are publicly managed and as you may know these are lands for all to experience. In this frontier, rural county of 10,000 square miles and less than 7,500 residents, distributing resources to better coordinate projects across jurisdictional boundaries would help to meet important DEI goals and restore and protect ecosystems. What happens on privately managed lands must be coordinated with publicly managed lands for watershed health. Often these are also lands that provide more urban areas with clean, safe water supply. Underserved and under resourced communities and individuals in frontier rural communities in fact protect urban communities - from catastrophic fire, flooding, etc.

Thank you for continuing to examine what it means to have resolutions such as this in organizations that provided resources for watershed level work and management. Given the mission of OWEB, is seems that working directly with groups that manage watersheds and natural habitats there are ways to provide underserved communities identified a larger voice in what types of watershed and habitat projects are occurring without of using resources that are not directly linked to watersheds and habitats.

Sincerely,

Brenda Smith

Director, High Desert Partnership

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item I

Spring Open Solicitation Grant Offering

Public Comment

Board Meeting October 23-25, 2023

Columbia Soil & Water Conservation District
35285 Millard Road
St. Helens, OR 97051
Ph: 503.397.4555
www.columbiaswcd.com

10/19/2023

Oregon Watershed Enhancement Board
775 Summer Street NE, Suite 360
Salem, OR 97301-1290

RE: Collaborative Expansion of the Columbia County Water Quality Monitoring Program 2023-2026
Spring 2023 Open Solicitation Grant Proposal

Dear OWEB Board Members,

The Columbia Soil and Water Conservation District (CSWCD) is writing you in support of the Lower Columbia Estuary Partnership's (the SWCDs project partner) Spring 2023 Open Solicitation grant proposal, the Collaborative Expansion of the Columbia County Water Quality Monitoring Program 2023-2026. We kindly ask that the OWEB Board consider funding this important project. We would like to highlight that the project was recommended for funding by the OWEB Review team based on the proven track record of the monitoring team's technical expertise, good quality data reported to the Oregon Department of Environmental Quality (DEQ), and the large amount of partner support. However, the project fell below the OWEB staff recommend funding line. Without OWEB funding the project as it's currently configured will cease to exist after 2023.

As impacts to water quality have detrimental effects to critical salmon and steelhead habitat, and to other important species and resources, the CSWCD is committed to monitoring water quality and has expended an extensive amount out-of-pocket funds to support the project. Since 2017 the SWCD's technical lead, in collaboration with our project partner, the Lower Columbia Estuary Partnership, has collected continuous water quality data for temperature, *E.coli*., dissolved oxygen (DO) and turbidity across six key Columbia County, Oregon, subbasins. All collected data is reported to DEQ and is used to inform Total Daily Maximum Loads (TDMLs) and beneficial use statuses. If the project is discontinued, paused for a year or more, due to a lack of crucial funding this will result in significant data loss which will have implications for strategic planning and habitat restoration, and particularly for expanded restoration funding.

From 2019 to 2022 the CSWCD received a total of $3,000,000 in federally appropriated funding, administered through NRCS, to implement a Regional Conservation Partnership Program (RCPP) for the Clatskanie River Watershed and the areas of the Lower Columbia River that occur within Columbia County. The purpose of this RCPP was to address the primary two Natural Resource Conservation Service (NRCS) identified Resource Concerns impacting the recovery ESA salmonids in the county: 1) water quality degradation, and 2) inadequate habitat. It's essential to underscore that the water quality monitoring project was instrumental in securing this $3,000,000 funding. This project not only highlighted the urgent need for action but also provided a clear roadmap for targeted, effective habitat restoration. The CSWCDs water quality monitoring project supported NRCSs determination that water quality degradation was affecting the recovery of ESA salmonids in Columbia County, which resulted in the RCPP funding the design and construction of four logistically complex habitat restoration projects and the design of a fifth project.

This project allows the CSWCD to provide solid information to the public and local governments on watershed water quality issues to facilitate strategic planning and water quality improvement actions. If three years of funding under the Spring 2023 Open Solicitation is granted, this project will build on data collected to date, which will provide an opportunity to complete more in-depth analyses of watershed health to identify specific areas of concern. The results of this project, identification of long-term water quality status and trends supported by in-depth analyses with robust data sets, will provide a strategic framework for habitat restoration prioritization, and provide opportunities for expanded habitat restoration funding, and better inform the public and local governments on effective actions to improve water quality.

We deeply value the support that the Board has extended for the project in the past. We are confident that the project aligns with OWEB's mission and strategic plan priorities, and we believe it will make a lasting, positive impact on our watersheds and the species and communities that depend on them. Again, we kindly request that you to consider our plea for continued funding, keeping in view the benefits, the endorsement of the review team, and the adverse consequences of prematurely discontinuing the project to strategic planning and habitat restoration in Columbia County.

Thank you for your consideration, sincerely,

Selene Keeney

Selene Keeney
Columbia SWCD, Resource Conservationist/Project Manager

COLUMBIA COUNTY

Board of Commissioners Office

ST. HELENS, OR 97051

Commissioners
Margaret Magruder
Kelly Jo Smith
Casey Garrett

Administration
Jacyn Normanee
Kathy Goldsberry

Communications
Mark Pulsifer

230 Strand St., Room 338
Direct: 503-397-4322
Fax: 503-366-7243
columbiacountyor.gov

October 18, 2023

Oregon Watershed Enhancement Board (OWEB)
775 Summer St. NE #360
Salem, OR 97301

Re: Letter of support for funding the application to extend the Columbia County Water Quality Monitoring Program 2023-2026 (Application number 223-1028-23003)

Dear OWEB Board Members:

Columbia County is divided by the Coastal Range into two major watersheds, the Lower Columbia River Watershed, and the Upper Nehalem River Watershed, which flows west to the Pacific Ocean. There are 62 miles of Columbia River shoreland, and seven watersheds and many fish bearing streams.

Columbia County is writing in support of funding for the Collaborative Expansion of the Columbia County Water Quality Monitoring Program between Lower Columbia Estuary Partners (LCEP), Columbia County Soil and Water Conservation District (SWCD), and other partners for a requested amount of $270,865 to extend the monitoring efforts for an additional three years; covering years 7-9 of the existing program. The extended timeline and growth of the program allow for the continued collection of crucial data and in-depth analyses of watershed health across six key sub-basins in Columbia County.

Continuing with the ongoing status and trend monitoring across Columbia County sub-basins, the above application aims to shift continuous dissolved oxygen (DO) data collection which will provide more insight to meet ODEQ requirements in addition to the implementation of innovative eDNA studies. The goal of the eDNA study is to trace sources of the ongoing E.coli issues, observed across all sub-basins. The testing for eDNA will assist Columbia County to determine if septic systems are failing, leaching into streams, and in need of repair. Through a current DEQ tri-county grant with Columbia, Clatsop, and Tillamook Counties and administered by Community Action Team, the testing will allow collaboration to solve this problem affecting our communities.

This program not only supports Columbia County's water quality efforts through the Stormwater & Erosion Control Ordinance 2001-10, it is a thorough collaborative drive to protect water sheds across multiple agencies while supporting Columbia County Land Development Services as a Designated Management Agency (DMA) and other DMA's for the Lower Willamette River Total Maximum Daily Loads (TMDL's) as required by DEQ for Mercury,

Temperature and future Bacteria: E.coli, to name a few. This funding opportunity encompasses a collaborative effort.

between partners within the County, including the Drainage Districts, for the betterment of the community, environment, water quality, and OWEB's mission, vision, and values.

Your thorough consideration of Columbia County Water Quality Monitoring Program grant application number 223-1028-23003 is greatly appreciated.

Sincerely,

Casey Garrett, Chair

Kellie Jo Smith, Commissioner

Margaret Magruder, Commissioner

COLUMBIA COUNTY
Land Development Services

ST. HELENS, OR 97051
230 Strand St.
Direct (503) 397-1501
www.co.columbia.or.us

October 18, 2023

RE: Support for Funding the Collaborative Expansion of the Columbia County Water Quality Monitoring Program 2023-2026 project (OWEB Application number 223-1028-23003)

Dear OWEB Board Members,

Columbia County's Onsite Wastewater Program is writing in support of the Collaborative Expansion of the Columbia County Water Quality Monitoring Program 2023-2026 project that was recommended for funding. If funded, this project would extend monitoring efforts for an additional three years. This extended timeline will allow for the continued collection of crucial data on water quality parameters such as temperature, *E. coli*, dissolved oxygen (DO), and turbidity across six key subbasins in Columbia County. In addition to continuing the ongoing status and trends monitoring across all monitored sub-basins, three years of additional data will allow more in-depth analyses of watershed health to better inform the project partners' strategic planning and restoration efforts.

As the application demonstrates, partners have provided an unprecedented amount of support. However, without OWEB funding the project as it's designed will cease to exist after 2023. Discontinuing the project will result in significant data loss, which will have implications for all entities involved.

We would like to highlight that after a rigorous review, the project was recommended for funding by the OWEB Review team. Their recommendation is based on the proven track record of the monitoring team's technical expertise, good quality data reported to the ODEQ, and a large amount of partner support.

I am the primary Environmental Services Specialist serving Columbia County; I am one of the core staff responsible for development processes and standards and often serve as the point person on water quality matters. I also act as the Oregon DEQ county contract agent for implementing the Onsite Wastewater System Rules which is a significant part of overall land development and currently the only staff responsible for protection of public health and waters as related to sanitation. I have been with Columbia County for 15 years and have long advocated for the counties increased role in water quality concerns and capabilities. The data amassed by this Water Quality Program has in the last few years allowed us to create the foundation to start to build out regulatory programs and processes with the direct purpose of creating policy for development's role in protecting our watersheds and communities. To highlight a few key advances made because of the data set established:

- As of FY 2024, a new Site Development program with the intended purpose of better regulating activities of storm water and erosion control
- Plans to update the Columbia County Storm Water and Erosion Control Ordinance
- Hiring an additional Environmental Services Specialist staff person
- Increasing capacity to build collaboration with multiple partner agencies on water quality and restoration; this includes the Watershed Councils, Soil and Water Conservation Districts, and all cities located in Columbia County to name a few.

- Development of a WQ mapping tool by the Columbia County GIS department to help use informatics to draw data related conclusions
- A new pilot program for eDNA testing for E. coli that we will look to support and establish septic repair programs and community outreach
- More robust Oregon DEQ TMDL reduction capabilities

The long term data already established by the Columbia County Water Quality Monitoring Program is a key piece responsible for providing the information needed for the County's leadership and staff to take steps towards a more comprehensive approach. The data to date demonstrates the need to act as the regulatory authority to ensure more effective policy in order to increase impacts. Should the ability to continue monitoring end, this effort could be significantly impacted. Columbia County is a small rural county that often does not have the resources to meet all of the needs of our citizens and we rely on every resource available to provide the most responsible government we can.

We deeply value the support that the Board has extended for the project in the past. We are confident that the project aligns with OWEB's mission and strategic plan priorities, and we believe it will make a lasting, positive impact on our watershed and the communities that depend on it. We kindly request you to consider our plea for continued funding, keeping in view the benefits, the endorsement of the review team, and the adverse consequences of prematurely discontinuing the project to strategic planning and restoration in the County that the project will inform.

Sincerely,



Erin O'Connell, REHS
Environmental Services Specialist

Community Action Team
Serving Columbia, Clatsop, and Tillamook Counties
phone (503) 397-3511
fax (503) 397-3290
www.cat-team.org

October 17, 2023

Subject: Support for Funding the Application to Extend the Columbia County Water Quality Monitoring Program

Dear OWEB Board,

Community Action Team Inc. is writing in support of funding the Collaborative Expansion of the Columbia County Water Quality Monitoring Program 2023-2026 (Application number **223-1028-23003**). Community Action Team Inc. (CAT) has been awarded a $1.5 million grant from DEQ to address failed or failing septic systems in Columbia, Clatsop and Tillamook counties. CAT has developed a partnership with the North Coast Watershed Councils and our organization uses some of the eDNA testing and mapping for the DEQ program. This mapping has been utilizing eDNA to identify various E. coli strains (human, deer, cow, etc.) throughout the area. This will allow for targeted outreach to households in the area who might be in need of septic repairs or replacement. With the partnership between CAT and the Watershed Councils, the program could also provide the results of testing from January 2023, as well as the results of future testing to occur in 2025. This would allow us to compare results to show the benefit of septic repairs/replacement and the effect on human E. coli in those particular waterways.

We look forward to working with the Columbia County Water Quality Monitoring Program to help identify watersheds that have been impacted by failed septic systems.

Sincerely,

Casey Mitchell
Program Manager
Community Action Team Inc.
503-366-6552

Oregon
Kate Brown, Governor

Department of Fish and Wildlife
Northwest Region
17330 SE Evelyn St
Clackamas, Or. 97015
Phone: 971-673-6000
Fax: 971-673-6073

October 16, 2023

Dear OWEB Board,

Subject: Support for Funding the Application to Extend the Columbia County Water Quality Monitoring Program

The Oregon Department of Fish and Wildlife (ODFW) is writing in support of funding the Collaborative Expansion of the Columbia County Water Quality Monitoring Program 2023-2026 (Application number 223-1028-23003). ODFW understands the difficulties of evaluating and prioritizing limited grant funds across all OWEB regions. ODFW also believes in the review team process using evaluation criteria to inform decisions at the review team, OWEB, and board levels. Understanding these complexities and the process, ODFW would like to address some concerns which the review and monitoring teams expressed during the review process.

All monitoring proposed under this application is occurring in the Clatskanie and Scappoose fish populations within the Lower Columbia River (LCR) Evolutionary Significant Unit. Clatskanie fish populations are LCR coho and SW Washington Distinct Population Segment (DPS) steelhead. In the last three years, a Columbia River chum re-introduction project has re-introduced chum salmon into the Clatskanie River basin. The Scappoose population has LCR coho and SW Washington DPS steelhead. LCR Chinook have not been found in the Scappoose population in the last 11 years of monitoring and not found outside of Plympton Creek (approx. 100% hatchery fish from Big Creek) in the Clatskanie

The Scappoose population is and has been for years, thermally stressed during the summer months and approximately 25% of available rearing habitat is no longer available during the summer. This scenario is only expected to worsen as a changing climate continues to warm summer air and stream temperatures. Additionally, LCR fall chinook occupy basins on either side of the Scappoose and Clatskanie populations but have not re-colonized based on annual spawning ground surveys. LCR coho have not responded in the Clatskanie as they have across other locations and Scappoose steelhead are averaging returns of less than 100 fish. With no hatcheries (except Clatskanie chum), almost no in basin harvest and no hydropower facilities, the problem most likely revolves around habitat. Part of the habitat story is water quality and that is acknowledged in the Oregon's recovery plan as secondary limiting factors (excessive fine sediment, elevated water temperature and altered hydrology from upslope land uses).

While there are many parameters around water quality, ODFW's key interest is in water temperature. Water temperatures is already stressed and will only continue to worsen under a changing climate without mitigative measures. Having current water temperatures provides a baseline to model for future change. ODFW developed a downscaled model for future summer stream temperatures within the LCR ESU. Current water temperatures could further inform the model. With this information practitioners can plan and prioritize restoration projects under future stream conditions and maximize restoration efforts for the benefit of salmonids.

There is also the mystery of why fish populations have not recolonized, not bounced back akin to adjacent populations and for some populations, teetering on extinction. During the chum re-introduction project, investigation occurred and showed the presence of *Ceratonova shasta* and the

vulnerability of chum salmon fry. *C. shasta* is also known to affect coho, chinook and steelhead. For the Klamath River, Oregon State University developed a model to simulate the density of water-born *C. shasta* actinospores. Spore density was simulated by a quadratic regression model based on a parabolic thermal response with river water temperature. While additional information would be needed to create this model based on Columbia County streams, water temperatures are focal points.

Data amassed by this proposal for water quality monitoring can inform future restoration project location and type, the potential to inform chum salmon release timing as well as potentially informing *C. shasta* actinospore densities.

ODFW values the support that the Board has extended to the monitoring program in the past.

Jim Brick
CREP Implementation Coordinator
Oregon Department of Fish and Wildlife

RE: Support for Funding the Collaborative Expansion of the Columbia County Water Quality Monitoring Program 2023-2026 project (OWEB Application number 223-1028-23003)

Dear OWEB Board Members,

Scappoose Bay Watershed Council (SBWC) are writing in support of the Collaborative Expansion of the Columbia County Water Quality Monitoring Program 2023-2026 project that was recommended for funding. If funded, this project would extend monitoring efforts for an additional three years This extended timeline will allow for the continued collection of crucial data on water quality parameters such as temperature, E.coli, dissolved oxygen (DO) and turbidity across six key subbasins in Columbia County.

In addition to continuing the ongoing status and trends monitoring across all monitored sub-basins, three years of additional data will allow more in-depth analyses of watershed health to better inform the project partners' strategic planning and restoration efforts. Data from this project will assist local governments in focusing efforts to improve water quality in their watersheds and is valuable in informing the public and leading to expanded funding opportunities.

While partners have provided $130,000 in match funding, showing an unprecedented amount of support. However, without the necessary funding from the OWEB, the project as it's designed will cease to exist after 2023. Discontinuing the project will result in significant data loss, which will have implications for strategic planning and subsequent restoration actions in the County. Furthermore, the data collected is reported to ODEQ, and in turn, is used by ODEQ to inform TDMLs and beneficial use status.

We would like to highlight that after a rigorous review, the project was recommended for funding by the OWEB Review team. Their recommendation is based on the proven track record of the monitoring team's technical expertise, good quality data reported to the ODEQ, and a large amount of partner support.

The Scappoose Bay Watershed Council does rely on data amassed by this Program for water quality management. The continued efforts of this program are allowing partners to assess and find mitigation strategies for water quality issues in the watershed. If necessary, scaling the proposed application to fit the available funding will at least provide the support needed for continuing this important project.

We deeply value the support that the Board has extended to the project in the past. We are confident that the project aligns with OWEB's mission and strategic plan priorities, and we believe it will make a lasting, positive impact on our watershed and the communities that depend on it. We kindly request you to consider our plea for continued funding, keeping in view the long-term benefits, the endorsement of the review team, and the adverse consequences of discontinuing the project to strategic planning and restoration in the County that the project will inform.

Sincerely,

Rachell Meyers

Coordinator, Scappoose Bay Watershed Council

Lower Columbia Estuary Partnership

October 19, 2023

Oregon Watershed Enhancement Board -OWEB
Board of Directors
Submitted via email

RE: Support for Funding the Application to Extend the Columbia County Water Quality Monitoring Program

Dear OWEB Board Members,

Lower Columbia Estuary Partnership is writing in support of funding the Collaborative Expansion of the Columbia County Water Quality Monitoring Program 2023-2026 (Application number 223-1028-23003). In the application, LCEP and partners request funds to extend the monitoring efforts for an additional three years. This extended timeline and growth of the project would allow for the continued collection of crucial data and more in-depth analyses of watershed health across six key subbasins in Columbia County. In addition to continuing the ongoing status and trends monitoring across all sub-basins, the new application also aims to shift to continuous dissolved oxygen (DO) data collection across these sites to gain more insight and meet ODEQ requirements, in addition to the implementation of an innovative eDNA study. The goal of the eDNA study is to trace sources of the ongoing *E. coli* issues observed across the sub-basins. These programmatic changes are informed by the results of our ongoing data collection from this program, feedback from our partners, and feedback provided by the OWEB grant committees and staff.

We would like to highlight that after a rigorous review, the project was recommended for funding by the OWEB Review team. Their recommendation is based on the proven track record of technical expertise on the monitoring team, good quality data with a large amount of partner support for this Program.

While partners have shown an unprecedented amount of support, without the necessary funding from the OWEB Board, the long-term program as it's designed will cease to exist beyond 2023. Discontinuing funding for the Program will result in significant data loss and affect any subsequent restoration actions in the County.

The data amassed by the project has been immensely useful to our partners. Over the course of the project's timeline, the CSWCD has been able to secure $3 million over 2019 – 2022 to implement a Regional Conservation Partnership Program (RCPP) for the Clatskanie River Watershed. The ODEQ uses data from this project to inform TMDLs for the County. Columbia County Department of Public Health has been able to take steps to implement updates to the Columbia County Storm Water and Erosion Control Ordinance 2001-10, develop a WQ mapping tool by the Columbia County GIS department, and take steps to establish septic tank repair programs. ODFW also has a key interest in water temperature data from this project which informs their models. If necessary, scaling the proposed application to fit the available funding will at the minimum provide the support needed for continuing the long-term baseline monitoring efforts.

We deeply value the support that the Board has extended for the project in the past. We are confident that the project aligns with OWEB's mission and strategic plan priorities, and we believe it will make a lasting, positive impact on our watershed and the communities that depend on it. We kindly request you to consider our plea for continued funding, keeping in view the long-term benefits, the endorsement of the review team, and the adverse consequences of discontinuing the project.

E. Elaine Placido

E. Elaine Placido, DPA
Executive Director

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item E

Director's Updates

Board Meeting October 23-25, 2023

This report provides the board with an update on the status of OWEB's investment in Klamath River Post-Dam Removal Watershed Restoration costs associated with work by the Klamath River Renewal Corporation (KRRC).

Background

PacifiCorp previously owned four hydroelectric dams on the Klamath River, three in California and one in Oregon (J.C. Boyle dam). PacifiCorp and the Oregon Public Utilities Commission determined that it is in the best interest of the company and its customers to stop operating the dams rather than spending substantial amounts on improvements needed if they were to continue generating power. The dams are not used for irrigation. KRRC is a private, independent nonprofit organization formed by signatories of the amended Klamath Hydroelectric Settlement Agreement (KHSA). Signatories of the amended KHSA, including the States of Oregon and California, local governments, Tribal nations, PacifiCorp, irrigators, and several conservation and fishing groups, appointed KRRC to take ownership and oversee the removal of the four Klamath River dams. Funding in the amount of $450 million for removal and watershed restoration was committed.

As KRRC implements the dam removal, former reservoir areas will become exposed and require restoration and stabilization of bare sediment deposits for long-term water quality, ecological benefits, and restoration of natural river functions and processes. Restoration work also will be needed at upland sites (where dredged material generated by regrading of slopes will be deposited) and at the mouths of creeks entering the former reservoir pools. KRRC submitted a Reservoir Area Management Plan (RAMP) to the Federal Energy Regulatory Commission (FERC), the responsible entity for principal federal regulatory review of the project. The RAMP describes measures for restoration, monitoring, and adaptive management of the former reservoir areas and high-priority tributaries, including actions specifically planned for the former reservoir area upstream of J.C. Boyle dam, the section of the project located in Oregon.

During the FERC review, a question was raised about whether existing contingencies and risk tools provide a high enough level of certainty that the work will be completed on time and within budget. In response to this concern, the states and PacifiCorp agreed to provide up to $45 million in additional financial support for the project, divided equally among the three entities. On October 26, 2022, the OWEB Board committed $15 million over a period of 3-5 years for Klamath River post-dam removal restoration watershed restoration costs incurred by KRRC. Multiple funding sources administered by OWEB will be utilized for this commitment. The initial grant award made and delegated by the board in October 2022 was $4.053 million. An additional $8 million was committed and delegated by the board in the 2023-2025 spending plan at the July 25, 2023, board meeting. The remaining $2.947 million will be included in the OWEB Board's spending plans in future biennia.

The final License Surrender Order from FERC approving the decommissioning and removal of the dams was issued on November 17, 2022. Ownership of the four dams and associated lands was transferred to KRRC effective December 1, 2022. The removal of the J.C. Boyle facility located in Oregon is expected to occur in 2024.

In late 2022, OWEB and KRRC finalized a partnership agreement that affirms the intent of OWEB's investment in Klamath River post-dam removal watershed restoration and describes the framework, scope, tasks, and timeline for the overarching $15 million in funding. In addition, the States of Oregon and California, PacifiCorp, and KRRC finalized a Memorandum of Agreement regarding the Supplemental Contingency Funding Implementation.

OWEB created a KRRC-specific grant offering that includes a project-level grant application and associated guidance documents for use by KRRC to propose specific activities that would utilize the OWEB's post-dam removal watershed restoration funding. Grant applications submitted by KRRC will mirror the restoration actions for the J.C. Boyle area as outlined in the RAMP and will adhere to minor additional requirements included in FERC's final order.

In March 2023, work officially began on dam removal. Significant work has been completed, including road and bridge improvements, installation of the Yreka water line, and other site preparations. In June 2023, FERC issued final authorization to complete remaining Pre-Drawdown Period work activities and construction, including removal of Copco No. 2 dam. Kiewit began removal of Copco No. 2 dam in June and completed removal in September.

Status Update

Since the July 2023 board meeting, OWEB staff have been in regular communication with KRRC. OWEB and KRRC are coordinating on timing for grant applications to be submitted to OWEB, in addition to considerations for different fund sources (e.g., Pacific Coastal Salmon Recovery Funds (PCSRF), Bipartisan Infrastructure Law funding through PCSRF, and Measure 76 lottery funds) relative to the restoration actions to be included in grant applications. Currently anticipated actions include tributary restoration, floodplain restoration and reconnection, fish-passage barrier removal, instream large-wood placement, revegetation, and treatment of invasive species, among others. KRRC, working with RES, KRRC's restoration contractor, expect to submit a grant application in mid-2024.

In terms of progress related to the broader Klamath dam removal project:

- KRRC's restoration contractor, RES, is coordinating closely with Kiewit, KRRC's construction contractor, to complete biological and water quality monitoring throughout the construction process.
- RES is beginning to coordinate initial restoration activities in anticipation of reservoir drawdown and ongoing construction activities. In addition, they are completing boulder- and tree-related work between the site of the now removed Copco No. 2 dam and Iron Gate dam, to ensure safety for recreators by the end of October.
- Kiewit will continue roadway and infrastructure improvements, including relocation of the Yreka water line, recreation site removals, fire management improvements, and other preparations for dam removal through the end of this calendar year.
- FERC and independent consultants are completing final review of the dam removal design. KRRC anticipates a phased approval approach, with FERC granting approval for reservoir drawdown and initial dam removal activities at J.C. Boyle and Copco No. 1 dams in 2023 and approval for the remaining dam removal activities in the spring of 2024, once the 2024 water year has been analyzed to finalize the Iron Gate dam breach schedule to ensure public safety during dam removal.
- Reservoir drawdown will begin in January 2024 and deconstruction of J.C. Boyle, Copco No. 1, and Iron Gate dams will be complete by October 2024. Restoration activities will commence immediately and continue for the next several years.

Quarterly reports will be provided to the board at each meeting.

Staff Contact

If you have questions or need additional information, contact Renee Davis, Acquisitions and Special Programs Manager, at renee.davis@oweb.oregon.gov or 971-345-7231.

October 23-25, 2023, OWEB Board Meeting

Executive Director Update E-3, Drinking Water Source Protection Grant Program Update

This report provides the board with an update about initial work to begin scoping for development of a Drinking Water Source Protection grant program, as directed by House Bill (HB) 2010 (2023).

Background

Earlier this year, the Oregon Legislature passed HB 2010, which was the 'omnibus' water package. The bill directed OWEB to establish a new drinking water source protection land acquisition grant program. The intent of this program is to provide grants to water suppliers to protect sources of drinking water. The bill also allocated $1 million in General Funds to the program; this funding is combined with an additional $4 million in Lottery Bond funding—through HBs 5030 and 5506—for the drinking water source protection program established in HB 2010. In total, $5 million is available to support the new grant program. Additionally, OWEB received funding (General Fund) and position authority for a 0.88-FTE Natural Resources Specialist 4 position to help support program development and administration.

At the July 2023 meeting, the board approved initiation of rulemaking for two grant programs, including the Drinking Water Source Protection program. This process will convene a rules advisory committees (RAC) composed of potential grant applicants, reviewers, and others most likely to be impacted by the administrative rules that govern the grant program. Staff propose to develop the rules in accordance with the draft schedule below.

Rulemaking Action	**Dates/Deadlines**
Board Authorization for Rulemaking	July 2023
Draft Rules Developed	Fall 2023
RAC Meetings to Vet Draft Rules and Provide Feedback	Fall-Winter, 2023/2024
Draft Rules Revised Based on RAC Feedback	April 1, 2024
Notice Filed with Secretary of State	April 1, 2024
Public Comment Materials posted online	April 1, 2024
Notice to Agency Mailing List and Legislators	April 1, 2024
Secretary of State's Bulletin	April 1, 2024
Public Comment Period	April 1-April 30, 2024
Public Hearing(s)	April 2024
Revisions to Draft Rules Based on Public Comment	May/June 2024
Board Adoption of Rules	July 2024

Status Update

The Drinking Water Source Protection grant program will sit within the newly created Acquisitions and Special Program section of the agency. Staff have taken several early steps for program scoping:

- Drafting a position description for submission through the State of Oregon's recruitment process for state employees;
- Initiating communications with subject-matter experts and grant program managers from the Oregon Department of Environmental Quality, Oregon Health Authority, the U.S. Environmental Protection Agency, and U.S. Forest Service to better understanding both technical information regarding source water protection and how this program may complement existing drinking water protection grant and loan programs;
- Analyzing legal and statutory direction to the agency to inform rulemaking;
- Beginning to engage in existing processes (e.g., Coastal Partnerships for Drinking Water Protection workshops) to learn more about challenges and opportunities faced by local communities and partners; and
- Drafting an outreach and implementation plan for program scoping and development, including RAC formation.

The board and, as appropriate, relevant board committees will receive periodic updates about progress on program development and rulemaking.

Staff Contact

If you have questions or need additional information, contact Renee Davis, Acquisitions and Special Programs Manager, at renee.davis@oweb.oregon.gov or 971-345-7231.

October 23-25, 2023, OWEB Board Meeting
Executive Director Update E-4: Focused Investment Partnership (FIP) Solicitation

This report provides the board an update about the current FIP solicitation and the review process for submitted applications.

Background

In May 2023, OWEB started a solicitation for new FIP initiatives that would begin in the 2023-2025 biennium. Over the summer, OWEB staff conducted virtual pre-application consultations with six partnerships exploring the option of submitting a FIP application in this grant offering. This consultation is required for all FIP applicants. During the meeting, OWEB staff described FIP program expectations and partnerships discussed their potential initiatives. OWEB staff expect to receive up to five applications by the October 16, 2023 due date.

FIP Application Review and OWEB Board Grants Committee Process

In January 2024, OWEB will convene a review team with expertise in partnerships and in each ecological priority represented in the submitted applications. Reviewers will evaluate the applications according to criteria in administrative rules for the program. After the review team discusses each application's strengths and concerns, OWEB staff will ask reviewers to rank the applications in numerical order. This is a new step compared with the previous FIP application reviews.

The rankings and other results of the review team meeting will be provided to the applicants and the OWEB Board Grants Committee. The committee and OWEB staff will meet for a work session in February 2024. This meeting is an opportunity for the committee to receive background information on the applications and evaluations and to begin to formulate interview questions to ask each of the partnerships. There will be no deliberations or recommendations at the work session.

In March 2024, the committee will conduct public interviews of the applicant partnerships. There was consensus at the September 2023 committee meeting to explore options for in-person interviews as conversations tend to be richer in-person than those held virtually. If the interviews are held in-person, OWEB will offer travel stipends for the partnerships to attend. The interviews will be conducted by the committee with individual committee members assigned to lead the interviews with each of the of the applicant partnerships.

Following the interviews, the committee will take into consideration the interview responses and rankings of the review team to develop a funding recommendation that will be provided to the full board at the April 2024 meeting. The full board will award new FIP initiatives at that time.

Staff Contact

If you have questions or need additional information, contact Eric Hartstein, Senior Policy Coordinator at eric.hartstein@oweb.oregon.gov /503-910-6201.

This report provides the board an update about two areas of focus in the SIA program: a pilot Restoration grant offering in Fall 2023 and the preparations for the next offering of SIA Technical Assistance funding in Winter 2024.

Background

The Oregon Department of Agriculture (ODA), Agricultural Water Quality Management Program, is leading the SIA initiative. Under the current program model in place since 2017, select areas around the state receive focused stakeholder engagement, technical assistance , monitoring, and, where necessary, compliance follow-up to address water quality concerns in agriculturally influenced areas. Local partners work with landowners and managers to meet and exceed water quality requirements, and ODA follows up as needed to address compliance concerns.

SIA Pilot Restoration Grant Offering

In September 2023, OWEB opened a Pilot Restoration grant offering for SIA leads to address restoration opportunities that were identified through the SIA process. The total amount available from OWEB for SIA Restoration Grants is $500,000. This program was developed in response to feedback from partners over the last few years. Eligible applicants are SIA lead organizations who received a SIA technical assistance grant between 2017-2022, or a partner organization if authorized by the SIA lead. Two grant cycles will be available this biennium, and applicants can apply to either cycle. The maximum request amount per grant is $15,000.

The offering is based on OWEB Small Grant Administrative Rules and uses the Small Grant Application plus supplemental climate questions. Applications will be reviewed by an interagency team from OWEB, ODA, Oregon Department of Environmental Quality (DEQ), and Oregon Department of Fish and Wildlife (ODFW). Projects must demonstrate a clear watershed benefit to aquatic species, wildlife, or watershed health. Priority will be given to projects intended to restore or protect agricultural water quality, such as: managing nutrient or sediment inputs; managing vegetation; managing erosion; implementing irrigation practices and/or improving surface drainage. Additional eligible project types include improvements to instream habitat, wetlands and/or fish passage, and/or invasive species eradication. For the full list of eligible project types see Attachment A.

Preparation for New SIA Applications for Technical Assistance Grants

Under the current funding model in place since 2017, OWEB Stakeholder Engagement/Technical Assistance and Monitoring funding is offered to each SIA identified by ODA. Technical assistance funding supports the SIA lead and local partners in developing outreach plans and working with landowners to develop restoration projects. Monitoring funds support baseline and long-term monitoring within the SIA geography. Each SIA convenes a local monitoring team to provide guidance and feedback on local monitoring objectives and the development of a monitoring proposal. Prior to implementation, all monitoring plans are reviewed by an inter-agency Monitoring Advisory Group made up of representatives of OWEB, ODA, DEQ, and ODFW.

ODA anticipates that at least four SIAs will apply for the offering in March 2024. Following the existing funding model, up to $125,000 will be made available for each SIA, and at least $25,000 of this must be used for monitoring. The Monitoring Advisory Group has developed updated SIA monitoring proposal guidance and a collaborative review process in response to local partner

concerns, and ODA is offering additional technical assistance to SIA grantees as they develop their monitoring proposals.

Staff Contact

If you have questions or need additional information, contact Courtney Shaff, Monitoring and Reporting Program Manager, at Courtney.Shaff@OWEB.oregon.gov or 971-345-7012.

Attachment

A. Restoration Grant Offering Announcement

SIA Leads, OWEB and ODA staff are excited to announce the opening of the Pilot Restoration grant offering for SIA leads to address restoration opportunities that were identified through the SIA process. This program was developed in response to feedback from partners over the last few years. The information on this pilot program is below, including application deadlines and eligible project types.

Eligible Applicants

SIA Lead organizations who received an OWEB SIA TA grant between 2017-2022. Other organizations can apply if the SIA Lead organizations emails OWEB and ODA granting permission for the other entity to apply for the SIA restoration funds.

Application Deadlines:

- January 17, 2024
- January 15, 2025

Maximum request amount per grant: $15,000

Total amount available from OWEB for SIA restoration grants: $500,000 (evenly distributed across the 2 grant cycles). Applicants can submit more than one project per cycle, and can re-apply to the 2nd cycle if they are unsuccessful with the first cycle. Match requirement is 25% and can be cash or in-kind.

Timeframe: Projects must be completed within two years of the grant award date. No time extensions will be allowed for these projects.

Application process: Applications will be submitted through OWEB's Online Application System. The grant offering title is: SIA Restoration.
In July 2023 the OWEB Board adopted new climate rules that are applicable to all grant types. As a result of these rules applicants must answer all of the questions in the online application AND must answer the climate questions, attached to this email. The answers to these questions must be uploaded and submitted with the application.

Review Process: Applications will be reviewed by an interagency team consisting of OWEB, ODA, DEQ, and ODFW. Funding decisions will be shared with applicants following the review team meeting.

Eligible Project types: Projects must demonstrate a clear watershed benefit to aquatic species, wildlife, or watershed health and be one of the eligible project types listed below. These are based on OWEB Small Grant Rules OAR 695-035-0050. Priority will be given to projects intended to restore or protect agricultural water quality.

Projects commonly used to restore or protect Agricultural Water Quality:

- Manage Nutrient and Sediment Inputs through managed grazing (e.g., fencing and developing off-channel watering) and plantings.

- Manage Vegetation: plant or seed native riparian species, propagate native riparian plants, or control weeds in conjunction with a restoration project.
- Manage Vegetation: control weeds (in conjunction with a restoration project), or plant native wetland species.
- Manage Erosion on Agricultural Lands: terrace land; employ laser leveling; create windbreaks; install water and sediment control basins (WASCBs); develop filter strips/grassed waterways; manage mud (e.g., gravel high-use areas, develop paddocks); seed bare areas, reduce tillage.
- Manage Nutrient and Sediment Inputs to Streams through the management of grazing, vegetation cover, animal waste, or irrigation runoff.
- Improve Surface Drainage: surface road drainage improvements, gravel surfacing, stream crossings.
- Manage Erosion: bioengineer stream banks, slope stream banks, or develop water gaps, streambank barbs.
- Implement Irrigation Practices.
- Decommission Roads.

Additional eligible project types:

- Improve Instream Habitat: place large wood, boulders, or salmon carcasses.
- Fish Passage: Remove Irrigation or Push-Up Dams, Remove and/or Replace Culverts, Remove or Replace Stream Crossings.
- Restore Wetlands: excavate or remove fill, or eliminate drainage structures.
- Install Stormwater Runoff Treatments.
- Create Off-Channel Flood Storage.
- Employ Integrated Pest Management.
- Eradicate or Control Exotic Aquatic Species.
- Manage Vegetation: prescribed burning, except when conducted as part of a commercial harvest; non-commercial thinning; control/remove juniper (except late-seral/old growth); plant or seed (native upland species or native beneficial mixes preferred); or control weeds (in conjunction with a restoration project). Projects for prescribed burning to reduce fuel loads require ODF technical review and approval, or tribal government review and approval for projects on Tribal Trust Lands, using a standard OWEB form.
- Manage Wildlife: install water guzzlers.

Questions

Questions regarding the application and review process should be directed to: Amanda Robinson, ODA SIA Lead amanda.robinson@oda.oregon.gov, or Courtney Shaff, OWEB Monitoring and Reporting Program Manager, Courtney.shaff@oweb.oregon.gov.

October 23-25, 2023, OWEB Board Meeting

Executive Director Update E-6 Strategic Plan Update

This report provides the board updates on the implementation progress of the 2018-2028 strategic plan. In addition, this report shares OWEB's current thinking on a timeline and process for an update to the strategic plan, in accordance with Governor Kotek's expectations of state agencies.

Background

In June 2018, the board approved a new, ten-year strategic plan. Beginning with the July 2022 board meeting, staff began providing quarterly reports using a new template.

Attached is the latest update of actions related to the strategic plan between July 2023 and October 2023. Some highlights from this quarter's report include:

- OWEB's outreach included meetings with additional new groups to discuss watershed health throughout Oregon including granting foundations Meyer Memorial Trust and Wild Rivers Coast Alliance. Staff continued Diversity, Equity, Inclusion and Environmental Justice training that focused on wealth inequality perceptions and realities regionally. Council Capacity was a focus with a 20-year Programmatic Review conducted collaboratively between OWEB, Oregon State University, and the University of Oregon. Watershed Councils were also awarded over $9 million in Council Capacity Grants.
- Accomplishments in funding diversity include an increase of $2 million in funding from the Bureau of Land Management for grants and the removal of Lovelace Dam with funding from National Oceanic and Atmospheric Administration (NOAA) Fisheries under the federal Bipartisan Infrastructure Law (BIL). This was the first project completed with NOAA BIL funds anywhere in the Northwest.
- With the adoption of new administrative rules, OWEB began incorporating questions related to the Climate-Related Evaluation Criteria into grant applications.

Upon taking office in January 2023, Governor Kotek shared a list of expectations for state agencies related to operational excellence. One of the expectations is that agencies with strategic plans older than 36 months will update those plans by June 1, 2024.

In response, OWEB has engaged with Dialogues in Action, the consulting team that helped the agency develop the current 2018-28 Strategic Plan. Staff, board, and partners were interviewed through a series of meetings to determine the diversity of values, perceptions, and needs, and a discussion session is planned as part of this October's board meeting.

Staff Contact

If you have questions or need additional information, contact Courtney Shaff, Monitoring and Reporting Program Manager, at **Courtney.Shaff@oweb.oregon.gov** or 971-345-7012.

Attachments

A. OWEB Strategic Plan Report October 2023

OREGON Watershed Enhancement Board


Linda Repplinger

2018-2028 Strategic Plan

Quarterly Report to the Board | October 2023

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

Priority 1

Broad awareness of the relationship between people and watersheds



Proceeds from Bandon Preserve (a 13-hole golf course) support grant funds for Wild Rivers Coast Alliance. Photo from Wild River Coast Alliance of Bandon Preserve No. 7

This past quarter, OWEB leadership continued to **connect with key organizations that can help build awareness about the relationship between people and watersheds.** Leadership met with four organizations active in connecting youth with Oregon's cultural and natural resources:

- OWEB met with Jill Fuglister, Program Director at Meyer Memorial Trust. The Meyer Memorial Trust is one largest private funders in Oregon. They work to accelerate racial, social and economic justice in Oregon.
- OWEB met with Marie Simonds, Executive Director of the Wild Rivers Coast Alliance during Lisa's trip to the South Coast. Wild Rivers Coast Alliance utilizes proceeds from Bandon Dunes Golf Resort to fund grants that promote local economics that preserve natural resources.



Eastern Oregon Economic Summit, 2023. Pnoto from Eastern Oregon Women's Coalition.

- OWEB attended another Say Hey networking event which is an opportunity to connect with diverse professionals in the greater Portland metro area.
- OWEB attended the 2023 Eastern Oregon Economic Summit in Union County. The summit is hosted by the Eastern Oregon Women's Coalition. Topics included economic development, housing, water, and forest management.

In addition to the groups above, OWEB leadership also continued regular meetings with other partner organizations and groups.

Priority 2

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



OWEB staff engaged in **training focused on Understanding Growing Wealth Inequality.** Through an interactive workshop format with ECONW, staff learned about key structural factors that are causing and upholding economic inequality. Staff discussed how these factors affect individual experiences and how it intersects with OWEB's work.

Priority 3

Community capacity and strategic partnerships achieve healthy watersheds



Slide from Council Capacity presentation.

The OWEB board **awarded $9,204,267 in Council Capacity Grants** at the July Board Meeting. Council Capacity Grants help support the operations of Watershed Councils that engage people and communities in their watershed to participate in collaborative, voluntary restoration and protection of native fish or wildlife habitat and natural watershed functions to improve water quality or stream flows.



Capacity Matters document.

OWEB engaged a team from Oregon State University (OSU) and the University of Oregon (UO) to conduct a **20-year programmatic review of Organizational Capacity grants.** ODA staff and a group of Watershed Council and SWCD representatives advised OWEB and the OSU/UO team throughout the review process.

The review evaluates:

- Impact funding has had on councils and districts
- Describes how the grants lead to additional funding and partnerships.
- Helps inform future capacity-building investments.

Priority 4

Watershed organizations have access to a diverse and stable funding portfolio



Article on Jefferson Public Radio.

The Lovelace Dam Removal project was the first in the nation to cross the finish line among restoration projects receiving funding from NOAA Fisheries under the **federal Bipartisan Infrastructure Law.**



Marys Peak Ridge View Overlook wildlife enhancement project, completed summer 2022 with BLM funds by Midcoast WC, provided approximately 112 trees suitable for instream restoration.

OWEB received its 5th **BLM modification, adding an additional $2,640,904.95 funds,** including $2,221,939 in Bipartisan Infrastructure Law and Inflation Reduction Act funds. These funds will support 17 additional projects to support native fish and instream habitat restoration.

Priority 5

The value of working lands is fully integrated into watershed health



Upper Nehalem River Strategic Implementation Area, 2018.

In response to demand from local partners, OWEB is providing **new Restoration funding opportunities for previously funded Strategic Implementation Areas (SIAs).** The Oregon Department of Agriculture (ODA) and the SIA Leads are working closely with OWEB to pilot this new funding opportunity, with applications accepted in 2024 and 2025.

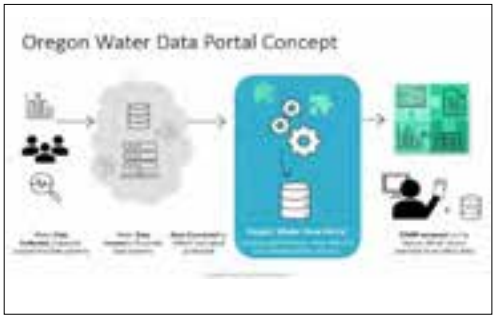
Priority 6

Coordinated monitoring and shared learning to advance watershed restoration effectiveness



OWEB site visit to a Dam Removal site on the Eklutna River, Alaska.

OWEB staff traveled to Alaska to meet with other PCSRF grantees and NOAA regional and national staff. Staff had a chance to hear about regional and national NOAA priorities, learn about new online systems and build relationships for future collaboration opportunities.



Slide from Report to Legislature Presentation.

OWEB is collaborating with other state agencies to integrate Oregon water data into **a new Water Data Portal.** The 2nd pilot phase of the project now continues through the 2023-25 biennium and is described here: www.oregon.gov/deq/wq/Pages/owdp.aspx

Priority 7

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





Notice of changes to Stakeholder Engagement and Technical Assistance grants.

Lowered Match on Technical Assistance and Stakeholder Engagement grants **to just $1 and lifted the cap** on Technical Assistance Grants, making these grants more available to a wider range of potential grantees.



Climate-Related Evaluation Criteria Rule.



Notice of training.

All grant offerings now include Climate Criteria. Multiple training options are offered to OWEB grantees to learn how to respond to new Climate Criteria questions in grant applications.

Strategies Chart Jan. 2022 - Oct. 2023

accomplishments
highlighted in quarterly update

	January	April	July	October
1 Broad awareness of the relationship between people and watersheds				
1.1 Develop and implement broad awareness campaigns and highlight personal stories to tell the economic, restoration, and community successes of watershed investments.	●	●	●	●
1.2 Increase involvement of non-traditional partners in strategic watershed approaches.	●	●	●	●
2 Leaders at all levels of watershed work reflect the diversity of Oregonians				
2.1 Listen, learn and gather information about diverse populations.	●	●	●	●
2.2 Create new opportunities to expand the conservation table.	●		●	●
2.3 Develop funding strategies with a lens toward diversity, equity and inclusion (DEI)	●	●	●	●
3 Community capacity and strategic partnerships achieve healthy watersheds				
3.1 Evaluate and identify lessons learned from OWEB's past capacity funding.	●		●	●
3.2 Champion best approaches to build organizational, community and partnership capacity.	●	●	●	●
3.3 Accelerate state/federal agency participation in partnerships.	●	●	●	●
4 Watershed organizations have access to a diverse and stable funding portfolio				
4.1 Increase coordination of public restoration investments and develop funding vision.	●	●	●	●
4.2 Align common investment areas with private foundations.		●		
4.3 Explore creative funding opportunities and partnerships with the private sector.	●			
4.4 Partner to design strategies for complex conservation issues that can only be solved by seeking new and creative funding sources.	●			
5 The value of working lands is fully integrated into watershed health				
5.1 Implement the Oregon Agricultural Heritage Program.	●		●	●
5.2 Strengthen engagement with a broad base of working landowners.	●	●	●	●
5.3 Enhance the work of partners to increase working lands projects on farm, ranch and forestlands.	●	●	●	●
5.4 Support technical assistance to work with owners/managers of working lands.				●
5.5 Develop engagement strategies for owners and managers of working lands who may not currently work with local organizations.	●	●	●	●
6 Coordinated monitoring and shared learning to advance watershed restoration effectiveness				
6.1 Broadly communicate restoration outcomes and impacts.	●	●		●
6.2 Invest in monitoring over the long term.	●		●	●
6.3 Develop guidance and technical support for monitoring.	●	●	●	●
6.4 Increase communication between and among scientists and practitioners.	●	●		●
6.5 Define monitoring priorities.				●
6.6 Develop and promote a monitoring framework.	●			●
7 Bold and innovative actions to achieve health in Oregon's watersheds				
7.1 Invest in landscape restoration over the long term.	●	●	●	●
7.2 Develop investment approaches in conservation that support healthy communities and strong economics.	●	●	●	●
7.3 Foster experimentation that aligns with OWEB's mission.	●	●	●	●

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item F

Committee Updates

Board Meeting October 23-25, 2023

October 23-25, 2023, OWEB Board Meeting
Water and Climate Committee Update

Committee Members

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

Meeting Summary

The Water and Climate Committee met on September 13, 2023.

Alli Miller, Program Analyst for the Clean Water State Revolving Fund (CWSRF) at Oregon DEQ, shared information about the CWSRF, including why and how it was created, eligible borrowers and projects, different loan types, and recent funding from the Bipartisan Infrastructure Law for emerging contaminants projects in Oregon. The committee had an opportunity to ask questions about the nexus of CWSRF with OWEB, including applicants and project types. Committee members were interested in doing a deeper dive into how the work of the agencies can complement each other and benefit Oregon communities and partners.

Brian Wolcott, Water Acquisition and Capacity Coordinator, provided the committee with an overview of the Water Acquisition grant program including its evaluation criteria and review process. This presentation was requested as a follow-up to board member questions that arose during the July 2023 board meeting.

Eric Hartstein, Senior Policy Coordinator, provided a brief overview of OWEB's mitigation policy and its update, particularly as it relates to the committee's past discussions on voluntary carbon markets.

Committee members briefly discussed intersectionality topics from other board committees. Stephanie Page, Deputy Director, and Dan Brown, board member representing the U.S. EPA, shared the recent announcement regarding the trainings for the climate evaluation criteria and the nexus with the Grants Committee.

Committee members also identified several potential topics for upcoming committee meetings, including a climate checklist that could assist in articulation of climate-related work at OWEB, sharing information about the content of the climate trainings and recommended resources, and a more comprehensive look at how OWEB can complement CWSRF activities.

To Be Presented at the October 2023 Board Meeting by:

Bruce Buckmaster and Jamie McLeod-Skinner

Staff Contact

Stephanie Page, Deputy Director
Stephanie.Page@oweb.oregon.gov or 971-345-7004

October 23-25, 2023, OWEB Board Meeting
Grants Committee Update

Committee Members
Barbara Boyer and Dan Brown (co-chairs), Molly Kile, Liz Agpaoa, Chris Allen, Mark Labhart, Liza Jane McAllister, Lindsay McClary

Meeting Summary

The Grants Committee met on September 18, 2023.

Revisiting the Name of the "Stakeholder Engagement" Grant Offering

Committee member Lindsay McClary raised the issue at the previous meeting. Historically, the term "stakeholder" refers to someone staking a claim to land, which can be offensive to tribal communities, reflecting colonial history. The committee agreed that OWEB should consider changing the name of the grant offering to something more appropriate. After discussion, the committee suggested calling the grants simply "Engagement Grants" as this reflects the purpose and intent of the grant type and is inclusive of any type of engagement necessary for implementing eligible restoration or acquisition projects.

While board approval is not needed to name grant offerings, the committee decided to provide this recommendation for discussion at the October board meeting. Staff indicated that if there was consensus from the board on the name change, it could be implemented with the next Engagement Grant offering. The name would be changed in administrative rules as each section of rules referencing this grant type is subject to rulemaking updates.

Preview of October Open Solicitation Grant Awards

Staff previewed the October Open Solicitation Grant awards, noting that the spending plan adopted in July includes significant increases in the restoration ($2.5 million) and technical assistance ($2 million) line items while Stakeholder Engagement and Monitoring line items are similar to last biennium. The board's spending plan approval included significant policy changes affecting open solicitation:

- Match is reduced to $1 for technical assistance and stakeholder engagement grants
- The $75,000 cap on technical assistance grants was lifted.

Since these changes did not apply to the Spring 2023 offering, staff recommendations accounted for the likely increased requests in the three subsequent offerings in the biennium, particularly to account for increased permitting costs and timelines to address cultural resources and no net rise requirements.

Demand in the Spring 2023 offering is similar to the previous cycle that included monitoring, with 110 applications requesting $19 million. Restoration demand increased by about $1.5 million and monitoring demand decreased by about $1 million.

Staff anticipates recommending funding for over 80% of applications recommended by regional review teams for restoration and monitoring applications, 70% of technical assistance applications, and 100% of stakeholder engagement applications.

The committee recommended issuing a separate press release recognizing the important work that salmon license plate revenues will fund in this cycle.

Preview of the Cohort 4 FIP Evaluation Process

Staff described process changes designed to better situate the Grants Committee for recommending implementation FIP applications to the board in April, including:

- The expert review team ranking applications instead of assigning high/medium/low ratings;

- Regional Program Representatives participating on the expert review panel to provide additional regional context;
- A Grants Committee work session in February to identify clarifying questions; no deliberations will occur in this non-public work session;
- An in-person Grants Committee interview of the partnerships in March with travel expenses paid by OWEB for partnership participation.

The Committee agreed that these changes provide a more effective framework to make funding recommendations to the full board. The revised timeline for implementation FIP applications is as follows:

- Applications received: October 16, 2023
- Technical Review: January-February 2024
- Grants Committee Work Session: February 2024
- Grants Committee Interviews, Public Session: March 2024
- Board awards: April 23-24, 2024

To Be Presented at the October 2023 Board Meeting by:

Dan Brown and Barbara Boyer

Staff Contact

Eric Williams, Grant Program Manager
eric.williams@oweb.oregon.gov or 971-345-7014

October 23-25, 2023, OWEB Board Meeting

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

Committee Members

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

Meeting Summary

The DEI and EJ committee met on September 5, 2023.

OWEB staff provided an update on the work of the Environmental Justice Council. A major area of focus for the council has been the environmental justice mapping tool created through HB 4077 (2022 regular Oregon legislative session). The council is developing a work plan to develop and roll out the tool and is planning listening sessions in late 2023 and early 2024.

OWEB staff updated the committee on efforts to reach out to non-traditional partners. Staff has committed to engaging with three new non-traditional partners each quarter. Committee members recommended staff continue this outreach, focusing on communities and organizations identified in the board's DEI resolution. Committee members also recommended sending a new request to board members asking for suggestions of groups to meet with.

During the last quarter, OWEB staff have connected with the following organizations:

- Wild Rivers Coast Alliance
- Say Hey (networking event organized by Partners in Diversity)
- Meyer Memorial Trust

OWEB staff also provided an update on government-to-government outreach. Staff met with the Cow Creek Band of Umpqua Tribe of Indians in August and toured restoration projects as well as lands restored to the tribe in 2018. Committee members recommended continuing government-to-government outreach efforts and visiting tribes in their communities to learn about potential barriers to engaging with OWEB.

Staff reviewed information about the co-chair elections process summarized in an email from committee member Liza Jane McAlister. Staff also shared research indicating that votes for co-chair must be done through a public process. The committee discussed recommendations around the elections process going forward, including the number of terms a co-chair may serve and the staggering of terms. The full board will discuss the committee recommendations in October.

Committee members reviewed the latest equity statement and resolution and recommended a few additional edits. The updated statement and resolution are attached and will be presented to the full board for discussion at the October 23-25, 2023 board meeting. Committee members asked that the draft equity statement be shared with the Environmental Justice Council.

Topics for the next meeting

- Engagement with non-traditional partners and government-to-government outreach
- OWEB Equity Statement – continue any discussions needed after Oct. board meeting

- Update on Environmental Justice Council
- Co-chair elections process – continue any discussions needed after Oct. board meeting

To Be Presented at the October 2023 Board Meeting by:

Kelly Coates and Dan Shively

Staff Contact

Stephanie Page, Deputy Director
stephanie.page@oweb.oregon.gov or 971-345-7004

Attachments

A. DRAFT OWEB Equity Statement and Resolution

DRAFT – FOR DISCUSSION AND FEEDBACK; NO ACTION WILL BE TAKEN AT THE OCTOBER BOARD MEETING

OWEB Equity Statement

As we fulfill our mission of helping to protect and restore healthy watersheds and natural habitats that support thriving communities and strong economies, OWEB and its staff are committed to advancing diversity, equity, inclusion, environmental justice, and sense of belonging in the work we do. In this way we seek to celebrate the rich, cultural, socio-economic, and natural resources of Oregon and work with our local partners to engage all Oregonians.

Diversity, Equity, Inclusion, & Environmental Justice Resolution

Background

WHEREAS OWEB's mission is "to help protect and restore healthy watersheds and natural habitats that support thriving communities and strong economies."

WHEREAS the intersection of impacts from climate change, biodiversity loss, and the movement for social justice has increased our awareness of the need for transformational change. Our conservation and restoration work has shown us the interdependence of all species, and that action or inaction in one area affects the outcome in others. To help protect and restore healthy watersheds and natural habitats that support thriving communities and strong economies, our work must fully integrate and balance environmental, social, and economic sustainability.

WHEREAS protection and restoration of healthy watersheds and natural habitats relies on robust ecosystem biodiversity for stability and resilience.

WHEREAS a multi-dimensional diversity of people, including ethnicities, identities, backgrounds, experiences, perspectives, cultural values and practices, local and indigenous environmental knowledge, and values of nature all contribute to the collective wisdom and stewardship needed for achieving long-term sustainability and resilience in our watershed restoration and conservation work.

WHEREAS while everyone lives in a watershed, not all Oregonians or their communities are starting from the same place due to historic and current embedded biases in society's structure and institutional systems of oppression, including inequities in policies, practices, processes, and the distribution of resources, benefits, and burdens.

WHEREAS systemic biases and inequities have produced advantages for some while disadvantaging others and perpetuated an imbalance of power resulting in the unfair treatment and silencing of too many people and communities; the devaluation of identities, disregard for experiences, and exclusion of perspectives tears through the fabric of our humanity and weakens our collective stability, which has become most apparent in the face of biodiversity loss and climate change.

WHEREAS we recognize that different levels of support are needed for those affected by historic and current inequities so that fairness in access and outcomes can be realized, and that empowerment of those most impacted includes the redistribution of resources, power, and opportunity.

WHEREAS many communities rely on healthy watershed ecosystems for their health and livelihoods and are therefore uniquely vulnerable to changes in their environment caused by climate change, such as food and water insecurity, sea-level rise, ocean health, extreme heat, drought, flooding, wildfire, smoke and other air pollution, and loss of traditional cultural resources or foods.

WHEREAS communities that have traditionally been underrepresented, underinvested, and underserved bear additional environmental burdens such as living in areas vulnerable to extreme weather or have increased health risks due to being overburdened by pollution, declines in ecosystem services, or through their inability to access basic services; where more than one of these apply, the burdens are cumulative and intensify these risks.

WHEREAS the most severe and immediate impacts of climate change such as heat waves, poor air quality, and flooding, compound the risks of vulnerable communities and disproportionately affect those who are the least able to prepare for and recover from these impacts.

WHEREAS these communities are diverse in many ways, including their ethnicities, cultures, nations of origin, race, immigration status, and levels of income; all deserving environmental justice of equal protection, fair treatment, and involvement in decision-making regarding policies affecting their environment without discrimination.

WHEREAS we acknowledge the dispossession of indigenous communities of land ownership, Oregon's history of racism, and systemic injustices that have excluded many Oregonians from the benefits and opportunities afforded others.

WHEREAS while OWEB enjoys strong public support for its contributions to community-based conservation, watershed health, and local economies, our culture of continuous improvement allows us to self-examine and recognize some of our structural biases and institutional policies, practices, and processes that help perpetuate inequities; that while some of these may fall outside of our authority, they do not absolve us of our need for change. Included among these are limitations in diversity for representation at decision-making levels, disparities in distribution of resources and benefits between landowners and non-landowners, lack of project types to accommodate the needs of urban communities, limited diversity in types of partners in project development and stewardship, processes that perpetuate barriers to program access and resources available for traditionally underrepresented and underserved communities, and limited methods of outreach to increase more Oregonians' awareness of OWEB and the support we can provide.

WHEREAS humans shape landscapes as much as they shape us, and degradation of both the natural world and our social systems are intertwined; achieving our mission demands we consider all actions within our authority to restore and protect, and as our name implies improve the health of our watersheds for the well-being and benefit of all.

WHEREAS we acknowledge that diversity, equity, and inclusion are interconnected, that none can thrive without the presence of the other, and that together with environmental justice they must be front and center in all of our board decisions, policy making, processes, and practices, as these considerations are

essential for the restoration, protection, and long-term sustainability of our ecosystems, their wildlife populations and communities.

Resolution

Be it resolved that the Oregon Watershed Enhancement Board will:

- Integrate and prioritize diversity, equity, inclusion, and environmental justice in all of our board decisions, policy making, processes, and other practices by:
    - Eliminating disparities in distribution of resources and benefits between landowners and non-landowners.
    - Increasing project types to accommodate the needs of urban communities.
    - Building a more inclusive grantmaking process to reflect a broader diversity of applicants, grantees, and types of partners in project development and stewardship, including community-based organizations and other private sector groups, businesses, and organizations that have not traditionally been engaged in this work.
    - Increasing & improving methods and diversifying targets of outreach and access to information so that all Oregonians can become aware of OWEB and the support we can provide.
    - Allowing for the tailoring of projects and processes to address locally expressed inequities and priorities while keeping in mind that some community-identified solutions may differ from what we prioritize yet still yield co-benefits beyond that of a singular outcome.
    - Identifying and implementing methods to strengthen public involvement, improve access to information, provide more inclusive decision-making opportunities, and increase community engagement that values the needs, priorities, and solutions expressed by the community, as well as their time and resources making it possible to participate.
    - Recognizing and incorporating the inextricable link between cultural and biological diversity as part of our community-based conservation, including the varying cultural values of and relationships with nature and the holistic approaches of indigenous peoples and local communities.
    - Recognizing the unique role federally recognized tribes in Oregon play in the conservation, stewardship, and restoration of natural resources; and with their permission and counsel, work to incorporate their tribal knowledge, experience, cultural, and spiritual values into our grantmaking processes.
- Motivate grantees to enlist, train, and fairly compensate partners in project development from local labor and businesses to strengthen local economies and skills.
- Continue to challenge our perspectives and positions; recognize and overcome our biases; look for ways we are limiting awareness of OWEB and access to resources from those outside our sphere; and work to counteract and dismantle institutional racism while advancing racial equity. Translate these findings into changes in policy, processes, and practices.

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

- Participating at least annually in intercultural competency and racial justice workshops, including training for all staff and Board Members.
- Rulemaking to reduce the match requirement for some grant types.
- Amending OWEB's application and grantmaking processes to be easily accessible, time-considerate, inclusive of a broader range of effective land-stewardship practices, and vigilant to the needs of vulnerable and traditionally underserved communities, including providing training and assistance.

- Developing an annual agency Diversity Equity, Inclusion, and Environmental Justice Action Plan, which includes agency-level goals, actions, and measures of success.
- Amending budget and budgeting process to address inequities in the distribution of resources, including the limited types of grants and projects available for traditionally underrepresented, underserved, and climate-vulnerable communities.
- Improving OWEB's communications to meet the needs of Oregon's diverse population and updating the website to be intuitively navigable, user-friendly, and resource-rich, including tools and guidance for translating this resolution into action.

DRAFT

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item G

ODFW and PCSRF

Board Meeting October 23-25, 2023

Oregon
Tina Kotek, Governor

OREGON WATERSHED ENHANCEMENT BOARD

775 Summer Street NE, Suite 360
Salem OR 97301-1290
www.oregon.gov/oweb
(503) 986-0178

Agenda Item G supports OWEB's Strategic Plan priorities # 4 & 6: Watershed Organizations have access to a diverse and stable funding portfolio and coordinated monitoring and shared learning to advance watershed restoration effectiveness.

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Courtney Shaff, Monitoring and Reporting Program Manager
Tom Stahl, ODFW Conservation and Recovery Program Manager

SUBJECT: Agenda Item G – ODFW and PCSRF
October 23-25, 2023, Board Meeting

I. Background

A portion of the Pacific Coastal Salmon Recovery Funds (PCSRF) are legislatively directed to be transferred to the Oregon Department of Fish and Wildlife (ODFW). The amount of funding transferred depends on the State of Oregon's successful receipt of PCSRF funding through the National Oceanic and Atmospheric Administration's (NOAA) annual competitive grant process. The purpose of the PCSRF program is to provide benefits to Pacific salmon and steelhead and their habitats. Projects and activities must fall within one of the three program priorities (restoration, technical assistance, or monitoring and capacity) and must be necessary for conservation of salmon and steelhead populations listed as threatened or endangered, or identified by a state as at-risk to be listed or for conservation of Pacific coastal salmon and steelhead habitat.

II. 2023-2025 Biennium ODFW Activities

Oregon's PCSRF grant award for Federal Fiscal Year 2023 was $20.2 million, and ODFW will receive $6.4 million of this award. The following ODFW programs will receive PCSRF funding for the 2023-2025 biennium: Fish Screening and Passage Program, Lower Columbia River Harvest Management Program, Conservation and Recovery Plan Implementation and Technical Support Program, Chum Reintroduction Program, and the Oregon Plan Fish and Habitat Monitoring Program. OWEB will apply again in March 2024 for PCSRF funding for the second part of the biennium.

III. Recommendation

This is an information item only.

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item I

Spring Open Solicitation Grant Offering Board Awards

Board Meeting October 23-25, 2023

Tina Kotek, Governor

OREGON WATERSHED ENHANCEMENT BOARD

775 Summer Street NE, Suite 360
Salem OR 97301-1290
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(503) 986-0178

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: Eric Williams, Grant Program Manager

SUBJECT: Agenda Item I. Spring 2023 Open Solicitation Grant Offering
October 23-25, 2023, Board Meeting

I. Introduction

This staff report describes the Spring 2023 Open Solicitation Grant Offering and funding recommendations. Staff request the board approve the funding recommendations outlined in Attachment D to the staff report, including funding for 54 restoration grants, 30 technical assistance grants, 5 engagement grants, and 21 monitoring grants.

II. Spring 2023 Grant Offering Background and Summary

A total of 110 applications were received requesting almost $19 million. Attachment A shows applications submitted by region, project type, and funding request.

III. Review Process

Staff facilitated a review process where all eligible grant applications were evaluated by the agency's six Regional Review Teams (RRTs). Staff scheduled site visits for as many proposed projects as possible, with all RRT members invited to the visits.

OWEB then facilitated RRT meetings in each region for all grant types offered. Reviewers considered the likelihood of success of the proposed project based on evaluation criteria in rule, which are provided in Attachment B. After classifying applications as "Recommended," "Recommended with Conditions," or "Not Recommended," the RRTs then prioritized the projects recommended for funding by application type.

The RRT evaluations and recommendations, along with staff recommendations, were distributed to all applicants. Attachment C includes the number of applications recommended by RRTs and staff for each region by project type, as well as staff-recommended award totals by application type and region. Prior to the board meeting, staff will forward to the board any written comments received from applicants regarding the RRT and staff recommendations.

IV. Salmon License Plate Projects

Staff recommends distributing $500,000 in salmon license plates funds to two recommended restoration projects ($250,000 each):

- 223-2016, “Smith River Basin: High Priority Passage Improvements,” and
- 223-3031, “Upper Sandy River Basin Habitat Restoration Project - Zigzag River.”

V. Sage-grouse Projects

At its April 2015 meeting, the board adopted a policy to make available at least $10 million through its granting programs over the next ten years in support of projects located in Oregon’s sage steppe ecosystem that improve greater sage-grouse habitat. The recommended Spring 2023 Open Solicitation Grant awards include two projects that meet the criteria:

- 223-4029, “Brattain Post Fire Restoration Project Effectiveness,” requesting $252,269, and
- 223-5028, “Dry Creek Phase III WQ Improvement,” requesting $51,183.

If awarded, total funding for sage-grouse projects since 2015 will be $14,254,493.

VI. Funding Recommendation

Staff considered the RRT recommendations and funding availability in developing the staff funding recommendations provided in Attachment D, which includes the number of applications recommended for funding by RRTs and staff by region and grant type. The funding recommendations for the Spring 2023 Open Solicitation Grant Offering are summarized in Table 1. This will be the first Open Solicitation grant award for the 2023-2025 biennium.

Table 1: Spending Plan and Funding Recommendations for Spring 2023 Grant Offering

Grant Type	Spending Plan	Awards to Date	Staff Recommendation	Remaining Spending Plan Balance
Restoration	$36,500,000*	$0	$8,998,845	$27,501,155
Technical Assistance	$6,800,000*	$0	$929,070	$5,870,930
Monitoring	$4,500,000	$0	$2,235,398	$2,264,602
Stakeholder Engagement	$2,000,000	$0	$298,552	$1,701,448
TOTAL	$49,800,000	$0	$12,461,865	$37,338,135

*Spending plan amount includes funds anticipated to be added in July 2024

Staff recommend the board adjust the spending plan and award funds for the staff-recommended projects listed in Attachment D.

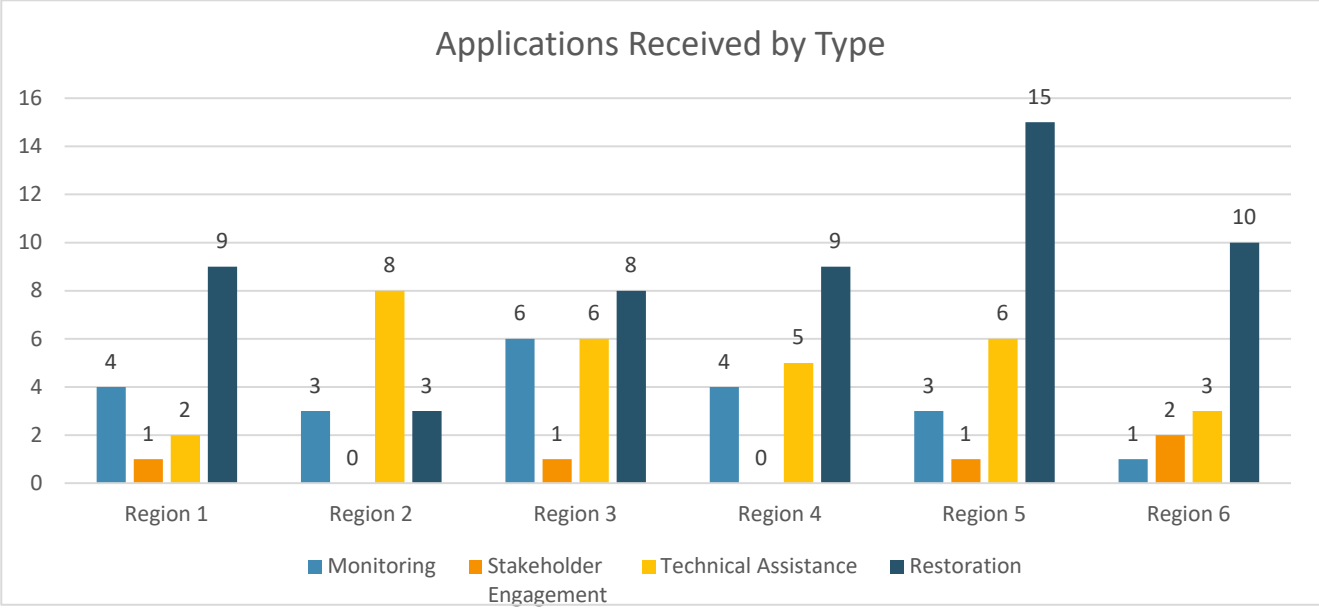
Attachments

A. Grant Applications Submitted
B. Evaluation Criteria
C. Comparison of Projects Recommended by RRTs and Staff
D. Regions 1-6 Funding Recommendations

Oregon Watershed Enhancement Board
Spring 2023 Open Solicitation Grant Offering

Applications Received by Type

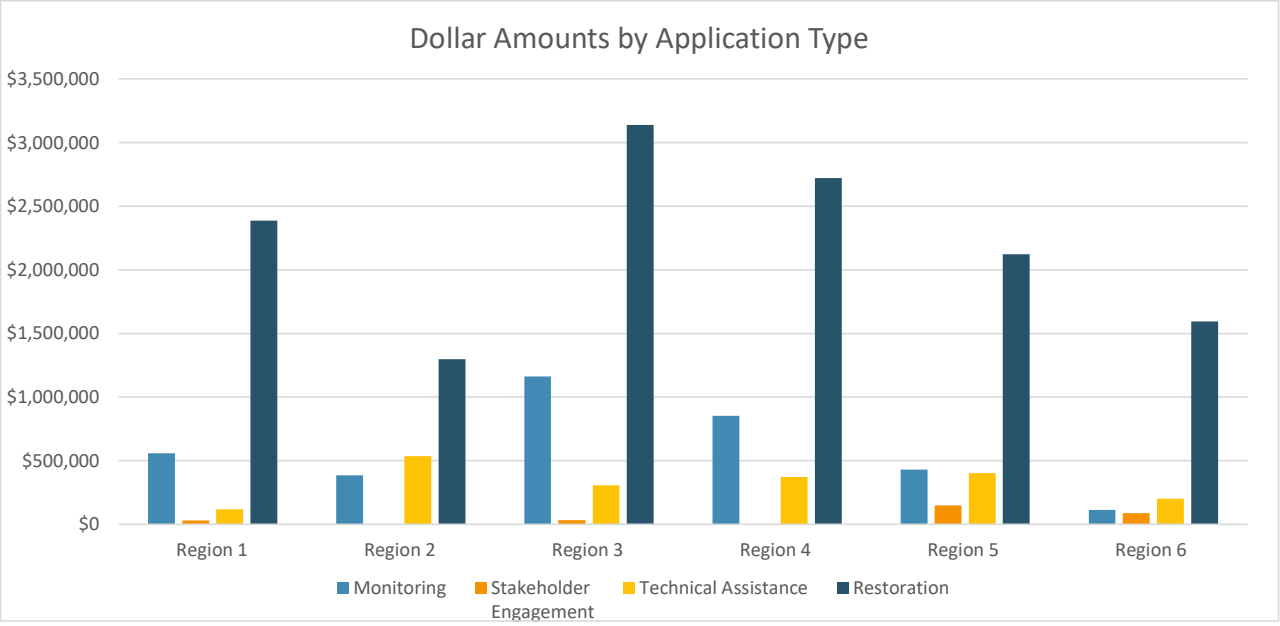
	Monitoring	Stakeholder Engagement	Technical Assistance	Restoration	Totals
Region 1	4	1	2	9	16
Region 2	3	0	8	3	14
Region 3	6	1	6	8	21
Region 4	4	0	5	9	18
Region 5	3	1	6	15	25
Region 6	1	2	3	10	16
Totals	21	5	30	54	110



Oregon Watershed Enhancement Board
Spring 2023 Open Solicitation Grant Offering

Dollar Amounts by Application Type

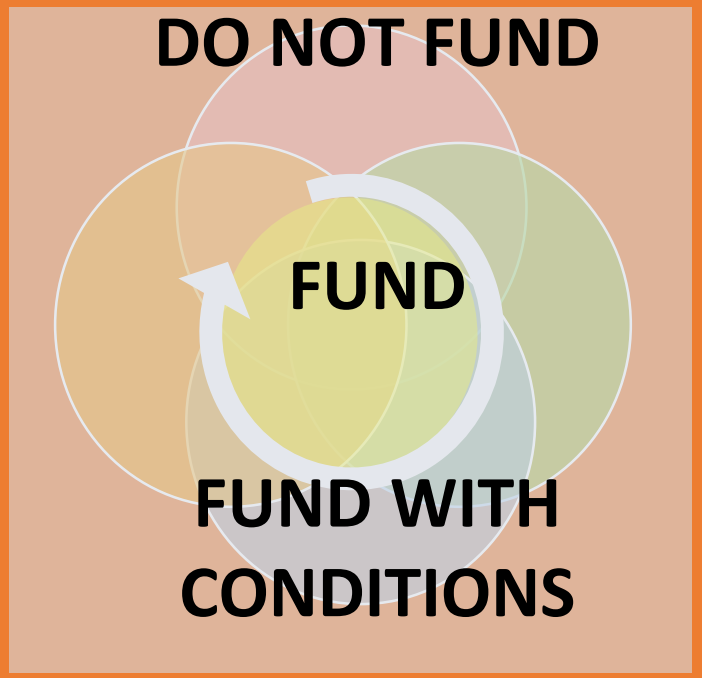
	Monitoring	Stakeholder Engagement	Technical Assistance	Restoration	Totals
Region 1	$558,455	$28,804	$117,039	$2,385,606	$3,089,904
Region 2	$384,064	$0	$535,573	$1,296,129	$2,215,766
Region 3	$1,162,901	$34,130	$306,855	$3,138,048	$4,641,934
Region 4	$851,592	$0	$371,524	$2,719,380	$3,942,496
Region 5	$429,845	$148,267	$404,017	$2,120,257	$3,102,386
Region 6	$113,273	$87,351	$199,979	$1,593,504	$1,994,107
Totals	$3,500,130	$298,552	$1,934,987	$13,252,924	$18,986,593



Open Solicitation – Restoration Grants

PROVIDE PUBLIC BENEFIT FOR WATER QUALITY, NATIVE FISH AND WILDLIFE HABITAT, OR WATERSHED/ECOSYSTEM FUNCTION

Recommend



Regional team reviews & evaluates each project individually based on how well project meets criteria

Prioritize

CRITERIA
How well project meets criteria for project evaluation & preferences, including:
- Causes over symptoms of disturbance
- Whole watershed approach over site-specific
- Collaboration over single-party

CERTAINTY OF SUCCESS
Certainty of success, based on the organizational capacity of the applicant & the likelihood the project will meet its ecological objectives

BENEFIT TO OREGON PLAN
Benefit to the Oregon Plan for Salmon & Watersheds, as evidenced by its expected benefits to watershed functions, fish habitat or water quality

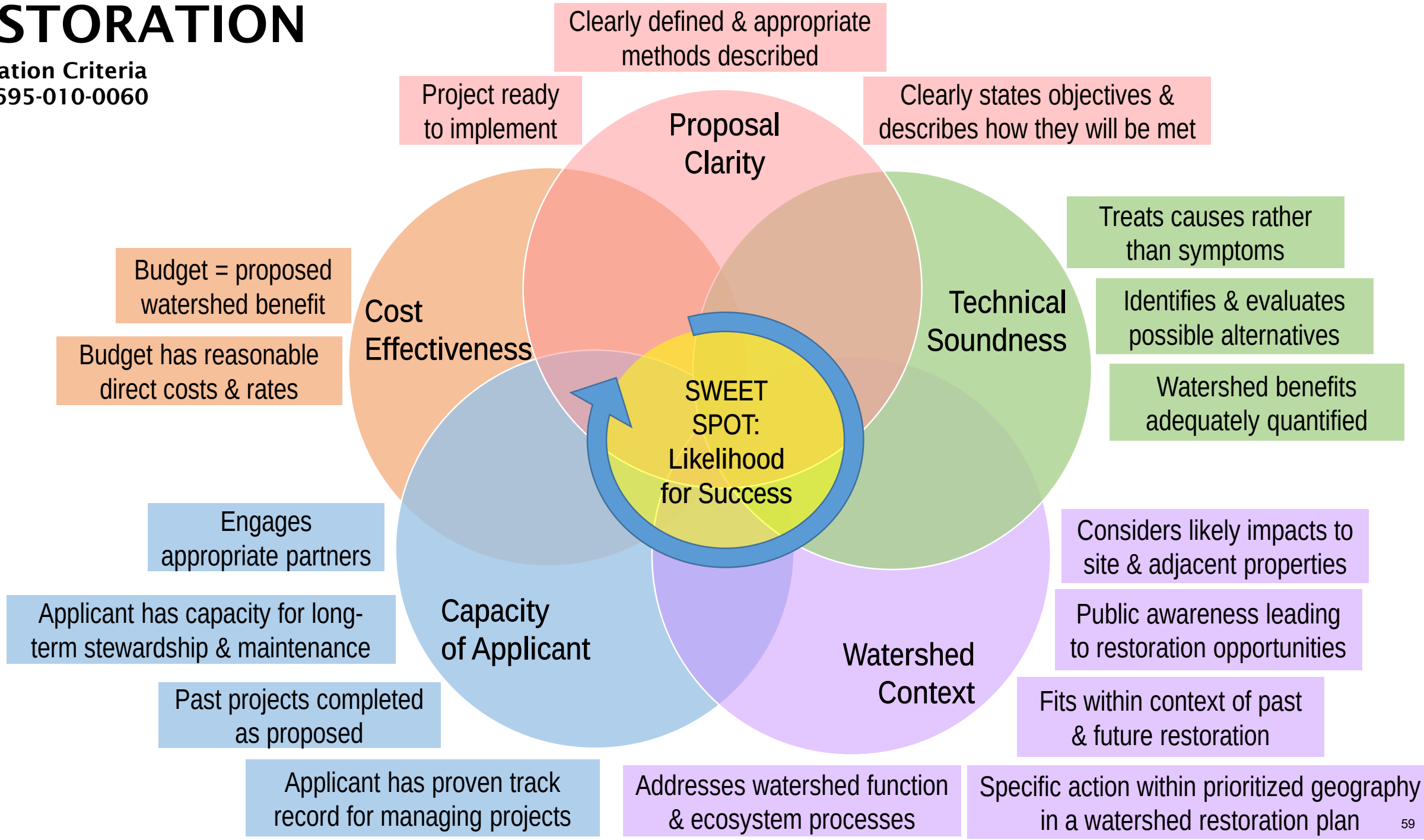
COST BENEFIT
Project costs relative to the anticipated watershed health benefits

Recommendation to Staff

Staff review recommendations from each regional review team & make a statewide funding recommendation to the Board based on available resources for the grant period & type.

RESTORATION

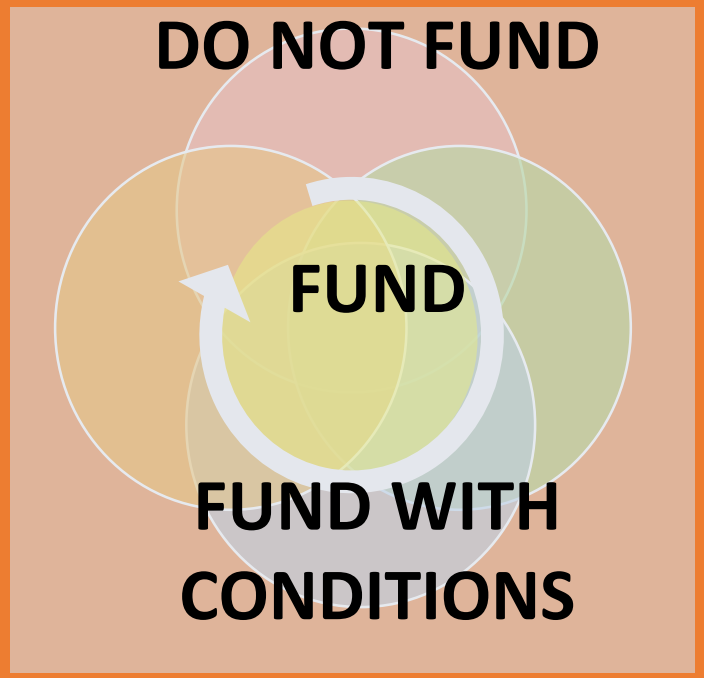
Evaluation Criteria
OAR 695-010-0060



Open Solicitation – Technical Assistance Grants

PROVIDE PUBLIC BENEFIT FOR WATER QUALITY, NATIVE FISH AND WILDLIFE HABITAT, OR WATERSHED/ECOSYSTEM FUNCTION

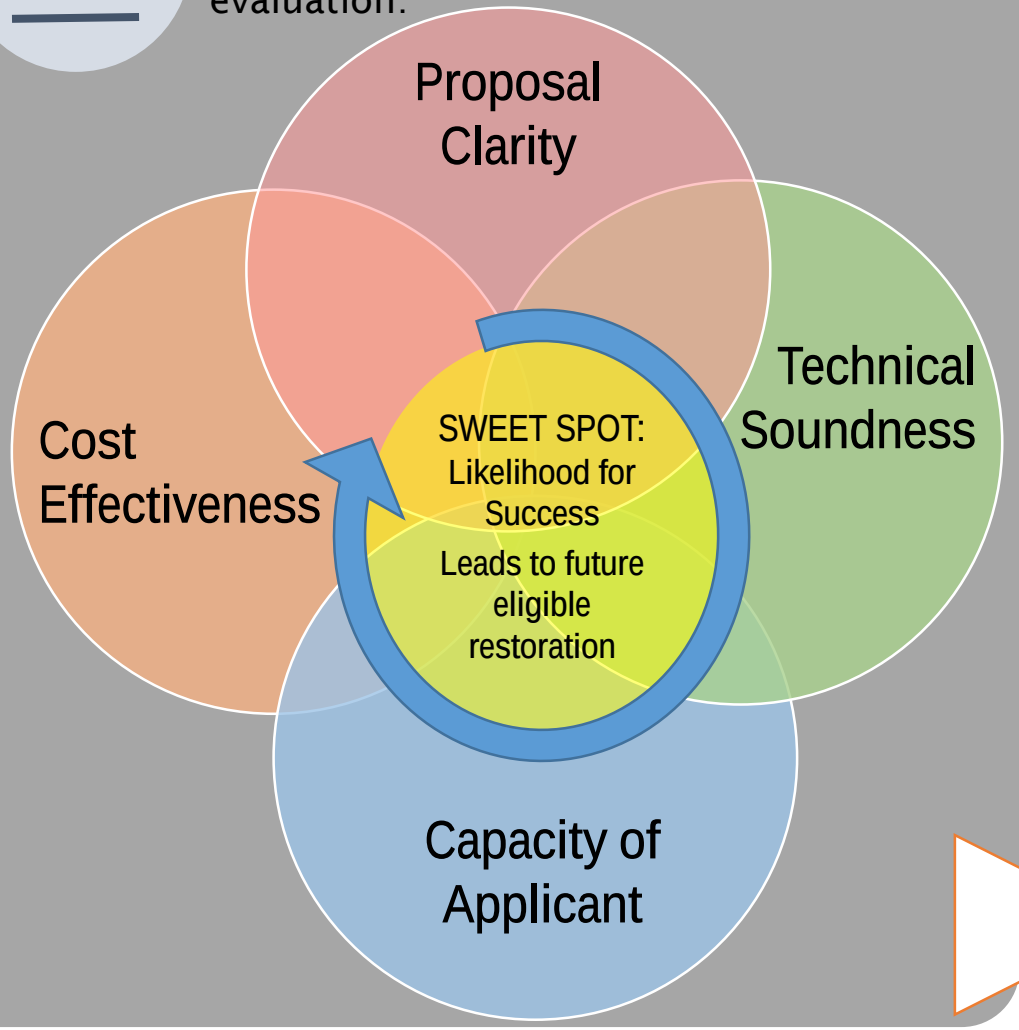
Recommend



Regional team reviews & evaluates each project individually based on how well project meets criteria

Prioritize

CRITERIA
How well project meets criteria for project evaluation:



Recommendation to Staff

Staff review recommendations from each regional review team & make a statewide funding recommendation to the Board based on available resources for the grant period & type.

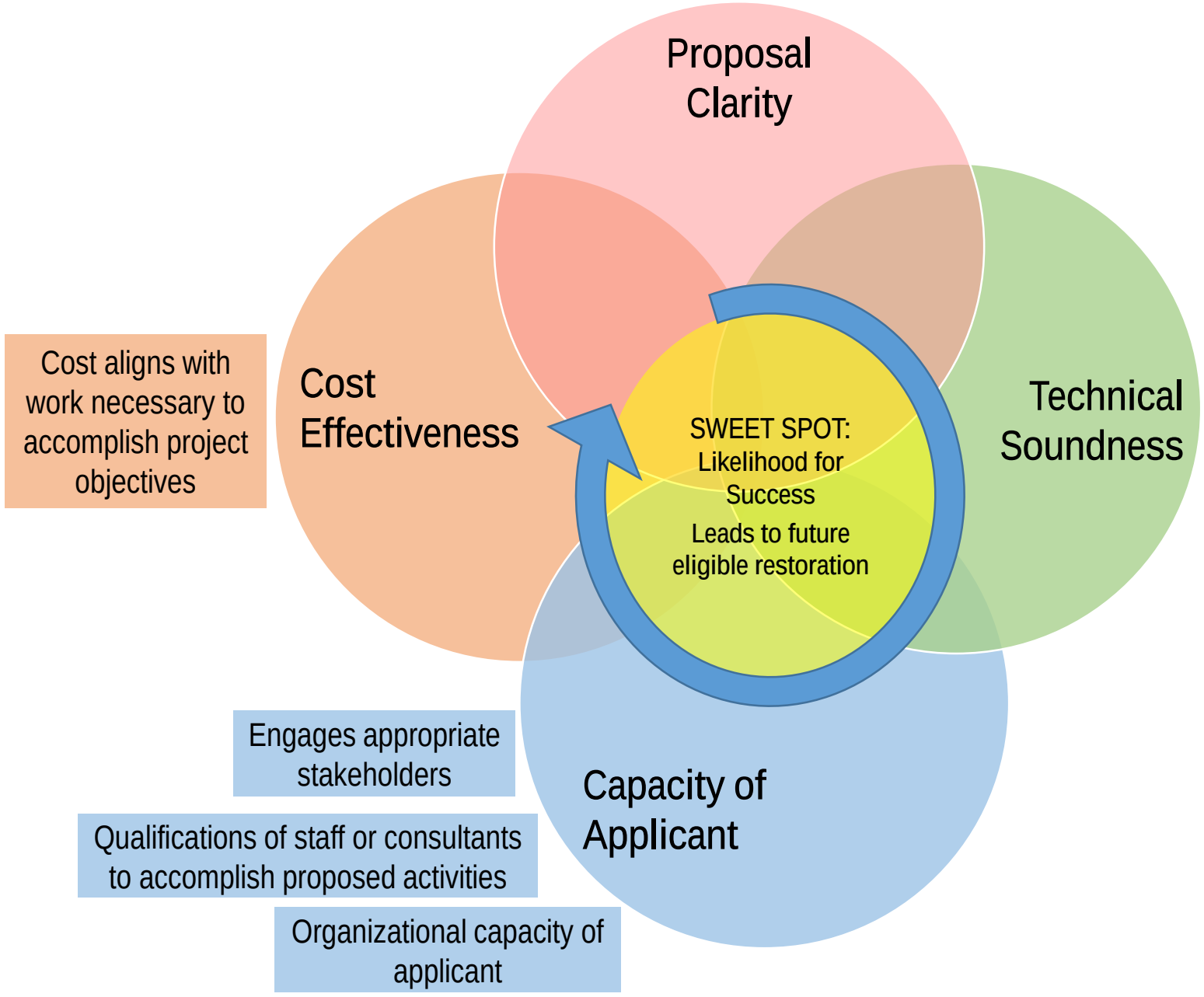
TECHNICAL ASSISTANCE

Evaluation Criteria
OAR 695-030-0045

Technical Design & Engineering = project feasibility reports, designs, or engineering materials that directly lead to site-specific restoration or acquisition projects within a specified timeframe

Resource Assessment & Planning = information about existing water quality or habitat conditions and processes at an identified scale, and relates those conditions and processes to actions that will directly lead to desired future conditions within a specified timeframe

Describes a clear need



Cost aligns with work necessary to accomplish project objectives

Engages appropriate stakeholders

Qualifications of staff or consultants to accomplish proposed activities

Organizational capacity of applicant

Technical Design & Engineering

- Addresses limiting factors in existing conservation or recovery plan
- Describes alternative analysis that demonstrates a range of options were considered
- Appropriate data will be collected to inform designs
- Professionally accepted technical or engineering approaches will be used

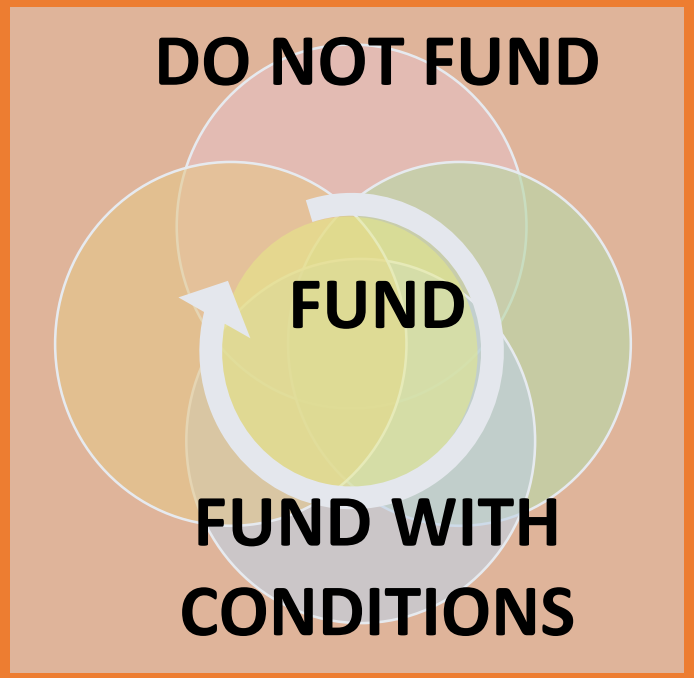
Resource Assessment & Planning

- Scope & scale is feasible, & partners have demonstrated ability in collaborative work at this scale
- Process by which data will be managed & shared with partners
- Professionally accepted methods & parameters will be used

Open Solicitation – Stakeholder Engagement Grants

PROVIDE PUBLIC BENEFIT FOR WATER QUALITY, NATIVE FISH AND WILDLIFE HABITAT, OR WATERSHED/ECOSYSTEM FUNCTION

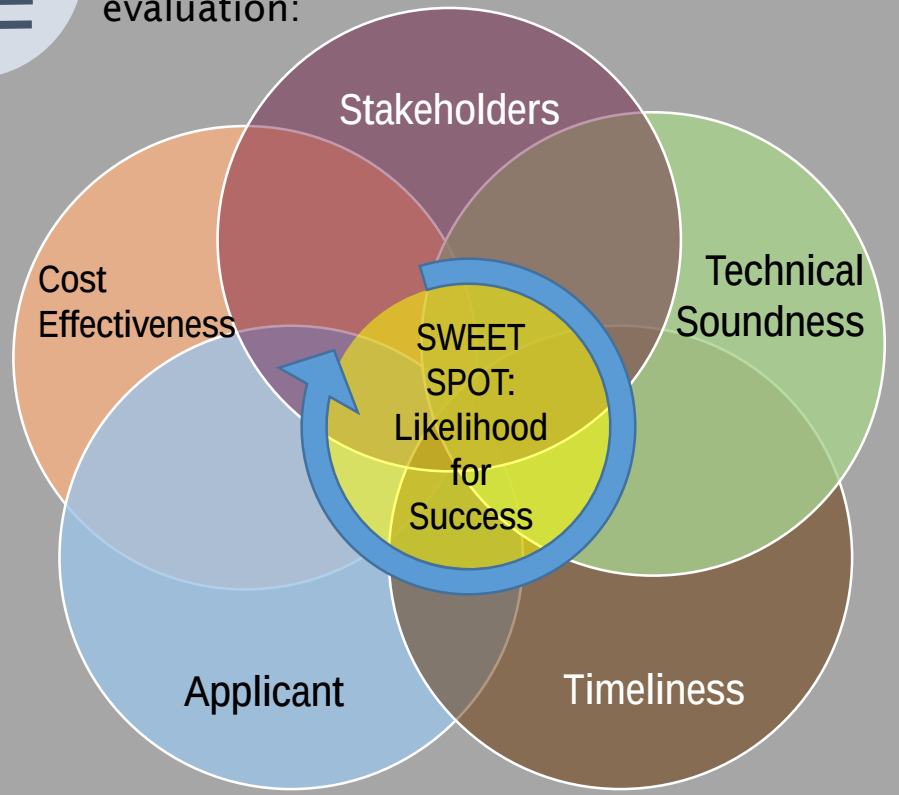
Recommend



Regional team reviews & evaluates each project individually based on how well project meets criteria

Prioritize

CRITERIA
How well project meets criteria for project evaluation:



CERTAINTY OF SUCCESS
Based on the organizational capacity of the applicant & likelihood the project will meet its stakeholder engagement objectives

Recommendation to Staff

Staff review recommendations from each regional review team & make a statewide funding recommendation to the Board based on available resources for the grant period & type.

STAKEHOLDER ENGAGEMENT

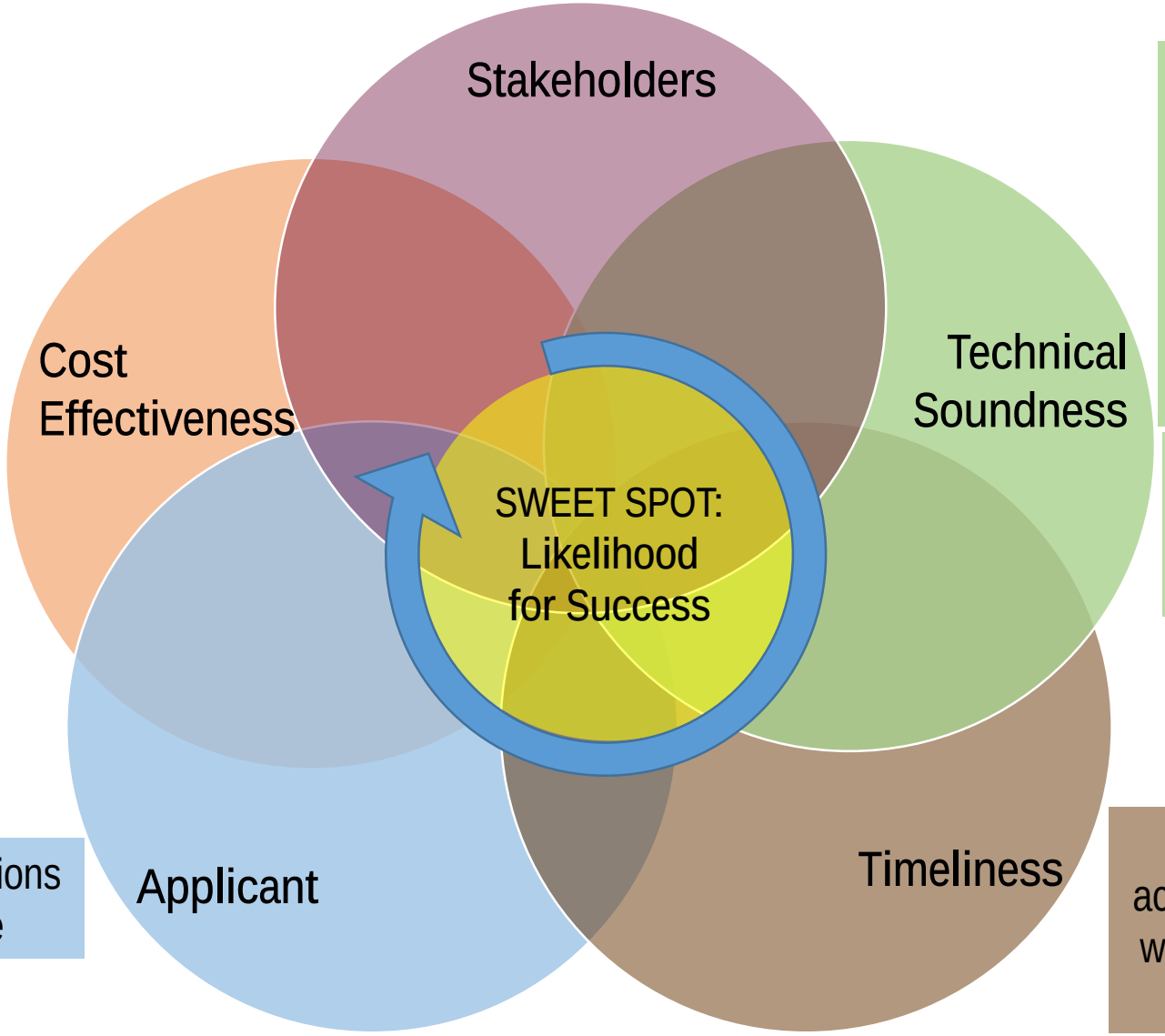
Evaluation Criteria
OAR 695-015-0070

"Stakeholder Engagement Project" means a project whose purpose is to communicate and engage with landowners, organizations and the community about the need for, feasibility, and benefit of a specific eligible restoration or acquisitions project or program that leads to development of eligible projects within an identified geography.

Projects whose primary purpose is education are NOT ELIGIBLE

Applicants engage with appropriate stakeholders in the appropriate geography

Likely effectiveness of multidirectional communication among the applicant & stakeholder



Expected outcomes of resulting restoration or acquisitions include protecting or restoring fish or wildlife habitat, watershed function, and or water quality or quantity

Evidence base linking engagement to eligible project types

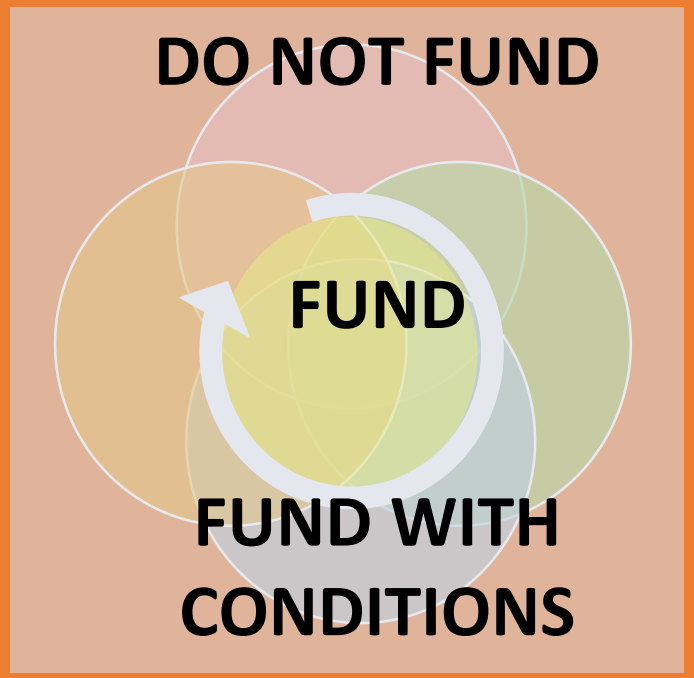
Shows qualifications & experience

Resulting restoration or acquisition projects, or program will lead to timely development of eligible projects

Open Solicitation – Monitoring Grants

PROVIDE PUBLIC BENEFIT FOR WATER QUALITY, NATIVE FISH AND WILDLIFE HABITAT, OR WATERSHED/ECOSYSTEM FUNCTION

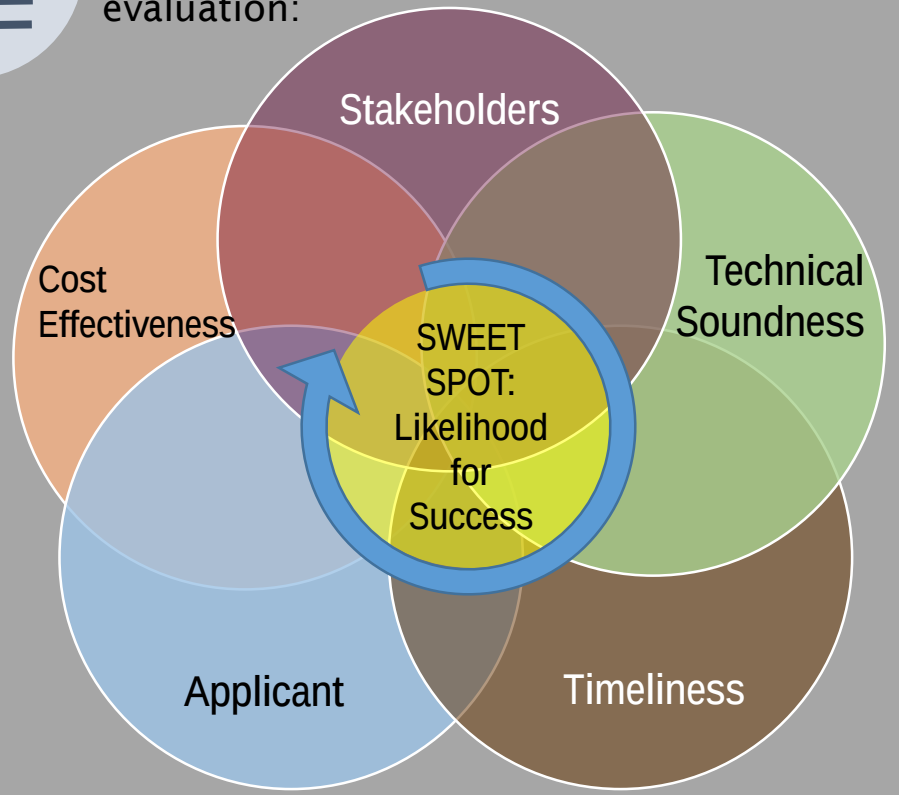
Recommend



Regional team reviews & evaluates each project individually based on how well project meets criteria

Prioritize

CRITERIA
How well project meets criteria for project evaluation:



CERTAINTY OF SUCCESS
Based on the organizational capacity of the applicant & likelihood the project will meet its stakeholder engagement objectives

Recommendation to Staff

Staff review recommendations from each regional review team & make a statewide funding recommendation to the Board based on available resources for the grant period & type.

MONITORING

Evaluation Criteria
OAR 695-025-0140

Eligibility
Projects that gather & analyze data to:
1. Describe current watershed conditions
2. Establish trends about watershed conditions
3. Evaluate the specific effects of a restoration or acquisition project

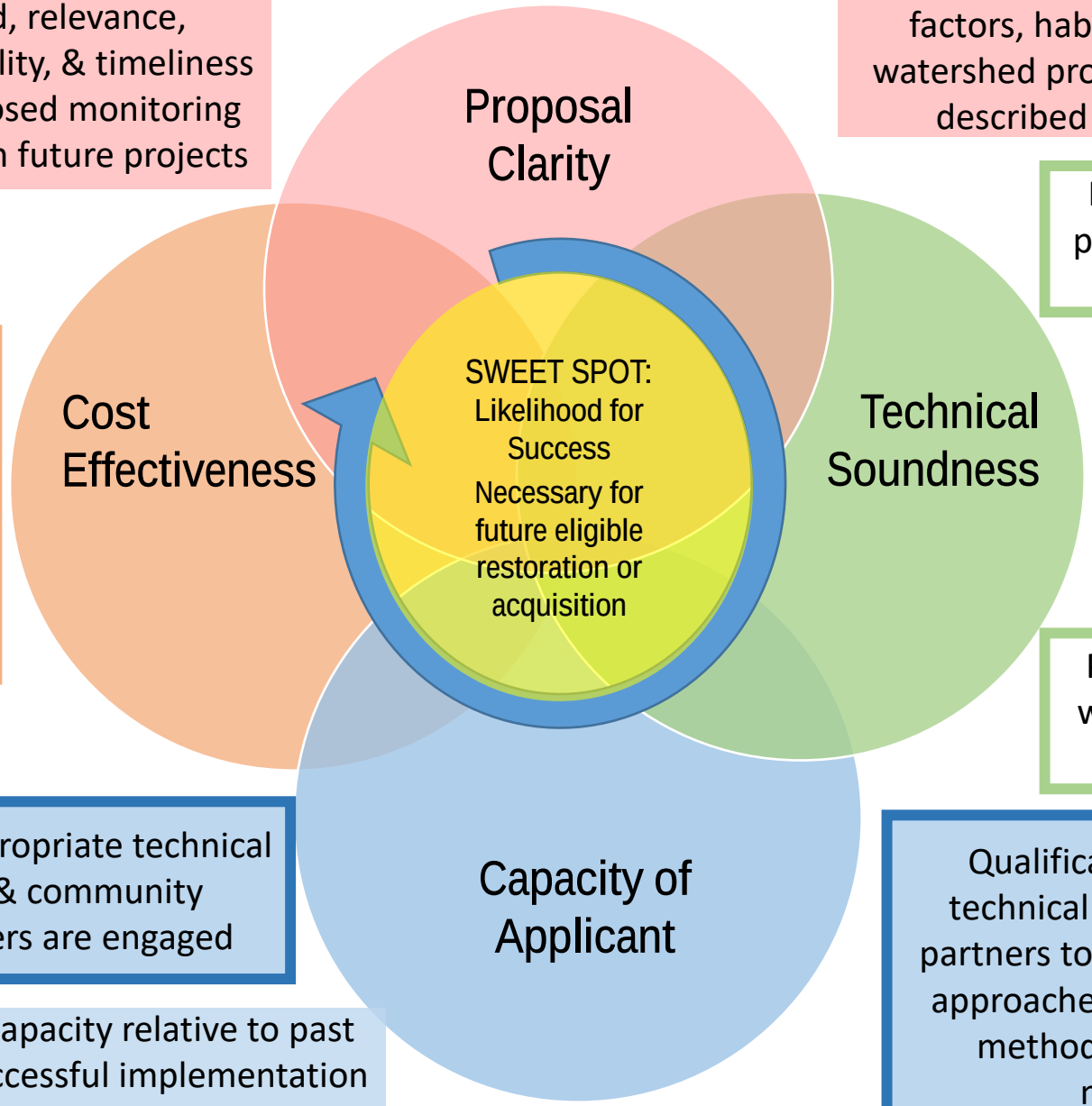
Two Team Review

- OPMT Review
- RRT Review
- Both Teams Review

Complements existing data or current or planned monitoring efforts

Need, relevance, applicability, & timeliness of proposed monitoring to inform future projects

Monitoring relates to limiting factors, habitat conditions, watershed processes or actions described in local plans



Monitoring questions & how proposed monitoring methods will answer these questions

Proposed costs are appropriate for the work necessary to accomplish the objectives

Professionally accepted monitoring & analysis protocols, including quality assurance / quality control procedures to be utilized

Process by which data & results will be stored, reported, & made publicly available

How the appropriate technical experts & community stakeholders are engaged

Organizational capacity relative to past experience & successful implementation of monitoring projects

Qualifications & ability of applicant technical staff, consultants, or project partners to apply appropriate monitoring approaches & data collection & analysis methods to successfully complete monitoring activities

Comparison of Projects Recommended by **RRTs and Staff for the Spring 2023 Open Solicitation Grant Offering**
Tables compare the number of projects recommended by each Regional Review Team (RRT) with projects recommended by Staff based on funds available in the 2023-2025 Spending Plan.

Restoration

Region	RRT	Staff	%
1	8	6	75%
2	3	3	100%
3	7	6	86%
4	7	6	86%
5	11	8	73%
6	6	6	100%
Total	**42**	**35**	**83%**

Technical Assistance

Region	RRT	Staff	%
1	1	1	100%
2	7	3	43%
3	5	4	80%
4	2	2	100%
5	4	3	75%
6	2	2	100%
Total	**21**	**15**	**71%**

Stakeholder Engagement

Region	RRT	Staff	%
1	1	1	100%
2	N/A	N/A	N/A
3	1	1	100%
4	N/A	N/A	N/A
5	1	1	100%
6	2	2	N/A
Total	**5**	**5**	**100%**

Monitoring

Region	RRT	Staff	%
1	3	1	33%
2	2	1	50%
3	4	4	100%
4	4	4	100%
5	3	3	100%
6	1	1	100%
Total	**17**	**14**	**82%**

Funding amounts are the totals for Staff Recommended projects

Region	Restoration	Technical Assistance	Stakeholder Engagement	Monitoring	Total
1	$1,494,492	$42,053	$28,804	$51,230	$1,616,579
2	$1,296,129	$225,000	$0	$120,489	$1,641,618
3	$2,633,369	$204,386	$34,130	$668,969	$3,540,854
4	$1,578,273	$148,101	$0	$851,592	$2,577,966
5	$1,117,070	$180,078	$148,267	$429,845	$1,875,260
6	$879,512	$129,452	$87,351	$113,273	$1,209,588
Total	**$8,998,845**	**$929,070**	**$298,552**	**$2,235,398**	**$12,461,865**

OWEB Open Solicitation Regions

Region 1: North Coast

Region 2: Southwest

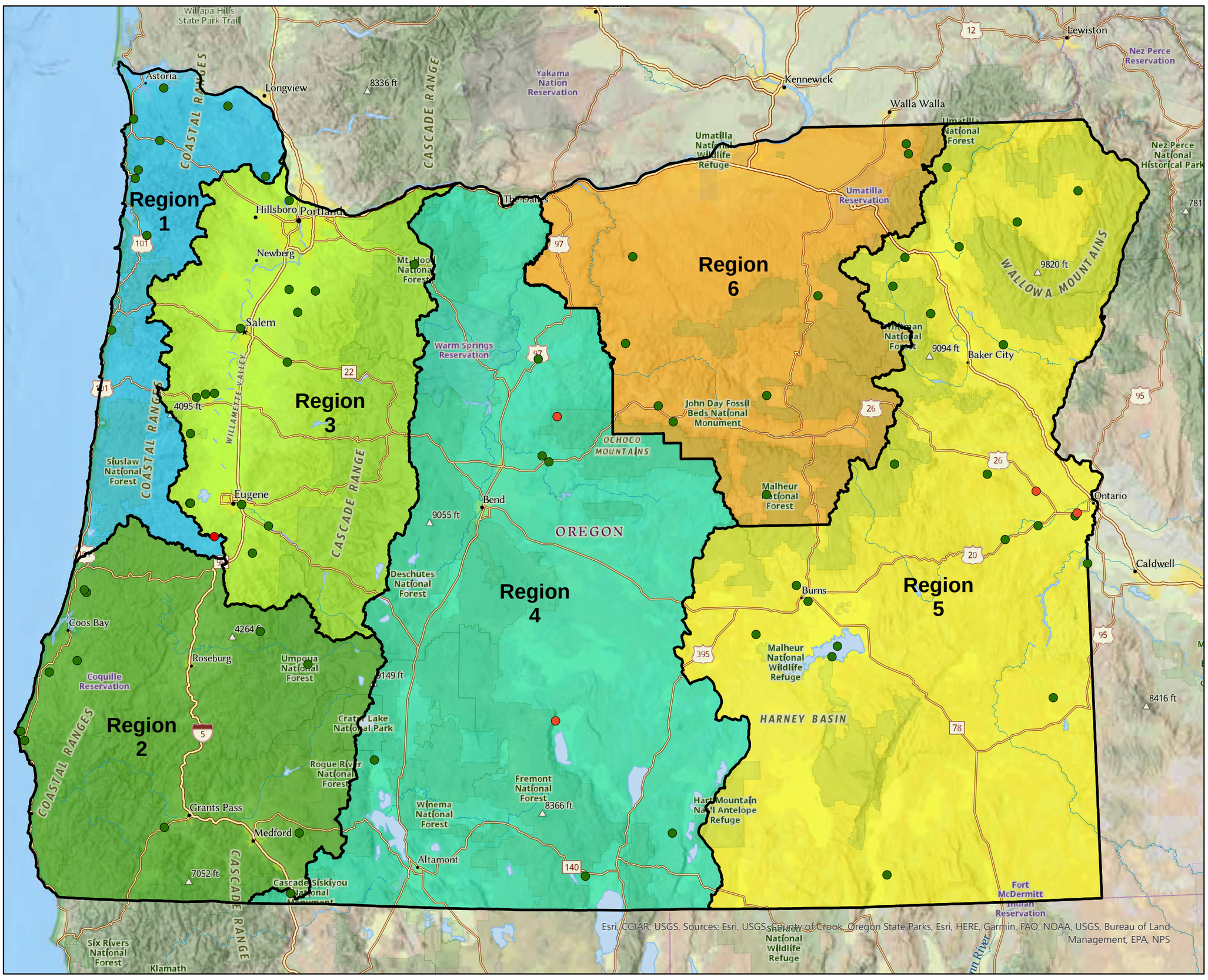
Region 3: Willamette Basin

Region 4: Central Oregon

Region 5: Eastern Oregon

Region 6: Mid-Columbia

All Regions
Fall 2022 Funding Recommendations



Fall 2022 Funding Recommendations

Status

- Staff Recommended Funding
- Below Funding Line

OWEB Regions

- Region 1
- Region 2
- Region 3
- Region 4
- Region 5
- Region 6

OREGON WATERSHED ENHANCEMENT BOARD

775 Summer St, NE Suite 360
Salem, OR 97301-1290
(503) 986-0178
https://www.Oregon.gov/OWEB/

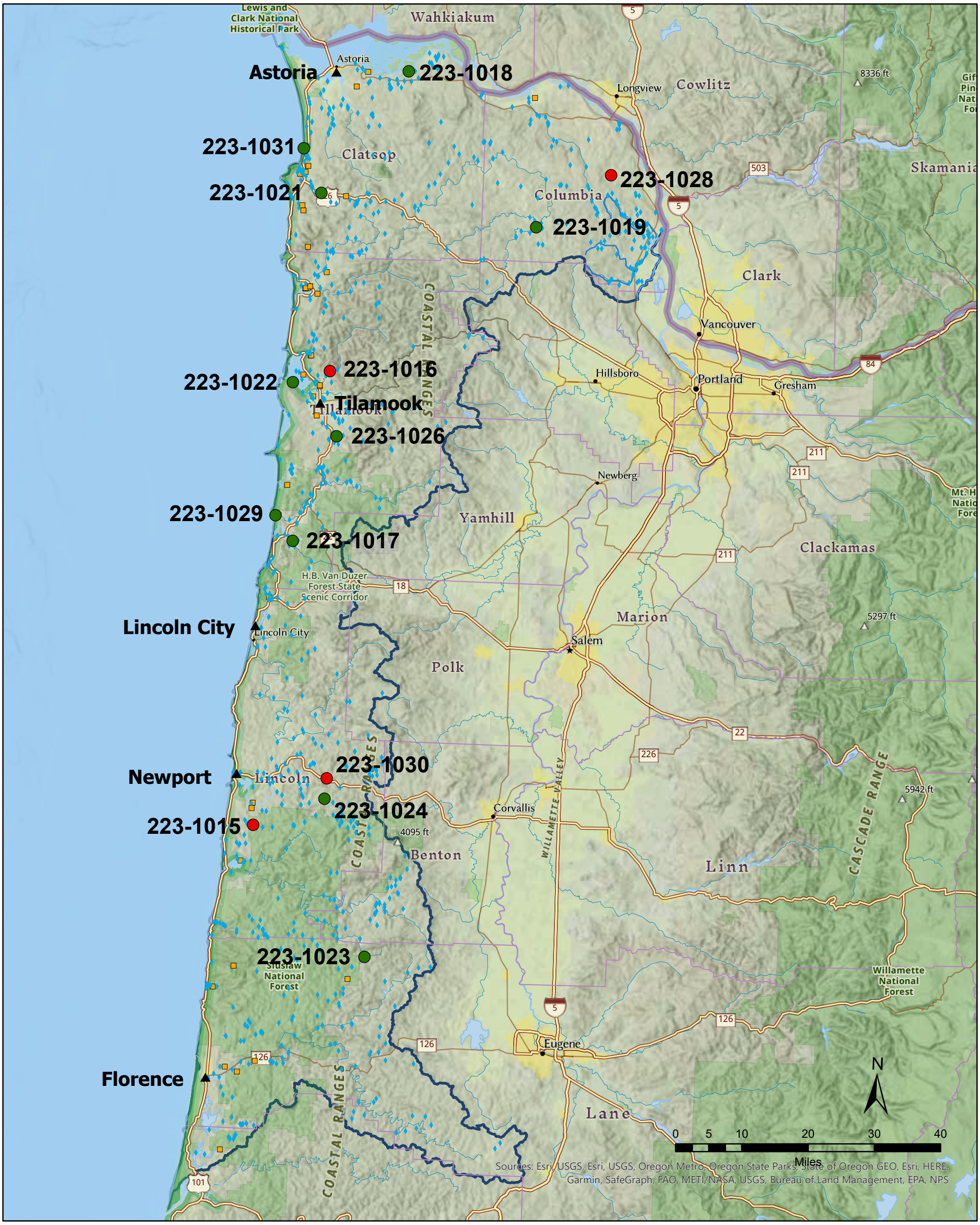
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North Coast - Region 1 Spring 2023 Funding Recommendations



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Funding Recommendation

- Staff Recommendation For Funding (SRF)
- Below Funding Line (BFL)

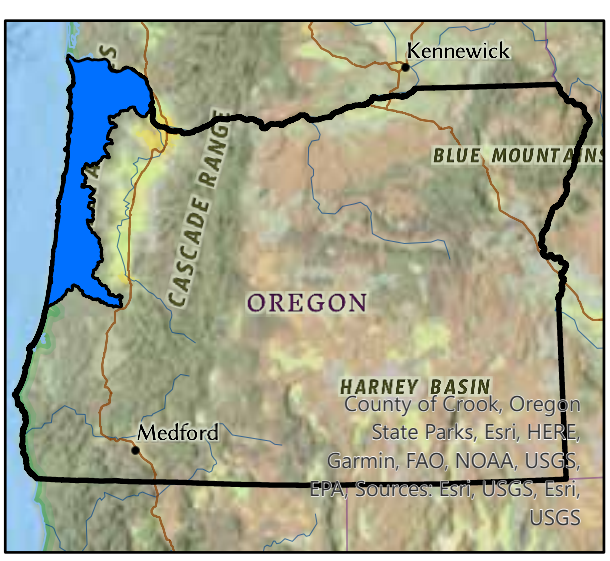
Previous Grants 1998 - Spring 2022

- Land Acquisition
- Restoration
- Region 1 Cities
- Region 1 Streams
- OWEB Region 1 Boundary

OREGON WATERSHED ENHANCEMENT BOARD

775 Summer St, NE Suite 360
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Region 1 - North Coast Restoration

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-1022	Trout Unlimited Inc	Tillamook Bay Wetland Connectivity and Fish Passage Project	Fish passage will be restored and a tidal wetland will be reconnected along Tillamook Bay with the replacement of a severely undersized culvert on Bayocean Road west of Tillamook.	505,060
223-1018	CREST	Nicolai-Wickiup Watershed Connectivity and Tidal Restoration - PHASE II	Critical rearing habitat for juvenile fish in the Lower Columbia River will be reconnected and tidal wetlands restored by creating a series of openings in two locations in the railroad prism.	497,338
223-1024	Oregon Wildlife Heritage Foundation	Deer Creek Willow Planting Project	Willow galleries will be planted in a valley bottom along a tributary of the Yaquina River to encourage the expansion of beaver populations. The ponds and dams that beaver create will restore natural function to the watershed and improve habitat for fish, including Oregon coast coho.	91,577
223-1017	Tillamook Estuaries Partnership	Heathershaw Planting Project	Native trees and shrubs will be planted and invasive species controlled in streamside habitat of the Little Nestucca River. Restoring a native forest will provide shade that will improve water quality and provide habitat for wildlife.	58,326
223-1021	Necanicum WC	Middle Necanicum Tributary Fish Passage and Habitat Improvement: Phase I	A legacy forest road and undersized culvert will be removed and the area regraded to restore fish passage and floodplain connection to a tributary of the Necanicum River.	74,033
223-1019	Upper Nehalem WC	Rock Creek Confluence Fish Passage Improvement	Fish barriers will be addressed at two locations within the City of Vernonia, including on Rock Creek, an important cold water tributary of the Nehalem River. The effort is part of a large water and sewer infrastructure project that will improve water quality in the Nehalem watershed.	268,158
Total Restoration Projects Recommended for Funding by RRT and OWEB Staff				**1,494,492**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-1016	Tillamook County Public Works	Salmon SuperHwy Myrtle Creek Priority Fish Passage	A fish passage barrier will be addressed at a undersized culvert on Kilchis River Road in Tillamook County to improve fish access to upstream habitat.	203,060
223-1015	Lincoln SWCD	North Beaver Creek Leach Property Riparian Restoration	A streamside buffer along North Beaver Creek will be planted with native trees and shrubs to reduce stream temperatures and improve habitat for wildlife.	90,527

Projects *Not Recommended* for Funding by RRT

Project #	Grantee	Project Title	Amount Requested
223-1020	Nestucca-Neskowin Watersheds Council	Sutton Creek Proposal Rock Loop Fish Passage Project	597,527

Region 1 - North Coast Technical Assistance

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-1026	Tillamook Estuaries Partnership	Mary's Creek Culvert Replacements - Phase 1 Designs	Designs will be produced to improve fish passage at two locations on Marys Creek, a tributary of Fawcett Creek in the Tillamook River watershed.	42,053
Total Technical Assistance Projects Recommended for Funding by RRT and OWEB Staff				**42,053**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
None				

Projects *Not Recommended* for Funding by RRT

Project #	Grantee	Project Title	Amount Requested
223-1025	Lower Nehalem WC	Gallagher Slough Fish Passable Tide Gate Upgrade	74,986

Region 1 - North Coast Stakeholder Engagement

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-1031	Necanicum WC	Necanicum Together: Landowner Engagement Program	Landowners will be engaged in the Necanicum River watershed along priority streams to develop a list of prioriitized projects for the watershed council.	28,804
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				**28,804**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
None				

Projects *Not Recommended* for Funding by RRT

Project #	Grantee	Project Title	Amount Recommended
None			

Region 1 - North Coast Monitoring

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-1029	Nestucca-Neskowin Watersheds Council	Nestucca, Neskowin & Sand Lake Expanded Monitoring II	Stream temperature and bacteria data will be collected for another two years in order to address a data gap in the watershed and inform planning and prioritization for future restoration projects.	51,230
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				**51,230**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-1030	Lincoln SWCD	Upper Yaquina Strategic Implementation Area Monitoring	Water quality monitoring associated with a Strategic Implementation Area will be expanded upon and continued for four additional years in order to provide updated baseline data and assess changes in water quality.	135,408
223-1028	Lower Columbia Estuary Partnership	Collaborative Expansion of the Columbia County Water Quality Monitoring Program 2023-2026	Water quality monitoring will continue for three more years in six key subbasins in Columbia County. Continuous dissolved oxygen and eDNA monitoring will be incorporated into the program as well as the original water quality parameters that have comprised the monitoring to date.	270,865

Projects *Not Recommended* for Funding by RRT

Project #	Grantee	Project Title	Amount Requested
223-1027	Columbia SWCD	Lower Columbia Watershed Rapid Biological Assessment	100,952

Region 1 Total OWEB Staff Recommended Board Award	**1,616,579**

Region 1 - 6 Grand Total OWEB Staff Recommended Board Award	**12,461,865**

Open Solicitation-2023 Spring Offering
North Coast (Region 1)

Application Number: 223-1015-22999
Project Type: Restoration
Project Name: North Beaver Creek Leach Property Riparian Restoration
Applicant: Lincoln SWCD
Region: North Coast
County: Lincoln
OWEB Request: $90,527
Total Cost: $113,345

Application Description This project would aim to restore the riparian buffer along North Beaver Creek within the rural residential/agricultural property parcel. The main issues currently impacting this location include a lack of canopy cover over the stream channel, and a displacement of native shrubs by reed canary grass (Phalaris arundinacea) and Himalayan blackberry (Rubus armeniacus). Additionally, recent logging sites border the riparian zone on both sides- a 1,275-ft stretch on the north side, and 400 ft on the south, which are largely devoid of trees or other sizable established vegetation to act as a buffer from sedimentation and pollution runoff. A gravel road also runs along the northern border of the property, coming as close as 70 ft of the stream in some places, further compounding the issue of a lack of natural buffer.
Funding from OWEB will be used to restore riparian function along an 1,800-ft stretch of stream by suppressing invasive vegetation; implementing a planting plan utilizing 35-75 ft wide buffers that will provide shade, eventual accumulation of large woody debris within the stream channel, and habitat for local wildlife; and installing exclusion fencing to prevent browsing pressure from deer, elk, and beavers while plants become established. As this property is a short distance upstream from another OWEB-funded restoration site implemented by the MidCoast Watershed Council and directly upstream of another prospective restoration property, this site presents an excellent opportunity to restore riparian function along 5,600 feet of contiguous stream habitat.

Review Team Evaluation

Strengths

- Establishing a healthy riparian corridor along North Beaver Creek will address water quality issues by providing shade that will contribute to an improvement in water temperature.
- The approach to control invasive species is multi-faceted by using a combination of manual and chemical techniques. Continuing plant establishment activities for four years post-planting will ensure the success of the project.
- Beaver Creek is a coho stronghold and contains high quality wetland habitat for rearing. Downstream, significant stream miles are in conservation ownership by both the Wetlands Conservancy and Oregon Parks and Recreation Department. Upstream, there is U.S. Forest Service ownership. This project addresses the critical habitat in between the two swaths of protected land.
- Fencing is proposed that is likely to keep livestock out of the riparian area.

- The plant species list has variety and includes a component of willows that could help reduce stream velocity and capture stream material. Slower velocities are important for fish during the winter months and encouraging the accumulation of streambed material will help address the incision that has degraded the aquatic habitat.
- The landowner may be interested in other restoration actions in the future, including large wood placement to restore instream habitat complexity.
- Applicant staff have worked closely with the watershed council on implementing similar projects in the past.

Concerns

- The planting approach may create high competition among seed and potted stock because the proposed plant density is very high, particularly for the seed.
- The application lacks a clear map showing the location of the different plant communities that would be helpful for understanding whether the planting plan matches site conditions.
- The application does not provide detail on the chemicals that will be used to treat reed canary grass or a clear explanation of the site preparation protocols that will be used. This information would be helpful to evaluate the likelihood proposed methods will effectively control reed canary grass enough to establish a native riparian plant community.
- A power line runs directly overhead through much of the planting area, and the application does not describe how the power line could impact the planting approach, such as restrictions or vegetation control that might be associated with the power line easement.
- The proposed planting plan is a high cost for the ecological benefit expected. Purchasing higher cost potted plant material may not be the best approach when planting the high densities that are proposed. Typically, high density plantings involve smaller and more low-cost plant materials, such as plugs or bare-root stock. The application lacks a clear rationale for using more expensive, larger stock in high densities.

Concluding Analysis

A healthy riparian corridor will be restored along a reach of Beaver Creek, a direct ocean tributary that provides habitat for anadromous fish species, including Oregon coast coho salmon. The re-establishment of native plants will provide shade to improve water temperature over time. The project is located near several other similar projects, which will maximize the benefit over a larger landscape by creating habitat connectivity.

Review Team Recommendation to Staff

Fund

Review Team Priority

8 of 8

Review Team Recommended Amount

$90,527

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team

n/a

Staff Recommendation

Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount

$0

Staff Conditions

n/a

Open Solicitation-2023 Spring Offering
North Coast (Region 1)

Application Number: 223-1016-23011

Project Type: Restoration

Project Name: Salmon SuperHwy Myrtle Creek Priority Fish Passage

Applicant: Tillamook County Public Works

Region: North Coast

County: Tillamook

OWEB Request: $203,060

Total Cost: $1,060,055

Application Description The proposed fish passage project is located at the road/stream crossing of Kilchis River Road and Myrtle Creek in Tillamook County, Oregon. The crossing is located approximately 600 feet upstream of Myrtle Creek's confluence with the Kilchis River. An existing 41-foot-long, 5.5-foot diameter culvert is undersized, and its outlet is perched approximately four feet above the downstream water surface elevation. As a result, it adversely affects aquatic organism passage, impeding adult and juvenile salmonid access to approximately 1.6 miles of upstream habitat as well as hampering both the natural stream processes and the stream's ability to transport organic matter. The Kilchis River basin historically supports Oregon Coast Coho (OCC) Salmon (ESA listed as threatened), Pacific Coast Chum Salmon, Oregon Coast Winter Steelhead, Pacific Lamprey, Oregon Coast Chinook Salmon, and Sea-run Cutthroat Trout. This project has the potential to increase habitat connectivity for these anadromous fish and restore access to historical spawning and rearing habitat. In addition, the culvert contributes to downstream fine sediment loading and requires an inordinate level of inspection and maintenance to avoid plugging and breaching. The proposed project will finalize project designs and specifications, remove the existing culvert, and construct a 42-foot-long concrete bridge. To ensure project stability and long-term fish passage, the project also will construct approximately 280 feet of roughened stream channel (with boulders, large wood, and a resting pool). The project will employ a staged construction method to provide continuous ingress and egress for residences and businesses beyond the crossing. OWEB funds will support contracted services needed to construct the replacement structure and will supplement funds and in-kind contributions from the U.S. Fish & Wildlife Service, Tillamook County, Oregon Department of Fish & Wildlife, and Tillamook Estuaries Partnership.

Review Team Evaluation

Strengths

- Replacing the road crossing on Myrtle Creek will result in improved passage to 1.6 miles of aquatic habitat in the Kilchis River watershed as well as allow for natural bedload transport through the stream reach.
- The project will benefit water quality by reducing the potential for road fill inputs to the stream that could result from failure of the existing structure.
- There has been a change in land ownership directly upstream of the site, and the current landowner is willing and supportive of the project.

- A broad partnership is behind the project, including partners from Trout Unlimited, U.S. Fish and Wildlife Service, and NOAA. Working together as the Salmon SuperHwy, the partnership has a proven track record of success with similar types of projects.

Concerns

- Upstream of the crossing, Myrtle Creek has a steep gradient and the stream bed is comprised of large cobbles and boulders, which is not ideal spawning material for anadromous fish. The habitat benefit will likely be focused on cutthroat trout and will provide minimal benefit for other anadromous fish species. There is low intrinsic habitat potential for Oregon coast coho salmon and limited capacity for spawning upstream due to the lack of gravel.
- Land uses upstream are commercial timber and an old rock quarry. More information about existing upstream habitat conditions and the potential for future restoration actions in reaches upstream of the project site would have been helpful for understanding watershed context for the investment.
- The application is unclear about the different funding sources in the project budget and how they all intersect with the project timeline.

Concluding Analysis

Improving passage at the project location on Myrtle Creek has long been a priority for both fish and wildlife and public works agencies. The road is an important emergency route and the current structure is at risk of failure. Previous efforts to replace the structure were stymied by an upstream landowner who was not interested in cooperating with the restoration effort. With a landownership change and a renewed focus by Salmon SuperHwy partners, passage will be restored to 1.6 miles of primarily cutthroat trout habitat.

Review Team Recommendation to Staff
Fund

Review Team Priority
7 of 8

Review Team Recommended Amount
$203,060

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount
$0

Staff Conditions

n/a

Open Solicitation-2023 Spring Offering
North Coast (Region 1)

Application Number: 223-1017-23015
Project Type: Restoration
Project Name: Heathershaw Planting Project
Applicant: Tillamook Estuaries Partnership
Region: North Coast
County: Tillamook
OWEB Request: $58,326
Total Cost: $76,005

Application Description The Heathershaw project is located along the Little Nestucca River and unnamed tributary to the Little Nestucca River. The property is located at the junction of Irish Rd and Little Nestucca River Hwy (Hwy 130) approximately 1.3 miles south of the junction of Hwy 130 and Hwy 101. The property's tax lot is 5S9Wsec9#100.

The riparian areas included in the project are dominated by reed canary grass, include eroding and sloughing riverbanks, and lack a diversity of native tree and shrub species.

The project will aim to control invasive species and establish native tree and shrub species within the riparian areas of the project and conduct tree release activities for 4 years.

Monitoring will be conducted once a year for 5 years and will include photo-point monitoring and survival rate estimates.

The Tillamook Estuaries Partnership's (TEP) Backyard Planting program has been implementing riparian enhancement projects for 21 years. Partners include TEP's Northwest Oregon Restoration Partnership (NORP), Oregon Dept. of Environmental Quality, the US Forest Service, and Trout Unlimited.

Review Team Evaluation

Strengths

- Planting over five acres of riparian habitat along the Little Nestucca River will provide important benefits to the stream by reducing water temperature and decreasing impacts from bacteria. Healthy, functioning riparian vegetation has benefits for floodplain connectivity as well as habitat benefits for birds and mammals.
- The planting plan is appropriately detailed, and has clearly defined methods. The species list, site preparation, and planting strategy is technically sound and has been developed from decades of experience. The project is well-designed and includes an approach to test different site preparation and plant protection techniques prior to planting. This will ensure that the methods are site-specific and likely to achieve the goals and objectives.
- The project builds on other successful planting projects in the area and there may be potential for future restoration on adjacent sites.
- The budget is reasonable for the expected ecological benefit.

- The Backyard Planting Program is renowned in Tillamook County for consistently delivering successful riparian restoration projects and building relationships with agricultural landowners.

Concerns

- The project site is primarily on the north side of the stream due to tax lot boundaries. As a result, the newly planted riparian buffer may not be able to provide significant stream shading.
- The setback for planting next to the stream is limited in some areas due to the site constraints of a working agricultural landscape; however, any planted buffer width will provide benefit compared to no buffer.

Concluding Analysis

The Little Nestucca River suffers from high temperature and bacteria inputs, which this project will make strides toward addressing. The Little Nestucca river supports populations of coho, chinook, steelhead, and cutthroat trout. The project is likely to address water quality-related habitat limiting factors for these fish by establishing native trees and shrubs in the riparian area.

Review Team Recommendation to Staff
Fund

Review Team Priority
4 of 8

Review Team Recommended Amount
$58,326

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Fund

Staff Recommended Amount
$58,326

Staff Conditions

n/a

Open Solicitation-2023 Spring Offering
North Coast (Region 1)

Application Number: 223-1018-23016

Project Type: Restoration

Project Name: Nicolai-Wickiup Watershed Connectivity and Tidal Restoration - PHASE II

Applicant: CREST

Region: North Coast

County: Clatsop

OWEB Request: $497,338

Total Cost: $1,967,378

Application Description Located between River Mile (RM) 20 and 30 of the Columbia River in Clatsop County Oregon, four geographically distinct but functionally similar sites comprise the Nicolai-Wickiup Watershed Connectivity and Tidal
Restoration Project: Wolf Bay at Columbia RM 20 (46.169558, -123.695282), Agency Creek at RM 26 (46.186919,
-123.607724), Warren Slough at RM 27 (46.192721, -123.575337), and E. Aldrich Point at RM 30 (46.232615, -123.496397).

This proposal only seeks funds to complete Agency Creek and the Warren Slough projects (Phase II) in summer of 2024. Wolf Bay. and Aldrich (Phase I) were funded for construction in 2023.

The project area is located directly adjacent to the Lewis & Clark National Wildlife Refuge on the OR shoreline of the Columbia River (CR) within the Big Creek- Frontal CR (HUC 10). This project is a partnership between CREST, North Coast Land Conservancy (NCLC), Columbia Land Trust (CLT), Oregon Department of Forestry (ODF), and three private landowners (Connie and Bob Hunt, Hampton Lumber, and ODOT/PNWR Rail). All landowners strongly support project implementation and have been key advocates throughout the design process.

In the project area, foraging and rearing habitat for all local and upriver stocks of juvenile salmonids are limited by past land use (rail/hwy and ag.) developments. Restoration efforts will focus on the enhancement of CR mainstem-adjacent habitat at the base of the Nicolai-Wickiup watershed bisected by the railroad, reestablishing juvenile salmonid access to rearing habitats. The projects will expand several existing openings and create new openings in the railroad prism providing access to over 110 acres (43.93 of which from Agency and Warren) of rearing habitat for salmonids. New railroad breaches, reducing velocities at existing openings, and channel excavation will significantly reduce the distances between existing available habitat patches, increase wetland capacity, and restore natural hydrologic connectivity.

Review Team Evaluation

Strengths

- The project will reconnect the lower Columbia River with 44 acres of tidal wetland habitat and provide critical rearing habitat for lower Columbia River fish species.
- The restoration and reconnection of estuary habitat will provide a host of benefits to a wide variety of species, including songbirds, mammals, forage fish, and waterfowl.
- The designs are technically sound and will address known fish passage barriers with a range of approaches, including levee breaching, bridge installation, and creating new openings in the railroad prism.
- The project is ready for implementation with permitting underway and additional funding secured for implementation.
- Data from temperature loggers installed upstream and downstream of the railroad line was used to inform project development.
- The applicant has been diligent in working with the railroad and putting together a large-scale project that encompasses several different land ownerships and crossing locations.
- CREST has a proven track record in implementing similar types of projects and this will be phase two of this tidal connectivity effort in the Lower Columbia.
- The project costs are reasonable for the acreage of tidal wetlands that will be reconnected and the expected ecological benefits, especially when considering the challenging design logistics required by the railroad line.

Concerns

- The site constraints created by the railroad necessitate a more limited design approach for a higher cost than would be possible without the need to maintain the transportation infrastructure.

Concluding Analysis

This fish passage and tidal connectivity project builds on a strategic effort within the Lower Columbia River estuary to reconnect priority areas of tidal wetland with the river. The applicant has built an effective working relationship with the railroad and numerous private and public landowners along the railroad line that resulted in rigorous project development and planning. Project sites have been prioritized throughout the Lower Columbia that will provide strategic habitat for migrating and rearing fish. This project will contribute to a larger watershed connectivity that will collectively provide over 100 acres of tidal habitat for the myriad of species that depend on estuaries to thrive.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 8

Review Team Recommended Amount
$497,338

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team

n/a

Staff Recommendation

Fund

Staff Recommended Amount

$497,338

Staff Conditions

n/a

Open Solicitation-2023 Spring Offering
North Coast (Region 1)

Application Number: 223-1019-23018
Project Type: Restoration
Project Name: Rock Creek Confluence Fish Passage Improvement
Applicant: Upper Nehalem WC
Region: North Coast
County: Columbia
OWEB Request: $268,158
Total Cost: $342,307

Application Description The City of Vernonia is working on two fish passage improvements within the city limits, at Rock Creek and Bear Creek.

Existing infrastructure, namely the sewer system and a culvert in Adams Ave, have created fish passage barriers over the years due to poor construction and/or degradation over time.

Within Rock Creek, the barrier is created by the existing sewer pipe and encasing concrete which is exposed during low-flow events and creates an unsuitable jump height for several of the present fish species. Where Bear Creek crosses the Adams Ave ROW, there is a similar sewer impediment which impedes fish passage. In addition to the sewer in Bear Creek, the Adams Ave culvert has degraded and created additional scour pools which add to the problem of allowing fish upstream.

Bear Creek is a tributary to Rock Creek spanning 1.8 miles to the west into the hills surrounding Vernonia. Rock Creek is a major cool-water tributary to the Nehalem River spanning 28.8 miles upstream of Vernonia to the productive heaswaters. The proposed improvements are meant to remove the existing impediments and provide suitable conditions for fish migration while maintaining the necessary system functionality. Based on ODFW fish surveys, both waterways present migratory, spawning and rearing habitat for Chinook, Coho, Cutthroat Trout, Winter Steelhead, Lamprey, Largescale Suckers, Sculpins, and Crayfish. With this, it is known that different life stages of these species are present throughout the year and the variable flow patterns of the both creeks.

Improvements to fish passage are focused on removing the impediments and restoring creek connectivity. Project designs have already been created for these improvements through iterative design revisions based on consultation with ODFW and NOAA/NMFS. Improved passage in Rock Creek will be accomplished by removing the existing sewer infrastructure and grading back the vertical difference in the creek bed to suitable conditions.

Review Team Evaluation
Strengths

- The project will address two crossings, one on Rock Creek and one on Bear Creek, a tributary of Rock Creek. Rock Creek is a source of cooler water in the upper Nehalem watershed. Providing fish access to cold-water refuge will be beneficial to ESA-listed salmonids.
- The proposed fish passage work is part of a larger sewer infrastructure project that will improve water quality in Rock Creek.
- The Rock Creek watershed is a stronghold for fall and summer Chinook salmon. Oregon coast coho salmon and steelhead will also benefit from improved passage to rearing habitat.
- The applicant has a proven track record of successfully implementing similar types of projects.
- The watershed council and the City of Vernonia are building a partnership that is a catalyst for addressing other fish passage and water quality issues in the Rock Creek watershed.
- The work is cost-effective by combining the fish passage project with the larger infrastructure project.

Concerns

- The permitting pathway described in the application is unclear. A clearly defined permit pathway is helpful for evaluating whether the applicable permits will be obtained in a timely manner so the project can proceed according to the proposed timeline
- There are other barriers upstream of both creeks, including a board check dam installed by the City of Vernonia annually to create a community swimming area. The dam is removed when adult fish appear, but it is a complete barrier to all life stages of fish throughout the summer when the cool water refugia in Rock Creek would be most important for juvenile fish to access. While the ecological benefit of the project is limited by this upstream summer barrier, the City of Vernonia and the Upper Nehalem Watershed Council are working together on a passage solution at the check dam.

Concluding Analysis

Fish passage barriers on both Rock and Bear Creeks will be addressed during a larger sewer infrastructure project. Together, these project elements will improve water quality in waterways in and adjacent to the City of Vernonia in addition to providing for improved fish passage to upstream cold-water habitat. Removing the sewer line that crosses Rock Creek will not only make the creek more accessible for fish but it will also prevent the possibility of sewage leaks and overspill in the creek that threaten water quality. This project has potential to create momentum for continuing work to resolve the upstream barrier. Once a solution is found, fish passage could be restored to nearly 28 miles of habitat.

Review Team Recommendation to Staff
Fund

Review Team Priority
6 of 8

Review Team Recommended Amount
$268,158

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team

n/a

Staff Recommendation

Fund

Staff Recommended Amount

$268,158

Staff Conditions

n/a

Open Solicitation-2023 Spring Offering
North Coast (Region 1)

Application Number: 223-1020-23021

Project Type: Restoration

Project Name: Sutton Creek Proposal Rock Loop Fish Passage Project

Applicant: Nestucca-Neskowin Watersheds Council

Region: North Coast

County: Tillamook

OWEB Request: $597,527

Total Cost: $1,104,968

Application Description 1) Sutton Creek is a 1.6-mile tributary of Neskowin Cr located in Tillamook County, at Neskowin. The headwaters are in the Suislaw National Forest and the creek flows through a beaver marsh wetland before reaching a residential neighborhood at its confluence with Neskowin Cr. Sutton Creek supports populations of ESA threatened coho salmon, winter steelhead, coastal cutthroat and Pacific lamprey.

2) In the downstream-most reach of the creek, two corrugated metal pipe (CMP) culverts at road crossings are undersized, failed/failing and not aligned with the channel. During storm events, the culverts fill with debris creating fish passage barriers and causing water to overtop banks flooding the neighborhood. In 2021, flooding overtopped both culverts resulting in damage to nearly two-dozen homes, washing away road fill at the downstream culvert exposing buried utility lines. One of the crossings is currently unusable.

3) The Nestucca, Neskowin, and Sand Lake Watersheds Council (NNSLWC) convened a technical review team and hired Stillwater Sciences to prepare 100% plans and a Basis of Design Report. The restoration project proposed here will replace the culverts with concrete box culverts following the stamped plans produced by Stillwater Sciences. This project will restore fish passage to 1.5 miles of spawning and rearing habitat for salmon and steelhead, including 0.8 miles of coho habitat.

4) The Project Team includes representatives from NNSLWC, the US Fish and Wildlife Service (USFWS), the US Forest Service (USFS), Trout Unlimited and Salmon Super Highway (TU & SSH), Tillamook Estuaries Partnership (TEP), and Proposal Rock Homeowners Association (PRHOA). ODFW will review and approve a Fish Passage Plan and will assist with fish salvage when work area isolation occurs prior to demolition and construction activities. USFS staff will provide federal and state permitting assistance for ARBO II and fish salvage under Wyden Authority rules.

Review Team Evaluation

Strengths

- The project is located just upstream of the mouth of Neskowin Creek, which has historically been an important place for juvenile fish to find refuge when they are flushed out during high water events and need to avoid being swept out into the ocean.
- There are multiple partners involved in the project that bring a breadth of technical expertise.
- Technical designs for the two crossings are underway and the project is nearly ready for implementation.

Concerns

- Additional details about the importance of Sutton Creek to fish and the expected ecological benefit from replacing the crossings would be helpful to better understand the ecological benefit of the project.
- Productivity of Oregon coast coho salmon and steelhead is only moderate in Sutton Creek. The coho population is dependent, meaning it relies on nearby independent populations for abundance. The restoration work may accomplish limited ecological benefit to ESA-listed fish for the cost.

Concluding Analysis

Fish passage will be improved on Sutton Creek by replacing two culverts with larger structures. The downstream crossing has already failed and the road is currently unused. Replacing failing road crossings is a priority for a gated community to address the need for emergency vehicle access. The project may have limited ecological benefit due to the dependent nature of the fish populations in the watershed and site constraints surrounding the crossings from the heavily residential area limits restoration opportunities that can be considered.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
n/a

Review Team Recommended Amount
$0

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

n/a

Open Solicitation-2023 Spring Offering
North Coast (Region 1)

Application Number: 223-1021-23035
Project Type: Restoration
Project Name: Middle Necanicum Tributary Fish Passage and Habitat Improvement: Phase I
Applicant: Necanicum WC
Region: North Coast
County: Clatsop
OWEB Request: $74,033
Total Cost: $94,878

Application Description 1) Upland from the Klootchy Creek Mainline and Middle Necanicum Mainline, this unnamed stream runs through Lewis and Clark Timberlands property. The Tributary drains into Klootchy Creek, and subsequently into the Necanicum River near milepost-3 on US-26. The tributary of focus for this project is a second-order fish-bearing stream that feeds into the Klootchy Creek/Necanicum system. Oregon Department of Fish and Wildlife surveys indicated that this stream supported ESA-listed coho, sea-run cutthroat, rough-skinned newts, red legged frogs and crayfish, and potentially winter-run steelhead.

2) It has been identified that a harvest road and failing culvert system is blocking fish passage to approximately 1.6-miles of type-F stream. Removing this barrier, widening the stream's width at the current barrier location to match with the floodplain, and reinforcing the new banks of the stream are all necessary to restore the stream's natural state.

3) Phase I of this project, which this grant proposal would support, will address the full decommissioning of the harvest road, removal of the failing culvert system, and excavation to return the stream system's width to the floodplain. In addition, measures will be taken to ensure that bank steepness, stream gradient and riparian vegetation are all addressed to protect against erosion and subsequent sediment transport, as well as increase the quality of the habitat as fish refugia.

4) Necanicum Watershed Council
Nuveen Natural Capital/Lewis and Clark Timberlands
Oregon Department of Fish and Wildlife
Chinook Indian Nation

Review Team Evaluation

Strengths

- The implementation plan for reconnecting 1.6 miles of stream habitat in a Middle Necanicum tributary is clear and technically sound. Road fill material and a collapsed culvert will be removed from a legacy timber harvest road and the streambank will be regraded to match the stream grade.
- The undersized culvert has caused sediment to build up and develop wetland habitat upstream. A large wood structure will be installed to retain that sediment in place so that no wetlands are lost.

- The stream supports populations of cutthroat trout and has potential to provide habitat for Oregon coast coho salmon. Removing the fish passage barrier will provide coho access to 1.6 stream miles located above the crossing that has high intrinsic habitat potential.
- The riparian buffer downstream is intact and in good condition.
- The project builds on previous downstream work to replace a culvert with OWEB funding.
- The partnership behind the project provides appropriate technical support for the project, including fish biologists from ODFW and a roads engineer from Nuveen Capital.

Concerns

- More details describing the plant species and locations planned for plantings would have been helpful for understanding the revegetation prescription even though the planting is a minor project component.
- The stream would benefit from the addition of large wood to increase habitat complexity and including it in the project would increase the ecological benefit gained from this investment. There is indication in the application that large wood placement is planned as a future phase two project.
- Including designs in the application would have been helpful to better understand the methods for decommissioning the timber road. The applicant, however, is engaging a roads engineer and fish biologist with relevant experience to implement the project.

Concluding Analysis

The watershed council has developed an effective partnership with an industrial timber landowner to restore stream habitat on a Necanicum River tributary. The existing timber road and culvert creates a full barrier for upstream fish migration. While coho distribution currently ends at the barrier, quality habitat exists upstream to which this project will restore access. Removing the failing culvert and restoring the streambank will connect quality upstream habitat with a downstream reach that has intact riparian conditions. The investment is reasonable for the expected benefits and is likely to lead to a phase two large wood placement project that will further improve habitat conditions.

Review Team Recommendation to Staff
Fund

Review Team Priority
5 of 8

Review Team Recommended Amount
$74,033

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team

n/a

Staff Recommendation

Fund

Staff Recommended Amount

$74,033

Staff Conditions

n/a

Open Solicitation-2023 Spring Offering
North Coast (Region 1)

Application Number: 223-1022-23038
Project Type: Restoration
Project Name: Tillamook Bay Wetland Connectivity and Fish Passage Project
Applicant: Trout Unlimited Inc
Region: North Coast
County: Tillamook
OWEB Request: $505,060
Total Cost: $1,384,758

Application Description The proposed wetland connectivity and fish passage project is located at the road/stream crossing of Bayocean Road and Flower Pot Creek at milepost 4.1 approximately 5.5 miles West of Tillamook, Oregon. Here, a 14.6 acre tidal, estuarine wetland has become hydrologically disconnected from Tillamook Bay due to an antiquated, deteriorating, and undersized culvert and associated road prism where Flower Pot Creek meets Tillamook Bay. This problem culvert impairs tidal exchange and prevents native migratory fish from accessing tidal wetland rearing and upstream habitats in Flower Pot Creek. The culvert is 56 feet in length and 4 feet in diameter, situated within the tidal inundation zone. The tidal wetland provides valuable rearing habitat for anadromous fish utilizing Tillamook Bay including Oregon Coast Coho Salmon (ESA listed as threatened), Oregon Coast Chinook Salmon, Winter Steelhead Trout, Oregon Coast Chum Salmon, Pacific Lamprey, and Coastal Cutthroat Trout. The proposed project will eliminate the culvert and replace it with a 44ft bridge that will fully restore volitional fish passage and reconnect the estuarine habitat of Flower Pot Creek with Tillamook Bay. The new bridge will also eliminate the risk of culvert blowout and subsequent road closure. Bayocean Road meanders along the Southwestern edge of Tillamook Bay and is an important emergency and pedestrian route that connects the town of Tillamook to Cape Meares. The project also contains plans to enhance the estuarine habitat of Flower Pot Creek via channel stabilization and the use of large wood/root wads for additional fish habitat structure. OWEB funds will support contracted services needed to construct the replacement structure and will supplement funds and in-kind contributions from the U.S. Fish & Wildlife Service, Tillamook County, and Oregon Department of Fish & Wildlife, U.S. Forest Service.

Review Team Evaluation

Strengths

- The project will provide floodplain inundation and water quality benefits that will both improve watershed process and habitat for aquatic species in Tillamook Bay at Flower Pot Creek.
- There is a 14.6-acre tidal estuarine wetland that has become hydrologically disconnected from the Tillamook Bay. Tidal wetlands provide valuable rearing habitat for anadromous fish. Replacing the culvert on Bayocean Road will restore tidal exchange and fish access to this wetland, which will provide rearing habitat for all species of juvenile salmonid occurring in the coastal region.
- The opportunity to restore tidal wetlands to historic hydrology is uncommon and a high priority for the coast.

- The current culvert is still structurally sound but allows only for minimal connectivity with the bay. The proposed design will completely restore tidal connectivity.
- The project will benefit a wide array of species that utilize estuaries, including crab, rock fish, and other forage fish.
- The Salmon SuperHwy partnership is a high functioning efficient network of practitioners with an extensive track record of implementing similar projects.
- The costs for the project are reasonable for the expected habitat benefit.
- The project is ready for implementation with match funding secured.

Concerns

- No significant concerns are identified.

Concluding Analysis

A 4-foot undersized culvert will be replaced with a 44- foot bridge to restore watershed connectivity between Flower Pot Creek and Tillamook Bay. In addition to restoring fish passage at the site, tidal inundation will be restored to an approximately 14-acre wetland associated with the tributary. This project provides a unique opportunity to open fish passage and reconnect important tidal wetland habitat to Tillamook Bay, and has a high likelihood of success in restoring priority habitats for ESA-listed fish.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 8

Review Team Recommended Amount
$505,060

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Fund

Staff Recommended Amount

$505,060

Staff Conditions

n/a

Open Solicitation-2023 Spring Offering
North Coast (Region 1)

Application Number: 223-1024-23051
Project Type: Restoration
Project Name: Deer Creek Willow Planting Project
Applicant: Oregon Wildlife Heritage Foundation
Region: North Coast
County: Lincoln
OWEB Request: $91,577
Total Cost: $118,022

Application Description The Deer Creek Willow Project is located in the Yaquina River Basin, 13.5 miles East of Elk City, Oregon approximately 2 river miles upstream from it's confluence with the Big Elk Creek. This stream has been designated as Essential Salmonid Habitat and is important spawning and rearing habitat for ESA listed Coho Salmon, Chinook Salmon, Winter Steelhead, Pacific Lamprey, and Coastal Cutthroat Trout.

This project aims to address factors limiting recovery and conservation of Oregon Coast Coho, which were identified in the Oregon Department of Fish & Wildlife's Coho Conservation Plan (2007) and NMFS ESA Recovery Plan (2016).

The project focus is to increase the quality and quantity of summer and winter rearing habitat for juvenile salmonids by restoring the riparian area within the project reach with native willow species to support existing beaver populations and promote their range expansion. By restoring the willow galleries that once dominated these valley bottoms, beaver populations will be able to thrive and return important ecological functions to the landscape by creating dams and ponds that restore floodplain connectivity, provide low velocity habitat for rearing juveniles, and mitigate water temperatures.

Project partners include the Oregon Department of Fish and Wildlife, The Oregon Wildlife Heritage Foundation, and the Mid-Coast Watershed Council.

Review Team Evaluation

Strengths

- Project actions will address a limiting factor for Oregon coast coho by improving habitat complexity. The restoration actions will also benefit Chinook and steelhead.
- The approach is appropriate for the site given the access constraints. The site is currently only accessible via ATV or on foot.
- The project utilizes a process-based restoration approach by attracting beaver to the Deer Creek watershed. A willow component will be planted in a reed canary grass dominated area, which will also help restore native vegetation in the riparian area.

- The planting plan is technically sound by incorporating primarily willow with a few other native species to match site conditions and a detailed plant establishment plan. Willow will be the easiest species to establish on the site and if it is successful there is a high probability that beaver will recolonize the area.
- The applicant is partnering with both ODFW and the MidCoast Watersheds Council to build capacity to accomplish the work.
- The project approach is cost-effective for the expected watershed benefit.

Concerns

- Reed canary grass suppression in the planting area will be limited to primarily hand operation techniques due to site access constraints. It may be challenging to achieve meaningful control.
- Due to limited site access, the applicant limited diversifying plant species they will be planting. The simple approach establishes a willow gallery to encourage beaver but there may be missed opportunities in improving biodiversity as a result.
- The applicant has had limited capacity to administer past OWEB grants and their current capacity to implement the project is unclear.

Concluding Analysis

Deer Creek contains high quality low gradient habitat for Oregon coast coho salmon and other aquatic species. This project will address a 10-acre portion of riparian area along the project stream reach that has become dominated by invasive species, particularly reed canary grass. Encouraging beaver back to the site by establishing a willow gallery is a low-cost process-based restoration approach that is likely to succeed at the project site.

Review Team Recommendation to Staff
Fund

Review Team Priority
3 of 8

Review Team Recommended Amount
$91,577

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team

n/a

Staff Recommendation
Fund

Staff Recommended Amount
$91,577

Staff Conditions

n/a

Open Solicitation-2023 Spring Offering
North Coast (Region 1)

Application Number: 223-1025-23004

Project Type: Technical Assistance

Project Name: Gallagher Slough Fish Passable Tide Gate Upgrade

Applicant: Lower Nehalem WC

Region: North Coast

County: Tillamook

OWEB Request: $74,986

Total Cost: $96,339

Application Description The Gallagher Slough tide gates are located under Hwy 101 near its intersection with Hwy 53 between Nehalem and Wheeler. The 5 tide gates are deteriorating, top-hinged, wooden doors, 7 ft x 8 ft. Gallagher Slough drains approximately 1,031 acres dominated by agricultural land use and limited impervious area. The existing tide gates limit fish passage to both Gallagher and Pye Sloughs, which intersect just upstream of the gates. Diking, tide gates, and other modifications to the Nehalem Estuary have resulted in a 54.9% reduction in tidal wetland area (Brophy, 2019).

This project will develop 30% conceptual level designs for the Gallagher Slough tide gates. This level of design will be sufficient to determine if the gates can be retrofitted or if the entire structure will need to be upgraded. To accomplish this, an engineering firm will be contracted. Water monitoring equipment will be deployed by Tillamook Estuaries Partnership to measure water depth, temperature, and salinity inside and outside the gates. The engineering firm will conduct site and bathymetric surveys. This information will be used for a hydraulic analysis to determine the fish passage status of the current structure with a Muted Tidal Regulator (MTR) or the size required of a new structure. That model will also be used to predict the effects of the project on the site's current land use including inundation extent, depth, and frequency over time using tidal data and the locally collected data. This information will be used to inform a water management plan.

This project is being undertaken in collaboration with the Tillamook County Creamery Association, Tillamook Estuaries Partnership, Oregon Department of Transportation, and the Oregon Department of Fish and Wildlife.

Brophy LS, Greene CM, Hare VC, Holycross B, Lanier A, Heady WN, et al (2019) Insights into estuary habitat loss in the western United States using a new method for mapping maximum extent of tidal wetlands.

Review Team Evaluation

Strengths

- Preliminary design solutions for replacing tide gates will be developed to address a long-standing fish

passage barrier on Gallagher Slough, the largest slough in the Nehalem River estuary. Historically, the slough provided important rearing habitat that was important for all salmonid fish species and once supported very productive populations.

- The Gallagher Slough tide gates is ranked on the list of priority ODFW fish passage barriers.
- The project is support by a partnership that includes ODOT, the Tillamook Estuaries Partnership, and the Tillamook County Creamery Association.

Concerns

- The expected ecological benefit of a tide gate replacement or modification at the project location is unclear given the lack of quality habitat upstream. Water management changes will be necessary to realize benefits to fish and wildlife and the application contains limited detail about what the landowners might be willing to consider.
- Water quality in Gallagher Slough is very poor. Increased tidal exchange from a new tide gate may help address temperature and dissolved oxygen to a certain extent, but other land management changes, such as increasing riparian buffers and changing livestock management practices to protect riparian areas, may be necessary to realize any habitat benefits from increased fish passage. The application does not provide detail on any considerations to improve upstream habitat and water quality.
- The ownership of the tide gate is unclear in the application and the roles and responsibilities of funding and implementing the eventual project are not well described.
- The resulting restoration project from this technical assistance work will likely be expensive for the expected habitat benefits.

Concluding Analysis

Gallagher Slough historically provided important rearing habitat for fish, including coho salmon. The current tide gate structure is a set of five top-hinged, wooden doors with an outdated design that does not provide optimal fish passage. Replacing or upgrading the tide gate could provide access to tidal estuary habitat that is critical for juvenile fish; however, with the poor water quality, high temperatures, lack of riparian shade, and intensive grazing found along the slough's reach, providing new access to fish may be of limited ecological benefit unless significant management changes can be realized. Details in the application are lacking with regards to what management changes, if any, will be possible with a tide gate upgrade. It is difficult to assess the ecological benefit of improved fish passage without an understanding of whether water management changes and other habitat improvements are possible within the slough.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

n/a

Review Team Recommended Amount

$0

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team

n/a

Staff Recommendation

Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

n/a

Open Solicitation-2023 Spring Offering
North Coast (Region 1)

Application Number: 223-1026-23039
Project Type: Technical Assistance
Project Name: Mary's Creek Culvert Replacements - Phase 1 Designs
Applicant: Tillamook Estuaries Partnership
Region: North Coast
County: Tillamook
OWEB Request: $42,053
Total Cost: $53,571

Application Description This technical assistance application is to fund Phase 1 - 30% design work for two culvert replacements on Mary's Creek, a tributary of Fawcett Creek in the Tillamook Bay Watershed of Tillamook County. Anadromous salmonid fish species occurring on the Tillamook watershed include spring and fall chinook salmon, coho salmon, summer and winter steelhead, and sea-run cutthroat trout. These two culverts are the two lowest fish passage barriers in Mary's creek before it joins Fawcett creek. Each culvert exists on a separate private property, owned by Robert Phillips and Bradley Pierce respectively.
Mary's creek was surveyed by Oregon Department of Fish and Wildlife (ODFW) biologists in the summer of 2022. Cutthroat trout and coho salmon fry were found present at the time of survey. The survey identified 1.19 miles of coho habitat upstream from the lowest fish passage barrier, and 1.78 miles of fish habitat upstream of the lowest barrier total.
The goal of this project is to secure complete engineering designs for replacement of both culverts with adequately sized structures and streambed simulation design.
Engineering designs will be contracted out to a private engineering firm. TEP will prepare and release an RFP for engineering designs, manage the engineering contract, and convene the technical team for design review.
Project partners include Oregon Department of Fish and Wildlife (ODFW), Trout Unlimited (TU), USDA Natural Resource Conservation Service (NRCS), and Tillamook County Public Works (TCPW).

Review Team Evaluation

Strengths

- Mary's Creek is a priority location in the Tillamook Bay watershed to restore habitat for Chinook, coho, steelhead, lamprey, and potentially chum. There is high potential for fish productivity upstream of two undersized culverts that are currently fish passage barriers, once they are improved.
- The application describes a clear need for the proposed design engineering plans for replacing two undersized culverts with the downstream crossing in an imminent stage of failure and the upstream crossing providing access to a community water source.
- A broad project partnership is behind the work, including local, state, and federal agencies. The applicant has a proven track record of success with similar projects.

- Intact riparian forest is present along portions of the stream reaches that provides shade and will likely contribute to future large wood recruitment into the stream.
- Previous review comments are addressed by providing additional alternatives analysis within the application. The design approach was also scaled back for the downstream structure to a level that is a better fit with the site conditions and the use of the road.
- Costs are reasonable for permit-ready designs for two crossings.

Concerns

- Construction access to the sites may be challenging due to the current road conditions, particularly the downstream crossing that has limited functionality.
- The stream would benefit from other habitat improvements in addition to the fish passage work in order to realize the full ecological potential of this project. Large wood additions would further encourage the stream's interaction with the floodplain.

Concluding Analysis

Mary's Creek is a tributary of Fawcett Creek in the Tillamook Bay watershed. The creek is prime habitat for a full suite of fish species, including Oregon coast coho salmon. Replacing the two road crossings will improve access to 1.8 miles of quality habitat for spawning and rearing. This is the second submission of this project for technical assistance funding after not being recommended in a previous cycle, and the applicant fully considered the comments from that review and improved the application. A technical team has been established that will help guide the design process, increasing the likelihood of success for the project to result in designs that will lead to improving passage for juvenile and adult migratory fish in Mary's Creek.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 1

Review Team Recommended Amount
$42,053

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Fund

Staff Recommended Amount
$42,053

Staff Conditions

n/a

Open Solicitation-2023 Spring Offering
North Coast (Region 1)

Application Number: 223-1031-22991

Project Type: Stakeholder Engagement

Project Name: Necanicum Together: Landowner Engagement Program

Applicant: Necanicum WC

Region: North Coast

County: Clatsop

OWEB Request: $28,804

Total Cost: $43,346

Application Description 1) The Necanicum Basin is a relatively small watershed, amounting to just under 56,000 acres of drainage into the Pacific Ocean. The 21-mile river and its extensive tributary system are one of the Oregon Coast's four distinct populations of coho salmon that do not currently meet the sustainability criteria as defined by NOAA. The location of this project is the entirety of the Necanicum Basin, with priorities given to property owners with river/stream front land and on type-F streams.

2) As a rural-based Watershed Council with limited capacity (1.0 FTE), a hurdle that often results in missed restoration opportunities is the apparent disconnect between community and organization. The Necanicum Basin is rich with privately and publicly owned property that contain Type-F rivers and streams. This project is designed to proactively make a frequent connection between our community-based restoration work and the landowners in our basin that could both contribute and benefit from participating in restoration work.

3) This project is a multi-pronged outreach effort to connect landowners with the services and opportunities that the Watershed Council can provide. 1) We will be sending out 5 quarterly mailers with pre-stamped return postcards to landowners in the basin, asking for information and whether they may have interest in working with the watershed on a restoration effort. 2) Scheduling at least 4, but up to 6, local events for landowners to attend. Events will vary from simply "informational mixers" to conference style setup in which we'd invite folks from funding organizations like OWEB, ODFW, NOAA etc. to explain the benefits of restoration work with local WCs and 3) conduct time-intensive door-to-door campaigns to make a face-to-face connection with NWC staff and local landowners.

4) This project has indirect partners in the City of Seaside and City of Gearhart, which have both offered to assist with connecting to landowners through mailer assistance.

Review Team Evaluation

Strengths

- The communication strategy to engage landowners in the Necanicum Basin is technically sound and contains a diverse array of approaches, including mail contact, brochures, website content, and in-person events.

- A landowner contact list and map of interested landowners will be produced that will inform and identify future restoration projects.
- The applicant is working with ODFW to acquire fish distribution information to disseminate to landowners and interested community members.
- The applicant has the capacity to implement the project and the proposed engagement will build on success with recent fundraising and community engagement work.
- The costs are reasonable for the proposed work and deliverables expected.

Concerns

- It is unclear how the landowners will be identified and whether the scope of the project is targeted to high priority areas or the entire geography. Much of the landownership in the Necanicum watershed is commercial timber and there may be limited opportunities for diverse landowner participation.
- The project goals and success measures are not clearly stated within the application. More information on how the specific outreach approaches are expected to lead to future restoration projects would be helpful.
- The scope of the project may be ambitious for the available staffing resources.
- Brochures and mailings can be expensive and may not be the best approach to generating new landowner participation.

Concluding Analysis

The stakeholder engagement proposal is timely because there is new interest developing in the Necanicum watershed and new entities open to considering restoration. The applicant organization is actively looking to engage with a wider audience and bring new voices to the table in the Necanicum watershed. The proposed landowner engagement is likely to build relationships with that audience that could lead to opportunities to restore coho habitat.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 1

Review Team Recommended Amount
$28,804

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Fund

Staff Recommended Amount
$28,804

Staff Conditions

n/a

Open Solicitation-2023 Spring Offering
North Coast (Region 1)

Application Number: 223-1027-22980
Project Type: Monitoring
Project Name: Lower Columbia Watershed Rapid Biological Assessment
Applicant: Columbia SWCD
Region: North Coast
County: Columbia
OWEB Request: $100,952
Total Cost: $134,951

Application Description 1) The Lower Columbia River Watershed Council (LCRWC) presides in Columbia County, Oregon serving an area centered on the Clatskanie River including all drainages from Mcbride Creek (Columbia USGS RM 82.5) to Kelly Creek (Columbia USGS RM 37.8). The LCRWC territory encompasses a contiguous drainage area of approximately 190,720 acres of Oregon's Lower Columbia River area. This expansive territory provides habitat for ESA listed Coho, Chinook, Steelhead, and Chum salmon along with non-listed coastal cutthroat trout, and lamprey (Pacific and brook).

2) Watershed assessments and plans drafted by local, state, tribal and federal entities have identified the lack of
basin-scale inventories of salmonid distribution, abundance, and habitat distribution in the LCRWC watersheds
as significant data gaps in efforts to prioritize areas for restoration and conservation. Previous assessments within
the LCRWC watersheds are outdated and/or do not provide the detail needed to establish restoration
goals for specific sub-watersheds or reaches within those streams.

3) This project proposes to conduct a Rapid Bioassessment (RBA) and Limiting Factors Analysis (LFA) Lite of 110.9 stream miles throughout the watershed of the LCRWC. The project will collect essential data
regarding salmonid distributions and abundance, and associated watershed characteristics that may serve as
limiting factors for salmonids. The goal is to determine seasonal habitat limitations for coho and steelhead and
develop a systematic approach to identify and implement restoration actions that address those limiting factors.

4) The project partners include:
Lower Columbia River Watershed Council
Columbia Soil and Water Conservation District

Bio-Surveys, LLC
Oregon Department of Fish and Wildlife (ODFW)
Oregon Department of Forestry (ODF)
Evenson Logging, Van Natta Brothers Logging, Weyerhauser

Monitoring Team Evaluation

Monitoring Team Strengths

- This project will provide information to update the outdated existing fisheries data that the application summarizes.
- The applicant will convene a technical advisory committee (TAC) to interpret the results and apply the information to plan future restoration strategies.
- The contractor is highly qualified to complete the work and has a proven track record of collecting the data as proposed and providing a comprehensive report that summarizes the information and opportunities for restoration.
- The budget is very detailed, and the contractor costs are reflective of the expenses to accomplish the monitoring and reporting objectives proposed in the application.

Monitoring Team Concerns

- The application contains redundant responses to different questions which made it challenging to find the details of the proposed monitoring project.
- The application didn’t describe how this project will incorporate the existing water quality data that the Columbia SWCD/Lower Columbia Estuary Partnership has been collecting with OWEB funds. This could prove very helpful given they are collecting continuous water temperature in this geographic area.
- Several of the monitoring questions that are posed in the application are vague and is not clear how they plan to answer them. For example, it is not clear how they plan to make the distinction between adult or juvenile barriers or how they plan to determine if previous restoration actions are functioning as intended.
- The study design did not clearly articulate which streams and reaches will be monitored. The uploaded map was difficult to read and did not explicitly identify which reaches would be surveyed.
- The applicant plans to identify thermal refugia, but the application does not provide a clear description of how that will be done.
- The application did not describe the quality assurance/quality control measures to ensure that high quality data will be collected, managed, and reported.
- The applicant proposes to store the data in an Access database but the application lacks details on how the data will be backed to ensure long term storage is successful.
- It is unclear whether the TAC members have been engaged yet or if they’ve committed to participate. The match related to the TAC members in the application was pending with no letters of commitment. Several of the TAC members listed in the application are not likely to possess detailed knowledge of the stream reaches to interpret the results.

Monitoring Team Comments

Review Team Evaluation

Strengths

- The monitoring approach utilizes a well-established protocol for Rapid Bio-assessments that is technically sound. Anchor habitats will be identified within the lower Columbia watersheds using an appropriate methodology.
- The project addresses a known data gap in fish distribution and habitat within the watershed.
- The selected contractor has relevant experience and a proven track record of implementing similar projects.
- A technical committee will be engaged to provide project oversight and additional expertise to the monitoring effort.
- The cost for the proposed monitoring is reasonable given the number of miles slated for survey.

Concerns

- The maps are unclear within the proposal as they only provide a very basic geography of the survey areas. The rationale for the locations selected for survey is also not well described within the application.
- The application lacks details about the methodology for the Limiting Factors Analysis “Light”.
- The proposed approach to conduct a spawning gravel inventory is not well described in the application and it is unclear how the data will be collected.
- Temperature data is listed as a parameter that will be monitored, but details are unclear. For example, it is unclear whether water temperature will be collected by continuous or grab sample monitoring or if the selected contractor has experience with temperature monitoring.
- Capacity to conduct the monitoring work is uncertain because the applicant has not been able to complete previous OWEB-funded projects due to staff turnover, low capacity, and organizational challenges.
- The application lacks letters of support or evidence of involvement from any of the proposed members of the technical committee.

Concluding Analysis

Rapid Bio-assessments have become a useful tool for restoration practitioners to plan and prioritize work within a watershed. There is limited information available currently within the geography covered by this proposal, and this monitoring work will refine fish distribution maps and identify stream reaches that contain anchor habitat. Partners working within the lower Columbia watershed have long suffered from a lack of strategy that comes with the lack of the information necessary to develop a suitable project prioritization approach, and this monitoring effort would take a step towards addressing that shortcoming. The application lacks clarity in several key areas, however, needed to better understand the project. More detail about site selection and the parameters beyond the typical Rapid Bio-assessment activities, such as water temperature and beaver populations, would have been helpful for evaluating the work

proposed.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
n/a

Review Team Recommended Amount
$0

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

n/a

Open Solicitation-2023 Spring Offering
North Coast (Region 1)

Application Number: 223-1028-23003

Project Type: Monitoring

Project Name: Collaborative Expansion of the Columbia County Water Quality Monitoring Program 2023-2026

Applicant: Lower Columbia Estuary Partnership

Region: North Coast

County: Columbia

OWEB Request: $270,865

Total Cost: $401,889

Application Description The Lower Columbia Estuary Partnership (LCEP), Columbia SWCD, and partners request $270,865 for a three-year water quality monitoring project in six key subbasins in Columbia County. Building on existing data collected since 2008, the project will expand monitoring efforts in Milton Creek, Scappoose River, Beaver Creek, Clatskanie River, and McNulty Creek watersheds for years 7-9 of continuous status and trends monitoring through our current program. These watersheds provide spawning, rearing, and refugia habitat for four ESA-listed groups of salmon and steelhead, and the Lower Columbia River (LCR) ESA Recovery Plan lists degraded water quality, elevated temperatures, and excessive fine sediments as limiting factors to their recovery.

The proposed work includes 1) continuing long-term data collection, measuring bacteria, temperature, turbidity, conductivity, dissolved oxygen (DO), and pH across 15 locations in the six focal watersheds; 2) adding continuous DO monitoring to these locations due to suboptimal conditions; 3) conducting a 2 yr eDNA study in Milton Creek sub-basins (11 locations) to identify E. coli sources; 4) collaborating with partners to integrate findings into restoration strategies, land-use plans, and best management practices.

Project partners, providing over $130,000 in match funding (a 48% total OWEB match), include the City of Scappoose, City of St. Helens, Columbia County, Columbia County Soil and Water Conservation District, Lower Columbia Watershed Council, Scappoose Bay Watershed Council, Tillamook National Estuary Partnership, Oregon Department of Fish and Wildlife, and Oregon Department of Environmental Quality. This project remains a high priority for addressing water quality issues and contributing to ESA-listed species recovery, ensuring a healthier ecosystem for future generations.

Monitoring Team Evaluation

Monitoring Team Strengths

- The proposed project including the bacteria eDNA source and continuous dissolved oxygen investigations will complement the existing water quality data that has been collected over several years with OWEB funding.

- This water quality monitoring project complements other local monitoring efforts in the Scappoose Bay watershed and the proposed rapid bioassessment by the Columbia SWCD.
- The applicant will follow established monitoring methods and are appropriate to answer their proposed monitoring questions.
- Continuing to collect the continuous water temperature and discreet water quality parameters at the existing sites for another three years will allow them to perform a statistical trend analysis.
- The applicant will apply several approaches to summarizing the results and making them publicly available including using tableau to visualize the data.
- The applicant has several years of experience collecting high quality data and summarizing the results in annual summary reports.
- The letters of support and match express that their technical expert and community engagement has been thorough and successful.
- The budget included sufficient detail and justification for the expenses necessary to accomplish the objectives proposed in the application.

Monitoring Team Concerns

- The application contained redundant responses to different questions which made it challenging to find the details of the proposed monitoring project.
- The application would have benefited from a description of what is achievable with the bacteria eDNA results from similar monitoring approaches in other areas.
- The application lacked details on the bacteria eDNA lab sampling approach and specific field monitoring quality assurance quality control measures that are necessary before samples are sent to the lab.
- The application was not clear how they will correlate water quality results with streambank conditions to identify hotspots, seasonal variations, and potential sources within the watersheds. It is not clear what streambank condition data exists to know if this task is achievable.
- The application only broadly describes that ODFW and the Columbia Public Health department will be involved.
- It was not clear on exactly how the interpretation of the water quality and bacteria eDNA data would be done and the finished product that would be generated to summarize the data that they are collecting.
- It was not clear if the applicant has the capacity to interpret the bacteria eDNA data to meet their monitoring questions to apply the data in a meaningful way.
- It was not clear if the budget amount was sufficient to allow enough staff time to collect year-round continuous dissolved oxygen data at 15 sites given that this is a challenging parameter to monitor which requires frequent site visits and time to review the resulting data sets.

Monitoring Team Comments

Review Team Evaluation

Strengths

- The proposed monitoring continues the collection of a long-running dataset. Multiple year data of this

nature is valuable.

- The applicant has a proven track record of success with water quality monitoring and managing data. The data dashboard and website are helpful tools for making the information publicly accessible.
- The project partnership has grown in recent years to encompass a diversity of participants within the monitoring geography.

Concerns

- The rationale for conducting dissolved oxygen monitoring year-round is not well described in the application, the need and applicability of using this data to inform future restoration is unclear.
- The project has broadened substantially to include eDNA and dissolved oxygen monitoring as well as the traditional temperature and bacteria data collection that has been conducted. The application appears to contain three separate projects in one application, and it is difficult to understand the need for the project expansion.
- There are a multitude of water quality parameters proposed for monitoring but understanding the project's end goal is challenging. There is an unclear path from the data being collected to informing the planning and prioritizing of restoration work.
- The eDNA project elements to trace E. coli sources can be a helpful tool for communicating with landowners, but this data is notoriously difficult to interpret to differentiate sources of E. coli, such as an elk herd versus a dairy. Higher frequency of sampling than what is proposed may be necessary to tease out sources of bacteria. It is unclear if the additional expense for this information is warranted due to the uncertainty in the results providing conclusive information about E. coli sources.
- Costs per year of monitoring have substantially increased, primarily due to the new project components and the labor-intensive nature of the dissolved oxygen monitoring. More information in the application explaining the increased costs for staff time and how the additional data is necessary for informing restoration would have been helpful in evaluating the cost-effectiveness of the work proposed.

Concluding Analysis

The project partners have a proven track record of implementing water quality monitoring in the Columbia County geography, and this project will continue data collection for an additional three years. The project recently expanded to include additional partners and monitoring parameters that could potentially provide new information on sources of bacteria and identify target areas where dissolved oxygen is a concern.

Review Team Recommendation to Staff

Fund

Review Team Priority

3 of 3

Review Team Recommended Amount

$270,865

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team

n/a

Staff Recommendation

Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount

$0

Staff Conditions

n/a

Open Solicitation-2023 Spring Offering
North Coast (Region 1)

Application Number: 223-1029-23027

Project Type: Monitoring

Project Name: Nestucca, Neskowin & Sand Lake Expanded Monitoring II

Applicant: Nestucca-Neskowin Watersheds Council

Region: North Coast

County: Tillamook

OWEB Request: $51,230

Total Cost: $77,191

Application Description

This project proposes to continue collection of stream temperature and bacteria data, initiated in 2022, in priority reaches of the Nestucca, Neskowin, and Sand Lake watersheds during 2023-25. This proposed 2-year extension represents the second phase of a planned 6-8 year project intended to capture data over a timeframe that will allow for statistically significant trend analyses. This monitoring program's goal is to fill a data gap on bacteria loads and stream temperatures in key locations to inform prioritization and planning for restoration projects. Existing water quality data collected by state and federal natural resources agencies and NGOs over the years (1998 to present), and a recent Sand Lake Basin Limiting Factors Analysis and Restoration Prioritization, indicate that surface waters in these basins are water quality limited the following ways:

1. Many mainstem stream reaches exceed the state temperature standard and are too warm to protect salmon and trout. However, limited information is available for the tributaries.
2. Fecal bacteria concentrations in Nestucca Bay are occasionally too high to allow human contact with the water as well as too high to protect human consumption of shellfish harvested from the Bay.
3. Fecal bacteria concentrations in Sand Lake and at Neskowin beach are frequently too high to allow human contact with the water, resulting in beach closures for Neskowin.

The current and historic data demonstrate that water quality problems exist, but the data are not high resolution enough to make decisions on prioritizing restoration in specific tributaries. This project is coordinating with the Tillamook Estuaries Partnership (TEP) and Oregon Department of Environmental Quality's (DEQ) Volunteer Water Quality Monitoring Program (VWQMP) with sites that complement their existing program and expand monitoring to priority tributary streams.

Project partners include field and technical volunteers, DEQ, and TEP.

Monitoring Team Evaluation

Monitoring Team Strengths

- The proposed project will build on the first phase of monitoring that was recently funded by OWEB and is currently being implemented.
- The applicant is following established monitoring methods that are adequately described in the application and have a DEQ approved Sampling and Analysis Plan.
- The water quality data will be submitted to DEQ, and the applicant will take several steps to make it publicly available including uploading the bacteria data on the "SWIM GUIDE" online platform.
- The applicant is working with the Tillamook Estuaries Partnership (TEP) and DEQ to develop their monitoring project and is working with the Neskowin Citizen Advisory Committee to distribute fact sheets to inform the landowners.
- The applicant is working with trained volunteers to assist in collecting bacteria samples and water temperature data which will improve community engagement.
- The applicant plans to analyze water samples for bacteria which will allow them to save time and money over time. Building this capacity in their community has the potential to provide an important service to others in their area.

Monitoring Team Concerns

- The uploaded maps did not include all the bacteria monitoring sites and it was not clear which sites are already monitored by TEP and which ones will be covered by the applicant.
- While the selection of monitoring sites that are publicly accessible are important it is not clear if their locations have a sufficient geographic distribution to answer their monitoring questions.
- The water temperature monitoring sites may not be adequate to document effects of completed projects (riparian, fish passage) since they are only located downstream of these restoration projects.
- The application did not include a description of the bacteria analysis lab methods that will be used to process the water samples and track the resulting data from the time the samples are delivered to the lab to when the analysis is completed.
- The application didn’t describe how they will incorporate quality assurance/quality control measures into the volunteer data collection efforts to ensure high quality data will be generated.
- The application did not include a detailed description of how the data will be analyzed and interpreted to answer their monitoring questions.
- The volunteer coordination efforts estimated in the budget may not be sufficient if there are fluctuations in volunteer participation.

Monitoring Team Comments

• Contact Spencer Sawaske at ODFW’s Water Division to coordinate on the water temperature monitoring.

• Incorporate the approved sampling and analysis plan measures to ensure the volunteers are collecting high quality data.

Review Team Evaluation

Strengths

- Water quality monitoring initiated in 2022 will be continued in priority reaches of the Nestucca, Neskowin, and Sand Lake watersheds.
- The applicant has a proven track record successfully implementing the proposed monitoring strategy.
- The work addresses key data gaps in both the DEQ's long term temperature monitoring and Tillamook Estuaries Partnership's bacteria monitoring.
- The geography proposed for the monitoring contains stream reaches that are impaired for temperature and bacteria.
- The application describes how the proposed monitoring will refine information about cold water refugia and impaired waterbodies, which will be used to prioritize areas for restoration.
- The proposed methodology is technically sound and utilizes DEQ protocols. The applicant is working closely with DEQ to determine trends and plans to display the information on a website platform to be accessible by the public.
- The applicant incorporated community input in order to refine the chosen sampling locations.
- The project is cost effective for the work proposed.

Concerns

- No significant concerns are identified.

Concluding Analysis

Water quality monitoring will be continued on impaired Tillamook County streams. Collecting additional years of data will expand the value of the data set in filling important data gaps in the selected watershed geography. The project partnerships with agencies and other organizations conducting monitoring in the county is likely to succeed in filling data gaps in bacteria loads and stream temperatures in key locations to inform prioritization and planning for restoration projects.

Review Team Recommendation to Staff

Fund

Review Team Priority

1 of 3

Review Team Recommended Amount

$51,230

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team

n/a

Staff Recommendation

Fund

Staff Recommended Amount

$51,230

Staff Conditions

n/a

Open Solicitation-2023 Spring Offering
North Coast (Region 1)

Application Number: 223-1030-23053

Project Type: Monitoring

Project Name: Upper Yaquina Strategic Implementation Area Monitoring

Applicant: Lincoln SWCD

Region: North Coast

County: Lincoln

OWEB Request: $135,408

Total Cost: $174,508

Application Description The Strategic Implementation Area (SIA) is located in the eastern portion of Lincoln County and encompasses the Upper Yaquina watershed. The sub areas within the Upper Yaquina Watershed included in the SIA are HUC12 171002040102 Bales Creek-Upper Yaquina, and 171002040103 Little Elk Creek. These water bodies have both been identified as Oregon DEQ 303(d) listed for impairments concerning dissolved oxygen, high temperatures, and bacteria (fecal coliform and E. coli). Excessive sedimentation and lack of riparian vegetation, or replacement of native vegetation with invasive species such as Himalayan blackberry (Rubus armeniacus) and reed canary grass (Phalaris arundinacea) is another common concern in these watersheds.
Six DEQ monitoring stations are already present within these watersheds, providing baseline water quality data. Our proposal is to conduct further monitoring on a 4-year timeline with the goal of assessing for changes in water quality since these waterbodies were last assessed in 2016/2018, identify parameters of concern within each reach in order to better target our outreach efforts, and provide updated baseline data as future restoration efforts are implemented within the watershed.
Lincoln SWCD will be partnering with the Oregon Department of Environmental Quality (DEQ), the USDA Natural Resources Conservation Service (NRCS), Oregon Department of Fish and Wildlife (ODFW), MidCoast Watersheds Council (MCWC), and the Oregon Department of Agriculture (ODA).

Monitoring Team Evaluation

Monitoring Team Strengths

- The proposed project will complement the existing data collected at the monitoring sites established in the past and the one site the applicant has maintained since 2000.
- The applicant has an existing local monitoring team comprised of state and federal agencies that was convened to help establish the Strategic Implementation Area (SIA) monitoring approach.
- The applicant is partnering with the NRCS to collect qualitative stream condition data and to track conservation practices that are implemented in the project area.
- The applicant is partnering with DEQ to help inform the study design and interpret the monitoring results.
- The budget includes cost-saving measures including sending water samples to the local Hatfield Marine Science Center for bacteria analysis.

Monitoring Team Concerns

- The application didn't describe how this project would complement the SIA monitoring proposal that is providing resources to collect related water quality data in the same geographic area.
- The application language appears to be outdated given that the application describes a need to collect data to develop the TMDL and it has already been completed.
- The applicant doesn't describe the monitoring questions that they want to answer with the continuous water temperature and dissolved oxygen monitoring proposed in Objective 2 and includes the same monitoring questions posed in Objective 1.
- The applicant does not have a DEQ approved sampling and analysis plan despite the application describing that one exists.
- The application proposes to determine if Little Elk Creek is attaining water quality criteria and it was not clear if significant conservation actions have been implemented since 2018 to understand if this might be the case.
- The application doesn't describe the monitoring methods to collect the water quality data.
- The information provided in the methods section of the application isn't clear on how often they'll be downloading the data and who will be responsible for it.
- The application doesn't describe what specific data that will be measured using the Streamside Vegetation Assessment (SVA) and the SVAP2 to assess the riparian condition in objective 3.
- The application mentions collecting data with a solar pathfinder, but it was not clear how this data will be incorporated into the data analysis.
- The timeline doesn't describe when the vegetation assessment will occur.
- The application does not clearly describe the roles and responsibilities of DEQ to assist in the dissolved oxygen data collection and analysis to ensure this project will be successfully implemented.
- It is not clear if the applicant has the capacity to complete the water quality monitoring project as proposed given that their monitoring staff no longer work at the district.
- It was not clear how the staff time was estimated to determine if it is appropriate to complete the objectives proposed in the application.

Monitoring Team Comments

Review Team Evaluation

Strengths

- There is a broad partnership working on the Strategic Implementation Area (SIA) in Lincoln County and the proposed monitoring will result in water quality data in this geography.
- The applicant proposes a longitudinal profile sampling method as opposed to random site collection, which is an effective approach to understanding water quality.
- The applicant has coordinated extensively with DEQ.

Concerns

- The application lacks information explaining how the proposed monitoring complements and utilizes previously collected monitoring data.
- The application indicates that the TMDL is in development, but the TMDL has already been developed and is out for comment. The intersectionality of this work with the existing TMDLs is not well-described.
- The application states that there is an existing DEQ-approved Strategic Action Plan (SAP) but there is no evidence of an approved SAP.
- The application lacks detail in how the monitoring builds off of the standard monitoring conducted as part of the SIA, which is also funded by OWEB.
- It is unknown how the monitoring work will complement other monitoring conducted locally.
- The applicant has recently built staff capacity, but the experience of the organization's staff in conducting this type of monitoring is unclear. The inclusion of continuous dissolved oxygen monitoring will be a challenging first foray into water quality monitoring.

Concluding Analysis

Strategic Implementation Areas receive a limited base level of monitoring funding and this project will expand the amount of data collected through the SIA program. More detail describing how the proposed work will build on that base SIA monitoring and how the data will support TMDLs would have been helpful for understanding the need and relevance for the proposed monitoring. There is, however, value in maintaining momentum in monitoring the Upper Yaquina. With the TMDL completed in this basin, there is now a broader need for implementation monitoring and this project could make strides toward achieving that goal.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 3

Review Team Recommended Amount
$135,408

Review Team Conditions

n/a

Staff Recommendation

Staff Follow-Up to Review Team
n/a

Staff Recommendation

Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount

$0

Staff Conditions

n/a

South Coast - Region 2 Spring 2023 Funding Recommendations



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Funding Recommendation

- Staff Recommendation For Funding (SRF)
- Below Funding Line (BFL)

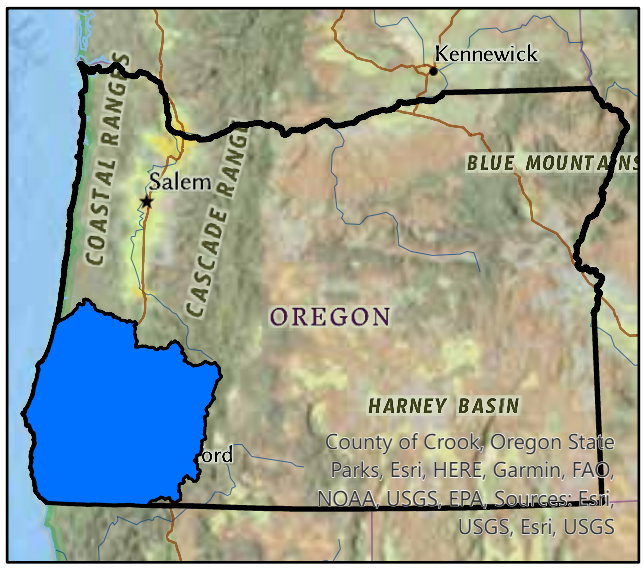
Previous Grants 1998 - Spring 2022

- Land Acquisition
- Restoration
- Region 2 Cities
- Region 2 Streams
- OWEB Region 2 Boundary

OREGON WATERSHED ENHANCEMENT BOARD

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Region 2 - Southwest Oregon Restoration

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-2014	Coquille Watershed Association	Coaledo Tide Gate Replacement for Fish Passage Improvement	A failing tide gate in the lower mainstem Coquille River will be replaced to restore fish passage to tidal floodplain habitat for over-wintering juvenile salmon.	773,104
223-2015	Curry SWCD	Willow Creek Riparian and Instream Restoration 2023	Native trees and shrubs will be planted and large wood structures will be placed instream along Willow Creek, a tributary to Floras Creek, to improve water quality and stream conditions for native fish.	78,847
223-2016	Smith River WC	Smith River Basin: High Priority Passage Improvements	Fish passage impediments will be corrected on three streams in the Smith River watershed to improve fish passage to upstream spawning and rearing habitat.	444,178
Total Restoration Projects Recommended for Funding by RRT and OWEB Staff				**1,296,129**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
None				

Projects *Not Recommended* for Funding by RRT

Project #	Grantee	Project Title	Amount Requested
None			

Region 2 - Southwest Oregon Technical Assistance

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-2021	Applegate Partnership, Inc.	Laurel Hill Push-Up Dam Fish Passage Project	Designs will be developed to replace a gravel push-up dam with a roughened channel on Williams Creek, near the confluence with the Applegate River, to improve fish passage, support streambank stabilization, and improve irrigation efficiencies for water users.	75,000
223-2022	Applegate Partnership, Inc.	Cheney Creek - Fish Hatchery Road Culvert Replacement	Fish passage improvement designs for the Fish Hatchery Road Culvert on Cheney Creek, a main tributary to the Applegate River, will be developed to replace a culvert with a bridge to allow fish access to high-quality habitat upstream.	75,000
223-2023	Applegate Partnership, Inc.	Iron Creek Fish Passage Project	Fish passage improvement designs at the Southside Road Culvert on Iron Creek, a tributary to the Applegate River, will be developed to replace a culvert with a bridge to allow fish access to high-quality upstream habitat.	75,000
Total Technical Assistance Projects Recommended for Funding by RRT and OWEB Staff				**225,000**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-2018	Williams Community Forest Project	Pipe Fork Land Purchase Assistance	An appraisal of a land parcel containing a high quality Port Orford cedar and old growth forest characteristics will be conducted to support efforts to obtain acquisition of that property in the Williams Creek watershed.	33,880
223-2020	The Freshwater Trust	Gold Ray Floodplain Restoration Technical Assistance Project	Site specific management and restoration actions will be identified with landowners at the former Gold Ray dam floodplain located in Jackson County between the towns of Central Point and Gold Hill.	74,070
223-2017	Smith River WC	Smith River Basin: High Priority Passage Design	Designs will be developed to address fish passage issues on three streams within the Smith River Basin to improve fish access to habitat and increase coho productivity.	71,934
223-2019	Coquille Watershed Association	North Fork Coquille River Subbasin Geomorphic Assessment	A detailed sediment transport assessment will be conducted for the North Fork Coquille River from the river's headwaters to its confluence with the South Fork Coquille to idenity and develop restoration projects.	74,998

Projects *Not Recommended* for Funding by RRT

Project #	Grantee	Project Title	Amount Requested
223-2024	Siskiyou Field Institute	Siskiyou Field Institute Meadow & Riparian Restoration	55,691

Region 2 - Southwest Oregon Stakeholder Engagement

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
None				

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Recommended
None				

***Projects Not Recommended* for Funding by RRT**

Project #	Grantee	Project Title	Amount Requested
None			

Region 2 - Southwest Oregon Monitoring

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-2025	Coquille Watershed Association	Basin Wide Temperature Monitoring of the Coquille	Water temperature monitoring will occur across the Coquille River basin to identify cold-water sources.	120,489
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				**120,489**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-2027	Illinois Valley WC	IVWC Passive WQM 2024-25	Baseline water quantity and quality data will be collected in the Illinois River watershed to inform a scientifically-based understanding of current and changing water quality in the watershed over time.	156,836

Projects *Not Recommended* for Funding by RRT

Project #	Grantee	Project Title	Amount Requested
223-2026	Cascade Pacific RC&D	Benson and Big Wetland Restoration Project Monitoring	106,739

Region 2 Total OWEB Staff Recommended Board Award	**1,641,618**

Region 1 - 6 Grand Total OWEB Staff Recommended Board Award	**12,461,865**

Open Solicitation-2023 Spring Offering
Southwest Oregon (Region 2)

Application Number: 223-2014-22977
Project Type: Restoration
Project Name: Coaledo Tide Gate Replacement for Fish Passage Improvement
Applicant: Coquille Watershed Association
Region: Southwest Oregon
County: Coos
OWEB Request: $773,104
Total Cost: $1,240,094

Application Description The Coaledo Drainage District (CDD) is a 9,800-acre drainage along the main-stem Coquille River in Coos County, Oregon. CDD contains 11.4 miles of coho salmon habitat and 490 acres of tidal wetland habitat, of which 289 acres are restored wetlands protected in perpetuity by ODFW. However, this area has been converted from its historic state by clearing, leveeing, tidegating, and draining for agricultural purposes. These actions have led to the degradation of tidal wetland habitats and/or restricted access to remaining wetland and tidal channel habitats for juvenile coho and Chinook salmon, as well as other species. Lack of slow-water refugia and off-channel habitat is a critical limiting factor affecting Oregon Coast coho populations with the access and restoration of tidal wetlands being a top priority action for recovery. To address these limiting factors, CoqWA has partnered with CDD, The Bridges Foundation, private landowners, ODFW, Coquille Indian Tribe (CIT), and the Coos Soil and Water Conservation District (CoosSWCD), with the assistance of River Design Group (RDG) and Nehalem Marine to implement a working lands restoration project that promotes ecological, economic, and social resiliency in the Coquille watershed.

This project will improve fish passage and restore hydrologic connectivity by replacing current deleterious infrastructure with three 8’x10’ box culverts, each fitted with an aluminum side-hinged tide gate and Muted Tidal Regulators to control upstream inundation and duration of gate door openness. Specifically, OWEB funds with match funds from ODFW, will pay for tide gate replacement actions, CoqWA staff time & mileage, project manager materials, and videography during implementation. A previously awarded OWEB grant, along with leveraged funds from CIT and Wild Rivers Coast Alliance (WRCA), will pay for replacement of a farm access bridge downstream of the tide gate, channel enhancements, and riparian enhancements.

Review Team Evaluation

Strengths

- The project design is technically sound and is likely to succeed in restoring fish passage for juvenile salmonids at the Coaledo tide gate. The design approach resulted from two OWEB Technical Assistance grants.

- The tide gate replacement will compliment nearby riparian planting and fencing projects. Restoring a more natural tidal exchange regime improves water quality by reducing stagnant water that normally pools behind poorly functioning tide gates. The water quality improvements from these projects collectively support TMDL plan implementation.
- Restoring fish passage to tidal wetlands is identified as a top priority action for coho recovery. Off-channel winter habitat located in tidally influenced lowland is important to ESA-listed coho and other species' life histories by providing critical habitat for over-wintering survival.
- The project leverages multiple nearby tide gate replacement and off-channel habitat projects that will collectively increase the footprint of available coho habitat, expanding on the 400 acres of restored tidal wetland from the China Camp Creek tide gate replacement project.
- The applicant has experience working in tidally influenced agricultural areas and adapted lessons learned from previous tide gate replacements into the project approach.
- The project team includes qualified professionals with relevant experience.
- ODFW, the largest landowner in the project footprint, is tasked with operation of the water management plan, which is critical to managing the area for maximum fisheries benefits.
- The project is ready for implementation with engineering designs, permits, and cost estimates.
- The budget incorporates the likely potential for inflation to increase project costs before implementation.
- There is a monitoring program that is actively evaluating the effectiveness of replacing tide gates and the use by juvenile salmonids of the habitat made available through these projects.

Concerns

- No significant concerns related to the tide gate replacement were identified during the review.

Concluding Analysis

Eleven miles of coho habitat and 490 acres of tidal wetland habitat will be made more accessible by replacing the Coaledo tide gate in the Coquille River watershed. Critical limiting factors affecting Oregon Coast coho populations will be addressed, including lack of slow-water refugia and off-channel habitat. Improving fish passage and restoring hydrologic connectivity will enhance ecosystem function to one of the largest basins in the freshwater Coquille estuary.

Review Team Recommendation to Staff

Fund

Review Team Priority

1 of 3

Review Team Recommended Amount

$773,104

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$773,104

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Southwest Oregon (Region 2)

Application Number: 223-2015-23001
Project Type: Restoration
Project Name: Willow Creek Riparian and Instream Restoration 2023
Applicant: Curry SWCD
Region: Southwest Oregon
County: Curry
OWEB Request: $78,847
Total Cost: $142,027

Application Description Willow Creek, a tributary of high importance to anadromous salmonids in the Floras Creek/New River watershed of northern Curry County, was relocated and straightened in the early 20th century to create more workable ground for livestock production. The combination of channel modifications and land clearing throughout the watershed resulted in degraded water quality and fish habitat. Efforts to restore conditions in the Willow Creek watershed began in the mid-1990s and have yielded positive results. The proposed project will build upon past and current efforts to further improve the condition of Willow Creek. The proposed project would yield 1.36 acres of riparian restoration and place eight large wood habitat structures along 0.57 miles of channel located between two recently treated reaches. The combination of these activities would improve water quality and habitat complexity in this vital watershed. Project partners include the Bureau of Land Management, Oregon Department of Agriculture, and landowners.

Review Team Evaluation

Strengths

- The proposed stream habitat improvement and tree planting will compliment nearby instream restoration and riparian plantings and will create habitat connectivity along approximately two stream miles on Willow Creek.
- Restoring the riparian plant community will increase shade that can prevent elevated water temperature and improve water quality, which supports TMDL plan implementation.
- Restoring instream habitat by adding large wood structures in lower Willow Creek will provide spawning and rearing habitat for Chinook, coho, and steelhead. This will address actions identified in a recovery plan for ESA-listed coho.
- The approach to treat invasive plant species on site is based on lessons learned from previous projects in difficult treatment areas that had positive results.
- The fence setbacks will provide a generous buffer for a functioning riparian area to become established. There are long-term plant establishment plans in place to support the vegetation growth until the plant community achieves a free to grow state.
- Alternatives to the proposed approach for wood placement and plantings were considered.
- The project team has experience successfully implementing similar projects and has established working relationships with the landowners.
- Partner support from BLM, ODA, and landowners is demonstrated by match.

Concerns

- Design information provided in the application for the instream wood structures has limited site specific details, such as log placement locations. Clarification was provided during the site visit that demonstrated how installation of the instream structures will fit within the footprint of the riparian restoration activities.
- Additional detail depicting the project activities on the map included in the application would be helpful for understanding the project site and locations of the proposed restoration treatments.

Concluding Analysis

The project builds on relationships developed with private landowners and expands the footprint of riparian and stream restoration in Willow Creek, which is a tributary of Floras Creek. The proposed restoration actions will improve water quality and instream habitat complexity, which will provide habitat benefits for all freshwater stages of salmonid life cycles.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 3

Review Team Recommended Amount
$78,847

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$78,847

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Southwest Oregon (Region 2)

Application Number: 223-2016-23007
Project Type: Restoration
Project Name: Smith River Basin: High Priority Passage Improvements
Applicant: Smith River WC
Region: Southwest Oregon
County: Douglas
OWEB Request: $444,178
Total Cost: $2,296,682

Application Description

This project will take place at three separate locations within the Smith River Basin: Coon, Sweden, and Herb Creek. These three streams lie within neighboring 6th field subbasins, the West Fork Smith River (Coon) and South Sister Creek (Sweden & Herb). All project sites possess poorly functioning fish passage infrastructure, featuring undersized culverts and/or associated passage inhibiting instream concrete weirs. These structures limit anadromous fish passage at multiple life stages, reduce habitat connectivity, and impede natural stream fluxes and function.

The Smith River Watershed Council (SRWC) proposes to remove, replace, or modify a combined 11 barriers to fish passage between the project locations. SRWC has contracted River Design Group (RDG) to produce engineered designs for the placement of passage structures meeting ARBO II criteria, as well as all state and federal requirements at all three project locations. These designs include provisions for new bridge installations which will replace existing culverts, as well as removal or modification of associated instream concrete weirs. Additionally, RDG's drawings will include plans for the placement of either a nature-like fishway or instream large wood placements to act as grade control structures after the removal of culvert associated weirs.

Project partners include: Bureau of Land Management, Coquille Indian Tribe, Pacific Lamprey Conservation Initiative, Oregon Department of Fish and Wildlife, Oregon Department of Transportation, River Design Group, and Roseburg Resources Co.

Review Team Evaluation

Strengths

- Eleven fish passage barriers will be removed, modified, or replaced in the Smith River basin to improve access to 56 miles of spawning and rearing habitat important to chinook, ESA-listed coho, steelhead, and Pacific lamprey.
- Improving fish passage leverages significant investments in instream improvement activities implemented throughout the watershed by providing unimpeded access to restored stream habitat.

- The project team is experienced in restoration and includes the Bureau of Land Management, the Coquille Indian Tribe, The Pacific Lamprey Conservation Initiative, Oregon Department of Fish and Wildlife (ODFW), Oregon Department of Transportation, River Design Group, and Roseburg Resources Company.
- The project is ready for implementation with significant funding secured from a diversity of sources.
- The West Fork Smith River has an established ODFW Life Cycle Monitoring site that provides a long-term data set documenting fish usage. This information will be used to illustrate the impacts from improving fish passage on salmonid populations.

Concerns

- Final design work is not completed. Clarifying information was provided during the site visit indicating the designs are on track for completion by the 2024 instream work window.
- Additional details regarding revegetation efforts to reduce erosion following construction would be helpful to evaluate whether planting plans are adequate for stabilizing the site.

Concluding Analysis

Addressing fish passage barriers restores natural ecosystems processes beneficial to aquatic life, including improved sediment transfer, access to spawning habitat, expanded forage opportunities, and access to thermal refugia during summer months. Improving fish access to upstream stream reaches with quality habitat and cool water refugia is critical to protecting and restoring salmonid populations.

Review Team Recommendation to Staff
Fund

Review Team Priority
3 of 3

Review Team Recommended Amount
$444,178

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount

$444,178

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Southwest Oregon (Region 2)

Application Number: 223-2017-22996
Project Type: Technical Assistance
Project Name: Smith River Basin: High Priority Passage Design
Applicant: Smith River WC
Region: Southwest Oregon
County: Douglas
OWEB Request: $71,934
Total Cost: $313,543

Application Description

This project encompasses passage improvement design work at three streams within the Smith River Basin: Gold Creek, Vincent Creek, and Blackwell Creek. Gold Creek is the largest tributary of the West Fork Smith River, located 42 miles east of Reedsport Oregon. Blackwell and Vincent Creek are both tributaries to the main stem Smith River, 35 and 31 miles east of Reedsport respectively. The Smith River Watershed Council (SRWC) is seeking funding to address fish passage issues at five undersized and restrictive culverts. In addition to culvert replacement, designs will include the removal of three associated structures (two concrete weirs, and one high-gradient fish ladder). These underperforming passage structures restrict salmonid and native fish passage at all life stages, interfere with sediment transfer, and also threaten important junctions of Bureau of Land Management (BLM) road network used for local economic and recreational purposes. Funding would be utilized to contract an engineering firm to produce complete designs which incorporate all aspects of removal of legacy structures and installation of structures which meet all state and federal fish passage criteria.
Project partners include: Bureau of Land Management Coos Bay District, Oregon Department of Fish and Wildlife, National Fish and Wildlife Foundation, and Roseburg Resources Co.

Review Team Evaluation

Strengths

- The proposal clearly illustrates the need for engineered designs that address fish passage at five locations in the Smith River Basin with undersized culverts and associated concrete weirs.
- The resulting restoration will target critical habitat for ESA-listed coho, chinook, and steelhead. The project area also has stream reaches listed on the Department of Environmental Quality’s 303(d) list for temperature impairment.
- The project team is experienced in successfully using OWEB Technical Assistance projects to develop viable designs for addressing fish passage impairments.
- Addressing the passage barriers will restore a more natural sediment transport regime and improve habitat connectivity on three streams in the Smith River Basin.
- Project costs are appropriate for the work proposed.

Concerns

- Additional information describing evidence used to determine there is a potential threat for roadway infrastructure failure would be helpful to better understand the extent to which the selected culverts are a priority for replacement.

Concluding Analysis

The project builds on current momentum to improve fish passage throughout the Smith River Basin that is also leveraging significant investments in stream habitat improvement. The future restoration project will increase habitat connectivity for ESA-listed salmon species by improving access to approximately eight miles of aquatic habitat.

Review Team Recommendation to Staff
Fund

Review Team Priority
6 of 7

Review Team Recommended Amount
$71,934

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Southwest Oregon (Region 2)

Application Number: 223-2018-23012
Project Type: Technical Assistance
Project Name: Pipe Fork Land Purchase Assistance
Applicant: Williams Community Forest Project
Region: Southwest Oregon
County: Josephine
OWEB Request: $33,880
Total Cost: $48,530

Application Description The Pipe Fork property is a 320 acre land parcel containing a high quality Port Orford cedar and Old Growth sanctuary that is being sold by the Josephine County, facilitated by the Williams Community Forest Project. Pipe Fork Creek flows from springs on the side of Grayback Mountain down through a lush canyon and over several waterfalls on the Pipe Fork property.
Technical Assistance is needed to obtain a land sale contract, complete a Yellow Book Appraisal for due diligence to satisfy the purchase, and for completion and sale costs to The Conservation Fund with a bridge loan. A Yellowbook Appraisal is needed to satisfy timber values, property values, and detailed conditions of the land to be purchased to satisfy the interests of the seller and buyers.
Pipe Fork Creek property has been recently awarded funding to be purchased by a land grant with the US government Land and Water Conservation Fund. It will be placed within the adjacent Pipe Fork Research Natural Area (RNA) for Port Orford cedar through the Bureau of Land Management. BLM currently manages the Pipe Fork Creek RNA for Port Orford cedar adjacent to the property as one of three such areas in Oregon as secluded enclaves of native plants and wildlife surrounding the Port Orford cedar forest complexes. Pipe Fork Creek provides a valuable consistent flow of cool water into the Williams Creek stream system.
This Technical Assistance would provide the funding needed to help negotiate the land purchase from the Josephine County Commissioners and complete the sale and of the land through the many channels it will require.

Review Team Evaluation

Strengths

- The Pipe Fork Creek property has a high conservation value. The old growth forest provides cool water sources for salmon bearing streams of the East Fork Williams Creek and the Williams Valley and diverse habitats that support the easternmost stands of Port Orford cedar in Western Oregon.
- Conducting an appraisal for due diligence is necessary for any purchase of real property.
- Project partners are committed to protecting the conservation value of the property.
- Funding from the federal Land and Water Conservation Fund was awarded to purchase the Pipe Fork Creek property; the proposed technical assistance project will provide an appraisal to determine the property’s fair market value needed to complete this transaction.

- There is a clear potential for timber harvest to occur on the property under the current ownership that would adversely impact forest conditions. Purchase of the property for conservation would eliminate the risk to existing healthy forest conditions.

Concerns

- The application lacks information describing the transaction structure or roles of the parties needed to understand and evaluate the proposed objectives. For example, more detail about the survey and assessment work is needed to understand the deliverables expected from the technical assistance investment.
- It is unclear whether the applicant has relevant experience for completing real estate transactions.
- The application lacks details describing how some of the budgeted costs are directly associated with developing an appraisal. For example, negotiations and closing costs are not typically actions associated with developing an appraisal. Also, the Williams Creek Watershed Council is included in Contracted Services but there is no information explaining what the watershed council will produce as part of the due diligence for purchasing the property.

Concluding Analysis

Purchasing the Pipe Fork Creek Property and transferring it into a long-term conservation land holding will preserve a high-quality Port Orford cedar and old growth forest in the Williams Creek watershed. Obtaining due diligence products is necessary to purchase the property.

Review Team Recommendation to Staff
Fund

Review Team Priority
4 of 7

Review Team Recommended Amount
$33,880

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Southwest Oregon (Region 2)

Application Number: 223-2019-23024
Project Type: Technical Assistance
Project Name: North Fork Coquille River Subbasin Geomorphic Assessment
Applicant: Coquille Watershed Association
Region: Southwest Oregon
County: Coos
OWEB Request: $74,998
Total Cost: $115,638

Application Description The North Fork Coquille River, located in Coos County, Oregon, is a significant waterway that provides critical habitat for fish and wildlife and serves as the drinking water source for the city of Myrtle Point. Unfortunately, the river is subject to ongoing erosion and sedimentation, which threaten its long-term stability and the health of surrounding ecosystems and agriculture. To better understand the geomorphic processes that govern the river's behavior and develop effective management strategies, a comprehensive survey of the North Fork Coquille River is required. This proposed project aims to perform a detailed geomorphic assessment of the North Fork Coquille River, covering a stretch of approximately 53 miles from the river's headwaters to its confluence with the South Fork Coquille River. The survey will include a range of field-based measurements and an analysis of available data, such as channel cross-sections, bathymetric surveys, bank profiles, and topographic surveys. Additionally, a basin-wide remote assessment will be combined with a geomorphic survey of 9.5 river miles to create a finalized geomorphic analysis. Project partners include the Coquille Indian Tribe, Coos Soil and Water Conservation District, Natural Resource Conservation Service, Oregon Department of Fish and Wildlife, Oregon Department of Agriculture, the City of Myrtle Point, and Business Oregon. The results of this project will be critical for developing effective river management strategies that promote long-term stability and ecological health. Specifically, the survey data will be used to inform the development of sediment management actions, guide habitat restoration efforts, and identify areas of the river that are most vulnerable to erosion and sedimentation.

Review Team Evaluation

Strengths

- A geomorphic assessment will be completed to investigate bank erosion in the North Fork Coquille River. Partners will use this assessment to prioritize restoration actions and design future projects that will improve water quality, fish and wildlife habitat, and watershed health.
- The project approach will factor in past and future climate change conditions.
- The applicant has previous experience utilizing similar stream reach-based assessments to focus restoration on targeting causes rather than symptoms of watershed impacts.
- A clear need for the proposed technical assistance is described in the application, and the project objectives and expected products are clearly defined.

- Previous project evaluation comments are incorporated into the proposed technical assistance approach.
- Partner support is demonstrated by letters from ODFW, BLM, Curry SWCD, City of Myrtle Point, and Coquille Indian Tribe.

Concerns

- Additional information describing how the geomorphic assessment will inform identification, prioritization, and selection of future projects would be helpful for understanding how the product will be used.
- The cost effectiveness of individual activities is difficult to evaluate due to the use of lump sums in the application budget for contracted services.

Concluding Analysis

Understanding the drivers causing erosion impacts to the North Fork Coquille River system will be important to focus efforts on meaningful actions that address the bank erosion. The resulting information will also provide a communication tool for outreach to landowners and the community that can build support for and participation in future restoration. The North Fork Coquille River basin has high salmonid production potential; resulting restoration projects will improve habitat for coho, Chinook, and steelhead.

Review Team Recommendation to Staff
Fund

Review Team Priority
7 of 7

Review Team Recommended Amount
$74,998

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Southwest Oregon (Region 2)

Application Number: 223-2020-23048
Project Type: Technical Assistance
Project Name: Gold Ray Floodplain Restoration Technical Assistance Project
Applicant: The Freshwater Trust
Region: Southwest Oregon
County: Jackson
OWEB Request: $74,070
Total Cost: $97,070

Application Description The Gold Ray Floodplain Forest is located in Jackson County between the towns of Central Point and Gold Hill. The proposed project area is adjacent to the BLM Upper and Lower Table Rock recreation areas and county and state park lands. In 2009, Jackson County worked with the Rogue Valley Council of Governments (RVCOG) to successfully remove a 30+ foot tall channel spanning dam on the Rogue. The Gold Ray Dam had limited fish passage and held back coarse sediments for nearly a century. Dam removal immediately invigorated river habitat and resulted in fish returning to the hatchery at Lost Creek Dam nearly 1 month earlier than previously reported.

While dam removal improved fish passage and sediment transport processes, the project did not address the 350-acre floodplain forest upstream of the dam. Currently more than 150 acres of the floodplain lack overstory trees and are covered exclusively in invasive blackberry. Where mature overstory trees have persisted, the understory is dominated by invasives, limiting the ability of trees to establish. In addition to degrading the ecological conditions at the site, the high cover of flammable invasive species poses a fire risk.

The Freshwater Trust (TFT) proposes to administer a planning process through which the two primary landowners (Jackson County and Oregon Department of Fish & Wildlife) will identify site specific management and restoration actions that align with the landowners' desired future conditions, develop 10% designs for selected actions, develop the information needed for permitting, and develop cost estimates. This project will set the stage for implementation work on the full 350-acre project area and make it possible for TFT, Rogue River Watershed Council, Jackson Soil and Water Conservation District, RVCOG and other local partners to secure implementation funding and play a variety of roles in implementing the single largest floodplain restoration opportunity in the Rogue basin.

Review Team Evaluation

Strengths

- The project focuses on restoring the footprint from the Gold Ray Dam removal site, which is one of the rare larger connected floodplain areas in the upper Rogue. The application clearly describes the ecological significance of the site, the factors limiting the site's potential, and the importance of the proposed design technical assistance to develop successful restoration approaches.

- The project will address limiting factors identified in several conservation plans and restoration priorities in watershed plans, including the Rogue Restoration Action Plan (2016).
- The design approach is technically sound and appropriate data will be collected to inform designs, including lidar and baseline mapping.
- Landowners will be engaged in identifying actions that align with shared priorities, reviewing the suite of potential future restoration projects, and developing a prioritized list of projects for the design process. This is likely to foster long-term ownership and active management in the success of the future restoration.
- The resulting project will restore natural floodplain function at the Gold Ray Dam removal site and provide water quality and habitat benefits for a variety of native terrestrial, avian, and fish species.
- The project costs are reasonable for the scope of work.
- The project team has relevant experience and knowledge designing and implementing similar restoration.

Concerns

- Restoring floodplain forests will have limited impact on addressing the key limiting factors that threaten coho fish recovery, such as lack of instream habitat. Restoring floodplain forests, however, will still improve terrestrial and aquatic wildlife habitats on the Rogue's largest undeveloped floodplain.
- The project timeline may be ambitious for achieving the goals. Landowner engagement, developing and prioritizing actions, developing initial design approaches, and finalizing restoration plans will be challenging to complete within a one-year timeframe.

Concluding Analysis

When the Gold Ray Dam was removed and water levels in the Rogue River dropped, many of the floodplain trees died. This die-off of the overstory trees allowed increased sunlight at the floodplain forest floor that encouraged weed populations to grow. Currently more than 150 acres of the floodplain lack overstory trees and are covered exclusively in invasive blackberry. Ecological conditions in the project area are degraded and pose a fire risk. Developing designs for priority projects will put the floodplain back on an ecologically functioning and resilient trajectory and improve community safety. Restoration of one of the largest connected floodplains in the upper Rogue will provide a variety of benefits to stream function and the species dependent upon this important habitat type.

Review Team Recommendation to Staff
Fund

Review Team Priority
5 of 7

Review Team Recommended Amount
$74,070

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Southwest Oregon (Region 2)

Application Number: 223-2021-23050

Project Type: Technical Assistance

Project Name: Laurel Hill Push-Up Dam Fish Passage Project

Applicant: Applegate Partnership, Inc.

Region: Southwest Oregon

County: Josephine

OWEB Request: $75,000

Total Cost: $305,860

Application Description The Laurel Hill Push-Up Dam Fish Passage Project proposes to replace an annually constructed gravel push-up dam with a roughened channel on Williams Creek, near the confluence with the Applegate River. This project proposes to complete designs that will remove the last, most severe barrier, improve streambank stabilization upstream from the point of diversion, and irrigation efficiencies in the delivery of the water on the Bureau of Land Management's (BLM) Provolt Recreation Site. This project is located at river mile 0.1 on the mainstem of Williams Creek, a main tributary to the Applegate River near Provolt, Oregon. Replacement of the annual creek disturbance and nearly full spanning gravel push-up with a roughened channel and new headgate will provide year-round volitional fish migration for all life stages of ESA-listed Coho Salmon, fall Chinook Salmon, summer and winter Steelhead, Trout, and Pacific Lamprey. Williams Creek and its tributaries are among the most important producers of salmon and steelhead in the Applegate River watershed. Laurel Hill Push-Up Dam is listed on the Oregon Department of Fish and Wildlife (ODFW) 2019 Statewide Fish Passage Priority List as the 6th highest priority in the Rogue Basin.

This proposal seeks to address the final major active irrigation point of diversion and fish passage barrier in Williams Creek Watershed, building upon the Lower Bridgepoint Fish Passage Project completed in 2020 (OWEB grant 220-2015), and the Watts Toppin Fish Passage Project scheduled for implementation summer 2023. These projects are all within the lower two miles of Williams Creek and are similar in scale. Together, they will provide uninhibited access to valuable upstream spawning and rearing habitat. Project partners include Laurel Hill Ditch Association (LHDA), Rogue Basin Partnership (RBP), BLM, Williams Cr Watershed Council, and ODFW.

Review Team Evaluation

Strengths

- The application describes a clear need for designs to replace an annually constructed gravel push-up dam with a roughened channel on Williams Creek, near the confluence with the Applegate River. The designs will include improvements to the irrigation conveyance system that will be more efficient, reduce the quantity of diverted water, and allow more water to remain instream.

- The project will provide uninhibited access to critical rearing and cold water refugia habitat for steelhead, cutthroat, Pacific lamprey, and ESA-listed coho.
- Limiting factors affecting ESA-listed Coho identified in NOAA's 2014 Final Recovery Plan for the Southern Oregon/Northern California Coast (SONCC) will be addressed.
- The project partners have considered a range of alternatives to address the complex situation at the site related to the combination of the water diversion network, the seasonal push up dam height, and the stream gradient.
- The project will build habitat connectivity with upstream fish passage improvement projects and extends the footprint of neighboring BLM projects targeting side-channel habitat development and riparian health.
- Project costs are appropriate for the proposed design work.
- The project is timely with support from the Laurel Hill Ditch Company, the principal water users, along with agencies and other key partners, including Laurel Hill Ditch Association, Rogue Basin Partnership, BLM, Williams Creek Watershed Council, and ODFW. The range of support coming together presents an urgency for developing a solution that addresses the passage and diversion issues where previous efforts failed due to the lack of cooperation and support that exists now.
- The applicant is experienced in working on complex fish passage projects with water users and has incorporated lessons learned from past projects.

Concerns

- The landowner support letters are only for passage design and lack evidence indicating support for future water conservation expected from the improvements to the irrigation ditch system.

Concluding Analysis

Williams Creek and its tributaries are among the most important producers of salmon and steelhead in the Applegate River watershed. The future restoration project will improve the survival and growth of juvenile Coho salmon and steelhead by providing access to summer and winter rearing habitat, reducing water temperatures, and limiting water withdrawals. Improving fish passage at Laurel Hill Dam will facilitate access to habitat that has been restored and enhanced through over ten years of in-stream habitat restoration projects. The project is likely to succeed with momentum generated by project support from the irrigators.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 7

Review Team Recommended Amount
$75,000

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$75,000

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Southwest Oregon (Region 2)

Application Number: 223-2022-23052

Project Type: Technical Assistance

Project Name: Cheney Creek - Fish Hatchery Road Culvert Replacement

Applicant: Applegate Partnership, Inc.

Region: Southwest Oregon

County: Josephine

OWEB Request: $75,000

Total Cost: $382,344

Application Description This project addresses the need for fish passage improvement at the Fish Hatchery Road Culvert on Cheney Creek, a main tributary to the Applegate River near Grants Pass, Oregon and public safety on Fish Hatchery Road. This project will remove a fish passage barrier on Cheney Creek by replacing an undersized box culvert on Fish Hatchery Road with a bridge. The 6 miles of high-quality upstream habitat provides critical spawning and rearing habitat for ESA-listed Coho Salmon, Chinook Salmon, Steelhead Trout, Coastal Cutthroat Trout, and Pacific Lamprey. Cheney Creek is a cold water refuge. These streams are increasingly important for survival as river temperatures rise in the summer months. This project complements Chinook and Coho restoration efforts ongoing throughout the Rogue Basin as well as general watershed restoration efforts within the Cheney Creek watershed by BLM and APWC. Engineering designs for the box culvert replacement will be developed by Josephine County and a contracted bridge construction firm. The designs will allow fish passage through a fully passable bridge design and the road realignment will improve public safety at a location known for vehicle accidents. Project partners include: Josephine County, BLM, Rogue Basin Partnership, and ODFW. This application will provide match funding for ODFW's application to the National Culvert Removal, Replacement, and Restoration Grant Program.

Review Team Evaluation

Strengths

- Designs will be developed to improve fish passage at Fish Hatchery Road Culvert in Cheney Creek, a tributary in the lower Applegate River.
- Limiting factors affecting ESA-listed Coho identified in NOAA's 2014 Final Recovery Plan for the Southern Oregon/Northern California Coast (SONCC) will be addressed.
- The project will benefit ESA-listed coho by improving access to six miles of upstream cold-water refugia.
- Passage improvement will leverage upstream instream habitat projects implemented by BLM.
- Partner support is demonstrated by letters included in the application from Josephine County, BLM, Rogue Basin Partnership, and ODFW.
- Project partners have the technical expertise needed to effectively design the restoration.
- A range of alternatives will be considered for the site conditions.
- The applicant is pursuing federal highway funding to implement the project.

Concerns

- An additional map that places the project area in the broader Cheney Creek geography would be helpful for understanding the larger watershed context for the project.

Concluding Analysis

Restoring access to stream habitat is vital to maintaining resilient populations of native fish species. Cheney Creek is a cold-water refuge. The high-quality upstream habitat provides critical spawning and rearing habitat for ESA-listed coho, Chinook, steelhead, Coastal Cutthroat Trout, and Pacific Lamprey. These streams are increasingly important for survival as river temperatures rise in the summer months.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 7

Review Team Recommended Amount
$75,000

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$75,000

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Southwest Oregon (Region 2)

Application Number: 223-2023-23063
Project Type: Technical Assistance
Project Name: Iron Creek Fish Passage Project
Applicant: Applegate Partnership, Inc.
Region: Southwest Oregon
County: Josephine
OWEB Request: $75,000
Total Cost: $233,844

Application Description This project addresses the need for fish passage improvement at the Southside Road Culvert on Iron Creek, a tributary to the Applegate River near Grants Pass, Oregon at Southside Road. This project will remove a barrier that is on the Statewide Fish Passage Priority List on Iron Creek by replacing an undersized box culvert on with a bridge. The 2 miles of high-quality upstream habitat provides critical spawning and rearing habitat for ESA-listed Coho Salmon, Steelhead Trout, and Coastal Cutthroat Trout. Iron Creek is a cold water refuge. These streams are increasingly important for survival as river temperatures rise in the summer months. This project complements Coho restoration efforts ongoing throughout the Rogue Basin. Engineering designs for the box culvert replacement will be developed by Josephine County and a contracted bridge construction firm. Project partners include: Josephine County, BLM, Rogue Basin Partnership, and ODFW. This application will provide match funding for ODFW's application to the National Culvert Removal, Replacement, and Restoration Grant Program.

Review Team Evaluation

Strengths

- A technically sound approach will be used to develop fish passage improvement designs at the Southside Road Culvert on Iron Creek, a tributary to the Applegate River.
- The existing culvert hinders fish access to two miles of habitat with high intrinsic potential. Addressing passage will provide cutthroat trout, steelhead, and ESA-listed coho access to cold water refugia.
- The application describes a clear need for technical assistance funding to support project design.
- The project partners have considered a range of alternatives to address the complex situation at the site resulting from the road location on top of the culvert and the positioning of the structure on a bedrock drop with no jump pool for fish.
- Partner support is demonstrated by letters included in the application from Josephine County, BLM, Rogue Basin Partnership, and ODFW.
- Costs are reasonable for the scope of work presented in the application.
- The applicant is leveraging technical resources and diverse funding sources to increase the likelihood of success in completing the design and restoration products.

Concerns

- An additional map that places the project area in the broader Iron Creek geography would be helpful for understanding the larger watershed context for the project.
- Some information in the application about fish benefits may not be applicable to the project because it appears to be pasted from other applications.

Concluding Analysis

Developing designs to improve fish passage in Iron Creek will improve access to high-quality cold-water habitats in this perennial stream that is critical to the protection and recovery of salmonids and trout species in the Rogue River system. Restoring access to stream habitat is vital to maintaining resilient populations of native fish species. Iron Creek is a cold-water refuge. The high-quality upstream habitat provides critical spawning and rearing habitat for ESA-listed coho, Chinook, steelhead, coastal cutthroat trout, and Pacific lamprey. These streams are increasingly important for survival as river temperatures rise in the summer months.

Review Team Recommendation to Staff
Fund

Review Team Priority
3 of 7

Review Team Recommended Amount
$75,000

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$75,000

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Southwest Oregon (Region 2)

Application Number: 223-2024-23065
Project Type: Technical Assistance
Project Name: Siskiyou Field Institute Meadow & Riparian Restoration
Applicant: Siskiyou Field Institute
Region: Southwest Oregon
County: Josephine
OWEB Request: $55,691
Total Cost: $69,614

Application Description This project is located at the Siskiyou Field Institute (SFI) in Josephine County, Selma, Oregon, approximately 2.5 miles upstream from the confluence of Deer Creek and the Illinois River. The property spans 850 acres and includes nearly one mile of frontage with Deer Creek and nearly 20% of the Takelma Creek watershed. The location, size, water rights, unique plant communities, and riparian restoration potential make SFI a key location for conservation, connectivity, and positive impact on Deer Creek summer flows, temperature regulation, aquatic habitat, and community access. As SFI has recently submitted an updated draft management plan to OWEB that includes new baseline assessments of stream, riparian, and upland vegetation conditions, and prioritization and planning of key projects to be accomplished in the next 5 to 20 years, the focus now turns to the task of restoration design beginning with our lower 140-acre meadow complex along Deer Creek. The meadow complex has become increasingly dominated by pasture grasses and ODA priority noxious weeds that require aggressive treatment and two severely incised unnamed tributaries to Deer Creek that have been highly impacted by years of cattle grazing. The proposed Technical Assistance deliverables include 1) a technical design that would return a suite of species and habitat types that have otherwise become quite
rare on the regional landscape, 2) The development of a multi-agency Technical Review Team to assist with restoration planning and implementation, and 3) prioritized restoration projects with preliminary conceptual designs including a focus on community access and participation. Sound management and restoration directives and committed partners set the stage for future restoration implementation. Project partners include Rogue Basin Partnership, USFWS Partners Program, The Understory Initiative, BLM, USFS, Trout Unlimited, Oregon Department of Forestry, Lomakatsi, and private restoration consultants.

Review Team Evaluation

Strengths

- The application describes a clear need for the technical assistance design capacity to develop restoration actions identified in the conservation easement and management plan for the Siskiyou Field Institute (SFI) conservation property.
- The project site is protected by a conservation easement that will ensure long-term protection and maintenance of investments in habitat restoration.

- The property has significant ecological importance and has a high potential for restoring a functional riparian area and historic upland oak meadow habitats.
- Restoration progress on the SFI property is demonstrated by the development of a management plan and removal of an old diversion structure on Takelma Creek during summer 2023.

Concerns

- Including a detailed work plan for the restoration design contractor line item in the budget would be helpful for understanding the expected outcomes from this cost.
- It is unclear who will serve on the technical advisory team described in objective one of the application. The application lacks information describing the affiliation of the team members and there is no documentation in the budget or match sections indicating a commitment to participate in the project. Information describing the technical advisory team membership is needed to determine whether appropriate expertise will be engaged in the project.
- Additional detail describing the proposed survey and assessment tasks is needed to determine whether appropriate data will be collected to inform project designs. For example, a description of the habitat and species to be targeted and the data to be collected is needed to evaluate whether the design product is likely to effectively address factors limiting habitat potential.
- The objectives are described as general process steps instead of detailed deliverables. For example, there is no clearly stated product described in objective three for reducing the impacts from invasive weeds, such as a prescription for treating target invasive weed species along with a planting and plant establishment plan. The number and wide distribution of invasive weed species is a clear threat to the property. A coordinated, long-term plan and commitment to control them will be necessary for restoring native plant communities. It is not clear if this project will produce a framework for addressing invasive plant species on the property.
- It is unclear if the instream habitat design approach for objective four is site appropriate without details indicating where large wood structures and beaver dam analogs will be placed.
- Understanding the larger long-term goals for the property would inform the review regarding proposed design and treatment approaches and whether they are site appropriate and likely to achieve those goals.
- The budget has lump sums that lacks details needed to determine if the tasks and activities are appropriate based on the estimated costs.

Concluding Analysis

The property owned and managed by SFI provides an important opportunity to restore historic ecosystems at a location that can be used for outreach to other landowners in the area. While a Technical Assistance grant is needed to provide capacity for developing technically sound restoration designs, the application lacks details needed to evaluate the likelihood for the project to succeed.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

N/A

Review Team Recommended Amount

$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Southwest Oregon (Region 2)

Application Number: 223-2025-22963
Project Type: Monitoring
Project Name: Basin Wide Temperature Monitoring of the Coquille
Applicant: Coquille Watershed Association
Region: Southwest Oregon
County: Coos
OWEB Request: $120,489
Total Cost: $174,821

Application Description The proposed Basin Wide Temperature Monitoring of the Coquille is located in Coos County on the Mid-South coast and will determine the spatial and temporal temperature regime of the Coquille Watershed to support management of anadromous fishes and further watershed restoration prioritization that was started by the Coquille Coho Strategic Action Plan (Coquille SAP). The Coquille is lacking in long-term, widespread temperature monitoring data. This lack of data is leading to an incomplete picture of water temperatures in the Coquille Basin and is impacting the ability of the Coquille Watershed Association (CoqWA) and partners to develop effective management strategies. Without a clear understanding of water temperatures across the Coquille River, it is impossible to prioritize restoration and conservation efforts in a way that optimizes their impact. Therefore, a secondary goal is to provide a comprehensive temperature dataset that will be useful to other stakeholders and resource managers.

The proposed basin wide temperature monitoring project will partner with the Coquille Indian Tribe (CIT) and Oregon Department of Fish and Wildlife (ODFW) to deploy 80 temperature loggers throughout the basin for a 3-year period. Temperature will be collected year-round at 15 locations with the remaining being paired logger locations to identify cold-water sources. Discharge measurements will also occur during the summer, low-flow field audits. Results will be distributed in an annual report and data will be available through ArcGIS Online. Additional project partners: BLM, USFS, CoosSWCD.

Monitoring Team Evaluation

Monitoring Team Strengths

- This monitoring project will fill spatial data gaps associated with the existing monitoring network that the Coos SWCD and Coquille Indian Tribe (CIT) operates and builds on the water temperature monitoring effort initiated by ODFW in 2022.
- The application’s monitoring questions are clear and the proposed monitoring methods they will follow are standardized procedures that enables them to collect the data to answer their questions.
- The study design pairs known tributaries with mainstem Coquille River locations to systemically identify cold water sources across the watershed.

- The applicant's definition of cold-water sources provides clarity on how they will be able to apply the data to answer their monitoring questions.
- The applicant will visit sites in August to measure tributary streamflow to quantify the cold-water source each stream is contributing to the mainstem.
- This project will use an electronic survey form developed in Survey 123 to minimize transcription errors and save time when uploading the field data into the database.
- The applicant will use R or Matlab to perform analyses to generate water temperature metrics and assess if the sites meet the cold-water source criteria to rank sites by the quantity of cold water each tributary is contributing in August.
- The data will be uploaded to DEQ to make the data publicly available and will develop a public facing Arc GIS Online map to make the data and site available to partners and interested parties.
- The applicant will write a report which will be distributed to the Coquille Strategic Action Plan team to help in the review and ground-truthing of their restoration priorities plan.
- The applicant and contributing partners all have experience collecting continuous water temperature and related field data in this basin.
- The applicant is working with technical experts and community that are part of the existing Coquille Strategic Action Plan team comprised of ODFW, BLM, NRCS, DEQ, CIT, Coos SWCD, Coquille Watershed Association, The Nature Conservancy and the Wild Salmon Center.
- The budget details the expenses needed for staff time by different tasks to complete the project as proposed.

Monitoring Team Concerns

- It is not clear if the applicant will incorporate the Coos SWCD's water temperature data into their database and into their data analyses.
- The application states the sites were prioritized from information in their action plan but lacked details on how that was done given the large watershed they are working in.
- The application didn't describe the rationale to understand why some sites are monitored year-round and others are only monitored seasonally.
- It was not clear if the applicant will reduce the large number of monitoring sites over time once they analyze the data to understand how dynamic the water temperature conditions are across the watershed.

Monitoring Team Comments

Review Team Evaluation

Strengths

- The proposed basin-wide water temperature monitoring will provide a better understanding of the spatial and temporal temperature regime in the Coquille Watershed that will be used to prioritize watershed restoration.
- The monitoring data will be used to support implementation of the coastal coho strategic action plan. Water temperature is a key limiting factor for ESA-listed coho, and the data will provide a better understanding of the range of its impacts on fish.

- The data will inform upcoming Total Daily Maximum Load development and associated restoration actions.
- The proposal has clear measurable and achievable objectives.
- Including water discharge measurements will improve analysis of temperature data.
- The project complements other current monitoring work by the applicant and project partners.
- Partner support is demonstrated by letters included in the application from Coquille Indian Tribe, BLM, USFS, Coos SWCD, and ODFW.
- The monitoring effort leverages ODFW work related to core cold water areas.
- The project will complement existing water temperature data and current monitoring efforts in the Coquille basin by expanding the geographic range of the data collected and increasing the level of partner coordination in deploying sensors.
- The applicant is qualified to do the work and has a track record with similar monitoring projects. The applicant also has a history of sharing and utilizing data collected to inform restoration actions.

Concerns

- It is unclear if ODFW is using a different stream temperature monitoring protocol than the one described in the application. The applicant should confer with ODFW on measurement protocols, especially for comparing monitoring data in larger river areas.
- Without information in the application describing the protocol that will be used to create discharge measurements, it is unclear whether professionally accepted monitoring methods will be used to collect this data.
- Measuring water temperature at 15-minute intervals will create a large amount of data that will require significant time to analyze and this additional data may not provide more insight into water quality conditions compared to less frequent monitoring intervals.

Concluding Analysis

A clear understanding of water temperatures across the Coquille River is needed to prioritize restoration and conservation efforts in a way that optimizes their impact. A comprehensive dataset will support science-based decision making to restore or conserve healthy water temperatures for native fish through projects such as riparian fencing and planting, creating off-channel habitat, and placing logs and boulders for pool habitat. Climate change is expected to increase water temperatures across the Coquille River, identifying current cold-water sources and prioritizing efforts to create thermal refugia into the future is vitally important.

Review Team Recommendation to Staff

Fund

Review Team Priority

1 of 3

Review Team Recommended Amount

$120,489

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$120,489

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Southwest Oregon (Region 2)

Application Number: 223-2026-22967
Project Type: Monitoring
Project Name: Benson and Big Wetland Restoration Project Monitoring
Applicant: Cascade Pacific RC&D
Region: Southwest Oregon
County: Coos
OWEB Request: $106,739
Total Cost: $177,878

Application Description The Tenmile Lakes area is a unique and significant watershed in regards to water quality, Coho productivity, and economically and socially to several Southern Oregon coastal region.
In the Tenmile basin, agricultural land-use is just 4% of the land-use in the watershed but our studies reveal that 100% of the historical wetlands were drained for agricultural land use, creating the largest and longest negative impact to native fish habitat and water quality in the basin. The Tenmile Lakes Steering Committee that includes Coos County, CTCLSUI, ODFW, DSL, ODEQ, City of Lakeside, WRLT, and TLBP developed the Tenmile Lakes Native Fish and Water Quality Restoration Plan (TLBP 2021) which prioritized wetland restoration within the priority tributaries of Big, Benson, and Johnson, above where they join the Lakes. In 2022, Partners were awarded funding from multiple sources and in-kind donations to implement the Big and Benson Wetland Restoration Projects. These two project will restore a total of 117 acres of palustrine emergent wetlands in the Tenmile Watershed.
Partners are seeking OWEB Monitoring funding to update our Tenmile Lakes Quality Assurance Project Plan (TLBP 2014) and implement on-the- ground effectiveness monitoring of the Big and Benson Creek wetland restoration project sites. This monitoring will track key channel and vegetation metric over time which will provide essential information for our wetland restoration and planting designs in the basin and the region.. OWEB funds will be utilized to support a Monitoring Field Technician, mileage, report supplies, Aerial Drone Surveys, and grant administration.

Monitoring Team Evaluation

Monitoring Team Strengths

- This project will monitor the effects of restoration that is aimed at addressing limiting factors that currently impact the water quality and native fish in the lake.
- This project will complement the historic data that has been collected at these sites.
- This resubmitted application has been revised based on the feedback from the review teams and has focused the monitoring to be a much simpler approach than previously proposed.
- The applicant will revise an existing quality assurance document and finish drafting a monitoring plan with these funds.

- The water quality data will be reviewed by the steering committee before being submitted to DEQ and a report will be made available on the applicant's website and uploaded to ODFW's data clearinghouse.
- The applicant has engaged community partners and technical experts by convening the Tenmile Water Quality Steering Committee, a group of local and state leaders which will help in reviewing the data and interpreting the results.
- The applicant has collected similar data in the past as part of a large-scale monitoring effort and their partners have experience collecting and reviewing similar data.

Monitoring Team Concerns

- The application doesn't include a monitoring question to understand what they hope to learn from the grab water quality monitoring component.
- The water quality sampling frequency (quarterly) grab sampling is not likely to provide enough information to evaluate the effects of the restoration projects.
- The application proposes to use methods based on vegetation surveys described in Roegner et al. 2008 and will be adapted to the wetland project characteristics but it was not clear what kind of adjustments would be needed or if this citation for monitoring tidally influenced wetlands is applicable to this project.
- The project will be implemented by a technician that will be hired if the project is funded and it was not clear how much training and supervision, they will have to implement the project as proposed.
- The application doesn't describe how they are tracking or estimating streamflow which may greatly influence the monitoring results and the impact of the restoration actions. This information is described briefly in the attached monitoring plan.
- Parts of the application were confusing to understand the need to finalize the draft monitoring plan that is attached that includes monitoring in the lake that is not related to the effectiveness proposed in this application.
- The application lacks detail on how the ground and drone-based data will be analyzed to detect changes over time to answer the monitoring question posed in the application.
- It was not clear if the budget is adequate to complete the analysis and reporting of the drone imagery.

Monitoring Team Comments

Review Team Evaluation

Strengths

- Tenmile Lakes Basin partnership has successfully implemented other large scale water quality and project effectiveness monitoring projects in the past.
- The proposed monitoring will provide data for evaluating the effectiveness of a project funded by an OWEB restoration grant. Data will be collected to document stream channel and vegetation responses to restoration treatments at two large historic wetland complexes located at the confluence of two main tributaries with Tenmile Lakes. The restoration actions are expected to provide important rearing habitat for ESA-listed coho, improve water quality through sediment filtering and temperature reduction, and restore wetland functions.

- The Tenmile Lakes watershed has a large beaver population that will likely move into the new habitat, collecting monitoring information in the restored wetland may provide a better understanding of responses to habitat changes.

Concerns

- It is unclear if the project timeline aligns with the proposed wetland restoration and will allow time to collect pre-project data.
- The monitoring protocols provided in the application lack information describing how data will be used to inform restoration.
- Additional information is needed to understand the technical soundness of the proposed vegetation survey protocols that are modified from professionally accepted methods to evaluate the constructed wetlands.
- The application lacks details describing the qualifications of the new monitoring technician. This position is key to the success of the project and additional information is needed to determine whether appropriate technical expertise will be engaged in the project.

Concluding Analysis

Nearly three million dollars has been awarded to restore 117 acres of wetlands in the Tenmile Lakes area. Monitoring the effectiveness of this restoration investment may be helpful to inform future projects restoring pasturelands to wetland complexes that existed prior to land uses that drained and channelized these wetlands. The application lacks information needed to determine whether the proposed monitoring is likely to succeed in documenting restoration effectiveness.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Southwest Oregon (Region 2)

Application Number: 223-2027-23023
Project Type: Monitoring
Project Name: IVWC Passive WQM 2024-25
Applicant: Illinois Valley WC
Region: Southwest Oregon
County: Josephine
OWEB Request: $156,836
Total Cost: $231,215

Application Description There is currently little water quality data on the Illinois River Basin located in Josephine County in southwestern Oregon. Illinois Valley Watershed Council (IVWC) proposes to address this paucity of water quality information by conducting water quality monitoring in the basin (HUC 17100311). The lack of water quality data makes it difficult for IVWC and other organizations in the area to make decisions, plan efforts, and/or evaluate the efficacy of projects generally. Specifically, IVWC would use water quality data to guide restoration efforts, design and implement a Pesticide Management Plan, engage with partners to write an updated Watershed Assessment Report, implement pollution control efforts, and engage local stakeholders.

IVWC's proposal is to strategically deploy passive monitoring units at 10 sites in the mainstem and tributaries of the Illinois River. USGS will process the field-deployed passive samplers, conduct the chemical analyses, calculate time-weighted average water concentrations of detected chemicals, provide interim reports as new results are available, and assist with data interpretation. IVWC will then conduct public engagement activities in collaboration with IVSWCD to disseminate results of water quality monitoring in the basin.

IVWC has collaboratively designed this project proposal in order to create a robust baseline dataset for the Illinois River Basin. Project partners include Illinois Valley Soil and Water Conservation District (IVSWCD), Oregon Department of Environmental Quality (DEQ), United States Geological Survey Columbia Environmental Research Center (USGS CERC), and the Integrated Ecology Research Center.

Monitoring Team Evaluation

Monitoring Team Strengths

- The applicant will coordinate this monitoring project with the Illinois Valley SWCD's current and planned water quality monitoring efforts.
- The applicant will follow quality assurance and quality control procedures that have been established by the USGS to deploy and retrieve the passive samplers.
- The applicant will develop a sampling and analysis plan in coordination with the USGS and submit it to DEQ for review.

- The applicant described the timing of the sampling which is largely based on streamflow and the likelihood of detecting presence of toxins in the watershed.
- The applicant is coordinating with the USGS staff that is highly qualified and will be training the applicant to deploy and retrieve the samplers.
- The USGS will process the samplers to analyze for the presence of toxins and assist the applicant in analyzing the data and interpreting the results.
- The data will be available in USGS's online data portal Science Base and submitted to DEQ.
- Results will be included in a GIS story map to make the data available to engage the general public.
- The application includes several letters of support that demonstrate the applicant has engaged the partners in the community and they are interested in the data that will be gathered.

Monitoring Team Concerns

- It is not clear if the sampling sites in this proposal are located near the SWCD's water quality monitoring sites to determine how the results can be integrated to characterize the watershed conditions.
- The applicant is relying on the USGS to manage, analyze and report the data and the application included little details on how that would be done to answer the monitoring questions posed in the application.
- The application describes the importance of collecting water temperature and streamflow data but lacked detail on how this data would be collected and incorporated into the data analyses.
- The application described the study design for the deployment of two different passive samplers across different seasons in 2024 but there was little information to understand the study design that resulted in a highly reduced monitoring effort in 2025 with fewer sites and use of one type of passive sampler.
- The narrative description of the 2025 monitoring effort is not consistent with the expenses estimated in the budget.
- The budget includes funding for two flow meters and the lack of information on stream flow monitoring methods in the application makes it challenging to determine if this proposed cost is appropriate to accomplish objective 1.
- It was not clear if the budget and timeline includes the activities to complete objective 3 to develop a pesticide management plan, update the watershed assessment report and prioritize restoration actions.

Monitoring Team Comments

Review Team Evaluation

Strengths

- Baseline water quality monitoring data will be collected in the Illinois River Basin that will be used to inform future riparian restoration projects.
- Data collected will inform Oregon Department of Agriculture and the Department of Environmental Quality's (DEQ) pesticide stewardship programs by providing water quality information in an area where there is currently little water quality data.

- Water quality impacts ESA-listed coho and other aquatic species. Additional information on existing conditions and locations where water quality is impaired will help with prioritizing restoration and outreach efforts.
- The applicant is working with United States Geological Survey and DEQ to establish a sample collection protocol.
- The methods described for detecting pesticide is technically sound.
- The United States Geological Survey input and oversight will provide capacity and appropriate technical expertise needed to implement the monitoring.
- The application includes a wide array of support letters that demonstrate the need and community support for the monitoring project.

Concerns

- It is unclear how sampling site locations were chosen. More detail in the application is needed to evaluate whether sampling locations is likely to provide information needed to accurately identify pollution sources and isolate the source points.
- Additional detail on how the data will be collected and analyzed is needed to evaluate the likelihood the project will succeed in informing future restoration.
- A map that includes other water quality sampling locations would provide helpful context for understanding the sites chosen and how they fit into the larger monitoring network.
- Placing water quality monitoring equipment at locations with public access could make the equipment vulnerable to vandalism and impact data collection.
- Showing Environmental Protection Agency collaboration on what is being tested for would provide a better understanding on the value of the approach.

Concluding Analysis

Potential impacts to human and aquatic life from unsafe pesticide inputs into streams is a growing concern in the Illinois Valley. The monitoring project will provide baseline water quality and quantity dataset that will lead to scientifically based assessment of the extent of pesticide presence. Water quality data will be used to guide restoration efforts, design, and implement a Pesticide Management Plan, and engage partners and landowners in implementing pollution control efforts.

Review Team Recommendation to Staff

Fund

Review Team Priority

2 of 2

Review Team Recommended Amount

$156,836

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Do Not Fund; falls below staff-recommended funding line

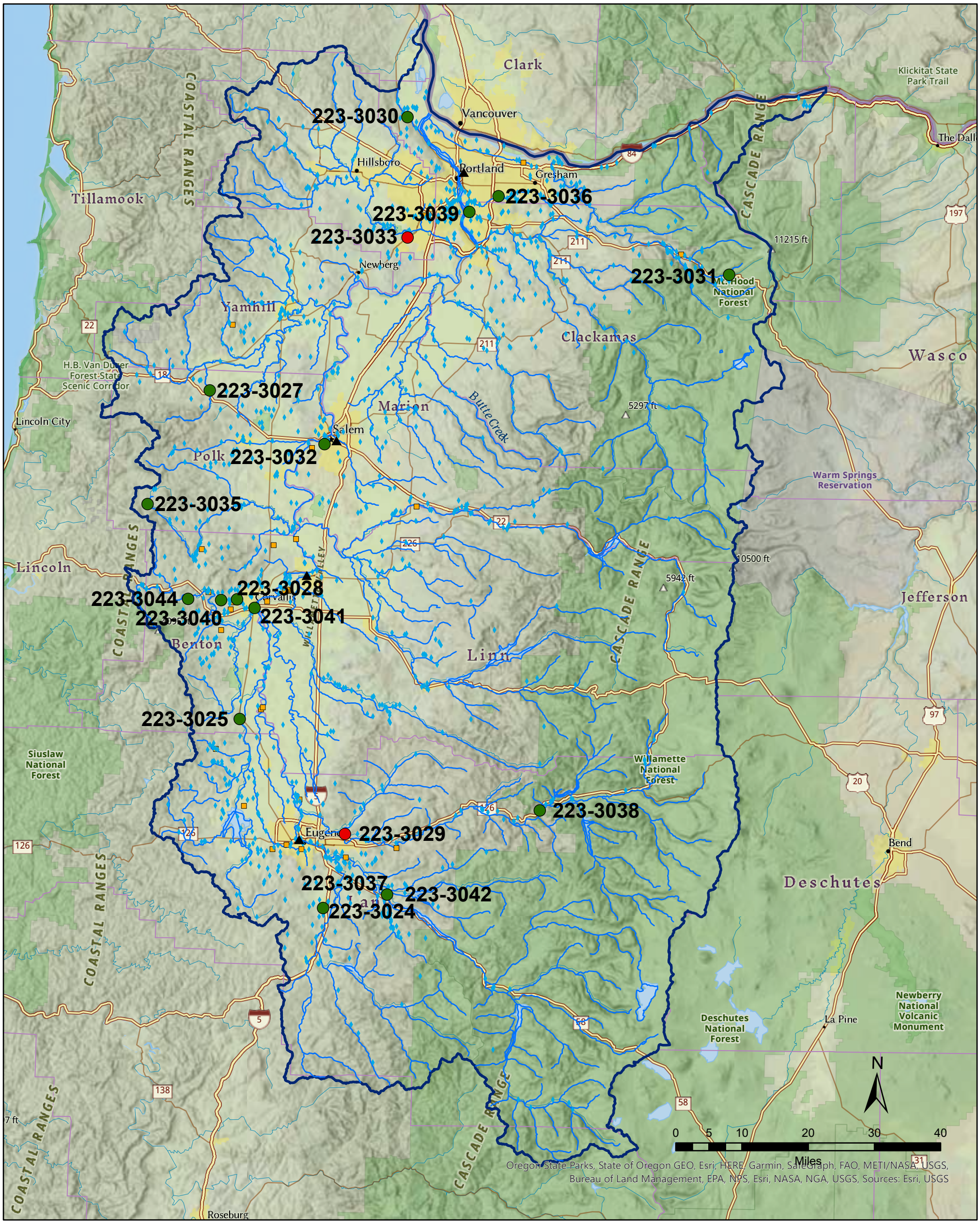
Staff Recommended Amount

$0

Staff Conditions

N/A

Willamette Basin - Region 3 Spring 2023 Funding Recommendations



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Funding Recommendation

- Staff Recommendation For Funding (SRF)
- Below Funding Line (BFL)

Previous Grants 1998 - Spring 2022

- Land Acquisition
- Restoration
- Region 3 Cities
- Region 3 Streams
- OWEB Region 3 Boundary

OREGON WATERSHED ENHANCEMENT BOARD

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Region 3 - Willamette Basin Restoration

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-3030	CREST	Palensky Highway 30 - Wildlife Underpass	Safe wildlife passage will be established under Highway 30 that will allow amphibians and small mammals to traverse between the floodplains of the Palensky Wildlife Area and the Tualatin Mountain forests.	496,787
223-3025	Long Tom WC	Long Tom River Dam Removal at Monroe	Monroe Dam will be removed to restore aquatic migration corridors and natural stream processes in the lower Long Tom River to benefit native fish and wildlife species.	798,201
223-3031	The Freshwater Trust	Upper Sandy River Basin Habitat Restoration Project - Zigzag River	The abundance and productivity of Sandy basin salmon and steelhead populations will increase by restoring access to habitat and accelerating the recovery of naturally-functioning conditions within the stream channels and floodplain areas of the Zigzag River.	439,900
223-3028	Greenbelt Land Trust	Oak Creek Preserve Restoration Phase 1	Wetland, prairie, and oak habitats will be restored on a former farm field that will support a diversity of rare and endangered prairie plant and wildlife species.	296,516
223-3027	Confederated Tribes of Grand Ronde	Takilth Floodplain Reforestation	Twenty acres of floodplain forest will be restored within the 104-acre Takilth Wildlife Area by removing a hazelnut orchard and planting native streamside hardwood trees and shrubs.	217,728
223-3024	Coast Fork Willamette WC	Creswell Butte: Oak Woodland Restoration	Upland prairie, savanna and oak woodland habitat structure will be restored to provide habitat for a diversity of native species on Creswell Butte located within the lower Coast Fork Willamette watershed.	384,237
Total Restoration Projects Recommended for Funding by RRT and OWEB Staff				**2,633,369**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-3029	Long Tom WC	Child Center Stormwater Improvements for Drinking Water Protection	Urban water quality will be improved by installing green stormwater infrastucture that will reduce pollutants entering the McKenzie River.	306,412

Projects *Not Recommended* for Funding by RRT

Project #	Grantee	Project Title	Amount Requested
223-3026	Greenbelt Land Trust	Willamette Floodplain Forest Enhancement	198,267

Region 3 - Willamette Basin Technical Assistance

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-3032	Friends of West Salem Watersheds	Salem Floodplain Species Assessment and Natural Floodplain Functions Plan	A species assessment will be completed to support future floodplain development decisions in the City of Salem that assure floodplain ecological functions are considered and protected.	28,850
223-3037	Middle Fork Willamette WC	Finalizing Floodplain Restoration Designs & Permitting for Elijah Bristow State Par	Final designs will be completed for a process-based floodplain restoration project on the Middle Fork Willamette River that will result in habitat for native species such as Oregon chub, western pond turtle, spring Chinook salmon, and beaver.	75,000
223-3035	Luckiamute WC	It's Miller Time! Uncorking Habitat Potential in the Miller Creek & West Fork Luckiamute Sub-basins	Restoration plans will be developed to address impacts caused by splash damming and other historical practices to improve salmonid and lamprey production and improve water quality and storage in the upper Luckiamute sub-basin.	74,962
223-3036	Johnson Creek WC	Action Plan 2025-2035 Technical Assistance	The Johnson Creek Watershed Council's Restoration Action Plan will be updated to guide restoration activities to benefit fish, wildlife, and people in the Johnson Creek Watershed.	25,574
Total Technical Assistance Projects Recommended for Funding by RRT and OWEB Staff				**204,386**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended

223-3033	Ducks Unlimited Inc	Tualatin River National Wildlife Refuge-Onion Flats Project	Designs will be completed to restore fish passage, stream channel and habitat complexity, and functional wetlands that hold water during critical periods for fish and migratory birds on Rock Creek, a tributary of the Tualatin River.	39,771

Projects *Not Recommended* for Funding by RRT

Project #	Grantee	Project Title	Amount Requested
223-3034	Pudding River WC	Davis Creek Fish Passage Improvements Phase 1	62,698

Region 3 - Willamette Basin Stakeholder Engagement

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-3044	Benton SWCD	Benton County Oak Habitats Stakeholder Engagement	Oak woodland, savanna and prairie habitats will be assessed in Benton County. This information will be used to engage landowners in developing voluntary restoration projects to restore these habitats.	34,130
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				**34,130**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
None				

Projects *Not Recommended* for Funding by RRT

Project #	Grantee	Project Title	Amount Requested
None			

Region 3 - Willamette Basin Monitoring

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-3040	Institute for Applied Ecology	Restoration effectiveness monitoring of Taylor's checkerspot butterfly habitat	The effectiveness of Talyor's cherspot butterfly habitat restoration treatments will be assessed to inform future actions for the recovery of this endangered species in Oregon.	65,351
223-3039	North Clackamas Watershed Council	Temperature Trend Monitoring: North Clackamas Watersheds	Data will be collected to understand water temperature status and trends in the North Clackamas watersheds, which will be used to identify and prioritize future restoration projects.	87,625
223-3038	McKenzie Watershed Alliance	Middle McKenzie Stage 0/8 Restoration Effectiveness Monitoring	The effectiveness of process-based restoration used to restore floodplain function will be assessed to develop standards of practice for designing, constructing, and monitoring these types of projects.	362,696
223-3041	Marys River WC	Marys River Watershed Council Monitoring Phase 1	Data will be collected to understand water temperature status and trends in the Marys River watershed, which will be used to identify and prioritize future restoration projects.	153,297
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				**668,969**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
None				

Projects Not Recommended for Funding by RRT

Project #	Grantee	Project Title	Amount Requested
223-3042	Middle Fork Willamette WC	Effectiveness Monitoring of Floodplain Restoration at Elijah Bristow State Park_Pre-Impmlementation	304,402
223-3043	Ecostudies Institute	Fire Effects Monitoring: Developing a Framework for Cultural and Ecological Health	189,530

Region 3 Total OWEB Staff Recommended Board Award	**3,540,854**

Region 1 - 6 Grand Total OWEB Staff Recommended Board Award	**12,461,865**

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3024-23037

Project Type: Restoration

Project Name: Creswell Butte: Oak Woodland Restoration

Applicant: Coast Fork Willamette WC

Region: Willamette Basin

County: Lane

OWEB Request: $384,237

Total Cost: $568,622

Application Description The 74-acre project is in Lane County along the southern border of the City of Creswell's urban growth boundary at Creswell Butte. Creswell Butte itself can be seen from the I-5 corridor and is within the City of Creswell’s viewscape. The property is currently owned by private landowners who enrolled their property into a Conservation Easement (CE) held by McKenzie River Trust (MRT). The easement did not come with operations and maintenance (O&M) funds. Years of limited management have left the legacy oaks and open meadow habitats overgrown with shrubs, cherry, and conifers. The risk of losing the legacy oaks that remain is imminent and with no action key habitat values will be lost forever. The project seeks to leverage Oregon Department of Forestry (ODF) fuels reduction and Oregon Department of Fish & Wildlife (ODFW) Oregon Recreation & Conservation Funding with OWEB restoration funding in order to restore the degraded upland prairie and oak habitats. Project partners include Coast Fork Willamette Watershed Council, MRT, ODF, ODFW, Natural Resources Conservation Service, Larry H Weaver & Sheila J Hale Living Trust and the Creswell Butte Technical Advisory Team which includes the previously mention organizations in addition to US Army Corps of Engineers, US Fish & Wildlife Service, and the City of Creswell.

Review Team Evaluation

Strengths

- The application has clearly defined project goals to restore and improve upland prairie, oak savanna, and oak woodland habitats and native species diversity on Creswell Butte located within the lower Coast Fork Willamette watershed.
- Previous application evaluation concerns related to the feasibility of removing large trees from the site are addressed by describing how skid roads will be used and shifting some restoration strategies to better match the site conditions. The budget also has more details describing project costs instead of providing lump sums.
- The project builds on an OWEB Technical Assistance Grant investment and previously completed restoration completed at Creswell Butte.
- The project has potential for raising awareness about habitat restoration because it is located on the edge of the City of Creswell and is highly visible.
- The target quantified habitat benefits expected from the project are reasonable. Restoring habitat on a hardwood butte will be valuable for migratory birds.
- Prescribed burns will be implemented in partnership with the Willamette Valley Fire Collaboration, which will provide the capacity and experience needed for using fire as a restoration treatment.

- The project site is protected by a conservation easement that will ensure long-term protection and maintenance of investments in habitat restoration.
- The applicant has the capacity and relevant experience for implementing the project.
- A diversity of partners and technical experts are engaged in the project and the Creswell Butte Technical Advisory Team. Partner support is demonstrated by letters and match from landowners, McKenzie River Trust, Oregon Department of Fish and Wildlife, Oregon Department of Forestry, and Ecostudies Institute.

Concerns

- The project location may be challenging for utilizing prescribe fire due to its proximity to the City of Creswell and roads.

Concluding Analysis

The proposed restoration is likely to contribute to addressing the degradation, loss, and fragmentation of upland prairie and oak habitats that has resulted in an overall significant decline of these habitats in the Willamette Valley. A combination of forest thinning, invasive plant control and re-seeding will be used to shift the site from a dense woodland to a mixed open oak and conifer woodland and prairie over the 73-acre conservation property.

Review Team Recommendation to Staff
Fund with Conditions

Review Team Priority
6 of 7

Review Team Recommended Amount
$384,237

Review Team Conditions

If prescribed fire is not feasible, the line item in the budget for this cost should be used for an alternative fuel reduction action.

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund with Conditions

Staff Recommended Amount

$384,237

Staff Conditions

If prescribed fire is not feasible, the line item in the budget for this cost should be used for an alternative fuel reduction action.

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3025-23042

Project Type: Restoration

Project Name: Long Tom River Dam Removal at Monroe

Applicant: Long Tom WC

Region: Willamette Basin

County: Benton

OWEB Request: $798,201

Total Cost: $3,786,277

Application Description The project is centered around the Monroe Drop Structure, a 9-foot high, low head dam on the Long Tom River at river mile 6.6. It is the downstream-most barrier on the Long Tom River and blocks upstream fish passage for juvenile upper Willamette River spring Chinook, which are ESA-listed as threatened. The project would open up access to 15 miles of mainstem and tributary rearing habitat for juvenile Chinook. The dam also blocks or impedes passage for Pacific lamprey and coastal cutthroat trout that would otherwise use habitat upstream of the dam for spawning and rearing. The dam also disrupts sediment transport processes, increases water temperatures, and creates ideal conditions for warmwater predatory fish as well as algae blooms. There are two other USACE low head dams upstream of the Monroe Drop Structure on the Long Tom River. LTWC has been working with USACE for nearly 20 years to develop plans for improving fish passage at all three dams, and once that vision is realized fish passage will be restored to 100+ miles of habitat in the Long Tom and Coast Range tributaries where LTWC has restored dozens of mile of habitat in partnership with OWEB and other funders. The proposed project is the first step in achieving this vision and is the highest priority aquatic project in the Long Tom Watershed.

The project will remove the dam, restore the channel 1,000' upstream of the dam, replace a fish passage barrier culvert to provide access to 1/2 mile of off-channel habitat in historical Long Tom River channel segments adjacent to the dam, and replace the City's municipal water intake, which is located 600' upstream of the dam. The current intake will not function once the dam is removed, so its replacement is an essential component of the project to maintain the City water supply and allow the dam to be removed. USACE, City of Monroe, the Confederated Tribes of Siletz Indians, and the USFWS National Fish Passage Program are partners on the project.

Review Team Evaluation

Strengths

- The application has clearly defined restoration goals and objectives for restoring migration corridors for native aquatic species and fluvial processes in the lower Long Tom River.
- The project builds on previous OWEB Stakeholder Engagement and Technical Assistance Grant investments that resulted in the proposed restoration project.

- The project has previously promoted and will continue to promote public awareness for watershed restoration. The applicant conducted extensive stakeholder engagement to build support for removing the Monroe Dam.
- The Monroe Dam removal is the highest priority project for the Long Tom watershed and is a prioritized action in multiple watershed plans.
- Removing Monroe dam will connect 15 miles of upstream mainstem and tributary habitat that was historically used by juvenile spring Chinook. The applicant has implemented stream habitat restoration projects over the last 20 years above the dam that have benefitted trout. Once the dam is removed, spring Chinook and lamprey will be able to access and benefit from these restored stream reaches.
- Removing the dam and eliminating impounded water will decrease solar radiation, which will improve stream temperatures and provide further habitat benefit to native aquatic species.
- The project is ready for implementation with National Oceanic and Atmospheric Administration approval of the designs. It is also time sensitive to successfully utilize the US Army Corps of Engineers (ACE) Section 1135 program for funding.
- The applicant has capacity and relevant experience to implement the project.
- The project could potentially lead to future restoration on upstream drop structures. These structures are currently partial passage barriers for aquatic species and restoring complete passage will further improve stream habitat connectivity.
- The City of Monroe and the Confederated Tribes of Siletz Indians are co-sponsors for the project, which is required for the project to receive USACE Section 1135 funds. Partner support is also demonstrated by support letters from the City, Tribes, Oregon Department of Fish and Wildlife (ODFW), and the Upper Willamette Soil and Water Conservation District.
- Alternative solutions were fully vetted through extensive stakeholder engagement conversations. A habitat suitability index model was also used to model existing and predicted habitat benefits under different restoration alternatives.

Concerns

- The application lacks design information for the dam removal portion of the project that may have provided helpful context for understanding how the project will be implemented. The dam removal will, however, be funded by the USACE Section 1135 program through a design-build approach. The OWEB request is for relocating the City of Monroe drinking water intake, which is necessary for the dam removal objective to move forward. The application does include technical information needed to understand the design and associated costs for this project component.
- It is unclear from the application the extent to which ODFW was consulted in conversations about fish passage at the project site.
- Potential benefits to Chinook may be overstated in the application while other watershed benefits are understated. While Chinook will pass upstream and utilize the stream habitat, they are unlikely to use the 15 miles of habitat because there will still likely be preference for other nearby basins, such as the McKenzie River. Removing the dam will still provide significant benefits for restoring watershed functions and improving stream temperatures.

Concluding Analysis

The Monroe Dam, located six miles upstream of the confluence of the Long Tom River with the Willamette River, disrupts sediment transport, fish access to upstream habitat, and migration of other native aquatic species. The impoundment created by the dam also contributes to elevated water temperatures by increasing solar gain and residence time. The applicant implemented extensive

stakeholder engagement that led to this restoration opportunity by building whole community support in a small, rural city. This is a large, complex project and the applicant's coordination of partners, community outreach, and design work has generated the momentum for dam removal to proceed.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 7

Review Team Recommended Amount
$798,201

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$798,201

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3026-22965

Project Type: Restoration

Project Name: Willamette Floodplain Forest Enhancement

Applicant: Greenbelt Land Trust

Region: Willamette Basin

County: Benton

OWEB Request: $198,267

Total Cost: $249,519

Application Description Greenbelt Land Trust manages some of the most successful floodplain anchor habitat projects on the mid-Willamette. The proposed project is located across three permanently protected properties and collectively comprises over 800 acres: Harkens Lake, Horseshoe Lake and Little Willamette (Benton and Linn Counties). These properties were brought into the Willamette Wildlife Mitigation Program by BPA, OWEB, and ODFW for their strategic location and recognition of their outsized potential contribution to salmonid recovery efforts. Over the past ten years Greenbelt has converted well over 500 acres of ag-land into diverse floodplain forest, wetlands and prairies. Early on, we naively thought that active management finished once trees were free to grow. Ten years later we now realize that a second phase of restoration is needed to speed the development of the mature and complex floodplain forest characteristics that are so valuable to fish and wildlife. This project will implement mechanical thinning across hundreds of acres to establish a varied age and multi-layered riparian forest canopy. We will emphasize the development of large canopy trees, add understory native plant diversity, and replace areas dominated by invasive plant species with many acres of newly planted forest. These activities will expand the sites' food webs and resources for salmonids and a suite of OCS species, increase the acreage of floodplain forest, and promote improvements for water quality / quantity. Work will follow the land management plans approved / reviewed by OWEB, BPA and ODFW, while technical assistance is provided by the USFWS Partners for Fish and Wildlife Program, ODFW and Bob Altman. Greenbelt relies on restoration professionals such as Rosario Franco, Seven Oaks Nursery, Heritage Seedlings and Advanced Land Management. Our floodplain properties are demonstration sites for the conservation and restoration community and provide educational opportunities for students of all ages.

Review Team Evaluation

Strengths

- The application has clearly stated objectives for a strategic and rational treatment approach at locations where previous floodplain forest restoration projects had higher-than-expected survival outcomes. The sites were planted using high density plantings, which is a common planting method in the Willamette Basin for restoring floodplain forests. Typically planting projects experience a high mortality; high-density plantings are designed to allow for natural thinning to occur through plant mortality. The trees and shrubs planted at the project sites had high survival rates, which is creating a dense monoculture. The proposed thinning to reduce plant density and uniformity is likely to add

complexity to the plant community and habitat diversity that will benefit native species, such as songbirds. The resulting mixed story forest will provide a higher habitat value in the bottom land forest plant community.

- The proposed approach to mechanically thin floodplain forests is based on a successful 30-acre pilot completed by the selected contractor. Due to this test project, the applicant has data to accurately estimate costs for the proposed project. Thinning the floodplain forest now will be more cost-effective, before trees get larger and are more costly to treat.
- The project includes a combination of three properties that altogether total 800 acres located in Willamette Anchor Habitats. The properties have OWEB and Bonneville Power Administration Conservation Easements that will ensure long-term protection and maintenance of investments in habitat restoration.
- Prioritized actions in watershed plans, including the Oregon Conservation Strategy, will be implemented.
- There is potential for the project to lead to future restoration. Demonstrating success in restoring the bottomland riparian forest could lead to additional floodplain reconnection restoration with the participating landowners and neighbors.
- The application budget includes details clearly describing project costs.
- The applicant has capacity and relevant experience to implement the project and will be working with a contractor with relevant forestry experience.

Concerns

- No alternatives to the proposed approach were considered. For example, it might be possible that the plant community stratification will sort out in five more years through mortality without intervention. There may be merit to waiting to see how the sites respond to previous restoration strategies over a longer time period instead of intervening too early.
- There are no plans to leave large trees on the forest floor, all materials will be mulched instead. There could be a missed opportunity to provide habitat benefits for native species, such as amphibians, by leaving larger woody material on the ground.
- While the presence of invasive plants is currently low on the project sites, thinning and opening the forest could increase the risk of invasive plant species moving in.
- The proposed treatments may speed up the ecological processes leading to a diverse multi-layered floodplain forest; however, it is unclear if the treatments are necessary to achieve this outcome. The high-density planting method has been applied at locations across the Willamette Valley and this project could lead to future requests to retreat these sites. More information is needed to understand why intervention is needed to achieve meaningful ecological gains compared to monitoring the sites over a longer timeframe to see if the plant community achieves the desired habitat outcomes with time.

Concluding Analysis

High-density floodplain riparian forest plantings have been an innovative restoration approach used to mediate for plant mortality and for reducing the use of plant protection that typically is washed downstream, such as tree tubes. There are a couple of paths that could provide opportunities to learn more about next steps for this proof-of-concept approach. One is to give the sites more time to see if they naturally move towards a multi-story floodplain forest. There is potential for this path to result in missing an opportunity for developing an understory plant community due to the monoculture stands shading understory growth. The second potential path is to thin the sites as proposed. The proposed

project has potential for influencing how sites across the Willamette will be managed. If the application is resubmitted, the applicant is encouraged to incorporate a monitoring component so that restoration practitioners can better understand whether using thinning on sites with high survival is necessary for achieving desired conditions. Monitoring that includes the stocking density and a forest inventory with plant densities, height, and stems per acre by different species or plant types would be helpful to better understand the extent to which thinning treatment is needed. This information could contribute to better understanding site attributes that restoration practitioners might use to determine whether it is best to leave a site alone or if thinning is necessary to achieve multi-story floodplain forest habitat goals.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3027-22968
Project Type: Restoration
Project Name: Takilth Floodplain Reforestation
Applicant: Confederated Tribes of Grand Ronde
Region: Willamette Basin
County: Polk
OWEB Request: $217,728
Total Cost: $275,531

Application Description

Takilth is generally located at -123.425/45.030 in Polk County, Oregon. This property is approximately 106 acres and is bordered by both Mill Creek and Gooseneck Creek, which converge to confluence on the property. The property is permanently protected by a Bonneville Power Administration conservation easement. The existing riparian habitat is 39 acres and is known to host native fish and wildlife species, including Oregon Conservation Strategy species such as: winter steelhead, Pacific lamprey, brook lamprey, coastal cutthroat trout, Northern red-legged frog, and Western pond turtle. In order to improve floodplain connectivity and riparian habitat in the area, this project proposes to convert 20 acres of mature hazelnut orchard back to riparian floodplain forest. This grant request includes contracted services for orchard removal, plant materials, plant establishment and project maintenance for 3 years. Partners on this project include the US Fish and Wildlife Service (USFWS), Natural Resources Conservation Service (NRCS), Oregon Department of Fish and Wildlife (ODFW), Polk County Soil and Water Conservation District (SWCD), Greater Yamhill Watershed Council (GYWC), and Bonneville Environmental Foundation (BEF).

Review Team Evaluation

Strengths

- The scope of work in the proposed solution section of the application has clear objectives and activities for converting a 34-year-old hazelnut orchard to a floodplain forest.
- The planting approach is technically sound and is based on the applicant’s experience restoring floodplain forests in other locations in the Willamette.
- The project site is protected by a conservation easement that will ensure long-term protection and maintenance of investments in habitat restoration.
- A variety of Oregon Conservation Strategy species are present on the property and will benefit from habitat restoration actions, including: coastal cutthroat, lamprey, Northern red-legged frog, and Western pond turtle.
- The applicant has identified a qualified contractor with specialized equipment for removing the hazelnut orchard.
- The applicant has capacity and relevant experience to implement the project.
- Partner support from Oregon Department of Fish and Wildlife, Polk Soil and Water Conservation District, Yamhill Watershed Council, Bonneville Environmental Foundation, US Fish and Wildlife Service, and Natural Resource Conservation Service (NRCS) is demonstrated through letters included in the application.

- It is likely the applicant will continue to plan and implement future stream and floodplain restoration that will build a variety of habitats over the 104-acre site.

Concerns

- There will likely be limited direct habitat benefits for fish or water quality improvements from the proposed restoration because the project footprint is disconnected from the adjacent stream. Benefits will likely remain within the 20-acre project footprint.

Concluding Analysis

Converting the hazelnut orchard to a floodplain forest is likely to be the first step in restoring a mosaic of Willamette Valley habitats on the project site. Re-establishing forest habitat and restoring more natural floodplain function also contributes to resiliency against impacts from climate change. The proposed project is likely to succeed in establishing native floodplain forest habitat that will leverage habitat on other nearby conservation properties, including NRCS easements and Noble Oaks, which is also owned and managed for conservation by the Tribe.

Review Team Recommendation to Staff
Fund

Review Team Priority
5 of 7

Review Team Recommended Amount
$217,728

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$217,728

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3028-23009
Project Type: Restoration
Project Name: Oak Creek Preserve Restoration Phase 1
Applicant: Greenbelt Land Trust
Region: Willamette Basin
County: Benton
OWEB Request: $296,516
Total Cost: $379,503

Application Description Oak Creek Preserve (OCP; 144 acres, Benton County) is Greenbelt Land Trust's newest acquisition. In it's current state, the property is mostly farm ground, but it is brimming with incredible potential to connect the largest network of Conservation properties west of Corvallis. OCP is within the Oregon Conservation Strategy (OCS) Conservation Opportunity Area for Corvallis Area Forests and Balds (081). It is also within US Fish and Wildlife Service (USFWS) Corvallis West Recovery Zone for endangered plants. The property includes legacy oaks, grassland remnants and the potential to convert 137 acres of agricultural lands to the most beautiful restored native prairie we've ever done. Known Oregon Conservation Strategy Species in the area include Western Bluebird, White Breasted Nuthatch, Oregon Vesper Sparrow, wintering Western Meadowlark, Kincaid's Lupine, Nelson's checkermallow and Willamette daisy. Our goal is to provide habitat for all of these species. Greenbelt is about to finish a $7 million campaign focused on this iconic property and we are committed to the permanent protection and creation of resilient landscapes.
Native prairie and oak habitats are extremely rare, and this loss of habitat quality, quantity and connectivity has left many species in peril. Our goal is to reverse those impacts by doing the following:
• Permanently retire farming and create 133 acres of diverse wetlands and prairies to benefit rare plants, pollinators, amphibians and grassland birds.
• Restore 7.3 acres of legacy oak woodland and 3.5 acres of remnant upland prairie, controlling invasive shrubs, promoting oak longevity, and improving habitat for birds.
• Introduce Willamette Daisy, Nelson's checkermallow and other rare plants into restored prairies.
• Limit the occurrence and reduce the spread of target invasive species.
• Offer community/stakeholder events on the Property.
Partners include: OWEB, USFWS Partners & Recovery Programs, Grand Ronde Tribe, IAE and OSU.

Review Team Evaluation
Strengths

- The application has clearly defined restoration goals, objectives, and activities for restoring vernal

pools, diverse prairies, and legacy oak stands on Oak Prairie Reserve located west of Corvallis.

- The proposed methods for restoring wetland, prairie, and oak habitats are technically sound, utilizing a recipe of actions the applicant has effectively implemented in other locations. The planned actions include establishing the following threatened and endangered plants: Nelson's checkermallow, Bradshaw's lomatium, Willamette daisy, and golden paintbrush.
- The project is located within an Oregon Conservation Strategy conservation opportunity area and US Fish and Wildlife Service (USFWS) recovery zone for endangered plants. The proposed restoration will build habitat connectivity across thousands of acres of conservation lands.
- Several Oregon Conservation Strategy species will likely benefit from the proposed habitat restoration because they are known to be in the area, including: Western Bluebird, White Breasted Nuthatch, Oregon Vesper Sparrow, wintering Western Meadowlark, Kincaid's Lupine, Nelson's checkermallow, and Willamette daisy.
- The presence of native bird species indicates that the existing oak habitat area on the property is functioning well.
- The applicant has capacity to implement the project and relevant experience with similar projects.
- Project costs are reasonable.
- The proposed project is timely because invasive plant species have not yet established on the site that would require extensive treatment and site preparation. This will make restoration activities easier to implement and cost less.

Concerns

- The application lacks information describing how partners listed in the application abstract and referenced in an attachment will be involved in the project, including Confederated Tribes of Grand Ronde, Institute for Applied Ecology, and Oregon State University.
- Information describing plans for maintaining the open prairie, such as using prescribed fire, mowing, or herbicide application to control weeds, would be helpful for understanding long-term habitat stewardship strategies that will maintain restoration gains.

Concluding Analysis

Native grassland, wetlands, and oak woodlands that were once the dominant habitats historically found in the Willamette Valley will be restored across 144 acres of permanently protected land. Restoring ecosystem function will provide habitat benefits to native species, including species listed on the Endangered Species Act and species identified in the Oregon Conservation Strategy. The project addresses habitat fragmentation caused by various land uses by creating a corridor that connects 1,400 acres of conserved lands to the south with thousands of acres of oak, prairie, and forest habitat owned by Oregon State University to the north.

Review Team Recommendation to Staff

Fund

Review Team Priority

4 of 7

Review Team Recommended Amount
$296,516

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$296,516

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3029-23017

Project Type: Restoration

Project Name: Child Center Stormwater Improvements for Drinking Water Protection

Applicant: Long Tom WC

Region: Willamette Basin

County: Lane

OWEB Request: $306,412

Total Cost: $399,952

Application Description This project is in Lane County at The Child Center (TCC), at the intersection of Marcola Rd. and Hayden Bridge Rd. on the McKenzie River.

The proposed work will significantly improve the function of existing green stormwater infrastructures (GSI) that manage stormwater from 1.9 acres of parking lots and roofs of TCC before entering the McKenzie River approximately 195' upstream of Eugene Water & Electric Board's (EWEB's) drinking water intake, providing almost no time for pollutant loads to dilute. Separately, TCC is engaged with Pure Water Partners (PWP) to restore their eight acres of riparian edge which is inundated with highly invasive plants. These activities will result in better flood attenuation, pollution management, riparian habitat, and drinking water for 176,000 EWEB customers, and both public and private wells.

GSI facilities provide stacked benefits, including addressing drinking water quality, aquatic life habitat, and habitat for upland species. Improved stormwater management will reduce the urban complex of pollutants entering the McKenzie River including heavy metals, petrochemicals, temperature, sediment & emerging pollutants of concern such as 6PPD-quinone from tire dust that has been shown to kill Coho Salmon within hours of exposure. Drinking water for EWEB's entire service area will be directly improved through pollution reduction. These same pollutants negatively impact aquatic life, so impacts to those species will be addressed by the same actions. Improved flood attenuation will reduce flash flood impacts like scouring and sediment movement. As the GSI is currently filled with invasive weeds, removing and replacing them with a dense planting of natives will reduce invasive pressure while improving upland habitat for birds and pollinators.

Project partners include TCC, EWEB, SUB, City of Springfield, PWP, McKenzie Watershed Council (MWC), and Urban Waters & Wildlife Partnership (UWWP).

Review Team Evaluation

Strengths

- The application describes a clear need to address stormwater pollution that has toxic effects on native aquatic species, especially salmonids.

- The methods for improving existing green stormwater management infrastructure at the project site are technically sound. Plans to utilize native plants and incorporating biochar into the soil to increase the capture of pollutants are above and beyond the minimal requirements for stormwater management infrastructure. The use of native plants will also provide pocket habitat that will support native birds and pollinators.
- The proposed restoration will address actions identified in federal, state, and local watershed plans, including the recovery plan for upper Willamette Chinook and steelhead, by reducing toxins from urban sources that impact fish.
- The project is ready for implementation with completed designs and feasibility study and is time-sensitive due to match dollars that must be spent in 2024.
- The project was ranked as a high priority site utilizing the stormwater project prioritization matrix developed by the applicant through a previous OWEB Technical Assistance Grant investment.
- The project site is in immediate proximity of the Eugene Water and Electric Board's water intake for drinking water; stormwater runoff from the property drains into the stream upstream of this intake. The project location is a high priority for removing stormwater toxins to benefit both stream habitat and to protect a drinking water source.
- The applicant has capacity and relevant experience to implement the project and has built a stormwater program by partnering with cities, water providers, and landowners in the Upper Willamette area.
- The application budget includes a detailed explanation that describes context for project costs.
- A diversity of partners support the project, which is demonstrated by letters and match contributions.
- The landowner is engaged in the Eugene Water and Electric Board's Pure Water Partnership program, which has received previous OWEB grant investments, to explore options for addressing invasive species and restoring the riparian area along the property.

Concerns

- The application objectives are unclear in describing a scope of work because they are stated as watershed benefit outcomes instead of specific, measurable steps for achieving the project goal.
- The current stormwater management infrastructure is underperforming even though the parking area is only ten years old. Information or data that was used as evidence to determine this infrastructure is failing and the extent to which it is impacting water quality would be helpful for understanding the priority for investing in the project.
- Additional information explaining the project need and how OWEB investment will target voluntary improvements would be helpful for understanding the project context. For example, it is unclear who the responsible party is for renovating a failing stormwater management system and why actions to address it are not automatically triggered through city regulation.
- Long-term plans and funding for maintaining the stormwater management facilities are unclear from the application. While the applicant will provide an operation and maintenance plan designed to ensure long-term functionality, it is unclear who will be responsible for implementing it and how maintenance will be funded.
- The landowner support and role in the project is unclear because there is no letter of support and there are no roles identified for the landowner, other than a pending match. It is unclear if the landowner will play a role in long-term maintenance.
- The overall project cost is high for the potential watershed benefit.

Concluding Analysis

The proposed project provides an opportunity to reduce stormwater potentially impacting aquatic habitats and drinking water. The investment will build on a strategic, programmatic approach to reduce pollutants in stormwater through voluntary measures and will offer an example to the community of a sustainable climate friendly landscape. A clear maintenance plan and resources to implement the plan will be important for maintaining the restoration investment.

Review Team Recommendation to Staff
Fund

Review Team Priority
7 of 7

Review Team Recommended Amount
$306,412

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3030-23026
Project Type: Restoration
Project Name: Palensky Highway 30 - Wildlife Underpass
Applicant: CREST
Region: Willamette Basin
County: Multnomah
OWEB Request: $496,787
Total Cost: $2,932,607

Application Description Spanning between Portland and Scappoose in Multnomah County, OR, U.S. Highway (Hwy) 30 poses a significant barrier to wildlife movement between the floodplain wetlands along Multnomah Channel and the upland forests of the Tualatin Mountains. Amphibian species including 1) the northern red-legged frog (Rana aurora), a Federal Species of Concern, State Sensitive Species, and top-ranked ODFW priority among Oregon Conservation Strategy Species for the Willamette Valley and 2) Pacific treefrog (Pseudacris regilla) each migrate twice/yearly between the forests and floodplain wetlands. The 4-lane Hwy severely impacts this migratory pattern, with high mortality rates as amphibians are struck by vehicles as they traverse back and forth across the Hwy.

This project is a collaboration between CREST, the Oregon Department of Transportation (ODOT), and the Oregon Department of Fish and Wildlife. The designs call for a wildlife underpass that will convey migratory amphibians, while meeting the safety and design standards of ODOT. The result is a 130-foot long underground tunnel with a natural bottom substrate, natural light openings, and 600 linear feet of directional wall to guide amphibians and small mammals to the new crossing.

Two other partner projects along Hwy 30 are currently in feasibility and initial designs. The Harborton Wetland Amphibian Underpass (led by Oregon Wildlife Foundation and USFWS), and Crabapple Creek (led by Metro and LCEP). Each are examining the feasibility of installing additional wildlife underpasses beneath Hwy 30. If all projects are constructed there will be three (3) new wildlife crossings along 5.5 miles of Hwy 30 – greatly enhancing wildlife connectivity throughout this region. Since the Palensky – Highway 30 wildlife corridor is fully designed, permitted, and ready for construction there is an opportunity to learn a lot about design, construction and monitoring which can be put to use for the two subsequent wildlife corridor projects.

Review Team Evaluation

Strengths

- The application has clearly defined goals, objectives, and activities to establish safe wildlife passage for amphibians and small mammals under Highway 30. The proposed wildlife underpass will connect floodplain habitat in the Palensky Wildlife Area with the Tualatin Mountain forests.

- Installing the wildlife underpass will address actions identified in the Oregon Conservation Strategy for northern red-legged frogs, which is a Federal Species of Concern, State of Oregon Sensitive Species, and a top-ranked Oregon Department of Fish and Wildlife (ODFW) priority among Oregon Conservation Strategy Species for the Willamette Valley. The new wildlife underpass will also benefit other native species that need to move between habitats.
- The project location was selected based on ODFW data that indicates the project site is a mortality hotspot for northern red-legged frogs.
- The project is ready for implementation with designs at 100% completion, permits are secured, two-thirds of the funding is secured, and Oregon Department of Transportation (ODOT) has approved the designs along with project staging plans.
- Alternative design and project location options were evaluated before selecting the proposed strategy.
- The proposed project will leverage two related northern red-legged frogs migration passage projects on Highway 30, including one with an OWEB Technical Assistance Grant investment. The project is also associated with extensive salmon habitat restoration occurring on the adjacent Palensky Wildlife Area, which is 470 acres of floodplain wetlands, sloughs, ponds, and riparian forests directly along the Multnomah Channel.
- The applicant is engaging adjacent landowners to address potential impacts to adjacent properties that could occur during and after project implementation.
- The applicant is engaging appropriate partners and partner support is documented in letters included in the application.
- The applicant has capacity to implement the project and relevant experience with similar projects.
- The project cost reflects the migration and habitat benefits that will be gained for a priority conservation species.

Concerns

- Installing a wildlife underpass for amphibians is a proof-of-concept project that has not been done before. There is some uncertainty that the desired outcomes can be achieved. The well-documented frog mortalities, however, indicates the site is a significant migration corridor and is a reasonable located to pilot a wildlife underpass for amphibians.

Concluding Analysis

Highway 30 has disconnected an important northern red legged frog migratory corridor, causing elevated levels of mortality as frogs migrate back and forth across the four-lane highway between the Tualatin Mountains and the floodplain wetlands of the Multnomah Channel. Creating a wildlife underpass underneath Highway 30 is likely to provide unimpeded safe passage between large parcels of protected habitat, including the 470-acre Palensky Wildlife Area and the 354-acre upland forest protected and managed by Metro. Establishing a wildlife underpass will provide landscape scale habitat connectivity across the forests and wetlands of the Northern Willamette Valley along the Columbia River Bottomlands.

Review Team Recommendation to Staff

Fund

Review Team Priority
1 of 7

Review Team Recommended Amount
$496,787

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$496,787

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3031-23031

Project Type: Restoration

Project Name: Upper Sandy River Basin Habitat Restoration Project - Zigzag River

Applicant: The Freshwater Trust

Region: Willamette Basin

County: Clackamas

OWEB Request: $439,900

Total Cost: $1,015,620

Application Description The Freshwater Trust (TFT) and US Forest Service (USFS) are taking the lead on the Upper Sandy River Basin Habitat Restoration Project-Zigzag River on behalf of the Sandy River Basin Partners (the Partners). The Sandy River originates on Mt. Hood and flows 56 miles northwest before entering the Columbia River near Portland, Oregon. The proposed project will address primary limiting factors by increasing off channel habitat/floodplain connectivity and large wood abundance on the Zigzag River (a tributary of the Sandy located within the upper Sandy sub-watershed). Proposed work is on public land managed by the USFS located near Zigzag, Oregon in Clackamas County.

Sandy River salmon and steelhead populations have declined over the last century due to degradation of habitat and other factors. The Partners have identified the upper Sandy sub-watershed among the top areas providing high quality habitat for the basin's native fish. The Partners are aligned on a near term goal of restoring this priority watershed to advance Sandy basin-scale restoration.

Restoration actions to be undertaken as part of the proposed project include: reactivation of flow to historic side channels and floodplain habitat; construction of large wood habitat structures; and placement of additional large wood in side channels and on stream margins. This project is part of a larger, multi-year, watershed-scale restoration effort and builds on similar successful projects completed in the basin by TFT and the Partners since 2008.

Review Team Evaluation

Strengths

- The proposed work is part of a large-scale restoration strategy that builds on momentum from and leverages investments in previously successful restoration that includes reactivating flow to historic side-channels and floodplain habitat, constructing instream large wood habitat structures, and placing additional large wood in side-channels and on stream margins.
- The applicant will use clearly defined restoration methods that have been applied in the Upper Sandy Basin for over a decade. The project builds on past practices by incorporating lessons learned from previous restoration. The proposed restoration techniques have been used in previous project phases to increase fish habitat abundance. Resulting fish counts indicate the approach is effective.

- The proposed restoration actions will address watershed limiting factors to Endangered Species Act (ESA)-listed fish recovery by restoring large wood abundance in Zigzag River and increasing off-channel habitat for Chinook, coho, and steelhead spawning and juvenile rearing.
- The map included in the application depicting planned and completed restoration provides a comprehensive overview of the long-term Upper Sandy Basin restoration strategy implementation.
- The applicant team provides tours that raise awareness about the impacts of stream restoration in restoring healthy native fish populations.
- The project team has a consistent track record for implementing similar high-quality projects. The team has relevant experience for designing the restoration treatments.

Concerns

- Including information describing how restoration practices are monitored and plans for identifying when long-term maintenance may be needed and how it is implemented would be helpful for understanding how long-term habitat gains are maintained.
- The application has limited documentation of project support with only one letter of support from partners even though the Sandy Basin Partnership has had a long relationship in collaborating and supporting projects. Documentation of additional partner support would strengthen the application.

Concluding Analysis

The proposed project builds on a phased stream restoration strategy that has been implemented since 2008 and has a record of producing quantified fish response to habitat improvements. The Sandy River watershed provides habitat to numerous ESA-listed fish species, making it a priority area for instream habitat restoration. The project has a high ecological benefit-cost ratio and certainty of success, which is guided by a multi-year strategic action plan and documented by monitoring data from previous phases of restoration.

Review Team Recommendation to Staff

Fund

Review Team Priority

3 of 7

Review Team Recommended Amount

$439,900

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation
Fund

Staff Recommended Amount
$439,900

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3032-22978

Project Type: Technical Assistance

Project Name: Salem Floodplain Species Assessment and Natural Floodplain Functions Plan

Applicant: Friends of West Salem Watersheds

Region: Willamette Basin

County: Marion

OWEB Request: $28,850

Total Cost: $39,850

Application Description The project includes the floodplains of the Willamette River, Mill Creek, Pringle Creek, Glenn Creek and all and flood prone areas within the urban growth boundary of the City of Salem.

The Salem reach of the Willamette River lies within Conservation Opportunity Area 60, Middle Willamette, as identified by the Oregon Conservation Strategy. This reach has incurred losses of 12% primary channel area, 16% side channels, 33% alcoves, and 9% islands according to the Biological Opinion of 2016. The BiOp further describes the conditions of the reach as: ” the formerly hardwood-dominated riparian forests along with mixed forest made up less than half of the riparian vegetation by 1990, while agriculture dominated. This conversion has reduced river shading and the potential for recruitment of wood to the river, reducing channel complexity and the quality of rearing, migration and spawning habitats”.

The project will develop a Floodplain Species Assessment and public information materials that will be used to inform the staff and public about floodplain dependent species and their conservation and reduce flood insurance rates in Salem. The project will also develop a draft Natural Floodplain Functions Plan that can be adopted by the City Council for additional CRS credits further lowering flood insurance rates.

As the capitol city and the second largest city in the state, Salem can provide a model approach to providing advance protection to floodplain species. This pilot can show other communities a way to address the apparent conflicts between the Endangered Species Act and the National Flood Insurance Program.

Current management of floodplain development in Salem does not consider ecological impacts of proposed development, only engineering standards. This project will provide the City of Salem with tools to identify measures to protect floodplain functions that are critical to riparian and aquatic species. The City of Salem is a critical partner.

Review Team Evaluation

Strengths

- Previous application evaluation concerns are addressed.
- A collaborative approach will be used to create a Floodplain Species Assessment and a Natural Floodplain Functions Plan to protect floodplain areas used by threatened and endangered species. The applicant is using FEMA guidance for the National Flood Insurance Program to proactively create a potentially replicable approach for meeting the program requirements while demonstrating that better information about ecological considerations can be incorporated into floodplain development programs at the local level.
- The expected product will compile information about each listed species, their habitat needs, and the management considerations necessary to protect them into the form of an assessment. This assessment could be used by the City of Salem as a planning resource to ensure ecological conditions of floodplains are considered when making floodplain development decisions. The assessment could also help inform land purchases for preservation in an urban area that could be otherwise purchased for development.
- A clear need for the proposed technical assistance is described in the application. Currently the City of Salem lacks staff capacity to address the ecological side of floodplain management. As a result, only engineering and flooding concerns are considered with development and not habitat concerns. This has led to stream health degradation typically seen in urban areas, including loss of habitat and side-channel complexity. Developing the proposed species assessment, is the first step for the City to have the information needed to integrate ecological concerns into the planning process.
- The applicant will coordinate with a diversity of agencies and non-profits, including Oregon Department of Fish and Wildlife (ODFW), Oregon Department of Agriculture (ODA), US Fish and Wildlife Service (USFWS), National Marine Fisheries Service (NMFS), Oregon Natural Heritage Program, and City of Salem to collect habitat data and form a plan that could lead to long-term protection of floodplain functions that will benefit endangered species.
- The example plan for the City of Monroe included in the application provides helpful context for understanding the expected product that will result from the proposed technical assistance.
- Information collected through the project will be made publicly available. The plan will be presented to the public and to the city council for approval.
- Partner support for the project is demonstrated by letters from Salem Audubon Society and West Salem Neighborhood Association. City of Salem support is demonstrated by staff involvement in the grant application and Letters of Support from the Public Works Director and Mayor, which was approved by the city council.
- Qualified technical experts with relevant experience will implement the project.
- Project costs are reasonable for the proposed technical assistance.

Concerns

- There is potential for the City to not actively use the plan to protect habitat; however, the city council unanimous decision to provide a letter indicates genuine intention. The plan is the first step for integrating habitat into planning decisions.

Concluding Analysis

Protecting floodplain habitat for threatened and endangered species is important for species recovery, and floodplain development is a major threat to their survival. The proposed Floodplain Species Assessment and Natural Floodplain Functions Plan has potential for serving as a model for providing

information needed for future floodplain development decisions to incorporate and protect ecological functions. The City of Salem is experiencing strong pressure for development and the City is using 20-year-old floodplain maps to make planning decisions. Current information describing floodplains and the species using them is needed to make planning decisions that incorporate habitat protection. The technical assistance product can help the City utilize preservation as a tool for creating ecological uplift.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 5

Review Team Recommended Amount
$28,850

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$28,850

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3033-22994

Project Type: Technical Assistance

Project Name: Tualatin River National Wildlife Refuge-Onion Flats Project

Applicant: Ducks Unlimited Inc

Region: Willamette Basin

County: Washington

OWEB Request: $39,771

Total Cost: $58,707

Application Description The 209-acre Onion Flats tract is part of a large marsh that once existed on the landscape within the Rock Creek drainage in the Tualatin River watershed. The Tualatin River National Wildlife Refuge located near Sherwood, Oregon, owns most of the historic Onion Flats wetland basin. 82 acres are privately owned working lands that support agriculture. The tract does support rearing habitat for Coho and brook lamprey, cutthroat trout, ESA Steelhead, waterfowl, and other wildlife, but use is inconsistent due to the variability in flooding that occurs on the site. Without functional water management infrastructure, the tract is subject to the flood stages of the Tualatin River: as river levels rise following wet season precipitation events, the basin floods; and as river levels drop, water recedes quickly. This drop in water levels results in a loss of floodplain wetland habitat and function.

Private landowners desire to continue the maintenance of working lands, thus limiting the implementation of a process-based restoration strategy that fully addresses stream and wetland function for the foreseeable future. Overarching goals are to develop a project concept that 1) restores wet season flooding patterns that occurred historically to provide more consistent habitat for migratory birds; 2) ensures passage for native aquatic species and explores options for improving stream function; and 3) maintains agriculture on private lands. This approach likely entails removal of a barrier and replacement with a step-pool system that will allow for aquatic species passage in Rock Creek, while retaining water on the floodplain after flood waters recede. Water can then be managed to inundate the tract between October and March for waterfowl and providing passage for aquatic species. The tract would be dewatered in April to support agricultural and refuge management operations.

Project partners will include US Fish Wildlife Service, Ducks Unlimited, ODFW and Pvt landowners.

Review Team Evaluation

Strengths

- The application has clear objectives and activities for designing water management infrastructure,

such as a step-pool system, to restore and maintain wetland habitat functions during critical periods for fish and migratory birds.

- Currently a structure in Rock Creek, a tributary of the Tualatin River, is prohibiting fish passage during non-flood conditions and prevents flood management. The resulting design will restore wet season flooding patterns that will provide natural habitat for migratory birds and improve stream function by providing passage for aquatic species.
- Multiple species will benefit from the expected future restoration project, including lamprey, coho, steelhead, waterfowl, and other wildlife.
- Partner support for the project is demonstrated by letters from US Fish and Wildlife Service (USFWS) and Oregon Department of Fish and Wildlife.
- The applicant has the capacity, relevant experience, and knowledge for implementing the project.

Concerns

- Onion Flats has mixed land ownership that includes USFWS properties and private agricultural lands. The USFWS is in the process of acquiring additional lands in the project area. There may be merit to waiting until the acquisition is complete and there are clear ownership boundaries before designing restoration. This would better facilitate capturing restoration opportunities on the new USFWS property into the project.
- It is unclear how the resulting design will address potential sediment issues. With standing water, sediment could build up, then recede back into the stream, and degrade water quality.
- It is unclear what considerations will be made to ensure the design will not lead to fish entrapment, which is a common concern related to projects designed to restore flooding and wetlands for bird habitat.
- Letters from the private landowners demonstrating support for the project concept would strengthen the application.

Concluding Analysis

A project concept and early design work will be developed that balances habitat with agricultural working lands. The resulting restoration is expected to restore historic wet season flooding patterns to provide more consistent habitat for migratory birds, improve stream function, and ensure passage for native aquatic species in Rock Creek while maintaining agriculture on private working lands.

Review Team Recommendation to Staff

Fund

Review Team Priority

5 of 5

Review Team Recommended Amount

$39,771

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3034-23019

Project Type: Technical Assistance

Project Name: Davis Creek Fish Passage Improvements Phase 1

Applicant: Pudding River WC

Region: Willamette Basin

County: Marion

OWEB Request: $62,698

Total Cost: $90,664

Application Description The Davis Creek Fish Passage Improvement Project - Phase 1 (DFP1) is located in the Molalla-Pudding Subbasin of the Willamette Basin. The project site is in Marion County on Davis Creek, which is within the Lower Abiqua Creek 6th level HUC, near the City of Silverton. DFP1 addresses the restoration of freshwater aquatic habitat connectivity for salmonids including the federally-listed Upper Willamette River Winter Steelhead. Davis Creek is a West Cascades foothills headwater tributary to the temperature-impaired mainstem of Abiqua Creek within Willamette Valley. This technical design proposal will prepare the path for the construction of fish-friendly, modernized infrastructure under two private roads. The culverts are instream artificial obstructions limiting access to approximately 4.5 miles of spawning and rearing habitat. Funding for the DFP1 technical design will result in 60% designs, permits submitted to regulatory entities, and begin partnership development for Phase 2 which includes Marion County. Partnership for DFP1 includes the Oregon Department of Fish and Wildlife which will provide technical assistance, the Department of the Interior/Fish and Wildlife Service which will provide match funding through the National Fish Passage Program Funding, and the private landowners who will voluntarily allow the project to move forward. The Pudding River Watershed Council will coordinate the project and work closely with Waterways Consulting to move forward with the permitting process.

Review Team Evaluation

Strengths

- Davis Creek is a tributary of Abiqua Creek, which provides the highest quality fish habitat in the Pudding River watershed. Abiqua Creek is also temperature limited in the summer. Davis Creek could potentially provide temperature refugia for fish rearing because its north-south orientation provides afternoon shade. Addressing fish passage at road crossings on Davis Creek will open fish access to this rearing habitat in the summer.
- Landowner project support is demonstrated by letters included in the application.

Concerns

- The proposed technical assistance will result in designs to replace two culverts on private driveways. There are two county culverts located upstream of these driveways that are also fish passage barriers. The application indicates the future restoration project will open 4.5 stream miles. Passage to this 4.5 stream miles requires the county to address passage in a future phase two project;

however, there is no indication the applicant has communicated with the county or evidence the county will address these crossings. The proposed technical assistance will instead lead to opening approximately a tenth of a mile of stream habitat.

- It is unclear whether a range of alternatives will be considered, such as working with the landowners to reduce the number of crossings.
- The cost of the future restoration will be significant due to the stream channel width. Future crossings will require a large diameter culvert for one site and a 55-foot-long bridge for the second site. The cost will outweigh the benefit for the amount of stream length that will be made available in Davis Creek. While the Abiqua Creek basin has the highest density of steelhead in the Pudding River watershed, this watershed is not as high of a priority for Endangered Species Act (ESA)-listed fish compared to other Willamette tributaries, such as the Clackamas and Mackenzie Rivers.
- Including stream temperature data and other habitat data from the Rapid Bio Assessment in the application would be helpful to better understand stream conditions and the potential value for opening access to the stream habitat as temperature refugia.
- It is unclear whether the applicant has capacity to administer the project in addition to the existing projects in progress.

Concluding Analysis

The cost of the proposed technical assistance and resulting restoration is likely to be high for the limited habitat gains at a location that is not as high of a priority for ESA-listed fish compared to other Willamette tributaries. Investment in replacing the crossings on the private driveways would be more cost-effective if the upstream county culverts were included in the project so that connectivity of 4.5 miles of stream habitat is restored.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

N/A

Review Team Recommended Amount

$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3035-23061

Project Type: Technical Assistance

Project Name: It's Miller Time! Uncorking Habitat Potential in the Miller Creek & West Fork Luckiamute Sub-basins

Applicant: Luckiamute WC

Region: Willamette Basin

County: Polk

OWEB Request: $74,962

Total Cost: $93,847

Application Description The project is centered on Miller Creek and the West Fork Luckiamute River (WFLR) within the Upper Luckiamute 6th field hydrologic unit. Located in the northwest corner of the Luckiamute basin in Polk County, the project encompasses approximately 5.2 miles of Miller/WFLR from the confluence with the Luckiamute River. Historical practices such as splash dams, log drives, logging to the water's edge, and log removal impacted upper Luckiamute sub-basins, including Miller/WFLR. In addition to legacies of past practices, the site includes a remnant berm from the Valley & Siletz Railroad, bisecting the Miller/WFLR confluence. The project seeks to address lack of instream complexity and degraded riparian conditions by 1) conducting an alternatives analysis and selecting a preferred alternative for potential removal or modification of a portion of the berm and 2) surveying Miller/WFLR and developing a suite of restoration actions. Resulting projects will be designed to maximize habitat and water quality benefits for winter steelhead, Pacific lamprey, coho salmon, cutthroat trout, and, where appropriate, beaver.

Rapid bio-assessment snorkel surveys and temperature monitoring data indicate Miller/WFLR provide valuable habitat to steelhead, P. lamprey, and other salmonids and that there are also opportunities for enhancements. The Luckiamute Watershed Council (LWC) used NetMap, a fine-scale watershed-based modeling tool, in combination with field verification to prioritize restoration reaches for steelhead recovery. The proposed project area is the next priority site from that process. Partners include Starker Forests, Inc. (landowner), Manulife Investment Management (land manager), Bureau of Land Management, and Oregon Department of Fish and Wildlife. This area has long been identified as a priority but was paused due to other project commitments and site complexities. Now, the LWC, Starker Forests, and Manulife are aligned to move this project forward. It's Miller Time!

Review Team Evaluation

Strengths

- The application clearly links current site conditions to the causes of watershed disturbance that created them, which are primarily due to past logging practices such as riparian harvest, log removal, and flash dams. The resulting technical assistance is likely to succeed in developing restoration actions that address causes of watershed disturbance instead of symptoms.

- The proposed design work is technically sound by utilizing professionally accepted approaches and incorporating lessons learned from previous large wood placement projects.
- The restoration actions that will be designed will address habitat limiting factors identified in a number of watershed plans by addressing the lack of instream complexity and degraded riparian conditions.
- A map of all the applicant's restoration projects in the area is included in the application and provides context for understanding the potential cumulative impact of the applicant's watershed strategy.
- Stream temperature data is included in the application that confirms the project area has potential to provide cold water refugia for aquatic species, which is a priority for restoration.
- Alternatives will be identified and analyzed as part of the technical assistance project.
- Future restoration expected from the technical assistance will have significant benefit for the cost by maximizing water quality and providing habitat benefit for lamprey, steelhead, coho, cutthroat, and beaver.
- The applicant has the capacity, relevant experience, and knowledge for implementing the project.
- Partner support is demonstrated by letters from the landowners, Bureau of Land Management, and Oregon Department of Fish and Wildlife. The landowner's commitment to the project is demonstrated by their approaching the watershed council to pursue the project.
- Costs are reasonable for the expected products.

Concerns

- The railroad that bisects the project area may have historic cultural value, which may limit restoration options.

Concluding Analysis

Developing restoration actions to address habitat limiting factors caused by splash damming and other historical land use practices associated with logging will improve channel-floodplain interaction, stream habitat, and water quality that will benefit winter steelhead, Pacific lamprey, coho salmon, cutthroat trout, and beaver.

Review Team Recommendation to Staff

Fund

Review Team Priority

3 of 5

Review Team Recommended Amount

$74,962

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$74,962

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3036-23062
Project Type: Technical Assistance
Project Name: Action Plan 2025-2035 Technical Assistance
Applicant: Johnson Creek WC
Region: Willamette Basin
County: Multnomah
OWEB Request: $25,574
Total Cost: $52,453

Application Description Johnson Creek Watershed Council proposes to update its existing 10-year Action Plan, which sunsets in 2025. The watershed covers 54 square miles, of which 67% is in Multnomah County and 33% in in Clackamas County and includes parts of the cities of Milwaukie, Portland, Gresham, and Happy Valley.

With the existing Action Plan (2015-2025), the Council and its agency partners confirmed limiting factors to watershed health, analyzed water quality data, assessed fish passage barriers, and prioritized riparian taxlots for shade enhancement using ORDEQ's Heat Source model.

Since that time, new watershed challenges and data have come to our attention that need to be incorporated into future restoration strategies. Climate change is the most significant driver in needing to update our Action Plan. We have eight years of new data that needs to be incorporated into articulating a new restoration strategy and Action Plan. In particular we wish to incorporate:
a) the impact of inline ponds on increasing stream temperature
b) eight new years of water temperature data
c) other water quality data and threats
d) recent instream habitat survey data
e) a new stormwater pipeshed analysis, which will assist us identifying focus areas for stormwater BMP projects to improve water quality and reduce hydromodification.

The Council and its partners for years have met monthly as a watershed restoration and monitoring technical work group, the Johnson Creek Interjurisdictional Committee. This committee will work together to update the Action Plan, with a Council Project Manager coordinating the effort and writing the plan. Partners include:

US Geological Survey, City of Portland, City of Gresham, Multnomah County, Clackamas County Water Environment Services, Oregon Dept of Environmental Quality, Oregon Dept. of Fish & Wildlife, Metro, City of Milwaukie.

Review Team Evaluation

Strengths

- The Johnson Creek Watershed Action Plan will be updated to integrate current water quality and habitat information and reassess watershed priorities and restoration opportunities.
- Eight years of stream temperature data will be utilized to classify stream reaches by temperature regime and inform action plan strategies for prioritizing restoration.
- The applicant has identified inline ponds as a significant contributor to increased stream temperature. Some ponds have been addressed through completed restoration. The new action plan will update information to better document the location, size, and other characteristics of the remaining inline ponds to prioritize them for restoration.
- The Johnson Creek fish passage barrier assessment will be updated and barriers will be re-prioritized to adjust the assessment after ten previously prioritized barriers have been addressed. The updated fish passage barrier assessment will also incorporate climate change considerations.
- BIPOC-led community partner organizations will be convened with agency partners to better understand heat islands in areas with low tree density and identify opportunities to address these heat islands by for example, removing pavement and replacing it with rain gardens.
- Public outreach is a significant focus for the applicant and this organization has experience in packaging information with marketing in mind for community and landowner engagement.
- The current action plan is included with the application and the quality of this plan indicates a technically sound product will likely result from the current project.
- The applicant has capacity and relevant experience to implement the project.
- Technical experts will be engaged in updating the Johnson Creek Watershed Action Plan through monthly interjurisdictional meetings.
- A diversity of partners support the project and their involvement is demonstrated by match and support letters, including East Multnomah Soil and Water Conservation District, Cities of Gresham and Portland, Multnomah and Clackamas Counties, US Geological Survey, and Oregon Department of Environment Quality.
- Costs are reasonable for the work proposed.

Concerns

- The action plan approach focuses primarily on stream related watershed concerns. Designing the action plan update to include more upland perspectives to capture the whole watershed up to the ridgetop would strengthen the product by providing a holistic watershed action plan.
- It is unclear from the budget how engagement with underserved communities will be funded. For example, there may be a need to incorporate costs for multi-lingual support and stipends to compensate for participants' time by breaking down financial barriers to participation. These strategies can increase the likelihood for success in engaging these underserved communities.

Concluding Analysis

As the applicant's current action plan sunsets in 2025, it is timely to update the plan with new information, reassess watershed issues, and reprioritize restoration actions. The applicant has a history of pursuing strategic restoration based on their action plan, which indicates the product is likely to lead to future

restoration. The new action plan will include priorities that will lead to ecological and social benefits by incorporating strategies that address community health concerns affecting underserved communities.

Review Team Recommendation to Staff
Fund

Review Team Priority
4 of 5

Review Team Recommended Amount
$25,574

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$25,574

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3037-23064

Project Type: Technical Assistance

Project Name: Finalizing Floodplain Restoration Designs & Permitting for Elijah Bristow State Park - Phase 2

Applicant: Middle Fork Willamette WC

Region: Willamette Basin

County: Lane

OWEB Request: $75,000

Total Cost: $168,960

Application Description The 437-acre project area within Elijah Bristow State Park (EBSP) is at the confluence of the Middle Fork Willamette River with Lost Creek, below Dexter Dam, and between the Lane County towns of Jasper and Lowell. Historically this area was a dynamic floodplain with multiple, braided channels and sloughs, ephemeral gravel bars and islands, and extensive cottonwood gallery forests. Located below three large dams that have modified flows and altered the natural sediment regime, the dynamism of this floodplain has been lost. Gravel mining and building berms contributed to a more static environment. After the completion of a feasibility analysis, modeling and alternative analysis, and the creation of initial conceptual designs, the MFWWC conducted a Stakeholder Engagement process to foster tribal and community input and involvement in floodplain restoration. The engagement process included public events, tours, extensive landowner outreach, communication with federally recognized Tribes, and culminated in the creation of the Community Advisory Committee to represent diverse community interests. The MFWWC and the Technical Team of collaborating partners from Oregon Parks and Recreation Department (OPRD), Oregon Department of Fish and Wildlife (ODFW), Confederated Tribes of Grand Ronde (CTGR), US Forest Service (USFS), and US Army Corps of Engineers (USACE) seek funding to contract Wolf Water Resources to finalize engineered designs and complete project permitting. The MFWWC is submitting adjacent TA proposals to the Open Solicitation and the Willamette Anchor Habitat Investment Fund.

The Open Solicitation proposal will support development of Upper Zone designs to 60% completion and coordination to submit a Section 408 Alteration Determination Application to USACE. The Anchor Habitat Investment Fund proposal seeks support to complete Lower Zone designs to 60% completion, finalize the Upper Zone Designs, and bring designs for both zones to a permit ready status.

Review Team Evaluation

Strengths

- The application provides a clear explanation describing the need to finalize Stage 8 process-based floodplain restoration designs and initiate permitting processes.

- There is limited off-channel habitat on the Middle Fork Willamette River below Dexter dam and the future restoration project is likely to provide habitat benefits for multiple native species, including western pond turtle habitat, spring Chinook, lamprey, and Oregon chub.
- The Stage 8 restoration approach is reasonable for addressing limiting factors affecting stream habitat that resulted from loss of floodplain function in the Middle Fork Willamette River. While the Stage 8 concept is relatively new, it is becoming more widely accepted for restoring watershed process and function.
- Appropriate data and analysis will be used to inform the design.
- The proposed project builds on previous technical assistance and stakeholder engagement OWEB investments on a large-scale, complex river restoration project that will require a long-term approach to both design and implementation. The applicant has been strategic in parsing out project design and engagement efforts that aligns with the applicant's capacity and constraints from limited resources.
- The future restoration project will be highly visible because it is located on an 850-acre state park that is popular for recreation use.
- Appropriate partners are engaged in the project. Oregon Parks and Recreation Department (OPRD) support is demonstrated by a letter and in-kind match to participate in the project. The applicant along with OPRD has made impressive progress in securing support from recreation user groups utilizing Elijah Bristow State Park, including agreement on moving trails.
- The applicant has a technical team of qualified experts to help guide the project.
- A qualified contractor is implementing the design work.
- Project costs are appropriate for the proposed technical assistance.

Concerns

- The future restoration project will require moving a US Geological Survey (USGS) gauging station, which will impact long-term gauging data and options for future gauging techniques. Implementing the restoration may depend on the feasibility of moving this station. The applicant has initiated conversations with USGS to determine options for moving forward.
- The park infrastructure could limit restoration opportunities. The applicant's community engagement, however, has increased support for restoration and park users are participating in conversations to identify where there can be flexibility in where trails are located.
- Implementing a Stage 8 restoration approach below a flood control dam may have uncertain results due to the influence of the dam on stream flows and the supply of large wood; however, there is still significant potential for restoring floodplain conditions.

Concluding Analysis

Utilizing a process-based restoration approach at Elijah Bristow State Park will restore a portion of the Middle Fork Willamette River back to a dynamic, braided multi-channel meandering river through a cottonwood gallery floodplain forest. This will provide habitat benefits for key indicator species such as Oregon chub, western pond turtle, spring Chinook salmon, and beaver. The site provides opportunity to be highly visible to the public and serve as an example of process-based floodplain restoration strategies for areas between headwaters and downstream zones.

Review Team Recommendation to Staff

Fund

Review Team Priority
2 of 5

Review Team Recommended Amount
$75,000

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$75,000

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3038-23069

Project Type: Monitoring

Project Name: Middle McKenzie Stage 0/8 Restoration Effectiveness Monitoring

Applicant: McKenzie Watershed Alliance

Region: Willamette Basin

County: Lane

OWEB Request: $362,696

Total Cost: $799,679

Application Description Process-based restoration to a Stage 0 or 8 condition is a relatively new approach to river restoration that is gaining interest in the scientific community. In theory, restoring river valleys to a Stage 0/8 condition (and processes that will sustain it) will have the greatest ecological uplift and resilience to disturbance and climate change, but project effectiveness has been largely untested. Short-term project effectiveness outcomes are encouraging, but there is still much to learn.

Partners within the McKenzie River watershed, including McKenzie Watershed Alliance (MWA), Eugene Water & Electric Board (EWEB), McKenzie River Trust (MRT), US Forest Service (USFS), Bureau of Land Management (BLM), and ODFW – all with direct involvement in this Effectiveness Monitoring (EM) Project – have a common vision to restore about 2,000 acres of the Middle McKenzie Valley and important tributaries to a Stage 0/8 condition (Attachment 1; 370 acres completed so far). Linked to this EM Project, partners have designed and developed the next round of valley-scale restoration projects on Finn Rock Reach (FRR) of the McKenzie River (150 acres, River Mile 55-56) and Quartz Creek (166 acres, River Mile 0-1.8), a major tributary to the McKenzie immediately downstream of FRR (Attachment 2). These projects are just down river from the town of Blue River in Lane County.

The goal of EM for these two restoration projects is to assess whether process-based restoration will indeed restore and enable fluvial and biological processes to reshape and sustain a Stage 0/8 condition over time and to help develop standards of practice for designing, constructing, and monitoring future Stage 0/8 projects. EM components include quantifying the hydrogeomorphic, ground water, habitat, macroinvertebrate, and Chinook spawning responses to restoration and using the results to inform future standards of practice, which are sorely needed in the growing field of process-based restoration.

Monitoring Team Evaluation

Monitoring Team Strengths

- This monitoring project builds off existing and completed Stage 0 restoration effectiveness monitoring efforts in surrounding locations with many of the same partners that have developed these monitoring approaches.

- This monitoring project will benefit from existing LiDAR data that is available for both project sites that was collected in 2022 and will be collected in 2024 and 2026 for post project comparisons.
- The project will utilize monitoring methods that are informed from past monitoring of Stage 0 restoration projects and are cited in scientific literature or existing agency's established methods.
- The application included an uploaded table that described the monitoring questions, and the restoration processes they are assessing.
- The monitoring study design was described for each monitoring objective and is appropriate for each monitoring question(s) posed.
- The data that will be collected will be maintained by the monitoring leads in databases that are consistently updated and backed-up. The leads will ensure the data management includes accurate metadata and records of all data collection activities.
- Individual reports will be written by the monitoring lead that is responsible for each data set and then combined into one comprehensive report in 2028.
- This project will share results and make the information available in a variety of ways, including posting reports on the internet, delivering presentations at conferences and the applicant is willing to work with OWEB to develop workshops or webinars.
- The project partners are highly qualified and have several years of experience collecting ground and remotely sensed data to monitor the effects of stage 0 restoration projects.
- The partners involved with this project have a good track record of sharing results of the restoration and monitoring efforts and their information is integrated into training restoration practitioners on how to implement this innovative restoration approach.
- The applicant and partners have worked extensively to engage the local community over time and is committed to engaging them into the future as these large-scale floodplain restoration and monitoring projects are implemented.
- The budget includes a detailed summary of the different monitoring components to demonstrate how the expenses were estimated and include sufficient time and resources for data analysis and reporting.

Monitoring Team Concerns

- It is not clear what existing data is available pre-restoration at Finn Rock for the phase 1 restoration project that was implemented in 2021 to understand if a before after study design can be implemented as proposed.
- The application focuses on monitoring changes from restoration that will occur immediately after the restoration are implemented and did not include a description of what potential plans there are for returning to the site to track changes over time as they continue to evolve. The application would have benefited from a description of how they would think of a returning timeframe in a period of years or after certain hydrological events or geomorphic conditions begin to emerge.
- The application didn't mention developing a Sampling and Analysis Plan for the macroinvertebrate monitoring and if that data will be submitted to DEQ.
- The status of the land ownership of the remaining 99 acres of the 181-acre project area on Quartz Creek was not clear as McKenzie River Trust is engaged in ongoing negotiations with the landowner and how that might impact the likeliness that the entire project will be implemented as proposed.
- It is not clear if sufficient time and funding is allocated in the budget for project management and monitoring coordination across all the monitoring components proposed to occur from 2023 to 2028.

Monitoring Team Comments

Review Team Evaluation

Strengths

- The application clearly describes the need and relevance of the proposed monitoring to evaluate the effectiveness of Stage 0 and Stage 8 process-based restoration approaches.
- A technically sound approach is proposed for using monitoring techniques to analyze results from Stage 0 and 8 restoration projects. This includes collecting baseline data, which is often overlooked with effectiveness monitoring projects.
- The methods for answering each monitoring question are appropriate. There are clear linkages between the monitoring questions and how they relate to river and biological responses to the restoration actions. The application also includes tables for the monitoring sites that describe SMART objectives linked to the monitoring questions.
- Monitoring results will be incorporated into the US Forest Service (USFS) Programmatic Aquatic Restoration Monitoring Strategy modeling framework. This will allow the data to be compared against other sites to create a synthesis of how the novel Stage 0 and 8 restoration method is performing at a regional scale. The findings will be used to inform future restoration projects implementing Stage 0 or 8 techniques.
- Partner support is demonstrated by letters from USFS, McKenzie River Trust, and Eugene Water and Electric Board, each of whom articulated how the results of the project will inform future restoration actions at their respective organizations.
- The applicant has capacity for implementing the proposed monitoring by working with partners, including Bureau of Land Management and USFS.
- The project team has relevant experience and expertise.
- The budget is reasonable for the broad temporal and spatial breadth of the project.

Concerns

- The proposed two to three years of post-project monitoring may be too short for answering questions about floodplain process activation, which may take a longer time to answer with statistically relevant data. Flow variations year to year could affect the accuracy of data interpretation. The McKenzie River system is a dynamic and changing landscape; it will take many years of analysis to understand how the wood, sediment, and water table are responding to Stage 0 and 8 restoration treatments. The applicant, however, plans to continue raising funds for long-term monitoring beyond the three years that may lead to the data collection needed to answer the monitoring questions.
- Some of the proposed monitoring components may not be necessary for answering whether Stage 0 or 8 floodplain conditions were achieved. While the Unmanned Aircraft Systems (UAS) and topobathymetric data could provide helpful information, it is unclear whether it is necessary to answer the monitoring questions. It is also unclear how the groundwater data will be more informative above and beyond collecting the proposed wetted width data.
- It is unclear whether alternative monitoring strategies were considered to increase the cost-effectiveness of the proposed monitoring approach given the limited availability of monitoring funds. For example, maybe one site could be monitored over a longer timeframe.
- The number of hours budgeted for applicant staff may not be enough for the work associated with the amount of data that will be generated over the project timeframe.
- It is unclear how the project goals and objectives will be affected if the match grant from Bonneville Power Administration is not secured.

Concluding Analysis

Process-based restoration to a Stage 0 or Stage 8 floodplain condition is a relatively new approach to river valley restoration. Significant investment has been made in projects utilizing this technique. Restoring unconfined river valleys to Stage 0 or 8 conditions and the processes that will sustain those conditions is expected to have the greatest ecological uplift and resilience to disturbance and climate change; however, project effectiveness has been largely untested. The proposed monitoring provides an opportunity to evaluate the effectiveness of Stage 0 and 8 restoration methods while also integrating those results into a broader USFS programmatic modeling framework with other projects sites regionally. Findings from this effort will likely inform future implementation of Stage 0 and 8 restoration that could improve implementation techniques and potentially determine more cost-effective adaptations when implementing these projects.

Review Team Recommendation to Staff
Fund

Review Team Priority
3 of 4

Review Team Recommended Amount
$362,696

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$362,696

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3039-23029
Project Type: Monitoring
Project Name: Temperature Trend Monitoring: North Clackamas Watersheds
Applicant: North Clackamas Watershed Council
Region: Willamette Basin
County: Clackamas
OWEB Request: $87,625
Total Cost: $124,035

Application Description The North Clackamas Watersheds Council will continue its successful temperature monitoring program in Kellogg, Mt. Scott, River Forest, Boardman, & Rinearson watersheds into the 2024-26 time frame. We will track status & trends in watersheds essential to all salmonids & lamprey rearing, spawning, or migrating through the Willamette River system & use the data to prioritize key restoration actions to restore & maintain cold-water refugia (CWR) & to examine temperature drives to prioritize restoration over time.
We will extend the collection & analysis of A-level data at a minimum of 28 monitoring stations to gather 5 years of continuous data, building on two years of successful trend monitoring which began with non-OWEB funds in 2022. Sites are selected to characterize stream reaches, tributaries, & cold-water refugia sites, establish a 5-year baseline, & to detect trends related to climate, development & restoration. We will continue our rigorous quality control data, our partnership with technical experts.
We will share this data in presentations with stakeholders, agency partners, & funders of restoration projects. We will continue a successful process that integrates temperature data, along with fish use & fish passage information, into our Interagency Working Group framework & Watershed Action Plan system that prioritizes restoration work for both the Council & our agency partners. The first year of data already has already led to specific restoration activities. OWEB support will accelerate this progress toward restoration.

Monitoring Team Evaluation

Monitoring Team Strengths

- The proposed project will collect water temperature data to better understand this limiting factor to inform future restoration actions.
- There is a need for continuous water temperature in this area and this project will complement existing fish data being collected by partners in the basin and the water temperature collected by the applicant in 2022 and 2023.
- The applicant is following established water temperature monitoring methods described in a DEQ approved Sampling and Analysis Plan and will be updated to include the additional sites proposed in the application.
- The study design will include 20 long term permanent sites to monitor tributaries to the Willamette River based on the 2020 bioassessment across a variety of land uses and spatial distribution to track trends over time.

- The applicant will work with Portland State University to assist with the five-year trend analysis that they plan to complete.
- The applicant is hosting an existing interagency working group that serves as a forum for engagement with technical experts and community partners that increases collaboration and dissemination of information.
- The applicant has staff and an existing contractor that have the experience and qualifications to collect and report the data as proposed.
- The applicant uploaded a summary of the water temperature data they have recently collected that demonstrates their ability to review and assess the continuous data they are collecting.
- The budget includes expenses that are detailed by task and these proposed costs are appropriate to complete the work necessary to accomplish the objectives.

Monitoring Team Concerns

- The applicant only proposes to check on the water temperature loggers once mid-way through the field season which may not be sufficient in these smaller tributaries to ensure they are submerged throughout the monitoring season.

Monitoring Team Comments

• Contact Spencer Sawaske at ODFW's Water Division to coordinate on monitoring cold water refugia.

Review Team Evaluation

Strengths

- A technically sound approach will be used to collect water temperature data. There is a clear need for collecting the data to better understand stream temperatures in the North Clackamas watersheds and identify opportunities for maintaining and restoring cold water refugia, which is a limiting factor for Endangered Species Act (ESA)-listed fish.
- The proposed monitoring builds on previous data collection and examples of this data is included in the application, which demonstrates the project is likely to succeed in producing quality data.
- The water temperature data will be used to improve the fish passage assessment that is underway by providing information to prioritize restoration projects that will improve fish access to cold water reaches. This will provide habitat benefits for ESA-listed fish and lamprey species.
- The applicant has already developed a Sampling and Analysis Plan with Oregon Department of Environmental Quality (ODEQ) and will update it with the new proposed monitoring sites.
- The data will contribute to the state's Total Maximum Daily Load plan implementation by leading to projects that protect and restore cold water refugia.
- The applicant regularly engages community stakeholders to collaboratively implement work in the watershed.
- Previous monitoring results have been shared through public workshops, articles, and the applicant's website.
- The project costs are reasonable for the proposed work and the application budget provides details needed to understand expenses.

- The applicant has a track record collecting water quality data and using data to plan restoration. The application provides examples of projects that have already moved forward as a result of information learned from previous monitoring data.

Concerns

- Additional information describing how the factor analysis in objective two of the application will be completed would be helpful for better understanding how data will be analyzed. The application indicates Portland State University (PSU) and ODEQ will be engaged to help conduct the analysis so these details may be worked out later. PSU and ODEQ have the relevant expertise to assist the applicant with this data analysis.
- Checking water temperature loggers once mid-way through the field season may not be sufficient to ensure the loggers remain submerged throughout the summer in the smaller tributaries.

Concluding Analysis

The proposed monitoring project will extend and expand an existing monitoring program in the North Clackamas watersheds area. Water temperature data will be used to prioritize restoration and inform project designs to ensure they provide access to cold-water refugia habitat, a priority habitat limiting factor affecting ESA-listed fish in the North Clackamas watersheds.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 4

Review Team Recommended Amount
$87,625

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$87,625

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3040-23030
Project Type: Monitoring
Project Name: Restoration effectiveness monitoring of Taylor's checkerspot butterfly habitat
Applicant: Institute for Applied Ecology
Region: Willamette Basin
County: Benton
OWEB Request: $65,351
Total Cost: $88,825

Application Description Taylor’s checkerspot butterfly (TCB), a federally-listed endangered species, was once abundant in the Pacific Northwest. TCB are threatened by loss of habitat from agricultural development, fire suppression, urbanization, forest succession, the spread of invasive species, and genetic drift.
The goal of this project is to conduct pre- and post-treatment effectiveness monitoring to assess the success of restoration actions conducted under an OWEB project to enhance habitat conditions for TCB at nine sites in Benton County, Oregon. Two of these sites have extant populations of TCB and seven sites are considered high priority for TCB introductions.
Pre- and post-treatment effectiveness monitoring will 1) estimate the patch abundances of the two known TCB host plants, golden paintbrush (Castilleja levisecta), and English plantain (Plantago lanceolata), 2) estimate the cover of TCB nectar plants, and 3) assess habitat conditions. We will assess restoration efficacy by quantitatively comparing the pre- and post-treatment estimates of host and nectar plants, as well as assessing the change in habitat conditions.
By monitoring TCB habitat conditions, this proposal addresses a Draft Priority Recovery Action (USFWS 2022) of studying the response of TCB to management actions. Our assessment of restoration efficacy will directly inform future restoration efforts and recovery criteria for TCB. We currently have a poor understanding of how to restore habitat to benefit TCB and to date there is no established recovery plan nor guidelines. The OWEB restoration proposal that this proposal complements represents the largest effort to date to restore habitat for TCB in Oregon. Without the ability to evaluate the effectiveness of these actions, we risk spending precious time, effort and money on less-than-effective treatments.
Project partners include the USFWS, Benton County, Greenbelt Land Trust, and private landowners.

Monitoring Team Evaluation

Monitoring Team Strengths

- This project complements existing data at several of the same sites collected by the applicant in 2016 and data collected by the state of Washington on this rare butterfly habitat following the same monitoring protocol.

- The applicant will follow an established monitoring protocol they developed in coordination with the state of Washington.
- The applicant will incorporate necessary quality assurance and quality control measures to train field technicians and review field data for completeness and for transcription errors as it is transferred from paper field forms to be stored electronically.
- The results will be made available through a variety of ways including posting the final technical report on the applicant's website and presenting to the Prairie Plant Working Group. The final technical report will also be posted on Research Gate and the Cascadia Prairie Oak Partnership's technical library.
- The applicant is partnering with a variety of land managers in the Willamette Valley that are engaged and interested in restoration including state, federal, non-profit agencies and private landowners. The uploaded letters of support demonstrate this engagement and interest in applying the information that this project will produce.
- The applicant's staff are highly qualified to collect this data and have relevant experience developing and following monitoring protocols to collect specific data related to the Taylor's checkerspot butterfly and similar plant/butterfly species in the Willamette valley.
- The proposed costs are appropriate to complete the work necessary to accomplish the objectives.

Monitoring Team Concerns

- The proposed analysis of the vegetation cover data is simplistic, which will compare the results before and after with no statistical tests being performed.
- The analysis will only summarize one year of pre and post restoration data that will not account for other environmental factors that could affect the results. The application did not describe how the habitat data will be analyzed.
- It was not clear if pesticide applications in the surrounding landscape is a factor that can influence the effectiveness of the plant establishment and butterfly colonization efforts.

Monitoring Team Comments

Review Team Evaluation

Strengths

- The proposed monitoring is clearly linked to habitat restoration actions funded through an OWEB grant for Taylor's checkerspot butterfly (TCB), a federally listed endangered species.
- The monitoring project will provide critical data needed to assess the effectiveness of TCB habitat restoration actions that will inform current and future restoration practices.
- The monitoring actions are a priority in the draft US Fish and Wildlife Service (USFWS) recovery action plan for TCB. The protocols that will be used are listed in this plan and, therefore, are standardized. This allows for comparisons across sites.
- The applicant has capacity to implement the project and relevant experience pairing OWEB restoration and monitoring grants to restore habitats for Endangered Species Act-listed species and collecting effectiveness monitoring data to track progress and inform restoration strategies.
- A large and diverse working group of state, federal, university, non-profits, and landowners are participating in the project.

- Project costs are reasonable for the proposed monitoring.
- Data will be made available online on the applicant's website and through online libraries. The applicant also has a history of sharing monitoring results through presentations at practitioners' meetings and conferences.

Concerns

- The timelines for the restoration actions and monitoring actions are unclear in the application. It is unclear whether sites will receive chemical treatment at the same times as monitoring data will be collected. If these actions are co-occurring, it could potentially affect the butterfly population data.

Concluding Analysis

TCB is a federally listed endangered species that was once abundant in native prairies across the Pacific Northwest. Loss of habitat has led to a decline in their distribution to only 11 extant populations. The proposed monitoring is paired with an OWEB restoration grant to collect pre- and post- treatment data to assess habitat conditions and examine the effectiveness of restoring host plant communities in rebuilding the TCB population. There are currently no guidelines for TCB habitat restoration due to a poor understanding of how to establish these plant communities and how the TCB population will respond. The data collected will be used to adaptively manage current efforts based on plant and TCB response and inform future actions. This will support implementation of the draft USFWS recovery action plan for TCB, which identifies habitat enhancement as the top priority action for the species.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 4

Review Team Recommended Amount
$65,351

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount

$65,351

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3041-23033

Project Type: Monitoring

Project Name: Marys River Watershed Council Monitoring Phase 1

Applicant: Marys River WC

Region: Willamette Basin

County: Benton

OWEB Request: $153,297

Total Cost: $198,451

Application Description The Marys River Watershed Council (MRWC) proposes to collect continuous temperature data from surface waters in the Marys River River Watershed during the summer months of 2023 and 2024. This is a continuation of an existing trend temperature monitoring program begun thanks to matching support from Meyer Memorial Trust as part of the Model Watershed program. The goal of this program is to continue to fill a data gap of stream temperatures and trends in key locations to inform prioritization and planning for restoration projects. Sites are selected to characterize priority tributaries and stream reaches, detect trends, and collect baseline data. The MRWC proposes to deploy 35 monitoring stations within Benton and Lincoln Counties. These include the continuation of 15 active stations in the middle and upper Marys River watershed, reactivation of 7 historical monitoring stations, and addition of 13 stations at new locations of interest. Work will include field deployments, midseason checks, and retrieval of loggers, as well as data analysis. The MRWC will also implement appropriate quality assurance and quality control measures to ensure high-quality data that meets A-level standards, as defined by the Oregon Department of Environmental Quality (DEQ). As a result of this proposed work, 15 of the 35 proposed monitoring sites would have a total of 13 years of data. The MRWC will conduct an analysis of the full dataset to assess trends and examine relationships with external drivers of temperature. The MRWC will share data through presentations, landowner summaries, and will submit data to DEQ. Project partners include field and technical volunteers, private landowners, OSU Extension Service, City of Corvallis, Benton County Public Works, and the Luckiamute Watershed Council.

Monitoring Team Evaluation

Monitoring Team Strengths

- This project will complement existing water temperature and rapid bioassessment data collected by the applicant and additional water temperature data collected by partners in the watershed.
- The applicant will follow established water temperature monitoring methods and develop a Sampling and Analysis Plan that will be reviewed and approved by DEQ.
- This resubmitted application, included a response to concerns that were identified in the previous evaluation and provided additional information that improved the application’s technical soundness.
- The application included a detailed table that was uploaded that described which sites they will continue to monitor, which new sites they are proposing, how the data can be used and which questions they plan to answer.

- The applicant will follow data management procedures to store the raw data in a cloud-based file storage system and have backup copies on desktop computers.
- The applicant has a variety of staff that will implement this monitoring project and all of them have a range of experience collecting, managing and reporting this data. In addition, the applicant will hire a qualified monitoring coordinator to help manage the program and they will be trained by staff that have completed this work in the past.
- The applicant is engaging technical experts through a Technical Advisory Team (TAT) which includes several technical experts from state, university, federal and local partner organizations to analyze and interpret the results to inform future restoration and monitoring activities.
- The application includes several letters of support demonstrating their engagement efforts and commitment to participating on the TAT.

Monitoring Team Concerns

- It is unclear what will be completed during the second phase of the project since the conclusions they will draw at the completion of the first phase due to some sites having limited data.
- The quality of the previously collected water temperature data is unclear due to the limited capacity of the applicant to perform the monitoring and lack of a Sampling and Analysis Plan.
- The monitoring methods for measuring streamflow were not described in detail and the protocol was not cited. It was not clear if multiple water depth and velocity measurements will be taken across the wetted width.
- The application did not describe how the data will be analyzed to identify temporal trends for the 16 sites that have 10 years or more of data.
- It is not clear why the budget increased by $50,000 from the last time it was submitted.

Monitoring Team Comments

• Contact Spencer Sawaske at ODFW's Water Division to coordinate on monitoring cold water refugia.

• Consider incorporating the completed TMDL shade gap modeling results into the monitoring site selection process.

Review Team Evaluation

Strengths

- Previous application evaluation concerns are addressed. The applicant's response to feedback provided a linear connection that demonstrated how these concerns were addressed.
- The monitoring will build on previous data collection and examples of this data are included in the application.
- The proposed monitoring will support Oregon Department of Environmental Quality's (ODEQ) Total Maximum Daily Load plan implementation by leading to projects that protect and restore cold water refugia.
- The applicant is working with ODEQ to create a Sampling and Analysis Plan.

- Monitoring will occur in areas that were identified as critical habitat for steelhead and Chinook salmon.
- The applicant will have capacity to implement the proposed work because the budget includes funds for a monitoring coordinator.
- Data will be shared with landowners and partners.
- Partner support and roles are demonstrated by letters from Oregon State University, City of Corvallis, Benton County Public Works, Benton Soil and Water Conservation District, Natural Resource Conservation Service, and a technical advisory member.

Concerns

- The application includes an example of temperature data that was used to identify areas for restoration on a tributary and lists a number of restoration techniques that were implemented. Additional information describing how data is used to determine and select site-specific restoration techniques would be helpful to better understand how the data informs restoration.
- It is unclear why the current application has significantly higher costs compared to the previous application for a similar scope of work. The project cost is also higher compared to other similar monitoring projects.

Concluding Analysis

Stream temperature data will be collected to fill data gaps and determine trends in priority streams in the Marys River Watershed. The proposed temperature monitoring is likely to help the applicant identify locations of cold-water refugia, a priority habitat for Endangered Species Act-listed fish, to prioritize and plan strategic restoration projects.

Review Team Recommendation to Staff
Fund

Review Team Priority
4 of 4

Review Team Recommended Amount
$153,297

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team
N/A

Staff Recommendation

Fund

Staff Recommended Amount

$153,297

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3042-23040

Project Type: Monitoring

Project Name: Effectiveness Monitoring of Floodplain Restoration at Elijah Bristow State Park_Pre-Impmlementation

Applicant: Middle Fork Willamette WC

Region: Willamette Basin

County: Lane

OWEB Request: $304,402

Total Cost: $380,927

Application Description Process-based restoration plans for Elijah Bristow State Park (EBSP) are in collaborative development between Oregon Parks and Recreation Department (OPRD), Middle Fork Willamette Watershed Council (MFWWC), Oregon Department of Fish and Wildlife (ODFW) among other diverse partners and stakeholders. The proposed 437 acre project area is located below Dexter Dam downstream to the Lost Creek confluence with the Middle Fork Willamette River, between the Lane County towns of Jasper and Lowell. Historically, EBSP was a dynamic floodplain with multiple braided channels and sloughs. Anthropogenic alterations such as gravel mining and dam construction have altered floodplain processes which has led to instream habitat degradation. Process-based restoration designs informed by Stage-0 and Stage-8 stream evolution model approaches will be implemented to restore floodplain function. To prepare for restoration, the MFWWC will develop a monitoring plan for the EBSP project area and conduct two years of pre-project monitoring to establish baseline conditions for a Before-After analysis of floodplain conditions and evaluate the effectiveness of restoration. Primary partners for this project include OPRD, Wolf Water Resources (W2r), ODFW, and the US Forest Service (USFS).

Monitoring Team Evaluation

Monitoring Team Strengths

- The application includes an objective to develop a monitoring plan that will synthesize data collected at Elijah Bristow State Park by other entities and incorporate that into the pre-project monitoring plan to avoid duplicate data collection.
- This project will monitor the effects of stage 0 restoration on terrestrial wildlife presence and abundance which has been lacking in other large-scale floodplain restoration projects.
- This project is making a focused effort to collect two years of pre-restoration data to be able to evaluate the effectiveness of this large-scale floodplain restoration project.
- The applicant has a clear plan for data management for a variety of data that will be collected including how the data will be stored on their server and backed up on an external hard drive.
- The applicant will interpret the data and include all the results in a monitoring report that will be shared on their website and uploaded to ODFW’s Natural Resource Information Management Program (NRIMP) clearinghouse and submit the water quality data to DEQ.
- The remote sensing contractor has the necessary experience collecting and analyzing similar data in largescale floodplain restoration projects.

- The applicant has engaged a variety of partners and have established a technical team which will review the monitoring plan and a community advisory committee to provide updates on the monitoring process to keep the public informed.

Monitoring Team Concerns

- Parts of the application were confusing, the applicant proposes to finalize a monitoring plan, yet this application proposes several detailed monitoring tasks with an extensive budget to support these efforts.
- This application will only support the collection of pre-restoration project data. The applicant will have to seek funding to collect post restoration data and evaluate the effectiveness over time.
- It is not clear what monitoring questions they are trying to answer by collecting bat and bird information since this was not included in objective three.
- The brief description of the bat monitoring methods described in the contractor's estimate that was uploaded to the application are not professionally accepted methods.
- The application does not describe the continuous dissolved oxygen monitoring methods and no citation was provided.
- The approach to filter water samples, freeze the filters and submit them for nutrient analyses later in the year is not a standard approach and it was not clear why this was proposed.
- Evaluating the project's success based on adult fish returns to Dexter dam is not likely to yield valuable information due to the variety of factors that affect fish returns across the basin.
- The application did not describe how they will track water releases at Dexter Dam and how they will incorporate gravel augmentation to understand project effectiveness.
- The timeline to hire a monitoring specialist, develop a Sampling and Analysis Plan, gather relevant data from agencies and complete the monitoring plan in four months is extremely ambitious and is not likely to be enough time to figure out the necessary details to ensure a successful monitoring approach.
- This monitoring proposal includes several complex monitoring efforts into one single application. A paired down application that proposes monitoring where capacity exists to identify a clear monitoring lead will increase the likelihood of success.

Monitoring Team Comments

Review Team Evaluation

Strengths

- Effectiveness monitoring could be helpful for documenting the proposed Stage 8 restoration planned for the Elijah Bristow State Park located downstream of Dexter dam in the Middle Fork Willamette watershed. The Stage 8 project is complex and will be challenging to implement due to the combination of the site being at a highly visible location with a high volume of park users and the influence of Army Corps dams on the hydrology and floodplain function. Utilizing the Stage 8 techniques will likely push the boundaries of what can be done to restore floodplain conditions using this process-based restoration approach. Documenting project effectiveness will, therefore, be important.

- The proposed monitoring methods will include collecting baseline pre-project data before starting restoration actions.
- Monitoring from previous Stage 0 projects completed by the applicant will be used to help inform the effectiveness monitoring at Elijah Bristow State Park.
- The project builds on previous OWEB stakeholder engagement and technical assistance investments at the Elijah Bristow State Park.
- Partner support is documented through letters and match from Oregon Parks and Recreation Department, US Forest Service, and Oregon Department of Fish and Wildlife.
- The project budget is reasonable for the breadth of the project.

Concerns

- The connection between the expected restoration actions, monitoring questions, and proposed monitoring actions are unclear. Information describing connections between the restoration that will be implemented and what the applicant expects to learn from the data to be collected would be helpful for understanding the need and relevance of the monitoring project.
- A large volume of metrics is proposed; it is unclear how the data will be used or if all the proposed metrics are needed for evaluating the effectiveness of the Stage 8 restoration. For example, while results from bat and bird data collection may be interesting, it is unclear how it will be used to directly inform restoration strategies. It is also unclear what will be learned from the nutrient monitoring that can be used for informing how Stage 8 restoration is implemented or determine whether Stage 8 restoration goals are met.
- The first objective in the application is to develop a monitoring plan. It is unclear if the application budget could be accurately estimated for the wide array of monitoring metrics proposed before a monitoring plan is established. It is also unclear how the detailed list of equipment and supplies was determined before the monitoring plan is completed.
- Some of the proposed methods are not standard protocols; information describing how the resulting data is likely to succeed in informing the effectiveness of the Stage 8 project implementation would be helpful for evaluating the technical soundness of these methods.
- While the applicant recognizes the limitations of using traditional monitoring methods on Stage 0 and 8 projects, some traditional monitoring methods are still proposed that are unlikely to be successful. For example, some of the proposed data collection will utilize randomized locations, which will likely not be effective because the same sites often cannot be accessed again after Stage 8 restoration treatments.
- While the application indicates monitoring results from the Coal and Staley Creeks Stage 0 projects will be incorporated, the application lacks information describing the existing data sets from these projects.
- It is unclear whether alternative monitoring strategies were considered to increase the cost-effectiveness of the proposed monitoring approach given the limited availability of monitoring funds. For example, monitoring fewer metrics that would provide more direct evidence on whether the Stage 8 project is performing as expected and inform future implementation approaches.
- It is unclear the extent to which the applicant has engaged with other practitioners implementing Stage 0 and 8 projects. Coordinating with practitioners implementing and monitoring similar restoration techniques could lead to cost savings and ensure similar monitoring approaches are used to compare projects across a broader geography.
- If the applicant is unable to hire a monitoring coordinator qualified to manage the complex monitoring project proposed, the applicant may not have capacity to complete the work and it could impact their ability to meet the project timeline.

Concluding Analysis

Process-based restoration to a Stage 8 condition is a relatively new approach to river valley restoration and significant investment has been made in projects utilizing this technique. Effectiveness monitoring to document whether these projects are achieving their expected outcomes is important for learning more about this novel restoration approach. The proposed effectiveness monitoring for the Elijah Bristow State Park Stage 8 project includes a high volume of diverse metrics and it is unclear if each metric is needed to determine whether the restoration technique is effective or the data will inform how these projects will be implemented. Developing a monitoring plan before pursuing funds for implementing the monitoring may provide a helpful tool for focusing the monitoring approach.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3043-23057
Project Type: Monitoring
Project Name: Fire Effects Monitoring: Developing a Framework for Cultural and Ecological Health
Applicant: Ecostudies Institute
Region: Willamette Basin
County: Lane
OWEB Request: $189,530
Total Cost: $351,830

Application Description Prior to colonization of the Willamette Valley (WV) in the 1800s, Kalapuya people helped shape the fire regime and evolution of local ecosystems through the use of intentional cultural fire. Since the forced removal of Kalapuya people and a societal suppression of fire, less than one percent of prairie and oak fire-adapted habitats now remain in the WV. Consequently, the use of prescribed fire to help restore these habitats and steward the land is increasing in the region, in addition to the increased realization and need for Indigenous people and values to be prioritized in these efforts. However, there is limited established monitoring data on the effects of prescribed fire on ecological and cultural parameters that prioritize local Indigenous values and goals.

Ecostudies Institute plans to bring technical experts and local Indigenous people together on a team to collaboratively develop a prescribed fire monitoring framework that prioritizes Indigenous perspectives and values. Vegetation, soils, air quality, avian, and cultural resources monitoring protocols will be used to collect one year pre-burn data and two years of post-burn data on up to 10 burn units to begin establishing a baseline dataset that could be used for long-term monitoring purposes. With the help of the technical team, the data will be interpreted and used to inform and provide recommendations on prescribed fire implementation, monitoring approaches, and next steps for expanding the framework and establishing a long-term dataset.

Current partners in this project include the Confederated Tribes of Grand Ronde, Confederated Tribes of Siletz Indians, the City of Eugene, Natural Resources Conservation Service, The Nature Conservancy, and the Upper Willamette Stewardship Network. We plan to engage more partners during the technical team development process.

Monitoring Team Evaluation

Monitoring Team Strengths

- The applicant will be working with tribes in Oregon to apply their knowledge and cultural values to develop a monitoring approach of prescribed burns in the Willamette Valley.
- The applicant will collect the field data using a combination of digital data tablets or paper field forms and store it electronically in different software using a cloud-based file system.

- The applicant has the necessary qualifications to collect the vegetation, fuels, soil and bird data and cite a variety of professionally accepted field methods that might be followed after the monitoring plan is finalized.
- The applicant has engaged staff from the Confederated Tribes of Siletz Indians and Confederated Tribes of Grand Ronde which both provided letters of support that demonstrate their engagement and interest in participating in this project.
- At the end of the project all data will be interpreted and presented in a final report. The final report will be posted on the applicant's website, at the Cascadia Prairie Oak Partnership conference and website and results of this monitoring efforts will be presented at relevant local and regional forums.
- The applicant uploaded a separate table to the application that breaks down the staff time by task to understand how staff wages were calculated.

Monitoring Team Concerns

- The application lacked a description of the existing data that has been collected by partners in the Willamette Valley on completed prescribed burn projects, such as the Baskett Slough project and others implemented by the US Fish and Wildlife Service, Oregon Department of Forestry, Institute for Applied Ecology (IAE) and the Confederated Tribes of Grand Ronde.
- The application describes evaluating the effects of fire suppression in oak prairie woodlands, but it wasn't clear how the sites would be selected to specifically evaluate the impacts of this management strategy. In addition, it was not clear how past management history on each parcel of land will be incorporated into the data analyses to understand the effects of the prescribed burns.
- An important and key component of the project hinges on the engagement of tribes and other partners to develop the collaborative monitoring approach, which is to be completed before May 2024. It is not clear if six months is enough time for thoughtful and meaningful engagement with the tribes to occur, especially if there is a lack of consensus on what and where to monitor.
- Several of the details on the monitoring study design depend on the availability and access to prescribed burns and it was not clear if there will be a deliberate approach to stratify the sites to evaluate spring and fall burning regimes.
- It was not clear why IAE wasn't mentioned in this application since they seem to be a likely partner to engage in this project given their work with oak prairie restoration in the Willamette Valley.
- It is unclear if the costs are appropriate since a thorough review of the monitoring of prescribed burns in the Willamette Valley was not described in the application.
- It was not clear if expenses are included in the budget to compensate the tribes for their time to engage in this project in a meaningful way.
- The budget table includes substantial match for prescribed burn planning on four NRCS easement sites but there was no information in the application that describes what this match includes and where these sites are to understand how this relates to the project.

Monitoring Team Comments

Review Team Evaluation

Strengths

- The application clearly describes proposed work with a technical team and Tribes to design a monitoring framework and protocols for understanding the effects of fire to inform future burning

practices.

- The applicant has experience with ecological monitoring in Washington.
- The applicant will share reports with local and regional restoration practitioners, including Rivers to Ridges Partnership, the Upper Willamette Stewardship Network, and Cascadia Prairie Oak Partnership.
- Partner support is demonstrated by letters, including communications indicating support from the Confederated Tribes of Siletz Indians and Confederated Tribes of Grand Ronde.

Concerns

- "Cultural burning" is not clearly defined in the application, and it is unclear how the term is being used to describe a practice that is different from "ecological fire." The application indicates the applicant is the only dedicated prescribed cultural burn program in the Willamette Valley; however, the Confederated Tribes of Grand Ronde has been implementing prescribed burning for many years. It is unclear how the applicant's team is doing something different from the Tribes without a clear definition for cultural burning.
- It is unclear from the application how monitoring sites will be selected. The 30-year conservation concept map for the Willamette Valley Oak and Prairie Cooperative included in the application does not indicate where sites might be located. Four Natural Resource Conservation Service (NRCS) sites are referenced in the application; however, no details are provided that describe the site conditions and characteristics nor are these sites noted on the map.
- Coordination with some partners is unclear from the application. For example, there is no letter of support or match confirmation from NRCS included in the application related to the NRCS sites and secured match referenced.
- It is unclear how the proposed monitoring could complement existing data or other current monitoring because the application does not acknowledge the considerable related data that exists from multiple organizations.
- It is unclear whether the project budget is reasonable for the proposed monitoring because the monitoring plan and methods are not yet developed.
- More specific monitoring questions related to on-the-ground restoration actions would demonstrate how the proposed monitoring can inform future restoration. For example, a question about the effectiveness of reseeding immediately after a burn could directly inform future restoration practices.
- All of the proposed monitoring is focused on ecological datapoints; however, the application emphasizes that cultural fire is different from ecological fire. No potential cultural type metrics are described in the application that could be used for monitoring cultural burning. It is unclear why the project focuses on the impacts of cultural fire but describes monitoring ecological health in response to fire.
- It is unclear how the data will be used specifically to inform future restoration planning or practices. Burning has occurred for a long time in the Willamette, it is unclear how the data will help the applicant use fire differently compared to current practices by the Tribes and other restoration practitioners.

Concluding Analysis

There is value in learning more about fire and its effects on ecological, cultural, and community health. It, however, is unclear how the monitoring approach will lead to informing restoration that will improve habitat and watershed functions. The application does not describe how the applicant expects to use the resulting data specifically or how fire could be used differently based on what is learned from that data.

The application lacks details needed to evaluate the project with the monitoring review criteria. More information is needed to understand the technical soundness of the monitoring approach, how the data is necessary for carrying out restoration, and whether the significant investment is reasonable for the proposed work. Developing a monitoring plan before pursuing funds for implementing monitoring could provide the information needed to evaluate the monitoring project.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Willamette Basin (Region 3)

Application Number: 223-3044-23047

Project Type: Stakeholder Engagement

Project Name: Benton County Oak Habitats Stakeholder Engagement

Applicant: Benton SWCD

Region: Willamette Basin

County: Benton

OWEB Request: $34,130

Total Cost: $46,330

Application Description 1) Project location: Existing and potential oak woodland and savanna/prairie habitats will be assessed in all of Benton County. Our initial focus will occur in Core Conservation Areas identified by the Willamette Valley Oak and Prairie Cooperative and expand outward.
2) Project need: Oak habitats are some of the most imperiled habitats in the Willamette Valley eco-region. For years, Benton SWCD has worked with private landowners to restore oak habitats when we receive a request for assistance. However, the geographic extent of the oak habitat is unknown in Benton County and incomplete data prevents us from strategically targeting landowners in key areas for restoration. Identifying our target audience based on average acreage sizes, location within the county, and assessing their current management objectives and barriers to conservation will help us to develop a strategy for restoration and seek the appropriate funding sources. We might find that we need to develop better programming and funding opportunities for small acreage oak habitat owners.
3) Describe the proposed work: We intend to analyze the most current GIS data to determine oak habitats, as well as tax parcels to identify areas in which to target outreach. We will work with partners to host events highlighting oak restoration activities and funding opportunities. Focus groups will also serve to help us learn about local landowner motivation for oak restoration. Information gathered will inform project partners of landowner interest, location and parcel size to leverage funds for OWEB restoration grants, NRCS programs (EQIP and RCPP), and/or other sources of restoration funding.
4) Identify project partners
Natural Resources Conservation Service
Greenbelt Land Trust
Benton County Small Woodlands Association
Willamette Valley Oak and Prairie Cooperative
Trout Mountain Forestry
Marys River Watershed Council (WC)
Luckiamute WC
Long Tom WC
US Fish and Wildlife Service

Review Team Evaluation

Strengths

- A combination of data collection and stakeholder engagement actions is proposed to better understand opportunities for restoring oak habitat in Benton County. Products will be used to coordinate oak habitat restoration on properties that are 20 acres or less, which are often overlooked when considered as stand-alone projects.
- A variety of outreach methods, such as tours, workshops, focus groups, and landowner interviews, will be used to raise awareness of oak habitats and restoration opportunities.
- A group of technical partners are involved in the project, including: Natural Resources Conservation Service, Greenbelt Land Trust, Benton County Small Woodlands Association, Willamette Valley Oak and Prairie Cooperative, Trout Mountain Forestry, Marys River Watershed Council (WC), Luckiamute WC, Long Tom WC, and US Fish and Wildlife Service.
- Partner support is demonstrated by letters included in the application.
- A facilitator will be hired for the focus groups designed to obtain landowner input on oak restoration strategies.
- The applicant has capacity and relevant experience to implement the project.
- Costs are reasonable for the proposed activities.

Concerns

- The linkage between the success indicators for the proposed stakeholder engagement activities with future restoration is somewhat vague; however, the proposed activities are likely to generate landowner interest that could lead to oak habitat restoration.

Concluding Analysis

The combination of data analysis and landowner engagement is likely to lead towards a better understanding of oak restoration opportunities among private landowners in Benton County. Oak habitats are a priority strategy habitat in the Oregon Conservation Strategy. Coordinating opportunities to restore oak across properties 20 acres or less, which typically do not receive funds, could provide a collective impact in restoring oak across a broader landscape in the Mid-Willamette valley.

Review Team Recommendation to Staff

Fund

Review Team Priority

1 of 1

Review Team Recommended Amount

$34,130

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

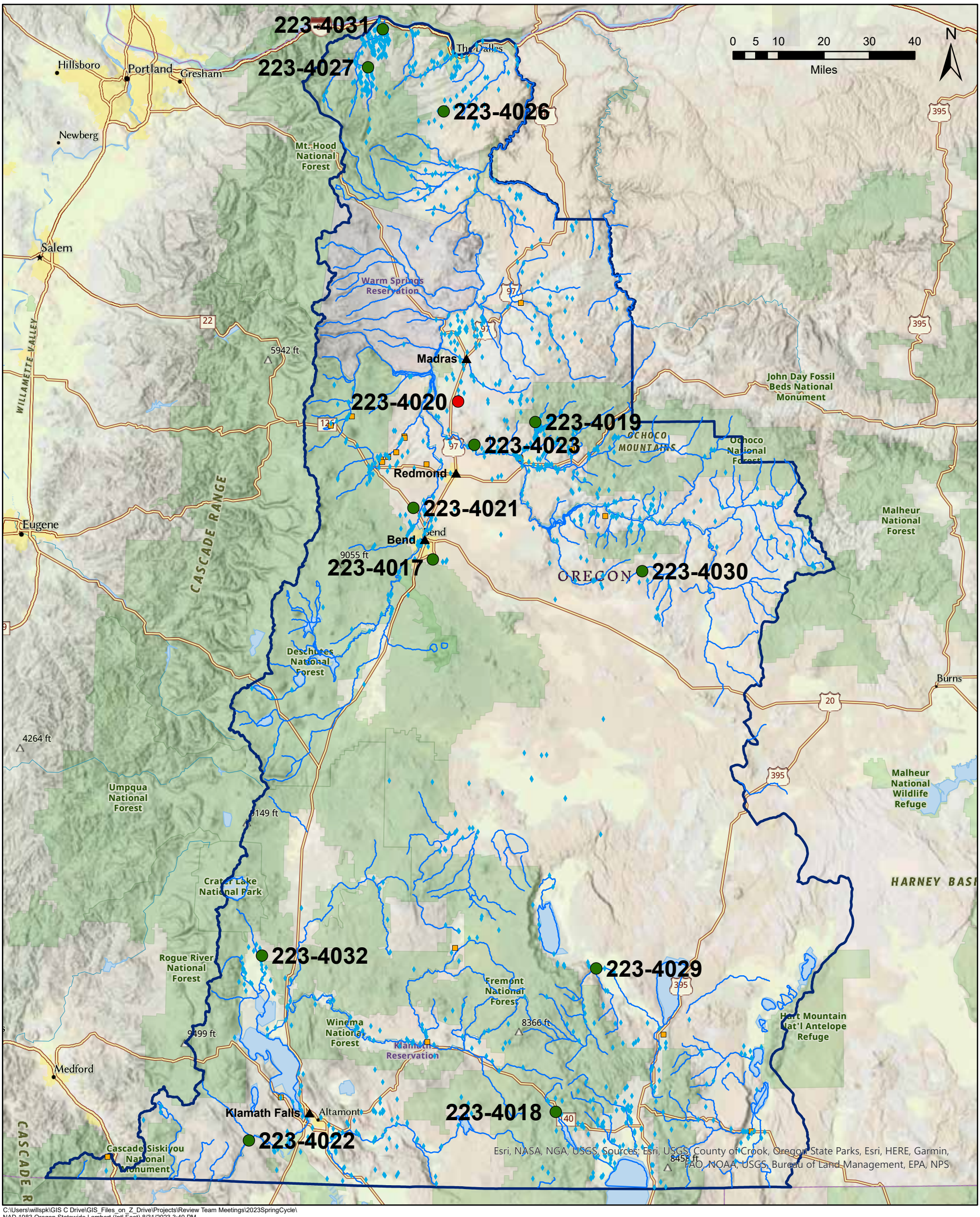
Staff Recommended Amount

$34,130

Staff Conditions

N/A

Central Oregon - Region 4 Spring 2023 Funding Recommendations



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Funding Recommendation

- Staff Recommendation For Funding (SRF)
- Below Funding Line (BFL)

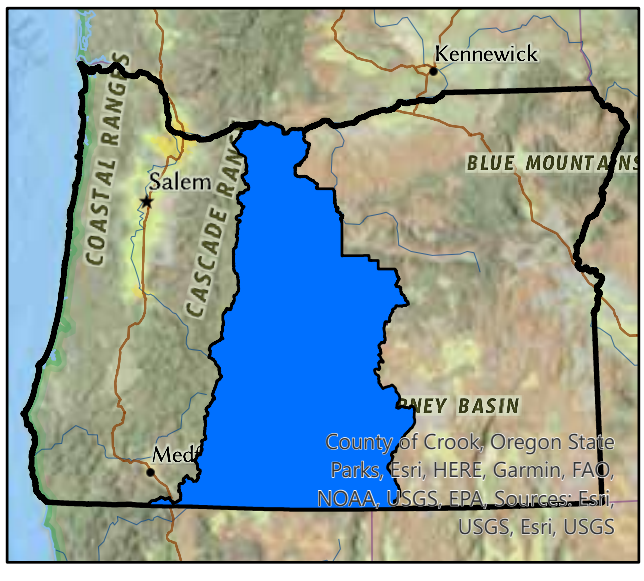
Previous Grants 1998 - Spring 2022

- Land Acquisition
- Restoration
- Region 4 Cities
- Region 4 Streams
- OWEB Region 4 Boundary

OREGON WATERSHED ENHANCEMENT BOARD

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Region 4 - Central Oregon Restoration

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-4022	Trout Unlimited Inc	J.C. Boyle Reservoir Riparian Habitat Buffer Fencing	The entire JC Boyle reservoir footprint along the Klamath River will be fenced off with wildlife friendly fencing to protect sensitive natural and cultural resources.	201,258
223-4018	Lake County Umbrella Watershed Council	Upper Drews Creek Fish Passage	An aging stream diversion will be replaced to provide fish and lamprey passage along Drews Creek in Lake County.	263,335
223-4019	Crooked River WC	Foley Butte Holistic Restoration	A suite of restoration actions will be implemented to improve fish and wildlife habitat and water quality along Allen Creek and adjaent forest lands in Crook County.	188,680
223-4017	Arnold Irrigation District	Deschutes River Flow Restoration - Arnold Irrigation District Phase Two	The Arnold Irrigation District will pipe leaky open ditch irrigation delivery canals to restore streamflow in the Upper Deschutes river to support Oregon spotted frog critical habitat.	250,000
223-4021	Tumalo Irrigation District	Tumalo Irrigation District Deschutes Basin Restoration Group 6b	Open ditch irrigation delivery canals will be piped to support the Tumalo Irrigation District's continued effort to restore streamflows to Tumalo and Crescant Creeks.	200,000
223-4023	Lone Pine Irrigation District	LPID Irrigation Modernization Project Phase 2	The Lone Pine Irrigation District will pipe leaky open ditch irrigation delivery canals to restore streamflow in the Upper Deschutes river and support Oregon spotted frog critical habitat.	475,000
Total Restoration Projects Recommended for Funding by RRT and OWEB Staff				**1,578,273**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-4020	North Unit Irrigation District	Irrigation Modernization and Winter Flow Augmentation Project Segments 1 and	Open porous irrigation canal will be converted into leak free pipe to conserve water to improve water quality and habitat for Oregon spotted frog.	500,000

Projects Not Recommended for Funding by RRT

Project #	Grantee	Project Title	Amount Requested
223-4015	Crooked River WC	Lower Crooked Habitat Restoration - Silva Ranch	241,819
223-4016	Crooked River WC	Lower Crooked Habitat Restoration - King Ranch	399,288

Region 4 - Central Oregon Technical Assistance

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-4027	Hood River WS Group	Lower East Fork Hood River & Baldwin Creek Fish Passage & Habitat Restoration D	Construction ready designs will be developed for fish passage and habitat enhancement projects along Baldwin Creek and the East Fork of the Hood River.	73,101
223-4026	Wasco SWCD	Fifteenmile Managed Underground Storage Pilot Testing 2023	Designs will be developed for a full scale aquifer recharge project buildout that will benefit native fish and water quality along Fifteenmile Creek in Wasco County.	75,000
Total Technical Assistance Projects Recommended for Funding by RRT and OWEB Staff				**148,101**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
None				

***Projects Not Recommended* for Funding by RRT**

Project #	Grantee	Project Title	Amount Requested
223-4024	Klamath Lake Land Trust	Planning for Restoration due to Bootleg Fire	74,263
223-4025	Lakeview SWCD	Chewaucan Working Wetland Reconnaissance	74,279
223-4028	Ecotrust	Enhancing Salmon Habitat on the Mainstem Columbia River through Control of Invasive American Shad	74,881

Region 4 - Central Oregon Stakeholder Engagement

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
None				

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Recommended
None				

***Projects Not Recommended* for Funding by RRT**

Project #	Grantee	Project Title	Amount Requested
None			

Region 4 - Central Oregon Monitoring

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-4031	Hood River WS Group	Hood River Basin Partnership Restoration Effectiveness Monitoring Plan	A monitoring plan will be developed for evaluating the effectiveness of a wide variety of restoration project types in achieving expected ecological outcomes in the Hood River basin.	77,480
223-4032	Trout Unlimited Inc	Response of a threatened amphibian to drought and bullfrog removal	Oregon spotted frog population and distribution will be monitored in the Upper Wood River valley in Klamath County to evaluate the effectiveness of removing bull frogs, one of the biggest threats to Oregon spotted frogs.	282,149
223-4030	OSU Office of Sponsored Research & Award Admin	Assessing the Long-Term Effectiveness of Juniper Removal on Water and Vegetati	The effects of removing Western juniper on local hydrology, groundwater, and native vegetation will be monitored to charactize ecological impacts of juniper removal.	239,694
223-4029	Fort Rock/Silver Lake SWCD	Brattain Post Fire Restoration Project Effectiveness	A study within the 2020 Brattain fire scar will be completed to determine the effectiveness of seeding post fire compared to allowing natural regeneration of vegetation to occur.	252,269
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				**851,592**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
None				

***Projects Not Recommended* for Funding by RRT**

Project #	Grantee	Project Title	Amount Requested
None			

Region 4 Total OWEB Staff Recommended Board Award	**2,577,966**

Region 1 - 6 Grand Total OWEB Staff Recommended Board Award	**12,461,865**

Open Solicitation-2023 Spring Offering
Central Oregon (Region 4)

Application Number: 223-4015-23014
Project Type: Restoration
Project Name: Lower Crooked Habitat Restoration - Silva Ranch
Applicant: Crooked River WC
Region: Central Oregon
County: Crook
OWEB Request: $241,819
Total Cost: $497,600

Application Description 1) The proposed work takes place on the Silva Ranch, located within the LCRSR area, approximately 4.5 miles northwest of Prineville. The project reach extends from approximately river mile (RM) 43 to RM 44.3.
2) The Crooked River Watershed Council and Natural Resources Conservation Service, through a Regional Conservation Partnership Program (RCPP), are working with private landowners between the City of Prineville and Smith Rocks State Park to implement the Lower Crooked River Strategic Restoration (LCRSR). The LCRSR is a comprehensive project intended to address key watershed deficiencies as recognized by the Mid-C Steelhead Recovery Plan (ODFW 2010), NRCS Hydrology Study (NRCS 2010), Lower Crooked River Watershed Assessment (CRWC 2008), and Deschutes Sub basin Plan (DBWG 2008) which all include an element of degraded fish and wildlife habitat, water quality, and riparian plant communities within the 19-mile Prineville valley reach of the mainstem Crooked River in Central Oregon.
3) The Silva Ranch project will include 1,680 linear feet of restoration treatments, large wood structures, bank sloping/planting, existing side channel connection at base flow, habitat promoting features inside channel. The proposed project will aid in steelhead and Chinook salmon reintroduction efforts in the greater Deschutes Basin, specifically for water quality, juvenile out-migrating habitat, and potential for adult holding/resting structure and long term wood recruitment.
4) Specific project partners include Portland General Electric, Crooked River Ditch Company, Crooked River Weed Management Area, Crook County SWCD, Confederated Tribes of the Warm Springs, City of Prineville, Oregon Watershed Enhancement Board, US Bureau of Reclamation, Ochoco Irrigation District, and the Oregon Department of Fish and Wildlife.

Review Team Evaluation

Strengths

- The project is part of a larger Lower Crooked River strategy the applicant and partners are implementing through the NRCS Regional Conservation Partnership Program to address key watershed limiting factors prioritized in watershed and recovery plans. The match funding provided by NRCS is secured and will support final design development and permitting.

- Sloping back streambanks, installing large wood structure, and restoring riparian vegetation to stabilize the bank can be a technically sound approach for arresting erosion while providing habitat benefit.
- The proposed restoration actions will build connectivity among restoration investments by tying directly into work completed by the neighboring Deschutes Land Trust and City of Prineville.
- The application includes letters of support from partners and the landowner.
- Previous project evaluations concerns are addressed by including additional details regarding revegetation treatments and engagement with adjacent landowners.

Concerns

- The application lacks details describing how CREP is integrated into the project design. For example, the CREP buffer is not identified in the project design; and it is unclear if seeding and planting components identified in the application will be part of CREP or implemented prior to CREP. Also, plant establishment costs included in the budget may not be appropriate if CREP is also funding plant maintenance. Without details describing plans for CREP, such as a map showing CREP components in relation to the proposed restoration actions, it is unclear if the project will take full advantage of the CREP investment.
- It is not clear how the seeding and planting components described in the application plant page will be implemented and how these components will be maintained to ensure success. There are no clear roles assigned between the applicant and landowner describing how plantings will be implemented and managed over time.
- The water quality benefit from the proposed treatment wetland is unclear. The application lacks key design specifications needed to evaluate whether the wetland design approach can effectively provide water quality improvements to irrigation tailwater, such as the hydrological residence time and the anticipated inflow volume. The application lacks information describing how the wetland feature will be maintained or who will be responsible for the maintenance.
- The ecological benefit from the proposed side-channel treatment is unclear. There is potential for the channel to fill in through sedimentation, contribute to elevated surface water temperatures, and cause increased predation from non-native warm water fish species using the side-channel as habitat.
- The streambank stabilization proposed will likely treat symptoms rather than root causes of watershed disturbance and may prioritize protection of agricultural lands over restoring natural watershed function. The instream habitat value of these treatments will be limited because most of the large wood structure installed will not interact with the river for most of the year.

Concluding Analysis

Restoration actions will be implemented to improve instream habitat and streambank stability along the Crooked River downstream of the City of Prineville. This section of the Crooked River has been heavily modified to support high value agriculture, making it a challenging environment to implement conservation actions that complement existing land use. The actions proposed are standard and effective practices to enhance habitat; however, the proposal lacks clarity around key design elements needed to understand the potential ecological benefit expected from the investment.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority
NA

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Central Oregon (Region 4)

Application Number: 223-4016-22961
Project Type: Restoration
Project Name: Lower Crooked Habitat Restoration - King Ranch
Applicant: Crooked River WC
Region: Central Oregon
County: Crook
OWEB Request: $399,288
Total Cost: $942,013

Application Description 1) Identify the project location - The King Ranch project site is located in the lower Prineville valley approximately six miles west from the city of Prineville. The ranch is on the north side of and adjacent to the Crooked River immediately downstream of the Lytle Creek confluence with the river.
2) Briefly state the project need - The purpose and need of this project is to address habitat limiting factors identified and described in the Middle Columbia Steelhead Conservation Plan (ODFW; 2010). It will address current conditions that do not fully support fish and aquatic needs and that impact water quality.
3) Describe the proposed work - The proposed work includes bank stabilization and restoration elements for side channel and mainstem areas centered on the use of large wood structures to sort and reduce sediment delivery, develop and maintain scour pools, and provide fish habitat (cover and refuge). Alcove habitat will be created and improved and river bar habitat areas will be enhanced to provide long term stability for fish and wildlife benefits. Revegetating key areas and in association with large wood structure locations will provide additional bank stability, shading to reduce stream temperature, and long-term detritus to the aquatic system.
4) Identify project partners - Partners include USDA-NRCS (designs, permits, wetland delineation, and some project oversight), Ochoco Irrigation District (irrigation system improvements), Crook County Soil & Water Conservation District (landowner outreach and project evaluation), King Ranch landowner (Greg and Karen Huston), and the U.S. Bureau of Reclamation (potential funder). Other traditional partners have offered letters of support but have no defined role in the project.

Review Team Evaluation

Strengths

- The project is part of a larger Lower Crooked River strategy the applicant and partners are implementing through the NRCS Regional Conservation Partnership Program to address key watershed limiting factors prioritized in watershed and recovery plans. The match funding provided by NRCS is secured and will support final design development and permitting.
- Improving side-channel and alcove features could offer instream habitat benefits and potential stream cooling affects through hyporheic exchange.
- Juniper trees will be sourced locally from adjacent uplands on the landowner’s property, reducing transportation costs.

- The proposed restoration actions will build connectivity among restoration investments by tying directly into work currently in progress across the river on a neighboring ranch where similar type conservation actions are being implemented.
- The landowner has previous experience as a contractor implementing restoration projects and will be able to offer lessons learned to improve implementation.

Concerns

- The application indicates water quality will be monitored but lacks details describing how this will be implemented.
- The streambank stabilization proposed will likely treat symptoms rather than root causes of watershed disturbance and may prioritize protection of agricultural lands over restoring natural watershed function. The river naturally wants to laterally migrate in the valley, stabilization will hinder this natural process. The instream habitat value of these treatments will be limited because most of the large wood structure installed will not interact with the river for most of the year.
- The application lacks details describing how the CREP program will be integrated with the proposed restoration, including the location and timing of CREP practices and the timeline for the planting activities outlined on the application plant page. Without details describing plans for CREP, such as a map showing CREP components in relation to the proposed restoration actions, it is unclear if the project will take full advantage of the CREP investment.
- Information describing where grass seeding will occur and how it will be implemented is needed in the application to determine whether the proposed seeding treatment is likely to succeed, and the seed mix is appropriate for the site conditions.
- The project may not be ready for implementation because permit applications have not been submitted.
- It is unclear if the existing hydrology will support the ecological benefits expected from enhancing the side-channel and alcove features. The application lacks detail describing the varying flow scenarios for when these features will be activated and provide habitat benefit. There is potential for the side-channel to fill in through sedimentation, contribute to elevated surface water temperatures, and cause increased predation from non-native warm water fish species using the side-channel as habitat.

Concluding Analysis

A suite of restoration actions will be implemented to improve fish and wildlife habitat and water quality along the Crooked River. Existing high value agriculture dominates the historic floodplain of the Crooked River in this valley located downstream of Prineville. The actions proposed are standard and effective practices to enhance habitat; however, the proposal lacks clarity around key design elements needed to understand the potential ecological benefit expected from the investment.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

N/A

Review Team Recommended Amount

$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Central Oregon (Region 4)

Application Number: 223-4017-22970

Project Type: Restoration

Project Name: Deschutes River Flow Restoration - Arnold Irrigation District Phase Two

Applicant: Arnold Irrigation District

Region: Central Oregon

County: Deschutes

OWEB Request: $250,000

Total Cost: $12,708,667

Application Description Arnold Irrigation District (Arnold or the District) operates over 39 miles of canals and laterals in the Deschutes Basin. The original system was built over a century ago by early settlers using methods and materials available to them at that time: open canals lined with porous volcanic rock. The open canals cause a tremendous amount of seepage, resulting in loss of nearly 50 percent of the water withdrawn. Thus, with the current system, Arnold must withdraw double the amount of water delivered to patrons.

Phase Twoof the Arnold Irrigation District Flow Deschutes Basin Restoration Project (herein referred to as ‘this phase ’ and/or ‘project’) will enclose 23,175 length-feet (LF) of open canal into leak-free piping to eliminate the seepage loss and restore 12.6 cubic-feet-per-second (CFS) of flow to the Deschutes Basin during the spring and winter. The water conserved will be protected instream for the benefit of water quantity, water quality, and habitat for native and listed species in the Deschutes Basin. This phase is a continuation of Phase 1 which enclosed 17,022 LF of open canal and conserved 11.2 cfs.

Review Team Evaluation

Strengths

- The project is the second and final phase of a multi-year effort to restore streamflow in the Deschutes River that will improve instream habitat conditions for fish and wildlife, specifically targeting the Oregon Spotted frog.
- The proposal clearly describes details for converting four miles of open irrigation canal into leak free piping, including the piping length, associated costs, and expected conserved water amounts.
- The project cost is reasonable for the expected benefit by securing up to 12.6 cfs of conserved water instream.
- Converting leaky open ditch canals to buried HDPE pipe is identified as an effective strategy to meet ecological objectives in the Deschutes River Basin Habitat Conservation Plan (2022).
- The project is ready for implementation with permits and matching federal funds secured.
- The applicant is collaborating with other irrigation districts in Central Oregon to creatively seek opportunities to assist one another amongst drought conditions. Specifically, the applicant will work directly with North Unit Irrigation District (NUID) to provide conserved water realized during the irrigation season, and in return NUID will release conserved water amounts from Wickuip reservoir during the winter months per direction from USFWS to support Oregon spotted frog habitat.

Concerns

- It is unclear how much of the expected conserved water will be realized due to reductions in water allocations in response to current drought conditions.
- The application attachments contain a significant amount of information that is not directly relevant to the actions outlined in the scope of work described in the proposed solution section. For future application submittals, the applicant is encouraged to consider uploading materials relevant to only the actions identified in the application.
- The cost effectiveness of individual project components is difficult to evaluate due to the use of lump sums in the application budget.

Concluding Analysis

This final project phase proposed by Arnold Irrigation District will complete the district's system improvement plan to pipe and pressurize the irrigation system to improve streamflow in the Deschutes River while providing water reliability to its patrons. The District, alongside all other irrigation districts in Central Oregon, are working diligently to address the roughly 50% seepage loss occurring in delivery canals. This project is timely to utilize significant federal match investments being made in the basin. The substantial increase in water remaining instream will directly impact and improve the natural hydrograph, support state and federally listed fish species, and support riparian habitat important for wildlife.

Review Team Recommendation to Staff
Fund

Review Team Priority
4 of 7

Review Team Recommended Amount
$250,000

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount

$250,000

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Central Oregon (Region 4)

Application Number: 223-4018-23002
Project Type: Restoration
Project Name: Upper Drews Creek Fish Passage
Applicant: Lake County Umbrella Watershed Council
Region: Central Oregon
County: Lake
OWEB Request: $263,335
Total Cost: $329,835

Application Description Drews Valley Ranch is located 21 miles west of Lakeview in Lake County, Oregon. The 11,400-acre ranch is surrounded by the Fremont-Winema National Forest and includes nine miles of streams, eight tributary creeks, a reservoir, and grassy wet meadows. The ranch is home to more than 185 species of birds, fish, and mammals, including the bald eagle and red-band trout.

The Upper Drews Creek Fish Passage Project was initiated in the summer of 2020 as the Lake County Umbrella Watershed Council secured an Oregon Watershed Enhancement Board Technical Assistance grant to survey the project sites and develop a 60% design plan to address fish passage. The lower diversion is a fish passage barrier when stop logs are in place, which overlaps a critical time fish migrate out of Drews Reservoir upstream to spawn.

A design plan has been developed and cost estimates have been retained from a local engineering firm. The Council is seeking construction funds to implement work to restore fish passage at an irrigation diversion on Drews Creek to provide access upstream, while maintaining flood irrigation to the wet meadows. The project will compliment and build upon several conservation actions that have been implemented on the ranch over the last three decades, including a conservation easement, four fish screens, improved fish passage, cross fencing, and off-site water developments.

Project Partners involve Drews Valley Ranch, Oregon Department of Fish and Wildlife, US Fish and Wildlife Service, and Anderson Engineering and Surveying.

Review Team Evaluation

Strengths

- Previous project evaluations concerns are addressed by removing the streambank stabilization treatments.
- The fish passage solution will support volitional movement of fish and lamprey, which are of high importance in Drews Creek. This project will make available an additional 1.5 miles of stream habitat during the irrigation season and improve access to the entire upper watershed in the non-irrigation season.

- The applicant is working with a private landowner that has implemented previous fish passage solutions on other parts of the ranch as well as enrolled a portion of the property in a conservation easement.
- The application includes a grazing management plan that is thorough.
- The ditch associated with the water diversion proposed for modification is already screened to ensure no fish are entrained in irrigation ditches.
- The applicant has successfully implemented similar types of fish passage projects.
- The applicant is working with Ducks Unlimited on projects nearby and will utilize their expertise to investigate the upstream barrier to develop conceptual solutions for further expanding habitat connectivity.

Concerns

- There is a known fish passage barrier 1.5 miles upstream of the project location, and downstream there is no fish passage on Drews Reservoir. These barriers limit the potential habitat access that could be gained from the investment.
- The project area is largely devoid of riparian vegetation and could benefit from riparian enhancements.
- It is unclear what the fish population assemblage and distribution is within the Drews Creek basin above Drews Reservoir. It is also unclear what the timing is for species migrating to and from spawning and rearing habitats above the reservoir. This information would be helpful to better understand the value this fish passage project will have for native fish.

Concluding Analysis

Fish passage will be addressed along Drews Creek in Lake County. The project builds off momentum gained in providing volitional fish passage in the Drews Creek basin above Drews reservoir. Drews Creek is an important tributary in the Goose Lake watershed by supporting a wide array of native aquatic species endemic to the Goose Lake basin that will benefit from the increased stream habitat connectivity expected from this project.

Review Team Recommendation to Staff

Fund

Review Team Priority

2 of 7

Review Team Recommended Amount

$263,335

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$263,335

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Central Oregon (Region 4)

Application Number: 223-4019-22950
Project Type: Restoration
Project Name: Foley Butte Holistic Restoration
Applicant: Crooked River WC
Region: Central Oregon
County: Crook
OWEB Request: $188,680
Total Cost: $285,775

Application Description Foley Butte Ranch, located in the northwest corner of Crook County, Oregon, encompasses 30,655 acres of timberland, creeks, meadows, and mountains. This property is known for its abundant wildlife species, including Mule deer, Rocky Mountain elk, Cougars, Black bears, Bobcats, coyotes, grouse, chukar, and native fish species in the creeks. Within the Foley Butte property there are several different HUC-6 watersheds, this grant will focus on the Allen Creek Watershed. Working on a large property of this size offers a unique chance for large scale watershed restoration work throughout the uplands, and several different headwaters of tributaries to McKay creek, with McKay creek being a main tributary to the Crooked River. This application will address several limiting factors identified in this area by working with project partners to address habitat needs on a holistic landscape scale.
2. This specific project area has suffered from past grazing management regimes that have allowed cattle to overgraze the riparian corridors along streams throughout this property, causing native vegetation to be nearly void along the riparian areas. Grazing management has also led to the encroachment of western juniper, and the decline of forbs, shrubs, and quaking aspen.
3. Project elements include cutting 88.2 acres of encroached Western Junipers, protecting and enhancing 5 acres of sensitive aspen stands by removing encroaching conifers and 4-strand wildlife-friendly fencing. Six springs will be developed with one spring including an above ground cistern for emergency wildfire water storage. 17.84 acres of CREP will be enrolled along Allen Creek, with VerticalPost Structures and large wood, enhancing the riparian corridor, an additional 4 acres of non-CREP riparian fence will be installed in the uplands, lastly 7 acres of weed treatment.
4. Project partners include the following: CRWC, Nuveen Natural Capital, Crooked River Weed Management Area, and Crook County SWCD.

Review Team Evaluation

Strengths

- Previous project evaluations concerns are addressed by including additional details regarding CREP enrollment, activities, budgets, and timeline.

- The landowner is new to the area, has an interest in conservation, is donating material from on-site, and is actively engaging local partners to develop restoration plans to improve fish and wildlife habitat.
- The grazing management plan included in the application offers insight on how the property will be managed for livestock to maintain restoration investments.
- The upland spring developments will facilitate improved livestock distribution and remove their dependence on riparian areas to access water. They will also be fenced with wildlife friendly fence and have escape ramps for wildlife.
- The instream habitat structures proposed for Allen Creek are likely to improve aquatic habitat conditions for juvenile and adult fish. This stream is designated as critical habitat for Mid-Columbia Steelhead.
- The applicant is engaging appropriate partners to assist with implementation of the conservation actions. The application includes support letters documenting how partners plan to engage in this project.

Concerns

- Juniper removal may not be the highest priority action to promote forest health and improve watershed function on the property. Photos in the application indicate there has been pine and fir mortality along with aggressive past forest management that has led to a degraded forested landscape that poses a risk to watershed and riparian function. Focusing on improving the health of the pine and fir stands over juniper removal may be a higher priority for restoration.
- The landowner needs a water right to store water in a cistern for the purpose of wildfire emergencies and there is no water right associated with this use in the project area.
- It is unclear how much area around the proposed spring developments will be fenced.
- The budget includes material costs for the large woody debris described in objective three of the application but does not contain installation costs.

Concluding Analysis

A new landowner who recently purchased a 30,000-acre ranch on Allen Creek in the Crooked River watershed will be engaged to restore upland, aspen, and riparian habitats. The actions outlined in the application present a holistic suite of restoration activities that are likely to improve habitat for upland species and aquatic species, including Rocky Mountain elk, Mule deer, steelhead, and Redband trout. The applicant is encouraged to work with the landowner to develop a property wide forest management plan as part of the project.

Review Team Recommendation to Staff

Fund

Review Team Priority

3 of 7

Review Team Recommended Amount

$188,680

Review Team Conditions

The applicant shall work with the landowner to engage with the Oregon Water Resources Department (OWRD) to obtain a water right to store spring water in a cistern for the purposes of wildfire emergencies.

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$188,680

Staff Conditions

The applicant shall work with the landowner to engage with the Oregon Water Resources Department (OWRD) to obtain a water right to store spring water in a cistern for the purposes of wildfire emergencies.

Open Solicitation-2023 Spring Offering
Central Oregon (Region 4)

Application Number: 223-4020-23028
Project Type: Restoration
Project Name: Irrigation Modernization and Winter Flow Augmentation Project Segments 1 and 2
Applicant: North Unit Irrigation District
Region: Central Oregon
County: Jefferson
OWEB Request: $500,000
Total Cost: $20,800,000

Application Description The North Unit Irrigation District (NUID or the District) Irrigation Modernization and Winter Flow Augmentation Project Segment 1-2 (Project) will enclose a portion of Lateral 43, a 34,040 length feet (LF) open porous irrigation canal into leak free HDPE piping to conserve 5.3 cubic-feet-per-second (CFS) of water previously lost to seepage. The water conservation achieved by this project will (1) improve conditions for ESA-listed species including the Oregon spotted frog; (2) improve water quality; (3) improve and stabilize agricultural production through water supply reliability; and (4) eliminate water delivery and operations inefficiencies.

NUID and its delivery system is located in the Deschutes Basin near Madras, Oregon in Jefferson County. The district is under contract with the U.S. Bureau of Reclamation to operate the North Unit project that withdraws water from Wickiup Reservoir with a diversion on the Deschutes River in Bend. The district operates 65 miles of main canal and 235 miles of laterals that were built nearly a century ago as a part of President Franklin D. Roosevelt's New Deal emergency relief program. The open canals were lined with volcanic rock that causes 37% of the water withdrawn to be lost due to seepage. Thus, along with other irrigation districts in the region, NUID is committed to enclosing the open canals and laterals into leak free pipe to conserve water and restore flows to the Deschutes Basin.

NUID is a junior right holder on the Deschutes and with the persistent drought in the region have experienced an exponential uptick in fields left fallow due to lack of water that threatens a major food source for the region and nation. Upon completion, this project will allocate the 5.3 cfs of conserved water to irrigation use during the spring and summer, and release the same amount of water in the winter months for the benefit of the ESA-listed Oregon Spotted Frog habitat near Wickiup Reservoir.

Review Team Evaluation

Strengths

- The proposal clearly describes details for converting 34,040 length feet of open porous irrigation canal into leak free piping, including the piping length, associated costs, and expected conserved water amounts.

- The applicant and engineer have demonstrated experience in successfully implementing similar irrigation projects.
- The restoration proposed implements actions identified in a habitat conservation plan. Converting leaky open ditch canals to buried HDPE pipe is identified as an effective strategy to meet ecological objectives in the Deschutes River Basin Habitat Conservation Plan (2022).
- The applicant will release conserved water amounts from Wickuip reservoir, where they own storage water rights, during the winter months per direction from USFWS to support Oregon spotted frog habitat.
- The project is ready for implementation with secured federal match funds.

Concerns

- It is not clear why the applicant prioritized the specific laterals proposed for piping. There is no information describing how these laterals fit into the overall system improvement plan for the North Unit Irrigation District.
- The application attachments contain a significant amount of information that is not directly relevant to the actions outlined in the scope of work described in the proposed solution section. For future application submittals, the applicant is encouraged to consider uploading materials relevant to only the actions identified in the application. For example, the entire system improvement plan is not necessary, only specifics related to the actions in the application.
- It is unclear if the project is ready for implementation. Final designs were not complete at time of application, and it is not clear if State permits are secured.
- The project cost is high for the ecological return on investment.
- The cost effectiveness of individual project components is difficult to evaluate due to the use of lump sums in the application budget.

Concluding Analysis

The North Unit Irrigation District, alongside all other irrigation districts in Central Oregon, are working diligently to address the roughly 50% seepage loss occurring in delivery canals. This project is timely to utilize significant federal match investments being made in the basin. The water conservation expected from this project will improve water quality and conditions for ESA-listed species, such as the Oregon spotted frog.

Review Team Recommendation to Staff
Fund

Review Team Priority
7 of 7

Review Team Recommended Amount
$500,000

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Central Oregon (Region 4)

Application Number: 223-4021-23036
Project Type: Restoration
Project Name: Tumalo Irrigation District Deschutes Basin Restoration Group 6b
Applicant: Tumalo Irrigation District
Region: Central Oregon
County: Deschutes
OWEB Request: $200,000
Total Cost: $5,465,625

Application Description The Deschutes River and its tributaries, including Tumalo Creek, suffer from low summer streamflows that are a major limiting factor for fish habitat and water quality in the basin. Restoring live flow in the basin is a regional and state-wide objective championed by local, state, and federal entities. For nearly three decades, Tumalo Irrigation District (TID) has been pursuing a water conservation program to provide a permanent solution to system-wide water losses caused by porous open irrigation canals. Since the mid-1990s, TID and its funding partners have enclosed over 154,704 length feet (LF) of open canal into leak-free piping, resulting in 27 cfs of return flow to Tumalo Creek and the Deschutes Basin.

This current phase of the Project conserves 1.1 CFS of water and returns 0.85 cfs to Tumalo Creek during the irrigation season and Crescent Lake during the storage season by enclosing a portion of the Columbia Southern Lateral in 36-42” diameter HDPE piping. The 0.85 cfs conserved by this project that will be returned instream will be protected by the Allocation of Conserved Water statute.

This Project has a direct and immediate impact on water conservation and instream flow restoration. One hundred percent of the publicly funded conserved water through each phase of the SIP will be returned and protected instream; providing substantial water quality and quantity benefits to the Deschutes Basin; with a majority being returned to Tumalo Creek. Tumalo Creek, Crescent Creek, the Little Deschutes River, and the Deschutes River are listed as impaired waterways under Section 303(d) of the Clean Water Act.

Review Team Evaluation

Strengths

- The project will protect streamflow in Tumalo Creek, a cold water refugia during the summer irrigation season, which may aid in decreasing stream temperatures in the Deschutes River system.
- The proposed project builds on previous phases completed by the applicant that successfully enclosed open porous irrigation canals into leak free pipe and restored streamflow through water conservation in the Tumalo and Crescent Creek watershed.
- The protected water storage in Crescent Lake expected from the project will allow for additional flow releases into Crescent Creek that will enhance Oregon spotted frog and native fish habitat.
- The applicant, design team, and contractors have the expertise to successfully implement the project.

Concerns

- The application attachments contain a significant amount of information that is not directly relevant to the actions outlined in the scope of work described in the proposed solution section. For future application submittals, the applicant is encouraged to consider uploading materials relevant to only the actions identified in the application.
- The cost effectiveness of individual project components is difficult to evaluate due to the use of lump sums in the application budget.
- It is unclear how much water quality benefit the conserved 0.85 cfs will have on the Middle Deschutes river and the extent to which it can contribute to cooling water temperatures.

Concluding Analysis

The project continues implementation of the applicant's watershed action plan to restore streamflow by piping leaky open ditch canals. The approach has proven to be effective in achieving desired streamflow restoration outcomes that benefit ESA-listed and other native fish species and contribute to improved water temperature conditions in the Deschutes basin.

Review Team Recommendation to Staff
Fund

Review Team Priority
5 of 7

Review Team Recommended Amount
$200,000

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$200,000

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Central Oregon (Region 4)

Application Number: 223-4022-23041

Project Type: Restoration

Project Name: J.C. Boyle Reservoir Riparian Habitat Buffer Fencing

Applicant: Trout Unlimited Inc

Region: Central Oregon

County: Klamath

OWEB Request: $201,258

Total Cost: $355,231

Application Description (1) This project is located on JC Boyle Reservoir, a reservoir on the Klamath River in Klamath County Oregon. (2) In November 2022, the Federal Energy Regulatory Commission issued a license surrender order for the Lower Klamath River Hydroelectric Project. Dam removal will start with Copco 2 Dam in 2023 and Copco 1 Dam, Iron Gate Dam and J.C. Boyle Dam in 2024. Water levels on J.C. Boyle Reservoir will be drawn down in the spring of 2024 and expose the lake bottom for the first time since 1958, and the dam will be removed later in 2024. The newly exposed sediment and riverbanks needs to be protected in order to successfully establish native vegetation. (3) This project will install a riparian buffer fence on J.C. Boyle Reservoir at the high-water mark to exclude range cattle, feral horse grazing, deleterious ATV use, and protect historical and cultural sites in the reservoir footprint. Fencing will also protect the mouth of Spencer Creek, which will be restored as part of the reservoir drawdown process. The fence will have walkthrough areas to allow access for recreational activities. Native planting and seeding in the reservoir footprint will be completed by project partners as part of the dam removal restoration process. (4) Project partners include Klamath River Renewal Corporation (KRRC), Resource Environmental Solutions (RES), Bureau of Land Management (BLM), Oregon Department of Fish and Wildlife (ODFW), Modoc Nation, and Green Diamond Resource Company.

Review Team Evaluation

Strengths

- The timing of this project is aligned with the JC Boyle dam removal and restoration of the native riparian vegetation in the reservoir area.
- The fencing proposed is a necessary component to ensure restoration of the JC Boyle reservoir area is protected once the dam is removed. The fencing will protect sensitive habitat as native vegetation is re-planted along the reservoir soils and anadromous salmonids return to this section of Klamath River.
- Fencing specifications will be wildlife friendly to promote wildlife movement while inhibiting livestock and ATV access.
- The applicant is engaging appropriate partners to assist with implementation of the conservation actions. The application includes support letters documenting how partners plan to engage in this project.
- The project will protect cultural resources important to the Modoc Nation.
- The cost of the fence is reasonable and was estimated based on previous fencing projects.

Concerns

- At the time of application, the exact footprint of the fence location is still unknown. It is also unclear who will maintain the fence and how future maintenance will be funded to ensure the restoration investment is sustained to ensure resource protection. Final designs and landowner engagement are ongoing and will be determined prior to dam removal.
- OHV use is heavy in the area adjacent to JC Boyle reservoir; however, the applicant has not engaged the OHV community.
- The application indicates public awareness activities are planned but provides few details describing how and when these will occur. The timing of the dam removal is quickly approaching, and it will take time to effectively engage the vast number of partners and community stakeholders affected by this project.

Concluding Analysis

The entire perimeter of the JC Boyle reservoir footprint will be fenced to ensure protection of newly exposed soils once the JC Boyle dam is removed. The applicant learned there was no funding allocated to this effort as part of the dam removal project and stepped up to take the lead on this project component last minute. The project is time-sensitive because once the reservoir sediments are exposed in early 2024 after the dam is removed, they will immediately be vulnerable to disturbance.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 7

Review Team Recommended Amount
$201,258

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$201,258

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Central Oregon (Region 4)

Application Number: 223-4023-23059

Project Type: Restoration

Project Name: LPID Irrigation Modernization Project
Phase 2

Applicant: Lone Pine Irrigation District

Region: Central Oregon

County: Crook

OWEB Request: $475,000

Total Cost: $3,498,000

Application Description Location: With canals in Jefferson, Deschutes & Crook counties, water flows from Deschutes River & overflow spills into Crooked River. Phase 2 includes Crook & Jefferson County. OWEB Region 4, Coor 44°22'40"N/ 121°04'24"W. Need: Addresses watershed concerns. Conveyance system water loss, water delivery & operation inefficiencies, fish & aquatic habitat instream flow, reduce public risk, increase property safety, improve water quality, local agriculture economic sustainability & resilience, legally protects a portion of conserved water instream. Improving water resources is a Deschutes Basin focus & coordinated effort of 8 irrigation districts. Work: Strategies to construct an efficient system, reduce energy & permanently restore Deschutes River flows. The project will realign canal systems, eliminate 4.11 miles of open canal & laterals, pipe & pressurize 10.89 miles of canals/laterals, save 3,219 acre-ft annually at a rate of 5.2 cfs. Phase 2 will install 4.2 miles of main canal/laterals: MC = 1305 ft 36", 1155 ft 32”, 1610 ft 30”, 2295 ft 26”, 2770 Lft 24”, 2195 ft 16”, totaling 11,330 ft HDPE pipe; lats = 2575 ft 12”, 6385 ft 10”, 1310 ft 6”, 845 ft 4”, totaling 11,115 ft HDPE pipe installed. LPID has a System Improvement Plan, Addendum-Alt C w/specific project details, Preliminary Investigative Report. Open earth ditch canals evaluation of seepage loss using state-of-the-art equipment found a loss of 5.2 cfs at measurement. Eliminating 20% seepage loss helps restore flows in Deschutes River. In-stream flows benefit endangered species & water quality, including spotted frogs, chinook salmon, mid-Columbia steelhead & bull trout. Piping the system eliminates spills improving Crooked river water quality. Partnerships: With DBBC & DRC, LPID coordinates & shares resources & assets to conserve water, improve farm/ranch services, enhance river conditions for wildlife/recreation. FCA helped develop the SIP, PIR, Watershed/EA. USDA/NRCS gives funding/technical assistance.

Review Team Evaluation

Strengths

- The project is the second and final phase of a multi-year effort to restore streamflow in the Deschutes River to improve instream habitat conditions for fish and wildlife, specifically targeting the Oregon Spotted frog.
- The proposal clearly describes details for converting over four miles of open porous irrigation canal and laterals into leak free piping, including the piping length, associated costs, and expected conserved water amounts.

- The restoration proposed implements actions identified in a habitat conservation plan. Converting leaky open ditch canals to buried HDPE pipe is identified as an effective strategy to meet ecological objectives in the Deschutes River Basin Habitat Conservation Plan (2022).
- The project is ready for implementation with secured permits and federal match funds.
- The applicant is collaborating with other irrigation districts in Central Oregon to creatively seek opportunities to assist one another amongst drought conditions. Specifically, the applicant will work directly with North Unit Irrigation District (NUID) to provide conserved water realized during the irrigation season, and in return NUID will release conserved water amounts from Wickuip reservoir during the winter months per direction from USFWS to support Oregon spotted frog habitat.

Concerns

- It is unclear how much of the expected conserved water will be realized due to reductions in water allocations in response to current drought conditions.
- The application attachments contain a significant amount of information that is not directly relevant to the proposed actions outlined in the scope of work described in the proposed solution section. For future application submittals, the applicant is encouraged to consider uploading materials relevant to only the actions identified in the application.
- The cost effectiveness of individual project components is difficult to evaluate due to the use of lump sums in the application budget.

Concluding Analysis

This final project phase proposed by the Lone Pine Irrigation District will complete the district's system improvement plan to pipe and pressurize the irrigation system to improve streamflow in the Deschutes River while providing water reliability to its patrons. The District, alongside all other irrigation districts in Central Oregon, are working diligently to address the roughly 50% seepage loss occurring in delivery canals. The project is timely to utilize significant federal match investments being made in the basin. The water conservation expected from this project will increase streamflow, which will improve water quality, habitat, and habitat availability in the Deschutes River downstream from Wickiup Reservoir.

Review Team Recommendation to Staff
Fund

Review Team Priority
6 of 7

Review Team Recommended Amount
$475,000

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$475,000

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Central Oregon (Region 4)

Application Number: 223-4024-22951

Project Type: Technical Assistance

Project Name: Planning for Restoration due to Bootleg Fire

Applicant: Klamath Lake Land Trust

Region: Central Oregon

County: Klamath

OWEB Request: $74,263

Total Cost: $113,967

Application Description The 280 acres of land owned by the Klamath Lake Land Trust (KLLT) on and around the Sycan River that had been forested prior to the Bootleg Fire in summer 2021 is the subject of this funding request. The property is located north of Beatty, OR.

We anticipate that the impacts from the fire will include erosion, degraded water quality, loss of habitat, and invasive species intrusion. We also anticipate that reforestation will be more challenging as a result of climate change, which will result in warmer temperatures in the region, more instances of drought due to less snowpack, diminished water quality, increased pests and invasive species.

KLLT requests funding to help facilitate the development of a current conditions report and restoration plan for the property. These goals will be achieved by working in partnership with KC Harvey and the Klamath Tribes, with input from the OR Department of Forestry.

Review Team Evaluation

Strengths

- The Sycan River property, owned and managed by the Klamath Lake Land Trust (KLLT), has an array of habitat types, including sage steppe, dry type Ponderosa pine, riparian, and instream. Potential future restoration of these habitats will likely benefit native fish and wildlife and water quality.
- The applicant is utilizing the Burned Area Emergency Response Assessment (BEAR) developed for the Bootleg fire as a basis to inform project objectives.
- The Klamath Tribes are a partner on this project, their engagement is demonstrated by a letter of support. The Klamath Tribes have been partnering with KLLT on past restoration efforts on the Sycan River property.

Concerns

- Specific ecological goals that will be used to determine the baseline metrics needed to inform a restoration plan are not identified in the application. Without this, it is unclear how the assessment will lead to restoration benefiting fish and wildlife habitat and water quality.
- It is unclear from the application how appropriate technical resources and partners in the region will be engaged in the baseline conditions assessment work. There is no information in the application or support letters describing efforts to partner or collaborate with agencies or organizations involved in post fire recovery work.

- An out of state consultant will be engaged exclusively to carry out the baseline conditions assessment and develop the restoration plan. It is unclear if the consultant has relevant experience to characterize and assess a post fire landscape in Klamath County.
- State agency engagement and support for the project is unclear because there are no letters of support from any State agency included in the application.
- Livestock from neighboring landowners continue to cause significant damage to riparian habitats on the property; however, it is unclear from the application how the applicant plans to address this trespass through the restoration plan.
- The severity of the Bootleg fire on the property was sporadic and mostly impacted portions of the Ponderosa pine stands. The application lacks information describing current forest management and the desired future condition that will be used for restoration planning and meet the landowner's vision for dry type Ponderosa pine habitats. It is unclear what metrics will be collected for the baseline conditions assessment that will inform restoration actions to promote forest health and resiliency.
- The project cost is high for the expected products. Additional detail is needed in the application budget to evaluate whether costs are reasonable and necessary for the proposed work.

Concluding Analysis

The Klamath Lake Land Trust proposes to complete an assessment that characterizes resources on their Sycan River property. The application lacks critical details describing the metrics that will be collected as part of this assessment and how metrics will be used to develop and prioritize a list of restoration actions.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

N/A

Review Team Recommended Amount

$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Central Oregon (Region 4)

Application Number: 223-4025-23005

Project Type: Technical Assistance

Project Name: Chewaucan Working Wetland Reconnaissance

Applicant: Lakeview SWCD

Region: Central Oregon

County: Lake

OWEB Request: $74,279

Total Cost: $93,029

Application Description The Chewaucan Watershed consists of a 53-mile-river, several tributaries, and thousands of acres of flood irrigated pasturelands, which provide stopovers and breeding grounds for thousands of migratory and resident bird populations. Additionally, these marshes provide sustainable forage for family ranching operations. Lake Abert, a hypersaline pluvial lake, is the end point within this watershed, additionally supporting migratory birds. The river and surrounding area provides habitat for the Chewaucan redband trout, mule deer, and sage grouse.

Five catastrophic wildfires have burned 75 percent of the upper watershed, likely resulting in drastic changes to the entire catchment. The Lakeview SWCD is undertaking a comprehensive analysis of the working wetlands in the lower 17 miles of the Chewaucan River Basin, approximately 25,000 acres known as the Upper and Lower Chewaucan Marshes. An in-depth field reconnaissance will provide area resource managers with information necessary to understand the current watershed conditions, document any completed restoration projects, help identify source problems along with restoration opportunities, and prioritize areas of concern. Known natural resource concerns include invasive weeds, infrastructure inadequacies, streambank erosion, and potential threats to aquatic habitat.

Our project would begin in late 2023 with a workshop to engage stakeholders and compile existing information. Reconnaissance would occur in spring and summer of 2024, with a final report detailing findings and treatment recommendations by fall of 2024 and shared through a final stakeholder workshop in early 2025. The remainder of 2025 will be used to pursue funding for additional action plans and restoration efforts based on the final survey and reconnaissance findings. Project partners include Lake County Umbrella Watershed Council (LCUWC), private landowners, Oregon Department of Fish & Wildlife (ODFW), and Intermountain West Joint Venture (IWJV).

Review Team Evaluation

Strengths

- Baseline watershed conditions data will be collected for the Chewaucan working wetlands to prioritize future restoration. The project area has never been fully assessed for its fish and wildlife habitat enhancement potential. Local technical experts have indicated the area has ecological importance to migratory birds, sage grouse, and redband trout.

- The project footprint spans a large geography in the Chewaucan River Basin that is privately owned by only three landowners. Access to this approximately 25,000-acre area was previously not possible. New management and landowner willingness have opened new opportunities for conservation.
- Wet meadows and marshes located in the project area support nesting habitat for a suite of birds. For example, the area is known for supporting large quantities of Sandhill cranes and Trumpeter swans.
- The Chewaucan marsh is located along the pacific flyway within the SONEC region and is adjacent to other similar type habitats significant to migratory birds, such as Lake Abert and the Warner Lakes Valley.
- Sage steppe habitat designated as core areas for greater sage grouse surrounds the Chewaucan marsh; the wet meadows on the project site are important habitat features for sage grouse and provides habitat connectivity with the surrounding area.
- Partner support for the project is demonstrated by letters of support included in the application.

Concerns

- It is unclear what types of restoration projects are envisioned for within the marsh and wetland areas that will likely be identified through the proposed technical assistance.
- The project focuses on addressing terrestrial invasive plant species within agricultural operations; it is unclear how future restoration actions will address habitat limiting factors and improve native wetland and meadow function.
- It is not clear how the baseline assessment described in the application will lead to future restoration that provides habitat benefits for native fish. The Chewaucan River, which serves as a fish migration corridor, has been ditched and channelized to support agriculture production and is disconnected from the adjacent meadows. Additional information describing potential restoration concepts that is likely to be considered, such as reconnecting the river with the meadows, would be helpful to better understand potential future ecological outcomes.
- While the consultant identified to assist with this effort has experience working in rural communities to generate interest and collaboration amongst landowners, partners, and technical expertise in terrestrial habitats, it is unclear if the consultant has the necessary wetland and marsh background to adequately assess and characterize these habitat types.
- The landscape has been heavily modified to support agriculture. It is unclear how willing the landowners are to make land use changes that will be recommended to improve fish and wildlife habitat and water quality.
- The use of Traditional Ecological Knowledge (TEK) is not appropriate in the context provided in objective two of the application. TEK does not refer to recent history from the last 150 years, but instead refers to knowledge of Indigenous people from pre-European settlement history.

Concluding Analysis

An assessment and characterization of lands encompassing approximately 25,000 acres will be completed to develop restoration projects. Understanding existing resources and the conservation potential within a large geography is a reasonable first step to strategize future restoration investments. The application lacks detail describing how the assessment will lead to restoration actions that will improve wetland and marsh function, water quality, and fish and wildlife habitat.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority
N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Central Oregon (Region 4)

Application Number: 223-4026-23043
Project Type: Technical Assistance
Project Name: Fifteenmile Managed Underground Storage Pilot Testing 2023
Applicant: Wasco SWCD
Region: Central Oregon
County: Wasco
OWEB Request: $75,000
Total Cost: $129,373

Application Description Located in Wasco County, the Fifteenmile Watershed includes lands drained by Fifteenmile Creek which discharges into the Columbia River. Fifteenmile Creek flows through the town of Dufur, located 15 miles south of The Dalles. The Fifteenmile watershed is home to federally-listed (threatened) wild Mid-Columbia steelhead, a culturally-significant population of Pacific Lamprey, other native fish species, and a vibrant farm community. The project location is 6 miles upstream from Dufur, near river mile (RM) 35. Surface flows in Fifteenmile Creek are over-allocated in the summer months, and the Watermaster regulates off junior water right holders to protect senior users during the irrigation season. Low stream flow and associated high temperature have been identified as primary limiting factors for viable fish populations. Summer low-flow temperatures in reaches of Fifteenmile Creek often exceed temperature thresholds for salmon and trout rearing, migration and spawning.
Subsurface storage of cool water has been identified through previous studies as a feasible approach to enhance summer streamflows, and improve temperature conditions for migration and rearing. The concept is to divert and treat cool water from Fifteenmile Creek during higher flow winter/spring months, store it in a deep, confined aquifer and return the water during low flow periods.
In April of 2023 the pilot basin was constructed and pilot testing had begun, however throughout the testing soils in the basin were not filtering the water at the capacity and water quality needed for subsurface storage. This application will provide further technical assistance to refine the pilot project to ensure and verify the design parameters for the full-scale diversion and treatment system to produce a source water quality that meets standards for injection and storage.
Partners include the Wasco County SWCD, Fifteenmile Watershed Council, ODA, OWRD, DEQ and ODFW. (See Attached Agency Roles Diagram)

Review Team Evaluation

Strengths

- The project continues the exploration of aquifer storage recovery to address streamflow and water temperature concerns along Fifteenmile Creek, an important stream for Mid-Columbia summer Steelhead.
- The applicant has worked for multiple years developing a pilot design concept that is likely to succeed in using cool water stored underground to enhance summer stream flows and improve temperature conditions for fish migration and rearing.

- The pilot project will continue to test and refine the design to embark on an expensive, larger project build out.
- The project builds off past efforts that increased streamflow during critical summer months, including the Fifteenmile Action to Stabilize Temperatures (FAST) program.
- The applicant and partners have a long history of implementing restoration and collecting monitoring data.

Concerns

- It is unclear whether water returned instream at the point of diversion will result in flow downstream at the lower reaches of Fifteenmile Creek because the stream reaches below this point of diversion are known to go sub-surface during summer months.
- It is difficult to evaluate the ecological value of the expected conserved water without details about the future instream water right, including the priority date and the water right holder.

Concluding Analysis

Using aquifer storage is a bold and innovative approach that could prove to be an effective solution for restoring flow during critical summer timeframes. The current technical assistance project is the final design step for a pilot project that has potential to be a long-term solution to providing adequate water flow and temperature conditions for Middle Columbia Steelhead and other fish species in Fifteenmile Creek.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 2

Review Team Recommended Amount
$75,000

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount

$75,000

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Central Oregon (Region 4)

Application Number: 223-4027-23049

Project Type: Technical Assistance

Project Name: Lower East Fork Hood River & Baldwin Creek Fish Passage & Habitat Restoration Design

Applicant: Hood River WS Group

Region: Central Oregon

County: Hood River

OWEB Request: $73,101

Total Cost: $275,976

Application Description This project will take place on the Lower East Fork Hood River and Baldwin Creek, located within the Hood River Watershed in Hood River County. The Hood River Watershed Group (HRWG), in partnership with the Confederated Tribes of the Warm Springs (CTWS) and private landowners, will develop fish passage and instream habitat restoration designs along the Lower East Fork and Baldwin Creek, a critical clearwater tributary to the Lower East Fork.

The purpose of these projects will be to restore aquatic habitat as an aid to the recovery of ESA-listed spring Chinook salmon, winter steelhead, and coho, as well as resident cutthroat and rainbow trout. Improving instream habitat and fish passage are listed as priority actions within the Hood River Basin Partnership Strategic Action Plan (2021) and multiple local planning and assessment documents. These documents identify the lack of habitat quantity and quality, including passage barriers, channel stability, habitat diversity, and sediment load, as primary factors limiting the natural production of spring Chinook, steelhead, and other salmonids in the East Fork Hood River.

This project will develop 90% restoration designs, resulting in 1.2 miles of instream habitat restoration on the Lower East Fork Hood River, and 1.25 miles of restored instream habitat, improved passage to approximately two miles of stream, and reconnection of up to 11 acres of floodplain on Baldwin Creek. Work will include topographic surveying, hydrologic and hydraulic modeling, cultural resource surveying, wetland delineations, and 90% design drawings. HRWG will pursue implementation funding with the completed designs.

Project partners include Hood River Watershed Group (project manager), CTWS (cash match), and project landowners.

Review Team Evaluation

Strengths

- The application clearly articulates a need for developing engineering plans to support future fish passage and habitat enhancement projects along Lower East Fork Hood River and Baldwin Creek.

- The applicant and partners have a long history of implementing similar types of projects.
- Support from the private landowners affected by the project is demonstrated by letters included in the application.
- Using existing LiDAR data that provides detailed topographic information will result in cost savings.
- The inclusion of cultural resource surveys is appropriate for the project design stage.
- Baldwin Creek is a clear water tributary to the East Fork Hood River that provides critical habitat for aquatic species.
- The project area along the East Fork Hood River is protected by a conservation easement managed by the Columbia Land Trust that will ensure long-term protection and maintenance of investments in habitat restoration.
- Habitat upstream of both project locations have high intrinsic habitat value for Steelhead and Chinook.

Concerns

- It is unclear from the pictures provided in the application whether the perched culvert acts as a fish barrier.

Concluding Analysis

The project continues momentum the applicant and partners are building to engage private landowners in an urban-rural interface to implement fish passage and instream and floodplain habitat enhancement opportunities. The future restoration project will increase the quantity and access to spawning, rearing, and overwintering habitat for winter steelhead, spring Chinook, coho salmon, and resident trout in the Lower East Fork Hood River and Baldwin Creek. Ecological processes, including stream-floodplain interaction, riparian function, and maintenance of instream habitat complexity, will also be restored and provide further fish habitat benefits.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 2

Review Team Recommended Amount
$73,101

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation
Fund

Staff Recommended Amount
$73,101

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Central Oregon (Region 4)

Application Number: 223-4028-23056

Project Type: Technical Assistance

Project Name: Enhancing Salmon Habitat on the Mainstem Columbia River through Control of Invasive American Shad

Applicant: Ecotrust

Region: Central Oregon

County: Wasco

OWEB Request: $74,881

Total Cost: $98,631

Application Description The proposed project, “Enhancing Salmon Habitat on the Mainstem Columbia River through Control of Invasive American Shad”, aims to enhance the freshwater habitat of mainstem Columbia River and create ecological benefits for salmon by significantly reducing the abundance of the invasive American shad species through increased harvests by tribal fishers. Development of dams in the Columbia River have created an ideal habitat for American shad, which are now contributing to deleterious conditions for native salmon populations. Shad harvests will decrease ecosystem stressors, enhance freshwater habitats, and build economic resilience for tribes of the Columbia Basin.

Ecotrust will provide technical assistance to support the collaborative development of a Strategic Action Plan that will lead to increased tribal shad harvests through strategies such as developing a commercial shad fishery and new market channels for shad products. Utilizing a community-centered approach, funding from OWEB will build upon current stakeholder engagement efforts and support the critical next step of developing a Strategic Action Plan to develop a shared vision and define the full scope of work, including geographic extent, a phased approach timeline, and the range of strategies to to be piloted.

Project partners currently include Columbia River Inter-Tribal Fish Commission, Oregon State University, and individual tribal fishers and natural resource experts. Additionally, we are engaging tribal leaders from the Yakama Nation, Warm Springs, Umatilla, and Nez Perce Tribes, as well as the Bureau of Indian Affairs, U.S. Army Corps of Engineers, and others. Ecotrust is a 501c3 based in Portland and holds nearly 30 years experience in providing TA and supporting efforts to increase regional resilience to a changing climate and advance lands and waters stewardship practices to be more ecologically restorative and economically just. Our project partners have requested we serve as project lead.

Review Team Evaluation

Strengths

- The application clearly articulates a need for developing a strategic action plan for managing non-native American shad in the Columbia Basin.

- A thoughtful and unique approach is proposed to restore native salmonids in the Columbia Basin by creating economic opportunities to reduce invasive shad that are crowding salmonid habitat.
- The applicant is engaging tribal leaders from the Yakama Nation, Warm Springs, Umatilla, and Nez Perce Tribes, as well as the Bureau of Indian Affairs.

Concerns

- It is unclear if there will be an ecosystem improvement from the implementation of the plan. There is not enough evidence that indicates removing invasive shad will have a beneficial impact on native salmonids.
- American shad have done extremely well in the Columbia River, there is concern the species will again recolonize and outcompete native salmonids if shad harvests cannot be sustained.
- It is unclear whether all the appropriate stakeholders are engaged. For example, commercial fishery involvement is not described in the application and this community likely has experience and expertise that could offer insight into harvest methods and techniques to reduce incidental by-catch of ESA-listed fish.
- More clarity is needed on the catch rate in relation to selective harvest methods to understand the extent of potential ESA-listed species caught as bi-catch.
- American shad is native to the East coast of the United States and is harvested for food and other markets, their experience and expertise could offer valuable insights to this effort, yet there is no mention of engaging with those involved.
- It is unclear how Oregon Department of Fish and Wildlife (ODFW), Washington Department of Fish and Wildlife (WDFW), and Army Corps of Engineers will serve in developing the strategic action plan. Engagement with these entities will be essential for the plan to be successful.

Concluding Analysis

A strategic action plan will be developed to control invasive American shad populations to benefit native salmonids. American shad have a huge presence in the Columbia River that could offer economic opportunities to Tribes and reducing their population could increase habitat available for native salmonids. There are too many unknowns to discern what long-term ecological value this project could offer to native fish.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

N/A

Review Team Recommended Amount

$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Central Oregon (Region 4)

Application Number: 223-4029-22979

Project Type: Monitoring

Project Name: Brattain Post Fire Restoration Project Effectiveness

Applicant: Fort Rock/Silver Lake SWCD

Region: Central Oregon

County: Lake

OWEB Request: $252,269

Total Cost: $324,724

Application Description 1) Our project effectiveness monitoring project is on private lands in the 2020 catastrophic Brattain wildfire scar, which negatively affected eight 12- digit HUCs in the upper Chewaucan and Anna River watersheds, with landscape level ecological degradation. The small incorporated town of Paisley is our work hub.
2) Post fire recovery work focused on improving aquatic habitat and water quality for the Chewaucan Redband trout (state status – vulnerable, potentially at risk) through erosion abatement. This included aerial seeding and aerial herbicidal application (OWEB grant #s222-8501-22392 and 220-8011-19315), with more recent OWEB funds (grant #s 222-8501-22392 and 222-8501-22727) for burnt wood removal as site preparation for seeding. With this high level of Oregon based investment, there is a need to evaluate aerial seeding success with naturally revegetating vegetation to guide other similar post fire restoration work in the Great Basin system.
3. Our project proposal is for a comprehensive monitoring plan in two phases with an initial focus on natural revegetation by deep rooted bunchgrasses compared with aerial seeding, and a phase 2: herbicide application / seeding, by slope, aspect, burn severity, and soil type. This will include vegetation and soil parameters. Our approach will utilize ground surveys for absolute measurements, drone aerial imagery for larger area coverage, and satellite imagery for a watershed approach, resulting in relevant and timely information for restoration , cost effectiveness of restoration methods, and outreach tools for land management agencies and producers. An on site postfire assessment will complete phase 2.
4. Project partners include private landowners, Oregon State University Department of Animal and Rangeland Sciences (OSU ANRS), Oregon State University Lake County Extension (OSU Extension), Bureau of Land Management (BLM), United States Forest Service (USFS), and Lake County Umbrella Watershed Council (LCUWC).

Monitoring Team Evaluation

Monitoring Team Strengths

- This project will produce information that is needed to better inform post-fire rangeland seeding.
- The proposed project will follow established protocols to collect field and drone-based data that are cited in the application.

- The applicant has engaged the local community to recruit interested private landowners to perform this monitoring and the letters of support demonstrate public landowners are interested in applying this information to implement fire rehabilitation projects in the future.
- The applicant is working with a qualified university professor and OSU Extension staff that have experience collecting, analyzing and reporting rangeland data in Oregon.
- This project will report results and share findings in several ways including hosting a field day, working with OSU Extension to produce a publication, and developing a peer reviewed manuscript.

Monitoring Team Concerns

- The application does not describe how the data will be stored long term and how it will be made accessible to the public or interested natural resources professionals.
- The application has very limited information on quality assurance and quality control procedures of the vegetation and soil samples that will be collected and delivered to the OSU lab for analysis.
- The applicant is measuring effects in and outside of exclosures which will measure changes associated with grazing, but no monitoring question was posed to understand what purpose the monitoring of vegetation in and outside grazing exclosures will serve.
- It is not clear how the interpretation of the monitoring results will account for how the lands were grazed after the fire in 2020 and after restoration was initiated in December 2022.
- It is not clear if the reseeding in the Fall 2023 will treat the three polygons and paired treatment and control sites in the same way to allow this study design to be implemented as proposed.
- It is not clear who is performing the drone monitoring and if they have the necessary qualifications and experience to collect and analyze the data.
- The application lacked details on how the drone data would be managed, analyzed and integrated to apply detailed information across a wider geography.
- The application lacked information to explain why the weather station is being installed, what parameters are being recorded, how that data will be managed and how that data will be used in the data analysis or interpreting the results.
- It was not clear how the three different locations' site-specific conditions will be incorporated into the data analysis and interpretation.
- The budget was not clear how the project manager and university contractor's hours were estimated to determine if they were appropriate to complete the objectives as proposed.
- The budget does not include expenses to perform the drone monitoring and it is not clear if there are adequate resources to complete objective 3.
- It is not clear why the professor's hourly rate is different than what was proposed in a separate application that was submitted.

Monitoring Team Comments

N/A

Review Team Evaluation

Strengths

- The proposed monitoring is likely to answer key questions public land managers, private landowners, and resource entities face when determining post fire seeding needs and specifications.

- The use and utilization of drone imagery will provide valuable data at the appropriate scale to answer the monitoring questions proposed.
- The maps included in the application are informative and useful to understand the monitoring site locations and their context within the greater Brattain fire scar landscape.
- Partner and agency engagement is demonstrated by their involvement in project development and letters of support.
- The applicant and partners have the appropriate skills and experience to carry out the proposed monitoring.
- The collaboration with OSU Extension in Lake County will generate landowner guides and materials that the ranch community can use as tools to promote native vegetation recovery post fire.

Concerns

- The application lacks information describing grazing management occurring throughout the project area. It is unclear whether livestock are currently accessing the project area, and if so, how that disturbance will be accounted for in the study. It is also unclear in the application what the timing, duration, and amount of livestock use will be within the project area.
- The application does not describe how the drone data will be analyzed; clarification provided during the site visit indicated OSU will be analyzing this data.
- The two-year project timeline may be too short for answering the proposed monitoring questions. Site access could be difficult depending on precipitation levels due to the remote locations in high elevation. It may take a longer timeframe to access sites and collect the data needed to answer the monitoring questions.
- It is not clear what type of pre-project data is available to accurately characterize pre-fire vegetation conditions that can be used to compare with post-fire seeding treatments and evaluate the effectiveness of these treatments.

Concluding Analysis

The proposed monitoring is designed to answer key questions regarding the effectiveness of post fire aerial seeding to control erosion compared to naturally revegetating areas not seeded. The data from this project is likely to provide valuable information that will be used to inform adaptive management and restoration actions in fire scarred areas.

Review Team Recommendation to Staff

Fund

Review Team Priority

4 of 4

Review Team Recommended Amount

$252,269

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$252,269

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Central Oregon (Region 4)

Application Number: 223-4030-23034

Project Type: Monitoring

Project Name: Assessing the Long-Term Effectiveness of Juniper Removal on Water and Vegetation Response

Applicant: OSU Office of Sponsored Research & Award Admin

Region: Central Oregon

County: Crook

OWEB Request: $239,694

Total Cost: $323,877

Application Description This project will be conducted at the long-term Camp Creek Paired Watershed Study (CCPWS), 60 miles southeast of Prineville, OR. The CCPWS started in 1994 and has continuously provided essential information regarding the implications of juniper removal in the hydrology and the ecology of the site. Numerous producers, SWCDs, and state and federal agencies use this study as a reference for planning and decision-making regarding juniper removal.

Juniper stand reduction in one of the watersheds in 2005 has resulted in significant and sustained vegetation and water response benefits. However, in recent years we have observed a decline in the hydrologic response, as indicated by lower soil moisture and groundwater levels. Severe drought conditions in several parts of the state and noticed re-establishment of juniper in the treated sites add significant stress to the restored landscape.

At 20 years post-treatment, we are a critical time to improve the understanding of the expected longevity of the treatment and identify critical thresholds that warrant discussing adaptive management strategies to maintain the health of restored ecosystems as we move forward.

This project aims to assess the long-term effectiveness of juniper stand reduction on soil, water, and vegetation variables in the treated areas compared to the untreated. We also look to replace failing equipment and install an enhanced sensor network to continue monitoring the hydrological response to juniper removal.

The main partners for this project are the OSU Department of Animal and Rangeland Sciences, Crook County, BLM-Prineville District, Hatfield Hyde Land Trust, and OSU-Extension.

Monitoring Team Evaluation

Monitoring Team Strengths

- The proposed project will complement existing vegetation, soil and hydrologic data that has been collected since 1994.
- The applicant has been working on this project since 2013 with the staff that has worked on this project since it began in the 1990’s.
- The applicant has the necessary qualifications and experience to complete this project as proposed.
- The applicant is working with many technical experts, landowners, and land managing organizations in the broader geographic area.

- The letters of support demonstrate a high level of engagement to share monitoring results and inform future land management approaches related to juniper management and removal.

Monitoring Team Concerns

- The application poses several monitoring questions and there is a lack of detail, particularly on the data analyses to understand how they will be answered.
- The application doesn't describe how the new data that is being added to the project will be analyzed in the Before After Control Impact (BACI) study design framework.
- It is not clear how they will analyze the data to parse out the impacts of drought and juniper reestablishment.
- The timeline to collect, analyze and report the results is unlikely to be met with data collection and analysis occurring in September 2025 and a final report being completed in the same month.
- It is not clear why the professor's hourly rate is different than what was proposed in a separate application that was submitted.

Monitoring Team Comments

N/A

Review Team Evaluation

Strengths

- The application provides a clear need to answer key questions about the lifespan of juniper treatments and understand when it is necessary to retreat landscapes to maintain ecological benefits.
- The proposed project is a continuation of an existing monitoring program led by the applicant and partners to assess the long-term effectiveness of juniper removal on water and vegetation response.
- Ecologically important data relevant to managing western juniper-dominated landscapes, including soil type, soil moisture, vegetation type, and moisture uptake, will be evaluated to inform adaptive management, such as the best timing and method for secondary juniper treatment.
- The applicant has capacity and technical capabilities to carry out and report on monitoring results.
- Partner and agency engagement is demonstrated by their involvement in project development and letters of support.

Concerns

- The two-year project timeline may be too short for answering the proposed monitoring questions. If the two years are similar in weather and precipitation conditions, it may be difficult to determine if the data is indicating a landscape response to juniper treatment or drought conditions.
- It is unclear whether pre-treatment data exists for groundwater that can adequately characterize current conditions and be used to compare with post-treatment impacts on groundwater levels. It is unclear whether the methods can effectively answer the monitoring question related to juniper treatment effects on groundwater conditions.

Concluding Analysis

The proposed monitoring will continue efforts initiated in 1994 to understand Western juniper impacts on hydrology and vegetation. This long-term project has provided a plethora of data that has been published in scientific journals, which are utilized and referenced by land managers. The data will be used to assess the long-term effectiveness of juniper stand reduction in restoring the ecological and hydrological conditions in sagebrush and perennial grass communities and inform decisions related to secondary juniper treatment.

Review Team Recommendation to Staff
Fund

Review Team Priority
3 of 4

Review Team Recommended Amount
$239,694

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$239,694

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Central Oregon (Region 4)

Application Number: 223-4031-23055

Project Type: Monitoring

Project Name: Hood River Basin Partnership Restoration Effectiveness Monitoring Plan

Applicant: Hood River WS Group

Region: Central Oregon

County: Hood River

OWEB Request: $77,480

Total Cost: $99,063

Application Description This project will develop a restoration and conservation effectiveness monitoring plan for the Hood River Watershed. The Hood River Basin Partnership (Partnership) seeks to develop a monitoring plan to evaluate the effectiveness of projects identified for implementation in Watershed 2040: Hood River Basin Partnership Strategic Action Plan (SAP). Strategies and projects identified in the SAP range from instream fish habitat and floodplain restoration, to water quality improvement, and restoration of instream flows. Projects occur on both public and private lands with multiple project sponsors and funding opportunities.

The Partnership proposes to develop a robust monitoring plan that will enable members to measure progress in implementing restoration, conservation, and water quality projects, get feedback on restoration techniques, evaluate the effectiveness of cumulative actions in achieving ecological outcomes, and implement adaptive management to improve restoration. Monitoring plan metrics will build off what partners currently collect, and add or refine metrics, methodologies, and spatial and temporal distribution of sites where gaps exist. Pre-existing metrics (e.g., continuous temperature monitoring, stream habitat data) and protocols will be reviewed and described in the monitoring plan to ensure consistent application and transparency. New metrics will provide data that are robust and repeatable and focus upon ecologically relevant outcomes. Additional deliverables will include the development of a relational database, methods and an application for data analysis and display, and programmed tablets for field data collection.

Project partners are the Hood River Watershed Group, the Hood River Soil and Water Conservation District, Confederated Tribes of the Warm Springs, US Forest Service Hood River Ranger District, East Fork Irrigation District, Middle Fork Irrigation District, Farmers Irrigation District, and Oregon Department of Fish and Wildlife.

Monitoring Team Evaluation

Monitoring Team Strengths

- This project will develop a monitoring plan that will incorporate existing monitoring data in the Hood River basin to evaluate future restoration actions.

- The applicant uploaded a monitoring plan developed by the same contractor to demonstrate how the plan could be organized and the metrics that can be generated to monitor restoration projects.
- The applicant is working with several partners that have developed a Strategic Action Plan to guide future restoration efforts.
- The contractor that provided a cost estimate is highly qualified and has experience developing monitoring plans for organizations and partnerships that are evaluating similar restoration actions in the Pacific Northwest.
- The applicant will engage technical experts that are participating in the Hood River Basin Partnership through two new committees they plan to form, including the habitat and water conservation technical advisory committees.
- The budget was developed with a consultant that has developed a similar monitoring plan recently following a similar process.

Monitoring Team Concerns

- The application lacked detail on many of the tasks to be completed and were not well connected to the contractor’s proposal that was uploaded to the application, which contained more details.
- The application proposes to have the contractor develop a single database to handle all the different types of data to be collected. Developing a single database for different types of data can be a big undertaking and it was not clear if the contractor had the necessary qualifications for this task.
- It is unclear if the budget is adequate to incorporate the different existing data sets and build a database that can manage the existing and new data.

Monitoring Team Comments

N/A

Review Team Evaluation

Strengths

- The application clearly demonstrates a need for developing a monitoring plan to evaluate whether the Partnership's restoration and conservation actions are leading to the intended ecological outcomes.
- Developing a monitoring plan will be cost-effective by reducing redundant efforts by partners in the basin.
- The data analysis protocols are clearly defined and outlined in the application.
- The selected contractor has the appropriate skill set and tools to develop the plan. The example monitoring plan uploaded to the application was completed by the contractor and developed for similar types of restoration work in the Grand Ronde watershed.
- The applicant and partners have a long history of working collaboratively in the Hood River basin.
- Previous project evaluations concerns are addressed by including additional details on data types, database structure, and the Shiny application development, which is an interactive application that summarizes data for sharing with the public.

Concerns

- There are no concerns.

Concluding Analysis

A monitoring plan will be developed for the Hood River watershed to quantify the effectiveness of restoration actions that will be completed over the next 20 years by the applicant and its partners. Data will be used to evaluate whether the Hood River Basin Partnership's restoration and conservation actions are leading to intended ecological outcomes, including optimal stream flows, quality instream and riparian habitats, and improved water quality for salmon and steelhead at all freshwater life history stages.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 4

Review Team Recommended Amount
$77,480

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$77,480

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Central Oregon (Region 4)

Application Number: 223-4032-23058

Project Type: Monitoring

Project Name: Response of a threatened amphibian to drought and bullfrog removal

Applicant: Trout Unlimited Inc

Region: Central Oregon

County: Klamath

OWEB Request: $282,149

Total Cost: $352,718

Application Description Drought and invasive species degrade wetlands and impact a variety of aquatic species including the threatened Oregon Spotted Frog (Rana pretiosa; OSF). Our proposed project extends data collection via partnership with an engaged landowner, USGS, and Crater Lake National Park (CLNP), to better understand OSF recovery through drought and removal of invasive Bullfrogs (Lithobates catesbeianus; BF). The original project (2019-2023) collected data on abundance, distribution, and habitat use by OSF and BF near Fort Klamath, Oregon. This period included 3 of the driest recent years in the area, affording the opportunity to document shifts by OSF from breeding in ponds during early wetter years to breeding in a small perennial creek in dry later years. This response underscores the value of refuge habitats of longer hydroperiods to support drought resilience. Recent pond drying also bolstered BF control success, and along with our removal of >750 BF of multiple life stages, they are nearly eliminated from the site. In this current project we are requesting support to continue removing BF from the one ditch where they remain in this key area - it is the upstream-most breeding in the subdrainage, and restored wetlands further up host only native frogs. We will monitor OSF breeding and adult use of the creek and ponds on the main study site with a focus on documenting recolonization in the ponds they left during the driest years. We will use breeding surveys and mark-recapture sampling of OSF to quantify abundance, survival, and recolonization/dispersal. Extended study capitalizes on an experienced team of partners, a robust multi-year dataset, and the installation by CLNP of 2 pairs of PIT tag antennae along the creek. Data from the passive arrays are yielding valuable insights on timing and intensity of use by tagged OSF in the creek. Results will inform OSF recovery efforts in the Klamath basin and across the species' range.

Monitoring Team Evaluation

Monitoring Team Strengths

- This project complements the monitoring data that has been collected with an OWEB monitoring grant and leverages the existing PIT tag arrays operated by the National Park Service (NPS).
- The application includes an explanation of how the existing data has been applied to learn which bull frog life cycle stage to focus on to effectively remove them from the study area.
- The applicant applied their knowledge from the previous monitoring effort to guide their proposed objectives.

- The applicant will evaluate the quality and confidence in the data by their ability to detect frogs during the surveys.
- The applicant will follow established methods and quality assurance/quality control procedures that have been established by the USGS.
- The applicant will provide regular updates to the project partners and Oregon Spotted Frog (OSF) working groups in OR and WA.
- The data will be submitted annually to ODFW and to the USFWS as part of the scientific data collecting permit and recovery permit requirements.
- The applicant will produce a technical USGS publication or peer reviewed journal article summarizing results and interpreting the findings.
- The contractor working on this project is highly qualified and has over four years of experience collecting data in the same project area working with the landowner.
- There are several technical experts from the NPS and USGS working on this project.

Monitoring Team Concerns

- The application does not include a thorough explanation of monitoring methods.
- The study design does not explain why bullfrog removal ends in 2026 but field data including OSF breeding survey extends into mid-2028. The study design also does not describe why other OSF sampling including abundance and mark-recapture sampling ends in 2027.
- The application does not describe how the data will be analyzed to understand how each monitoring question will be answered, especially the first question posed in objective one.
- It is not clear how this project will document the water irrigation and use by the landowner to interpret the water year type's influences on habitat conditions, frog abundance and distribution.
- The application mentioned briefly a SNOTEL site on how past years snowpack conditions varied over the last 15 years, but it was not clear how this data will be incorporated into the proposed project.
- The application doesn't describe how the drone data will be collected and how the imagery will be processed to assist in completing objective two.
- The application did not describe how community stakeholders are engaged.
- The contractor's ability to complete final technical reports in a timely manner has been historically unreliable.
- The budget and justification do not include expenses to perform the drone monitoring and it is not clear if there are adequate resources to complete objective 2.
- The field crew expenses are the same across all five years, yet the amount of data collected varies across the project management schedule – for instance only OSF breeding surveys extend into 2028 and all the other work ends in 2027.

Monitoring Team Comments

N/A

Review Team Evaluation

Strengths

- The proposed project will leverage PIT tag arrays established in Sun and Annie Creeks by Crater Lake National Park staff to track Bull trout. These PIT tag arrays can also be used to record passing tagged frogs. This collaboration will track valuable insights on the timing and intensity of habitat use by tagged Oregon spotted frog (OSF) in the creek.
- Drought conditions have caused OSF to move out of historic pond habitat and into creek habitats. Monitoring information has helped researchers understand the species adaptability. Additional data collection will provide a better understanding of OSF responses to drought and the value of refugia habitat in dry years.
- Bull frogs are almost eliminated from the project area through OWEB funded grants. Additional funding to extend monitoring will capitalize on the robust dataset already collected for OSF and provide information on the effectiveness of removing Bull frogs. The results can be used to inform future management strategies for removing this predator from OSF habitats.
- The applicant and USGS have a long history of working on similar projects in the Klamath basin geography.
- The proposed work addresses conservation actions identified in the 'Conservation Agreement for the Oregon Spotted Frog in the Klamath Basin of Oregon' interagency plan and the Oregon Conservation Strategy.

Concerns

- The project costs seem high for monitoring across a small geographical area.
- It is not clear why additional PIT supplies is needed for this project, information describing supplies needed to achieve the monitoring objectives would be helpful for evaluating whether costs are reasonable and necessary for the proposed work.
- It is unclear if or how engagement with neighboring landowners is occurring, particularly around Bull frog presence on neighboring ranches.

Concluding Analysis

The Oregon spotted frog (OSF) is listed as a threatened species on the Endangered Species Act list and populations in the Upper Klamath Basin are at serious risk. The project will continue to gather valuable data on OSF habitat use during all life stages, and the species adaptability during drought conditions and response to Bull frog removal. Extending the monitoring allows the OSF dataset to reach a duration that will enable a more detailed analysis of OSF survival in relation to drought and reduction in Bull frog distribution that can inform how and where to implement conservation measures.

Review Team Recommendation to Staff

Fund

Review Team Priority

2 of 4

Review Team Recommended Amount

$282,149

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

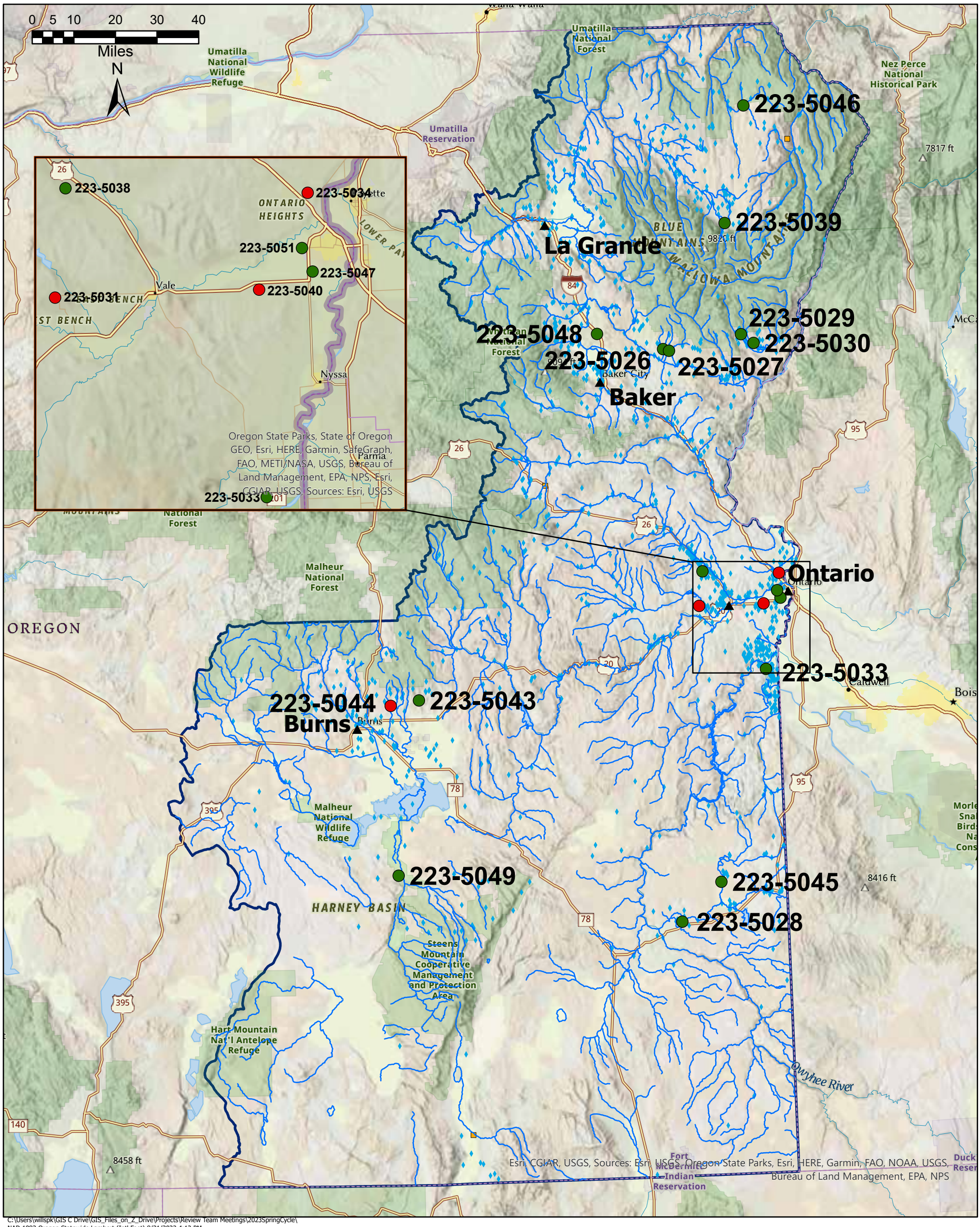
Staff Recommended Amount

$282,149

Staff Conditions

N/A

Eastern Oregon - Region 5 Spring 2023 Funding Recommendations



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Funding Recommendation

- Staff Recommendation For Funding (SRF)
- Below Funding Line (BFL)

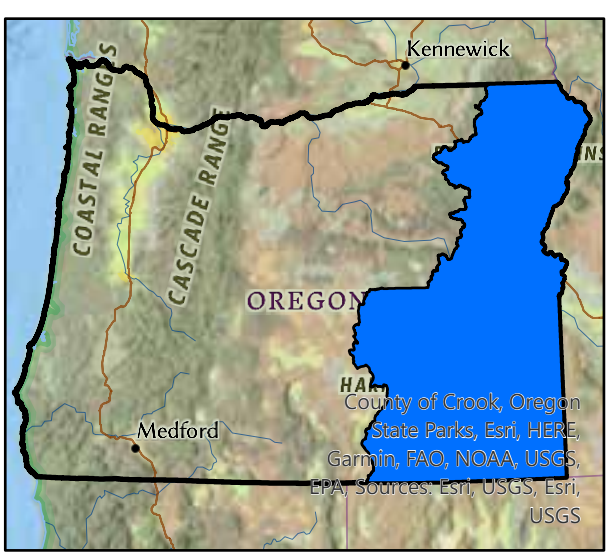
Previous Grants 1998 - Spring 2022

- Land Acquisition
- Restoration
- Region 5 Cities
- Region 5 Streams
- OWEB Region 5 Boundary

OREGON WATERSHED ENHANCEMENT BOARD

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Region 5 - Eastern Oregon Restoration

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-5030	Powder Basin WC	Johnny-Bill Irrigation Efficiency Project	Irrigation efficiency improvements, streamside fencing, and livestock watering will be installed on a farm near Halfway to benefit bull trout, redband trout, and water quality.	302,006
223-5029	Eagle Valley SWCD	Boulder Flat Irrigation Phase I	An irrigation ditch will be piped and flood irrigation will be converted to sprinkler application to improve water quality and bull trout habitat in Clear and Pine Creeks near Halfway.	275,101
223-5039	OSU Office of Sponsored Research & Award Admin	East Moraine Community Forest (EMCF) Virtual Fence Project	Virtual fence technology will be installed to improve grazing management to restore native vegetation, conserve cultural-use areas important to tribal gatherers, and improve wildlife movement on a community forest near Joseph.	80,112
223-5026	Keating SWCD	Clover Creek Irrigation Round 2	Flood irrigation on sixty-five acres near Keating will be converted to sprinkler application to improve water quality and stream flow in Clover Creek, a tributary to the Powder River.	64,436
223-5027	Keating SWCD	Skinner Irrigation	Water quality and stream flow in Balm Creek near Baker City will be improved by converting sixty-six flood irrigated acres to sprinkler irrigation.	83,920
223-5028	Owyhee WC	Dry Creek Phase III WQ Improvement	Seventy-seven flood irrigated acres will be converted to sprinkler application to improve water quality in Dry Creek, Jordan Creek, and the upper Owyhee River.	51,183
223-5033	Owyhee WC	Willow Water Quality Improvement	Flood irrigation on seventy-six acres near Adrian will be converted to sprinkler application to improve water quality in the Kingman drain, a tributary to the Snake River.	144,305
223-5038	Malheur WC	Pivoting on South Road G revised	Flood irrigation on 122 acres will be converted to sprinkler application to improve water quality in Willow Creek, a tributary to the Malheur River.	116,007
Total Restoration Projects Recommended for Funding by RRT and OWEB Staff				**1,117,070**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-5031	Malheur WC	Steely Eyed Water Quality Improvement	Water quality in Bully Creek, a tributary to the Malheur River, will be improved by converting seventy-five flood irrigated acres to sprinkler irrigation.	153,221
223-5034	Malheur WC	In the Hart of Jacobsen Gulch	Twenty flood irrigated acres will be converted to sprinkler application to improve water quality in Jacobsen Gulch, a tributary to the Snake River.	43,655
223-5040	Malheur SWCD	Pounds of Efficiency II	A leaking irrigation delivery pipe will be replaced and forty wheel line irrigated acres will be converted to pivot application to improve water quality in the lower Malheur River.	71,586

Projects *Not Recommended* for Funding by RRT

Project #	Grantee	Project Title	Amount Requested
223-5032	Owyhee WC	Twirly Bird Water Quality Improvement	123,357
223-5035	Powder Basin WC	Trout Creek Ecosystem Resiliency	177,776
223-5036	High Desert Partnership	Malheur Lake and Blitzen River Aquatic Health Project	368,150
223-5037	Malheur SWCD	The Last Two Pieces of the Puzzle	65,442

Region 5 - Eastern Oregon Technical Assistance

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-5046	Nez Perce Tribe	Chesnimnus Creek Williams Restoration Design	Construction designs, environmental permitting, and coordination will be completed to implement a 4.5 mile river restoration project on Chesnimnus Creek, an important steelhead bearing stream in Wallowa County.	74,250
223-5045	Owyhee WC	Lava Butte Upland Management Design	Survey and design will be completed for a livestock watering system near Jordan Valley to improve grazing distribution on 7,307-acres important to sage-grouse viability.	30,828

223-5043	Harney County Watershed Council	Cow Creek Floodplain Restoration Project	Preliminary designs will be completed to inform an irrigation water management and stream restoration project that will benefit migratory waterfowl, sage-grouse, and aquatic species.	75,000
Total Technical Assistance Projects Recommended for Funding by RRT and OWEB Staff				**180,078**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-5044	Harney County Watershed Council	Soldier Creek Wet Meadow Restoration Project	Preliminary designs will be completed to inform an irrigation water management and stream restoration project that will benefit migratory waterfowl and aquatic species.	75,000

Projects *Not Recommended* for Funding by RRT

Project #	Grantee	Project Title	Amount Requested
223-5041	Harney SWCD	Colony Creek Flood Irrigation	73,939
223-5042	Harney SWCD	Beaubien Diversion Structure	75,000

Region 5 - Eastern Oregon Stakeholder Engagement

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-5051	Malheur WC	Engagement with Water	Malheur River watershed producers and irrigation districts will be engaged to develop water quality improvement, bull trout conservation, and streamside vegetation enhancement projects identified in local conservation plans.	148,267
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				**148,267**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount
None				

Projects *Not Recommended* for Funding by RRT

Project #	Grantee	Project Title	Amount Requested
None			

Region 5 - Eastern Oregon Monitoring

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-5047	Malheur WC	Checking On Things: WQ Monitoring	Water quality monitoring will continue in the lower Malheur and Owyhee river basins to track past project accomplishments and inform upcoming water quality improvement work.	258,826
223-5048	Powder Basin WC	Powder Basin Macroinvertebrate Status and Trend Monitoring	Aquatic insect monitoring in Baker County will continue to identify impaired water quality, evaluate streams in need of restoration, and provide effectiveness data for prior implemented restoration work.	38,111
223-5049	Audubon Society of Portland	Ecological linkages between birds, water patterns, and vegetation	The relationships between nesting and migratory shorebirds, seasonal water patterns, and vegetation will be monitored in the Harney Basin to inform upcoming restoration work.	132,908
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				**429,845**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount
None				

Projects *Not Recommended* for Funding by RRT

Project #	Grantee	Project Title	Amount Requested
None			

Region 5 Total OWEB Staff Recommended Board Award	**1,875,260**

Region 1 - 6 Grand Total OWEB Staff Recommended Board Award	**12,461,865**

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5026-22913
Project Type: Restoration
Project Name: Clover Creek Irrigation Round 2
Applicant: Keating SWCD
Region: Eastern Oregon
County: Baker
OWEB Request: $64,436
Total Cost: $124,004

Application Description Located within the Keating Soil and Water Conservation District northeast of Baker City, as well as within the Lower Powder Strategic Implementation Area boundary, the Clover Creek Irrigation Round 2 project will address ongoing water quality and water use efficiency concerns in Clover Creek, a direct tributary to the Powder River.

Currently, 65 acres of agricultural farm ground is flood irrigated through a series of earthen ditches diverted out of Clover Creek, a perennial stream. Although it can be effective, flood irrigation at the project site contributes sediment, debris, organic matter, and inorganic matter directly into Clover Creek, negatively impacting water quality throughout the Powder River Watershed.

To mitigate the water quality concerns and to improve on-farm irrigation efficiency, the Clover Creek Irrigation Round 2 project is proposing to install one center pivot irrigation system, eliminating flood irrigation and tailwater at the project site. This project is a continuation of large grant #220-5026, Clover Creek Irrigation, which was approved for funding in the fall of 2019. The landowner was ready to implement the project in 2020; however, with the rapidly rising costs of material and fuel, we soon discovered that the original project budget would not be sufficient to complete the project in its entirety. Round 2 will complete the project by installing the pivot with a flow meter, mainline, bubbler, and new steel head gate. Project partners include the Keating SWCD and the landowner.

Review Team Evaluation

Strengths

- The application clearly describes the irrigation conservation actions proposed on this 65-acre farm field, including previous delays in the project history.
- The maps uploaded with the application show that the work is within an Oregon Department of Agriculture (ODA) Strategic Implementation Area (SIA) and Oregon Department of Environmental Quality (DEQ) conducts water quality monitoring in the area, demonstrating this water quality improvement work is a priority for both agencies.
- Converting from flood to sprinkler irrigation will have water quality and quantity benefits to Clover Creek and the Powder River and both are priority streams for conservation in the Keating Valley.

- The application identifies three restoration alternatives, and the applicant will implement the appropriate alternative due to increased water savings, cost effectiveness, and field shape.
- When installed, this irrigation conversion may be a catalyst for other conservation projects in the Lower Powder SIA, which is an area where landowners have not completed many conservation practices in the past.
- The landowner is actively working to treat weeds, improve riparian conditions, and improve irrigation practices on their property indicating the irrigation system is likely to be implemented and operated as proposed.
- The project team, including the landowner, have the capacity to implement and maintain the project as proposed.
- The Keating SWCD has a proven track record of managing and completing projects as proposed and according to the project schedule.

Concerns

- This application is a phase 2 project to complete work that was proposed in phase 1 and due to pipe price inflation in 2019 the original budget is not sufficient to complete the proposed work. The phase 2 budget does not clearly describe the new total project cost and while the site visit clarified the total cost is $110,411, this information is lacking in the application.

Concluding Analysis

Converting sixty-five acres from flood to sprinkler irrigation in the Keating Valley will reduce water diversion for current crop production and improve water quality in Clover Creek. The Partnership of the Keating SWCD and the landowner working to improve water resource conditions is in support of ODA's Lower Powder SIA program and may encourage additional on-farm conservation in the area. Irrigation water management is a top priority for the area and likelihood of success is high.

Review Team Recommendation to Staff

Fund

Review Team Priority

4 of 11

Review Team Recommended Amount

$64,436

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation
Fund

Staff Recommended Amount
$64,436

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5027-22943
Project Type: Restoration
Project Name: Skinner Irrigation
Applicant: Keating SWCD
Region: Eastern Oregon
County: Baker
OWEB Request: $83,920
Total Cost: $183,463

Application Description The Skinner Irrigation project is located within the Keating SWCD and within the Lower Powder Strategic Implementation Area (SIA); near Baker City, Oregon. This project will address 66 acres of flood-irrigated pasture ground that is currently causing erosion and untreated runoff on uneven terrain. Sourced from Balm Creek, which is in the Lower Powder SIA focus area, an irrigation ditch transports water to the project site where it is then diverted into a series of earthen ditches to irrigate the property. As flood irrigation water is “pushed” across the field it collects sediment, debris, E.coli, and organic and inorganic material adding it back into Balm Creek and ultimately into the Powder River. The completion of this project will convert 66 acres from flood irrigation to sprinkler by installing one center pivot. The landowner realized these water quality issues and is partnering with the Keating SWCD to mitigate these concerns.

Review Team Evaluation

Strengths

- The application clearly describes the irrigation conservation actions proposed on this 66-acre farm field and review concerns from the previous application are addressed in this application.
- The maps uploaded with the application show that the work is within an Oregon Department of Agriculture (ODA) Strategic Implementation Area (SIA) and Oregon Department of Environmental Quality (DEQ) conducts water quality monitoring in the area, demonstrating this water quality improvement work is a priority for both agencies.
- Converting from flood to sprinkler irrigation will have water quality and quantity benefits to Balm Creek and the Powder River and both are priority streams for conservation in the Keating Valley.
- A conversion from flood to pivot irrigation will use less water at the point of application in the field for current crop production and may result in more water left in Balm Creek.
- When installed, this irrigation conversion may be a catalyst for other conservation projects in the Lower Powder SIA, which is an area where landowners have not completed many conservation practices in the past.
- The project team, including the landowner, have the capacity to implement and maintain the project as proposed.
- The Keating SWCD has a proven track record of managing and completing projects as proposed and according to the project schedule.

Concerns

- No concerns were expressed at review.

Concluding Analysis

Converting sixty-six acres from flood to sprinkler irrigation in the Keating Valley will reduce water diversion for current crop production and improve water quality in Balm Creek. The Partnership of the Keating SWCD and the landowner working to improve water resource conditions is in support of ODA's Lower Powder SIA program and may encourage additional on-farm conservation in the area. Irrigation water management is a top priority for the area and likelihood of success is high.

Review Team Recommendation to Staff
Fund

Review Team Priority
5 of 11

Review Team Recommended Amount
$83,920

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$83,920

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5028-22957

Project Type: Restoration

Project Name: Dry Creek Phase III WQ Improvement

Applicant: Owyhee WC

Region: Eastern Oregon

County: Malheur

OWEB Request: $51,183

Total Cost: $170,644

Application Description The Dry Creek III Water Quality Improvement project is located 2 miles South of Arock. The project area consists of 77 acres of hay/pasture cropland irrigated with gated pipe. Tailwater containing sediment, nutrients and bacteria flow off the project area into Dry Creek, Jordan Creek, and the Upper Owyhee River. The proposed work includes converting 77 acres from gated pipe to sprinkler irrigation through the installation of 1 pivot system, 8-inch pipeline and required electrical connections. Project partners include the landowner, Owyhee Watershed Council and Agrilines Irrigation.

Review Team Evaluation

Strengths

- The application has clearly defined project goals and objectives.
- Maps included in the application provide ample detail for understanding the project vicinity and proposed restoration components, along with its proximity to prior implemented projects.
- Pivot irrigation is appropriate for the topography in the project area. The irrigation system will serve as a demonstration to other landowners in the area and may encourage future water conservation projects.
- The application identifies four restoration alternatives, and the applicant will implement the appropriate alternative based on field shape and economic feasibility.
- The new irrigation system will reduce sediment, nutrient, and bacteria runoff from the project site, and improve water quality in Dry Creek, Jordan Creek, and the Upper Owyhee River.
- The project team, including the landowner who has completed several conservation projects on the farm, have the capacity to implement and maintain the project as proposed.
- The Owyhee Watershed Council has a proven track record of managing and completing projects as proposed and according to the project schedule.

Concerns

- The application identifies benefit to sage-grouse, and it is unclear how the proposed work will benefit this species. The proximity of sage-grouse leks to the work area is not identified and this benefit may be overstated.

Concluding Analysis

Converting 104 flood irrigated acres to pivot irrigation will reduce irrigation wastewater in the project area and reduce sediment, nutrient, and bacteria runoff. The project is likely to succeed in continuing work in the Jordan Valley area that implements Oregon Department of Agriculture (ODA) and the Department of Environmental Quality (DEQ) water quality improvement objectives for the Upper Owyhee River.

Review Team Recommendation to Staff
Fund

Review Team Priority
6 of 11

Review Team Recommended Amount
$51,183

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$51,183

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5029-22958
Project Type: Restoration
Project Name: Boulder Flat Irrigation Phase I
Applicant: Eagle Valley SWCD
Region: Eastern Oregon
County: Baker
OWEB Request: $275,101
Total Cost: $491,477

Application Description The Boulder Flat Irrigation Phase I Project is located in northeast Baker County, within the Eagle Valley SWCD boundary, approximately five miles north of Halfway, Oregon. The project site is situated between the main Pine and Clear Creek and represents a high-priority area for bull trout recovery actions in Pine Creek Basin; specifically for water quality and fish habitat improvements.
The project site currently hosts flood irrigation practices on 249 acres of pasture/hay ground. All tailwater from the flood-irrigated pasture empties into Clear Creek and then into Pine Creek a few short miles downstream. Flood irrigation is inefficient, and the resulting runoff contains excess nutrients, sediment, E. Coli, debris, and organic matter that are negatively impacting water quality and critical native fish habitat downstream from the site.
The Phase I proposed project will convert 81 acres from flood to a more efficient sprinkler irrigation method by installing two center pivots, one new “community” headbox, two off-channel watering troughs, and 8,500 feet of pipe to convert from an open earthen ditch to a closed pipe system. The landowner has already applied for funding for part of this project through Idaho Power’s Pine Creek Water Efficiency Program. The project was reviewed by a 12-member panel and awarded funding to be used towards an expanded project detailed in this application. The landowner has partnered with Eagle Valley SWCD in this application and expanded the project to provide additional benefits to water efficiency and quality Clear Creek and Main Pine Creek.

Review Team Evaluation

Strengths

- The application has clearly defined project goals and objectives.
- Maps and photos included in the application provide ample detail for understanding the project vicinity and proposed restoration components, along with its proximity to prior implemented projects.
- The application identifies two restoration alternatives, and the applicant will implement the appropriate alternative based on topography and cost effectiveness.
- The proposed project will address Oregon Department of Environmental Quality (DEQ) and Oregon Department of Agriculture (ODA) priorities for improving water quality and the restoration approach comprehensively addresses water quality, water quantity, soil conservation and priority bull trout habitat.
- The letter of support from five landowners demonstrates that stakeholders are engaged in the project.

- The project has secured funding from Idaho Power demonstrating applicant engagement with appropriate partners to complete the work.
- The project team, including the landowner, has the capacity to implement and maintain the project as proposed.
- The Eagle Valley SWCD has a proven track record of managing and completing projects as proposed and according to the project schedule.
- The work completed in this phase 1 project will contribute to work in an upcoming phase and this is a cost-effective approach.
- Project costs are commensurate with the anticipated watershed benefits resulting from water conservation for current crop production and improved water quality.

Concerns

- The application focuses on benefits to water conservation and water quality improvement and does not describe how this conservation work contributes to bull trout habitat improvement, which is a species prioritized for restoration in the Eagle Valley.

Concluding Analysis

Converting eighty-one flood irrigated acres to pivot irrigation will reduce irrigation wastewater in the project area and reduce sediment, nutrient, and bacteria runoff. The project is likely to succeed in continuing work in the Eagle Valley that implements ODA and DEQ water quality improvement objectives.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 11

Review Team Recommended Amount
$275,101

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$275,101

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5030-22966
Project Type: Restoration
Project Name: Johnny-Bill Irrigation Efficiency Project
Applicant: Powder Basin WC
Region: Eastern Oregon
County: Baker
OWEB Request: $302,006
Total Cost: $400,006

Application Description The Johnny-Bill Irrigation Efficiency Project is located within the Powder Basin in the Pine Creek Watershed. The project site is in Baker County, approximately 1.8 miles Northeast of Halfway, Oregon.

This project encompasses 135 acres of flood irrigated hay and pastureland. Flood irrigation on this property is inefficient due to deteriorated ditches which have widened and incised. Flood tail waters run directly into East Pine Creek, carrying sediment and waste. Water quality and quantity are both concerns for East Pine Creek. East Pine Creek is 303(d) listed as impaired for temperature year-round, supports a small population of federally threatened Bull Trout, and supports native Redband Trout.

The goal of this project is to improve water quantity and quality in East Pine Creek by converting 135-acres of flood irrigation to sprinkler irrigation. 1 half center pivot will be installed in conjunction with 5 wheel lines, and a mainline pipe will be installed to facilitate the sprinkler system. Sprinkler systems will improve water efficiency, allowing more water to remain in East Pine Creek throughout the irrigation season, reducing water temperature and improving fish habitat. Sprinkler irrigation will improve water quality by eliminating flood tail water runoff into the creek. Riparian fencing will be installed on unfenced portions of the creek and off-channel watering sites will be developed to further eliminate erosion, sedimentation, and to protect riparian vegetation.

The Johnny-Bill Irrigation Efficiency project is a collaborative endeavor between the landowners, Idaho Power Company, and the Powder Basin Watershed Council, and potentially OWEB. This project is part of Idaho Power’s 2023 Water Efficiency Program (WEP). This project was submitted to the WEP Review Team for evaluation and was elected for funding in March 2023. This will be the 4th WEP project undertaken by the landowner in partnership with Idaho Power.

Review Team Evaluation

Strengths

- The application has clearly defined project goals and objectives.

- Maps and photos included in the application provide ample detail for understanding the project vicinity and proposed restoration components, along with its proximity to prior implemented projects.
- The application references survey data for redband and bull trout in the project reach and a grazing management plan is uploaded with the proposal, making it clear how the project area will be managed to improve fisheries habitat post implementation.
- The application identifies three restoration alternatives, and the applicant will implement the appropriate alternative based on ranch grazing rotation, topography, adjacent ranch infrastructure, and cost effectiveness.
- Improved irrigation methods, additional fencing, and a livestock watering system are needed on the property to manage livestock and reduce irrigation wastewater. The proposed work will contribute to improved aquatic habitat and water quality in the project reach.
- The proposed project will address Oregon Department of Environmental Quality (DEQ) and Oregon Department of Agriculture (ODA) priorities for improving water quality and the restoration approach is comprehensive addressing water quality, water quantity, soil conservation and priority bull trout habitat.
- The project has secured funding from Idaho Power demonstrating applicant engagement with appropriate partners to complete the work.
- The project team, including the landowner who has completed previous OWEB-funded restoration projects, has the capacity to implement and maintain the project as proposed.
- The Powder Basin Watershed Council has a proven track record of managing and completing projects as proposed and according to the project schedule.
- Project costs are commensurate with the anticipated watershed benefits resulting from water conservation and improved water quality.

Concerns

- Fence maintenance is identified as match in the budget, but this work is not described in the application, and it is unclear how the maintenance will contribute to the longevity of this restoration investment.

Concluding Analysis

Converting 135 flood irrigated acres to sprinkler irrigation and improving livestock management on the property will reduce irrigation wastewater and reduce sediment, nutrient, and bacteria runoff. The project is likely to succeed in continuing work in the Eagle Valley that implements ODA and DEQ water quality improvement objectives, as well as bull trout recovery for East Pine Creek near Halfway.

Review Team Recommendation to Staff

Fund

Review Team Priority

1 of 11

Review Team Recommended Amount

$302,006

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$302,006

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5031-22981
Project Type: Restoration
Project Name: Steely Eyed Water Quality Improvement
Applicant: Malheur WC
Region: Eastern Oregon
County: Malheur
OWEB Request: $153,221
Total Cost: $309,978

Application Description

1) The project is located in the Vale Bench priority area, roughly 10 air miles from Vale.

2) Water quality improvement in the Malheur Basin is one of the top restoration priorities. Water quality improvement is achieved through on-farm irrigation infrastructure improvements and management. Malheur Watershed Council in cooperation with irrigation districts and private landowners has been systematically improving water quality through irrigation system conversions over the past 20 plus years across the Malheur Basin. This is one of our first projects in our new priority area in the Vale Bench. We were just successful in obtaining a BOR WaterSmart grant to pipe canals in this area.

3) We plan to improve water quality in Bully Creek and the Malheur River by converting 75 acres of flood irrigated pasture and hay fields to sprinkler irrigation by installing:

- Pivot 1
- Pivot 2
- 20 HP pump
- 5 HP pump
- pivot tie in (2)
- pump station 1
- pump station 2
- electrical allowance
- 2400 feet of conduit
- 2400 feet of 6-inch pipe
- 7624 feet 4-inch pipe
- 1180 feet 10-inch pipe
- 8224 feet trench lay and back fill
- 19 Risers
- 6 gun carts
- fitting allowance
- Flow meter

- Idaho Power hook up
- Water Right Transfer

4) Project partners include the landowners, Vale Irrigation District, NRCS and the Malheur WSC.

Review Team Evaluation

Strengths

- Pivot irrigation is appropriate for the topography in the project location. The irrigation system will serve as a demonstration to other landowners in the area and may encourage future water conservation projects.
- The new irrigation system will reduce sediment, nutrient, and bacteria runoff from the project site, and improve water quality in Bully Creek and the Malheur River.
- Reducing sediment, nutrient, and bacteria laden runoff from the property will contribute to water quality benefits to the Malheur Basin, and flood to sprinkler irrigation conversion is a Oregon Department of Environmental Quality (DEQ) Total Maximum Daily Load (TMDL) action plan priority.
- The applicant has secured funding from the BOR Water Smart program to implement irrigation water management work in the Vale Bench, demonstrating that the applicant is engaging with appropriate partners to implement water conservation.
- The project team has the capacity to implement and maintain the project as proposed.
- The Malheur Watershed Council has a proven track record of managing and completing projects as proposed and according to the project schedule.

Concerns

- The application is overly succinct and lacks necessary detail including why two pumps are necessary to operate the pivot irrigation system, how the recently acquired BOR Water Smart funds will contribute to upcoming work in the Vale Bench priority area, and why this property is strategic in the Vale Bench.
- A brief alternative analysis is included in the application, but it does not describe the selection process or why the proposed alternative is selected.
- The project goal and objective are not clearly stated, and information is lacking about how the restoration work will be accomplished, making it difficult to determine if the project will be implemented using clearly defined methods appropriate for addressing the watershed problem.

Concluding Analysis

Converting 75 irrigated acres from flood to sprinkler application will reduce irrigation wastewater. The proposed irrigation conversion in the Vale Bench area will further efforts to implement Oregon Department of Agriculture and DEQ water quality improvement objectives by reducing sediment, nutrient, and bacteria delivery to Bully Creek and the Malheur River. The application narrative lacks necessary details, and, if resubmitted, the applicant is encouraged to write applications that fully answer each application question and address the noted concerns.

Review Team Recommendation to Staff
Fund

Review Team Priority
9 of 11

Review Team Recommended Amount
$153,221

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5032-22982

Project Type: Restoration

Project Name: Twirly Bird Water Quality Improvement

Applicant: Owyhee WC

Region: Eastern Oregon

County: Malheur

OWEB Request: $123,357

Total Cost: $158,678

Application Description The Twirly Bird Water Quality Improvement project is located 7.5 miles South of Adrian near the Oregon/Idaho Border. The project area consists of 21 acres of gated pipe irrigated hay/pasture farmland. Tailwater containing sediment, nutrients and bacteria flow off the project into the 5.7 Canal and the Snake River. The proposed work includes converting 21 acres from gated pipe irrigation to sprinkler irrigation through the installation of 36 solid set sprinklers and all required water conveyance and electrical infrastructure. Project partners include the landowner, Owyhee Watershed Council and Agrilines Irrigation.

Review Team Evaluation

Strengths

- The application has clearly defined project goals and objectives.
- Maps included in the application provide ample detail for understanding the project vicinity and proposed restoration components.
- Solid set irrigation is appropriate for the topography in the project area. The irrigation system may serve as a demonstration to other landowners in the area and may encourage future water conservation projects.
- The application identifies four restoration alternatives demonstrating the project team considered other options and the selected alternative is based on topography, field shape, and cost effectiveness.
- The new irrigation system will reduce sediment, nutrient, and bacteria runoff from the project site.
- The project team has the capacity to implement and maintain the project as proposed.
- The Owyhee Watershed Council has a proven track record of managing and completing projects as proposed and according to the project schedule.

Concerns

- The irrigation delivery ditch is in poor condition and carries sediment, nutrients, and bacteria to the project site and the Snake River. It is not clear if converting from flood to sprinkler irrigation will reduce contaminated irrigation wastewater contributions to the Snake River.
- The project site is not close to other water conservation projects, is not in a water quality improvement priority area, and the work appears opportunistic rather than strategic.
- Project costs are not commensurate with the anticipated watershed benefits resulting from water conservation and improved water quality.

Concluding Analysis

Converting Twenty-one flood irrigated acres to sprinkler irrigation will reduce irrigation wastewater and reduce sediment, nutrient, and bacteria runoff at the project site. While water quality benefits will be realized at the project site, the delivery ditch continues past this property and contributes contaminated wastewater to the Snake River, and the likelihood of water quality improvement in the basin is unknown.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5033-22983
Project Type: Restoration
Project Name: Willow Water Quality Improvement
Applicant: Owyhee WC
Region: Eastern Oregon
County: Malheur
OWEB Request: $144,305
Total Cost: $303,792

Application Description The Willow Water Quality Improvement project is located 1 mile NW of Adrian along Mendiola Road. The project area consists of 76 acres of furrow irrigated row crop farmland . Tailwater containing sediment, nutrients and bacteria flow off the project area through a small drainage, into the Kingman Irrigation Drain and the Snake River. The proposed work includes converting 76 acres from furrow irrigation to sprinkler irrigation through the installation of 2 pivot systems, solid set handlines in pivot corners and all required water conveyance and electrical infrastructure. Project partners include the landowner, Owyhee Watershed Council and Agrilines Irrigation.

Review Team Evaluation

Strengths

- The application has clearly defined project goals and objectives.
- Maps included in the application provide ample detail for understanding the project vicinity and proposed restoration components, along with its proximity to prior implemented projects.
- Pivot irrigation is appropriate for the topography in the project area. The irrigation system will serve as a demonstration to other landowners in the area and may encourage future water conservation projects.
- The application identifies four restoration alternatives, and the applicant will implement the appropriate alternative based on cost effectiveness, crop rotation, and water quality improvement outcome.
- The new irrigation system will reduce sediment, nutrient, and bacteria runoff from the project site, and improve water quality in Kingman Drain and the Snake River.
- Reducing sediment, nutrient, and bacteria laden runoff from the property will contribute to water quality benefits to the Snake River, and flood to sprinkler irrigation conversion is a DEQ Total Maximum Daily Load (TMDL) action plan priority.
- The project team, including the landowner, have the capacity to implement and maintain the project as proposed.
- The Owyhee Watershed Council has a proven track record of managing and completing projects as proposed and according to the project schedule.
- Project costs are commensurate with the anticipated watershed benefits resulting from water conservation and improved water quality.

Concerns

- A large terrace will be removed to accommodate pivot #2 and this cost is not included in the application budget.

Concluding Analysis

Converting seventy-six flood irrigated acres to pivot irrigation will reduce irrigation wastewater in the project area and reduce sediment, nutrient, and bacteria runoff. The project is likely to succeed in continuing work in the Adrian area that implements ODA and the DEQ water quality improvement objectives for the Snake River.

Review Team Recommendation to Staff
Fund

Review Team Priority
7 of 11

Review Team Recommended Amount
$144,305

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$144,305

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5034-22984
Project Type: Restoration
Project Name: In the Hart of Jacobsen Gulch
Applicant: Malheur WC
Region: Eastern Oregon
County: Malheur
OWEB Request: $43,655
Total Cost: $91,603

Application Description

1) The project site is about 5 miles from Ontario. It is with in the Jacobsen Gulch priority area and very near the Snake River.

2) Water quality improvement in the Malheur Basin is one of the top restoration priorities for the Malheur Watershed Council. Willow Creek has been a focus area for the Council and other agencies since the late 1990s. Improved water quality is achieved through on-farm irrigation infrastructure improvements and management. The Council in cooperation with irrigation districts and private landowners has been systematically improving water quality through irrigation system conversions over the past 20 plus years across the Malheur Basin. This project complements several recently completed and on-going water quality improvement projects in the Jacobsen Gulch priority area.

3)The proposed project will convert 20 acres of flood irrigated fields to sprinklers by installing:

-- One 15 HP pump
-- Electrical panel for the pump
-- One filter
-- One flow meter
-- 600 feet of 6-inch 125# pipe
-- 800 feet of 4-inch 125# pipe
-- 400 feet of 3-inch 125# pipe
-- 60 feet of 10-inch 80# pipe
-- 1,800 feet dig lay and backfill pipe
-- Misc valves and tees
-- 1,360 feet of wheel lines
-- Handlines to irrigate poplar trees and corners
-- Idaho Power hook-up
-- Water Right Transfer

4) Partners are the landowner, NRCS, Owyhee Irrigation District and the Malheur WSC.

Review Team Evaluation

Strengths

- Water quality monitoring data collected in Jacobsen Gulch is summarized and uploaded with the application, clarifying the strategic nature of the proposed work in the Jacobsen Gulch priority area.
- Maps included in the application provide ample detail for understanding the project vicinity and proposed restoration components, along with its proximity to prior implemented projects.
- Hand and wheel line sprinkler irrigation is appropriate for the topography in the project location. The irrigation system will serve as a demonstration to other landowners in the area and may encourage future water conservation projects.
- The poplars on the property, while not native or in a natural configuration, provide limited wildlife habitat and the irrigation system will maintain this valuable habitat until the trees are harvested.
- The new irrigation system will reduce sediment, nutrient, and bacteria runoff from the project site, and improve water quality in the Snake River.
- Irrigation water management in Jacobsen Gulch is a priority for the Malheur Watershed Council, the Owyhee Irrigation District, and the Natural Resources Conservation Service (NRCS) demonstrating the strategic nature of the proposed work.
- Reducing sediment, nutrient, and bacteria laden runoff from the property will contribute to water quality benefits to the Snake Basin, and flood to sprinkler irrigation conversion is a DEQ Total Maximum Daily Load (TMDL) action plan priority.
- The project team has the capacity to implement and maintain the project as proposed.
- The Malheur Watershed Council has a proven track record of managing and completing projects as proposed and according to the project schedule.

Concerns

- The poplar grove will be irrigated with hand lines, and it is questioned if this is a viable irrigation method in a planted forest.

Concluding Analysis

Converting twenty irrigated acres from flood to sprinkler application will reduce irrigation wastewater. While limited in scale, the proposed irrigation conversion in the Jacobsen Gulch priority area will further efforts to implement ODA and DEQ water quality improvement objectives by reducing sediment, nutrient, and bacteria delivery to the Snake River.

Review Team Recommendation to Staff

Fund

Review Team Priority

10 of 11

Review Team Recommended Amount

$43,655

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5035-22986
Project Type: Restoration
Project Name: Trout Creek Ecosystem Resiliency
Applicant: Powder Basin WC
Region: Eastern Oregon
County: Baker
OWEB Request: $177,776
Total Cost: $244,508

Application Description This project is on Trout Creek in the North Fork Burnt River watershed, approximately 45 miles southwest of Baker City, southeast of Whitney Valley on lands administered by the Whitman Ranger District of the Wallowa Whitman National Forest. Watershed issues addressed are: 1) degraded groundwater recharge and water storage functions, 2) limited water table maintenance supporting narrower riparian vegetation communities, 3) limited zones for water quality filtering, and 4) excessive bank erosion resulting in streambeds with abundant fine silts. Throughout the 2.5-mile project reach, the creek is incised, not connected with its broad historic floodplain, and beaver are not present. The result is a stream with an altered potential riparian vegetation community including upland species, simplified aquatic habitat and one that is more efficient at routing water out of the system. Both Trout Creek and the North Fork Burnt River experience very low summer base flows and water temperatures that exceed state water quality standards (303d water quality impaired for water temperature). We propose to utilize low-tech process-based restoration techniques (beaver dam analogues – BDAs) to reconnect Trout Creek with its historic floodplain and facilitate restoration of the native willow community by fencing to exclude ungulates from five one-acre protection areas and developing upland water sources for domestic livestock. This is a collaborative project between the Powder Basin Watershed Council and Wallowa Whitman National Forest. OWEB funds will be used to support PBWC staff, pay work crews to implement the work, contract upland water developments, and purchase fencing materials, PPE, equipment and tools.

Review Team Evaluation

Strengths

- The applicant proposes to use low-tech process-based restoration techniques including beaver dam analogs (BDA) and post assisted log structures (PALS) to improve water storage function, riparian vegetation communities, and water quality on Trout Creek and these methods are appropriate for the valley type.
- Upland livestock watering systems will be installed providing infrastructure to help keep domestic livestock away from Trout Creek and increase the chance of stream restoration success.
- The project concept is based on a similar project on Camp Creek in Baker County that is being administered by the Powder Basin Watershed Council.

Concerns

- The project does not have a design making it difficult to determine if project objectives will be met, if implementation methods are appropriate, or if the project is ready for implementation.
- The project will require environmental compliance review and construction permits from several agencies. The proposed work is in a conceptual phase making it difficult to determine if the environmental compliance package is likely to be achieved.
- It is unclear in the application how many livestock watering systems will be installed or the location of each system making it difficult to determine the effectiveness of this livestock management tool.
- Conditions upstream of the project area are not clearly described in the application and it is difficult to determine how the proposed work may be affected by stream and floodplain processes upstream.
- The youth labor force proposed to construct the project is an untested model at the time of this application. The application does not describe the scope of work to be completed by youth crews, therefore it is unknown if the work can be completed as proposed.

Concluding Analysis

The Powder Basin Watershed Council proposes to restore a 2.5-mile reach of the Trout Creek aquatic and valley bottom ecosystem 45-miles southwest of Baker City. The work will provide ecosystem services by distributing cold and clean water temporally and spatially, providing abundant quality fish and wildlife habitat, and increasing resiliency to wildland fire. The application lacks design and completed environmental compliance, the youth labor force model is untested, and the project is not ready for implementation. If the application is resubmitted the applicant is advised to address the concerns identified in this evaluation.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team
N/A

Staff Recommendation

Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5036-22987

Project Type: Restoration

Project Name: Malheur Lake and Blitzen River Aquatic Health Project

Applicant: High Desert Partnership

Region: Eastern Oregon

County: Harney

OWEB Request: $368,150

Total Cost: $492,450

Application Description The project will take place in the Harney Basin, within the Donner und Blitzen (Blitzen) river watershed. The project proposes to install an electronic fish barrier (E-barrier) near the mouth of the Blitzen river where it reaches Malheur lake. The goal of the project is to assist the management of invasive common carp (carp) that are negatively effecting water quality in the Malheur lake and the Blitzen river. During low water years (~6 out of 10 years) This barrier will be used to stop carp from 1) spawning in the river which is their only viable location on dry years. 2) using the river as a refugia when the lake water quality, depth, ice make it uninhabitable to carp. 3) Use the electronic barrier to easily capture and remove huge amounts of carp from the watershed. The project will require design, installation, and effectiveness monitoring of the proposed barrier. Project partners will include Malheur National Wildlife Refuge, High Desert Partnership, Oregon Department of Fish and Wildlife and Friends of the Malheur National Wildlife Refuge.

Review Team Evaluation

Strengths

- Carp removal from the Malheur Lake and Blitzen River is an effective method to treat the cause of poor water quality in the system, improve submergent and emergent aquatic vegetation, and improve Pacific Flyway migratory bird habitat.
- The partnership has successfully trapped and removed large amounts of carp from the system in the past and these removal efforts have led to improved lake habitat conditions.

Concerns

- The application does not clearly state the project objectives or provide information on how the objectives will be met. The narrative does not describe how the barrier will be powered, operation procedures are not included, it is unclear who will operate the system, and the barrier design is conceptual and based on communication with the manufacturer from two years ago.
- The project schedule shows many steps to implement the project, but the proposal narrative does not describe each step and it is unclear if the applicant will use clearly defined methods appropriate for addressing the carp problem in the system.
- Carp removal alternatives are not included in the application narrative, and it is unclear if the proposed barrier is a viable and preferred solution.

- It is unclear why some adult carp will be PIT tagged, why adult carp tracking through the barrier system is necessary, or how this method provides benefit to the project.
- Given the lack of proposal clarity and uncertain technical soundness it is unclear whether the proposed solution is cost effective in terms of watershed benefits.
- The budget lacks sufficient detail to determine whether costs are reasonable.

Concluding Analysis

The High Desert Partnership proposes to install a carp barrier on the Blitzen River near its confluence with Malheur Lake. The barrier will keep adult carp from entering the Blitzen River system and this will limit carp spawning during low water years when the river is the only viable spawning area. The application lacks elements essential to determine the likelihood of project success, and if the application is resubmitted the applicant is advised to address the concerns identified in this evaluation.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5037-22990
Project Type: Restoration
Project Name: The Last Two Pieces of the Puzzle
Applicant: Malheur SWCD
Region: Eastern Oregon
County: Malheur
OWEB Request: $65,442
Total Cost: $110,874

Application Description 1. The proposed project is located approx. 3 miles northwest of Vale and less than 3.5 miles from the Malheur River.
2. Poor water quality is the primary limiting factor for the Malheur River. The project will address water quality improvement for on-farm system. This project will take advantage of the pressurized system already in place on the farm.
3. Pasture Conversion -10 acre
1380 feet of 6 inch 100#Pip Pipe 720 feet of 4” inch 125#IPS Pipe 600 feet 3 inch 125# IPS Pipe
2700 feet Dig/Lay Backfill
15 Riser Assembly w/ Senniger 8025 Gun 1 Manifold & Tie In
1257 ft of old 2 strand boundary fence removed on west side of pasture.
2626 ft of new 6 strand fence for three sides
230 lbs grass seed

Small Pivot-3 acre
540 feet 4” 125# Pip Pipe
1300 feet #4 Cable in Conduit w/Controls 1300 feet Dig/Lay/Backfill
1 Pivot Tie in w/4” valve
1 Tie into Existing Mainline 1 Pivot Pad
1 10 hp Pasco Pump 1 Pump Tie In
1 Electrical Service
1249 ft of new 6 strand fence
69 lbs grass seed

Additional fence removal of 2317 feet of old 2 strand fence on north side boundary fence with new 6-strand fence, and 2387 ft new 6 strand fence on east side of existing 40-acre pivot that will provide an alley for livestock to
move back and forth on non-irrigated land.

4. Working with landowner and Vale Oregon Irrigation for a water right transfer.

Review Team Evaluation

Strengths

- The solid set portion of the proposed irrigation system will reduce sediment, nutrient, and bacteria runoff from the project site, and improve water quality in the Malheur River.
- Reducing sediment, nutrient, and bacteria laden runoff from the property will contribute to water quality benefits in the Malheur River, and flood to sprinkler irrigation conversion is a DEQ Total Maximum Daily Load (TMDL) action plan priority.

Concerns

- Two-strand fence exists on the property and the applicant proposes to replace this fence with six-strand fence. The fencing is not included in the attached map, and it is not clear how replacing an existing fence addresses limiting factors or watershed issues identified on the property or in the Malheur Basin.
- A pivot installation is proposed for an unirrigated three-acre field on the property. It is not clear how adding irrigation to this currently dry field addresses limiting factors or watershed issues identified on the property or in the Malheur Basin.
- The Malheur SWCD currently has eleven open grants and twenty-one grants in the monitoring phase with OWEB. It is unclear whether the grantee has the capacity to implement this project as well as complete their existing thirty-two OWEB projects that are open or in the monitoring phase.

Concluding Analysis

Converting 10 irrigated acres from flood to sprinkler application will reduce degraded water quality runoff on the farm. Adding a pivot to three non-irrigated acres will not have water quality benefits and there is no clear rationale for replacing the existing fence on the property. The applicant is encouraged to seek OWEB funding for projects that have clear watershed benefits.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

N/A

Review Team Recommended Amount

$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5038-23008
Project Type: Restoration
Project Name: Pivoting on South Road G revised
Applicant: Malheur WC
Region: Eastern Oregon
County: Malheur
OWEB Request: $116,007
Total Cost: $245,558

Application Description 1) The project in the Willow Creek Focus Area. It is 0.9 miles from the town of Willow Creek.

2. Water quality improvement in the Malheur Basin is one of the top restoration priorities for the Malheur Watershed Council. Willow Creek has been a focus area for the Council and other agencies since the late 1990s. Improved water quality is achieved through on-farm irrigation infrastructure improvements and management. The Council in cooperation with irrigation districts and private landowners has been systematically improving water quality through irrigation system conversions over the past 20 plus years across the Malheur Basin. This project complements several recently completed and on-going water quality improvement projects in the area.

3. The proposed project will convert 122 acres of flood irrigated fields to sprinklers by installing:

-- One pivot
-- One Cornell 3 phase pump
-- 1,520 feet of 10 inch 100# PIP pipe
-- 1,540 feet Cable Wire
-- Connection to pipeline
-- Electrical Panel
-- Flow Meter and
-- Apply for a water right transfer if needed.

4. Partners are the landowner, NRCS, Vale Irr. Dist, and the Malheur WSC.

Review Team Evaluation

Strengths

- The applicant addressed concerns from the previous evaluation in this application by adding a dry wheel package to the pivot design.
- The project objectives are clearly stated, the pivot installation methods are defined and appropriate for the location, and the project is ready to implement.

- The application includes information on work accomplished over the past 25 years in the Willow Creek area. This provides watershed context and demonstrates how this project will build upon a long standing and successful water quality improvement effort in the area.
- The new pivot irrigation system will connect to a piped lateral that replaced an open ditch delivery system, which demonstrates the strategic nature of the proposed work.
- Converting 122 flood irrigated acres to sprinklers will address water conservation priorities in the Willow Creek focus area.
- Reducing sediment, nutrient, and bacteria laden runoff from the property will result in water quality benefits to Willow Creek, and flood to sprinkler irrigation conversion is a DEQ Total Maximum Daily Load (TMDL) action plan priority.
- Ongoing water quality monitoring will document water quality trends in the watershed.
- The project team has relevant experience and a proven track record implementing irrigation water management projects.

Concerns

- No concerns were expressed at review.

Concluding Analysis

Converting 122 flood irrigated acres to pivot irrigation will reduce irrigation wastewater in the project area and reduce sediment, nutrient, and bacteria runoff. The project is likely to succeed in continuing work in the Willow Creek area that implements ODA and DEQ water quality improvement objectives for the Malheur River watershed.

Review Team Recommendation to Staff
Fund

Review Team Priority
8 of 11

Review Team Recommended Amount
$116,007

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation

Fund

Staff Recommended Amount
$116,007

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5039-23025

Project Type: Restoration

Project Name: East Moraine Community Forest (EMCF) Virtual Fence Project

Applicant: OSU Office of Sponsored Research & Award Admin

Region: Eastern Oregon

County: Wallowa

OWEB Request: $80,112

Total Cost: $134,893

Application Description This project focuses on Wallowa County's East Moraine Community Forest (EMCF), a unique locale recognized as the largest glacial moraine in North America. To protect this area from the pressures of development, the County purchased the moraine in 2021 as a community property to be managed and showcased as a multi-use landscape. Currently the 1791-acre EMCF hosts a multitude of plant and wildlife species (including the endangered Spalding's catchfly), rare plant communities utilized for cultural purposes by the Nez Perce Tribe, sustains a managed forest, serves as a grazing resource to livestock producers, and is visited by hundreds of people each year who navigate the six-mile-long trail system that overlooks majestic Wallowa Lake. This area is highly visible and serves as a showcase of how multiple uses can complement one another when thoughtful management tools are employed. This project seeks to utilize virtual fence technologies to implement an adaptive grazing system within EMCF to address a number of issues including: 1) improving upland condition, 2) protecting vulnerable populations of Spalding's Catchfly, 3) protecting cultural-use areas important to tribal gatherers and 4) reducing fencing infrastructure that impedes wildlife movement and recreational access. To accomplish this, we will manage livestock distribution and grazing pressure using virtual fence (VF) technologies in conjunction with improving upland water access and wetland protection. Prior to turn out, cattle will be fitted with VF collars and trained to respond to the auditory and stimulus cues. Using the technology, cattle grazing, and distribution can be set and adjusted in real time as needed to meet land management objectives. Cattle will be excluded from sensitive and important areas without the need to build physical fences, thereby improving the health and function of these upland ecosystems. Partners are Oregon State University, Wallowa Resources, and the Wallowa County Commissioners.

Review Team Evaluation

Strengths

- The journal articles, grazing management plan, maps and photos included with the application add clarity to the project objectives and provide information on how the objectives will be met.
- The project will be implemented using clearly defined methods that are appropriate for improving natural resource conditions on the property and the work is ready for implementation.

- Virtual fence is a flexible and transportable grazing management system that can move livestock without the use of traditional permanent fence that is detrimental to native wildlife.
- Virtual fence has the capacity to both exclude domestic livestock from sensitive areas as well as contain stock in areas where grazing is intended.
- The project location is on public property owned by Wallowa County, the technology will be on display to the public, and this setting may encourage additional use of this method in the surrounding area.
- Spalding's Catchfly, an endangered plant species identified for preservation in local and regional conservation documents is present on the property, and the proposed livestock management methods will work towards the conservation of this plant.
- The purpose of the grazing management plan for the property is to protect sensitive areas, improve cultural uses of the property, and improve wildlife habitat which will improve watershed function and ecosystem processes.
- The project team has relevant experience and a proven track record implementing grazing management projects.
- Oregon State University has a proven track record of managing and completing projects as proposed and according to the project schedule.
- Project costs are commensurate with the anticipated watershed benefits resulting from the improved grazing management infrastructure on the property.

Concerns

- The uploaded grazing management plan and virtual fence journal articles contain many pages of text and related information. The application does not indicate which sections of each document are relevant to the project, making it time consuming for reviewers to determine how each document supports the proposal narrative.
- Equipment line items in the budget for a 6x10 utility trailer with wood floor is entered twice and it is unclear why two trailers are needed. This issue was discussed at the site visit and the applicant clarified that equipment line items are for one trailer and one base station. The applicant is advised to review applications for errors prior to submission.

Concluding Analysis

Improving grazing management on public property on Wallowa Lake's east moraine near Joseph is an important step to improve native fish, wildlife, and endangered plant habits in the area. The proposed virtual fence and upland water developments will improve domestic livestock distribution, allow for the removal of traditional permanent fence, and showcase an emerging livestock management technology. The project team has relevant experience and likelihood of success is high.

Review Team Recommendation to Staff

Fund

Review Team Priority

3 of 11

Review Team Recommended Amount

$80,112

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$80,112

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5040-23044
Project Type: Restoration
Project Name: Pounds of Efficiency II
Applicant: Malheur SWCD
Region: Eastern Oregon
County: Malheur
OWEB Request: $71,586
Total Cost: $233,035

Application Description 1. Located 6.7 miles west of Ontario, in the Morgan Bench Priority Area.

2. 1320 feet of leaking irrigation lateral in the middle of the field makes it hard to meet the goal of partners in the Morgan Bench Priority Area, also known as NRCS 'Valley View Priority Area with zero runoff that will improve water quality.

3. The proposed work will replace 1320 ft of broken concrete pipe with 1320 Feet of 12" 125# IPS Pipe.. Replace wheel lines on 40 acres with two center swipe pivots. That will be pressurized with two pumps, two flow meters This Conversion from wheel lines to pivot system will improve efficiency by 15 %.
A water right transfer will be needed.

4. The partners for this project are the landowner, Malheur County SWCD, NRCS and Owyhee Irrigation District and Romans Precision Irrigation (RPI)

Review Team Evaluation

Strengths

- Converting 40 wheel line irrigated acres to a pivot application system and replacing a 1,320-foot leaking irrigation lateral pipeline will address water conservation priorities in the area.
- The project is in the Morgan Bench Priority Area is a focus area for the Natural Resource Conservation Service (NRCS) to improve water quality in the Malheur River.
- Reducing sediment, nutrient, and bacteria laden runoff from the property will result in water quality benefits to the Malheur River and flood to sprinkler irrigation conversion is a DEQ Total Maximum Daily Load (TMDL) action plan priority.
- Ongoing water quality monitoring will document water quality trends in the watershed.
- The project is near previous and future on-farm irrigation improvements demonstrating the strategic nature of the proposed work.
- The project team has relevant experience implementing irrigation water management projects.

Concerns

- Water quality monitoring is mentioned in the application, but a summary of past water quality data is not present in the application, making unclear the extent to which the proposed project will address water quality impairments.
- A brief alternative analysis is included in the application, but it does not describe the selection process or why the proposed alternative is selected.
- A conversion from the existing sprinkler irrigation to a pivot will not result in a significant reduction in irrigation wastewater, making it unclear if the project will achieve the stated watershed benefits.
- The Malheur SWCD currently has eleven open grants and twenty-one grants in the monitoring phase with OWEB. It is unclear whether the applicant has the capacity to implement this project as well as complete their existing thirty-two OWEB projects that are open or in the monitoring phase.

Concluding Analysis

Converting 40 irrigated acres from wheel line to pivot application will improve irrigation efficiency by a maximum of only 15%. The proposed irrigation conversion in the Morgan Bench Priority Area may further efforts to implement ODA and DEQ water quality improvement objectives by nominally reducing sediment, nutrient, and bacteria delivery to the Malheur River. It is unclear how the proposed alternative was selected, and the magnitude of watershed benefit is unclear.

Review Team Recommendation to Staff
Fund

Review Team Priority
11 of 11

Review Team Recommended Amount
$71,586

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5041-22969
Project Type: Technical Assistance
Project Name: Colony Creek Flood Irrigation
Applicant: Harney SWCD
Region: Eastern Oregon
County: Harney
OWEB Request: $73,939
Total Cost: $93,796

Application Description 1) The Colony Creek irrigation system is located on Colony Creek, just 5 miles from the Nevada border in southern Harney County southeast of Fields, Oregon.

2) The existing structures need replacement due to their inability to adequately distribute surface water to historical wet meadow floodplains.

3) The requested funds will support survey and design for the replacement structure to improve water delivery. Funding will support a topographic survey and development of a digital elevation model, draft engineering design sufficient for permitting and cost estimating, and initiation of regulatory compliance.

4) Project partners are the Harney Soil and Water Conservation District, Oregon Department of Fish and Wildlife, Oregon Water Resource Department, Ducks Unlimited and the landowners/irrigators.

Review Team Evaluation

Strengths

- Project design data will be collected to initiate environmental permitting that will be required for the restoration work this technical assistance seeks to design.
- The design work seeks to address habitat limiting factors for Pacific Flyway birds identified in regional conservation and recovery plans.
- Appropriate stakeholders are engaged in the project and the project team is qualified to accomplish the proposed technical assistance work.
- The Harney SWCD has the capacity to manage and implement the project as proposed.

Concerns

- The application lacks clarity and describes a generalized design approach for work at this remote location.
- It is unclear in the application how the proposed design work may be affected by water rights and how irrigation water is managed by Oregon Water Resources Department (OWRD) in the project area.

- The application narrative references two creeks in the project area; it is unclear where the irrigation point of diversion is located on Colony Creek, and the photos of a second creek nearby does not add clarity to the proposal.
- A design method alternative analysis demonstrating that a range of options will be considered is not articulated in the application, which is an important consideration given the remote location of the design work.
- Match funding from Ducks Unlimited (DU) is detailed in the application and it is unclear if DU will contribute this match if they are not awarded the design contract.
- The project objectives lack site specific detail for this remote work area, and it is unclear if project costs align with the work necessary to accomplish those objectives.

Concluding Analysis

The Harney SWCD proposes to complete preliminary design sufficient to inform a restoration project budget and initiate regulatory compliance for an irrigation water delivery project near Fields. The application narrative and budget are generalized and not site specific to the work area making it difficult to determine if the design work is likely to succeed. The applicant is encouraged to write and budget future technical assistance applications that are site specific.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5042-22971
Project Type: Technical Assistance
Project Name: Beaubien Diversion Structure
Applicant: Harney SWCD
Region: Eastern Oregon
County: Harney
OWEB Request: $75,000
Total Cost: $95,040

Application Description 1). The project is located 3.5 miles east of Burns, Oregon in Harney County and is situated along the Foley Slough.
2). The project aims to replace the instream Beaubien diversion structure, which is the third irrigation diversion structure along the Foley Slough. The requested funds will be used to complete the necessary landowner outreach, ecological planning, survey and design, and permitting. The project will affect the adjacent floodplain to the north, west, east and south. The existing water diversion structure has caused significant erosion on the banks of the slough and no longer adequately and safely backs up water across the historic floodplain.
3). An 85% competed engineering design will be developed for review and consistent with the Harney Basin Wetland Initiative and its partnership.
4). Partners directly involved include the Harney County Watershed Council, Ducks Unlimited, Oregon Water Resource Department, Oregon Department of Fish and Wildlife, Harney Soil and Water Conservation District, and the private users.

Review Team Evaluation

Strengths

- The design work proposed in the application is supported by several assessments stating that flood irrigated wet meadow restoration is critical in this area for Pacific Flyway migratory birds.
- Appropriate stakeholders are engaged in the project and the project team has accomplished similar technical assistance work.

Concerns

- The application lacks clarity and describes a generalized design approach for the Beaubien Diversion Structure.
- An alternatives analysis demonstrating that a range of options are considered is not articulated in the application, which is an important consideration to determine likelihood of success.
- Match funding from Ducks Unlimited (DU) is detailed in the application and it is unclear if DU will contribute this match if they are not awarded the design contract.

- During the site visit the review team visited an example diversion structure that is eroding on the downstream side of the structure; it is unclear if the applicant and design team are incorporating lessons learned into their design process.

Concluding Analysis

The Harney SWCD proposes to complete preliminary design sufficient to inform a restoration project budget and initiate regulatory compliance for an irrigation water delivery project near Burns. The application narrative and budget are generalized and not site specific to the work area making it difficult to determine if the design work is likely to succeed. The applicant is encouraged to write and budget future technical assistance applications that are site specific.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5043-22972
Project Type: Technical Assistance
Project Name: Cow Creek Floodplain Restoration Project
Applicant: Harney County Watershed Council
Region: Eastern Oregon
County: Harney
OWEB Request: $75,000
Total Cost: $94,856

Application Description 1). Cow Creek floodplain restoration site is about 17 miles northeast of Burns, Oregon in Harney County. It is located between the Malheur National Forest and Hwy 20. The Toelle Ranch owns the property where the project will take place.

2) Cow Creek needs restoration due to its (a) incising creek bed (b) inability to adequately flood into side channels (c) flood its historic floodplain footprint and d) provide adequate riparian and floodplain vegetation for wildlife.

3). The requested funds will support survey and design for restoration of the stretch of Cow Creek. Funding will support a topographic survey and development of a digital elevation model, drafted engineering design sufficient for permitting and cost estimation, and invitation of regulatory compliance.

4) Partners: Landowner, Harney County Watershed Council, Harney Soil and Water Conservation District, Ducks Unlimited, Oregon Water Resources, and Oregon Department of Fish and Wildlife.

Review Team Evaluation

Strengths

- The design work proposed in the application is supported by several assessments stating that flood irrigated wet meadow restoration is critical in this area for Pacific Flyway migratory birds.
- The project location is in core sage-grouse habitat and the design work will lead to restoration actions that improve mesic habitat critical to sage-grouse survival.
- Appropriate stakeholders are engaged in the project and the project team has accomplished similar technical assistance work.
- Project actions align with the work necessary to accomplish the project objectives in this project location near Burns.
- The current ranch management is likely to support and maintain aquatic and upland habitat benefits implemented on this ranch.

Concerns

- The application does not describe current grazing management, how the riparian areas on the ranch are protected, or how sage-grouse viability is promoted through current management, all of which are helpful to determine likelihood of success.
- The application narrative is not clearly written, making review of the narrative challenging.
- An alternatives analysis demonstrating that a range of options are considered is not articulated in the application, which is an important consideration to determine likelihood of success.
- The restoration work resulting from this technical assistance to connect a down cut stream to its adjacent floodplain may be an opportunity to increase watershed resiliency and mitigate the effects of climate change; however, this potential benefit is not articulated in the application.
- It is unclear if the budget is adequate to accomplish the project objectives.

Concluding Analysis

The Harney County Watershed Council proposes to complete preliminary design sufficient to inform a restoration project budget and initiate regulatory compliance for an irrigation water delivery and floodplain connection project near Burns. The application narrative and budget are generalized and not site specific to the work area. The resulting design, if the above concerns are addressed, is likely to lead to restoration that improves sage-grouse and Pacific Flyway bird habitats.

Review Team Recommendation to Staff
Fund

Review Team Priority
3 of 4

Review Team Recommended Amount
$75,000

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$75,000

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5044-22973

Project Type: Technical Assistance

Project Name: Soldier Creek Wet Meadow Restoration Project

Applicant: Harney County Watershed Council

Region: Eastern Oregon

County: Harney

OWEB Request: $75,000

Total Cost: $94,856

Application Description 1). Soldier Creek wet meadows is located about 9 miles northeast of Burns, Oregon in Harney County. It is located below the Malheur National Forest north of Hwy 20 and east of hwy 395. The Soldier Creek, LLC owns the property where the project will take place.

2). The Soldier Creek wet meadow habitat needs restoration. The objective is to improve its flood irrigation efficiency by upgrading the irrigation infrastructures: (a) Stop and reverse incising and erosion of meadow and channels that are disconnecting flow from floodplain; (b) Replace and improve floodplain infrastructure to effectively flood wet meadow habitat; (c) Improve forage for spring migratory waterbirds and improved habitat for local wildlife and neotropical nesting birds.

3). The requested funds will support survey and design for restoration of the Soldier Creek project area. Funding will support a topographic survey and development of a digital elevation model, drafted engineering design sufficient for permitting and cost estimation, and invitation of regulatory compliance.

4). Partners: Harney County Watershed Council, Harney Soil and Water Conservation District, Ducks Unlimited, Oregon Water Resources Department, and landowner/irrigator.

Review Team Evaluation

Strengths

- The design work proposed in the application is supported by several assessments stating that flood irrigated wet meadow restoration is critical in this area for Pacific Flyway migratory birds.
- Appropriate stakeholders are engaged in the project and the project team has accomplished similar technical assistance work.
- The Harney County Watershed Council has the capacity to manage and implement the project as proposed.
- Project actions align with the work necessary to accomplish the project objectives in this project location near Burns.

Concerns

- The application is not clearly written, making review of the narrative challenging.
- The application identifies that the project will affect sage-grouse but does not describe how sage-grouse will benefit from the proposed actions.
- An alternatives analysis demonstrating that a range of options are considered is not articulated in the application, which is an important consideration to determine likelihood of success.
- It is unclear whether the budget is adequate to accomplish the project objectives.

Concluding Analysis

The Harney County Watershed Council proposes to complete preliminary design sufficient to inform a restoration project budget and initiate regulatory compliance for an irrigation water delivery project near Burns. The application narrative and budget are generalized and not site specific to the work area. The resulting design work, if the above concerns are addressed, is likely lead to restoration that improves Pacific Flyway bird habitats.

Review Team Recommendation to Staff
Fund

Review Team Priority
4 of 4

Review Team Recommended Amount
$75,000

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund; falls below staff-recommended funding line

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5045-22988

Project Type: Technical Assistance

Project Name: Lava Butte Upland Management Design

Applicant: Owyhee WC

Region: Eastern Oregon

County: Malheur

OWEB Request: $30,828

Total Cost: $39,828

Application Description The Lava Butte Upland Management Design project is located approximately 14.5 miles NW of Jordan Valley in the Lower Cow Creek/Anawalt area of the Owyhee Uplands. The project area is in the Cow Lakes PAC and Core Sage Grouse habitat. Lack of water sources across 7,307 private land acres limits grazing distribution, degrades wildlife habitat, and impacts vegetative composition. The proposed work includes 100% survey/design of four livestock watering systems on two different properties by a licensed engineer, as well as development of livestock grazing/management plans. Project partners include the Owyhee Watershed, RSI Engineers, Cow Lakes Grazing Association and Skinner Ranches.

Review Team Evaluation

Strengths

- Project goals and objectives are clear in the application, and the maps provide ample detail of the project vicinity.
- Additional watering troughs on the 7,307-acre ranch will facilitate proper grazing management, which will provide opportunity to graze invasive annual grasses (IAG) to reduce their presence and promote native vegetation that will benefit sage-grouse and other native wildlife.
- Current grazing management is flexible and does not appear to have negative impacts to sage-grouse habitat. The addition of permanent water sources will add grazing rotation flexibility, which will help improve native bunchgrass understory species.
- Appropriate stakeholders are engaged in the project and the project team has accomplished similar technical assistance work in remote locations.
- The Owyhee Watershed Council has the capacity to manage and implement the project as proposed.
- The budget rates are reasonable given the remote project location, and the overall project cost is commensurate with the expected design result.

Concerns

- An alternatives analysis demonstrating that a range of options are considered is not articulated in the application, which is an important consideration to determine likelihood of success.

Concluding Analysis

The Owyhee Watershed Council is proposing to design a stock watering system for a 7,307-acre rangeland grazing area near Jordan Valley. The resulting restoration work will improve grazing operations and provide the tools needed to properly manage this sage-steppe plant community in sage-grouse habitat. With this improved management the likelihood of project success is high.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 4

Review Team Recommended Amount
$30,828

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$30,828

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5046-22997

Project Type: Technical Assistance

Project Name: Chesnimnus Creek Williams Restoration Design

Applicant: Nez Perce Tribe

Region: Eastern Oregon

County: Wallowa

OWEB Request: $74,250

Total Cost: $191,700

Application Description The Chesnimnus Creek Williams Restoration Project is part of a multi-phased effort proposing to complete designs, permitting, and all necessary documents to implement a thoroughly vetted instream and floodplain restoration project benefitting limiting life stages of ESA listed steelhead between RM 4.6 and 9.1 in Chesnimnus Creek. Chesnimnus Creek is a tributary of Joseph Creek, located in the northern end of Wallowa County. Although the Joseph Creek steelhead population is among the most viable in the region, its headwaters do not originate in high elevation snowpack dominated mountains, which makes this watershed extremely susceptible to changes in temperature and hydrologic regimes.
With legacy logging effects, roads, agricultural practices, and other anthropogenic influences within the Joseph Creek watershed, current habitat conditions in Chesnimnus Creek are significantly deviated from its historic ecosystem function. This departure has negatively impacted many physical and biological aspects of the watershed, resulting in various life stage impairments to steelhead and Pacific lamprey, of which this project aims to improve through a suite of priority restoration actions.
In addition to the Nez Perce Tribe, the Grande Ronde Model Watershed (GRMW), the landowners, project funders, the Oregon Department of Fish & Wildlife (ODFW), and other Atlas Implementation Team partners will be instrumental in the successful completion of this project.

Review Team Evaluation

Strengths

- The application describes a clear need to design restoration along a 4.5-mile reach of Chesnimnus Creek to improve Endangered Species Act (ESA)-listed steelhead habitat and improve watershed resiliency to mitigate the effects of climate change.
- Work proposed in the application addresses limiting habitat factors identified in the Wallowa Atlas strategic action plan and other regional steelhead recovery plan documents.
- An alternatives analysis demonstrating that a range of options are considered is included in the application, which is an important consideration to determine likelihood of success.
- Project objectives are sequential and clearly written and include scheduled design review check- in intervals with the Atlas team and the landowner.
- Appropriate data will be collected to inform project designs and professionally accepted engineering approaches will be applied to accomplish the final design and environmental compliance documents.

- The landowner, state and federal agencies, the Nez Perce Tribe, and the watershed council are engaged in the project and the project team has accomplished similar technical assistance work in remote locations.
- The Nez Perce Tribe has the capacity to manage and implement the project as proposed.
- Ample project match is secured from a variety of partners demonstrating that appropriate stakeholders are engaged in the project and committed to project implementation.
- The budget rates are reasonable given the remote project location, and the overall project cost is commensurate with the expected design result.

Concerns

- No concerns were expressed at review.

Concluding Analysis

The Nez Perce Tribe proposes to complete design and all permitting requirements for a project addressing degraded aquatic, floodplain, and riparian habitat on Chesnimnus Creek near Enterprise. The resulting restoration guided by this design work will occur in steelhead habitat, restore habitat necessary for beaver colonization, and guide future restoration that addresses Oregon Department of Environmental Quality concerns.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 4

Review Team Recommended Amount
$74,250

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount

$74,250

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5051-22995
Project Type: Stakeholder Engagement
Project Name: Engagement with Water
Applicant: Malheur WC
Region: Eastern Oregon
County: Malheur
OWEB Request: $148,267
Total Cost: $185,863

Application Description

1) Our proposed project will cover the Malheur River Watershed.

2) The Basin has several natural resource issues. The river has the some of the worst water quality in Oregon. One of the primary contributors is irrigation induced erosion. Bull trout, a federally listed species, is in the upper reaches of the Malheur River. It requires riparian areas in good condition and the Vale Irrigation District needs help to maintain a minimum pool in Beulah Reservoir. Weeds in riparian areas are an ever increasing problem. We need to engage landowners directly to address this specifically.

3) We are proposing to hire a Engagement Project Manager. Their responsibilities will be to engage the producers in the basin, conduct 4 workshops/townhall meetings to discuss irrigation efficiency opportunities, weed management in riparian areas, and present eco-friendly bank stability methods. We will contract with a local company to produce two newsletters distributed both in print and electronically, continuous updates of our website, and develop electronic media publications twice a year for 2 years.

4) Partners include NRCS, Vale Irrigation District, Mesa Communications, Malheur Basin residents, and local natural resource agencies.

Review Team Evaluation

Strengths

- The Malheur Watershed Council (MWC) will hire an engagement project manager who will conduct workshops, town hall meetings, contribute to the watershed council newsletter, provide updates to their website, and contribute to other electronic media publications, which will engage landowners, agencies, and the public in the Malheur watershed.
- The stakeholder engagement methods are designed to reach local, state, and federal agencies, private landowners, and public land managers, as well as nonagricultural producers in the Malheur watershed.

- The engagement methods described in the application will encourage multi-directional communication between stakeholders in the basin. The proposed work builds on work ongoing since the late 1990s, when the council began water quality, weed management, and riparian improvement work in the basin.
- The proposed stakeholder engagement work is timely and will result in the development of eligible restoration projects, especially in the Vale Bench priority area where the Bureau of Reclamation (BOR) Water Smart program will fund the conversion from open irrigation ditch delivery to piped delivery systems.
- There is not a dedicated MWC staff member working on stakeholder engagement in the basin, there is a need for this service, and the proposed work will improve relationships between agencies, landowners, and the interested public.
- MWC has the necessary experience and a proven track record of implementing the proposed stakeholder engagement activities.

Concerns

- Additional information linking the engagement activities to eligible restoration will add clarity to the application, especially regarding riparian weed control in the basin.
- The project schedule details multiple engagement events, and the budget has one line item for outreach materials making it difficult to determine if costs are reasonable and necessary for the proposed work.
- Travel is not detailed in the budget and this cost is necessary to complete the proposed stakeholder engagement work.

Concluding Analysis

The MWC proposes to hire an engagement project manager who will initiate stakeholder engagement efforts in the Malheur watershed regarding irrigation water, riparian weed, and aquatic habitat management. The proposed work will highlight the importance of improved water quality, aquatic, and upland habitats and how private landowners and public land managers can facilitate these improvements.

Review Team Recommendation to Staff

Fund

Review Team Priority

1 of 1

Review Team Recommended Amount

$148,267

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$148,267

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5047-22993
Project Type: Monitoring
Project Name: Checking On Things: WQ Monitoring
Applicant: Malheur WC
Region: Eastern Oregon
County: Malheur
OWEB Request: $258,826
Total Cost: $348,826

Application Description

1) Location. Priority areas for irrigation improvement activities in the lower Malheur and Owyhee River Basins. We propose to sample at 9 sites on the Malheur River, Bully Creek, Willow Creek, and drains that flow into these streams. We will sample in the Owyhee Basin at 2 sites on the Owyhee River and 6 important drains. These are all sites where we have monitored for many years
2) NRCS and the Malheur WSC have identified priority areas for irrigation/water quality improvement projects and the Owyhee WSC has identified focus areas as well. We are applying for grant funds to implement on farm conversions to sprinkler irrigation and to pipe dirt ditch laterals for better water management. We need to assess if our efforts are successful in improving water quality in the Malheur River, Bully and Willow Creeks, and the Owyhee River. This monitoring is an important component of our recently awarded BOR WaterSmart grant for piping laterals in the Vale Bench.

Continued monitoring is necessary to quantify water quality improvements and to characterize further changes in water quality related to changes in land and irrigation management over time. Continued monitoring is critical to show agricultural producers that current agricultural practices are contributing to water quality impairment and to demonstrate that their efforts to improve land and irrigation management can be effective and worthwhile. This message is important and of great interest to producers in these basins.
3) We are proposing to sample water from 17 locations twice a month from May to October. Sample parameters will be:
-- Total and ortho Phosphorus
-- E. coli
-- Total Suspended Solids (TSS)
We propose to install flow gauges at 7 sites and use data from 3 permanent sites to calculate pollution loads.
4) Project partners are the NRCS, Vale Oregon Irrigation District, Owyhee Irrigation District, BOR Lab in Boise, Idaho Power, and the Malheur and Owyhee WSCs.

Monitoring Team Evaluation

Monitoring Team Strengths

- This proposed project will collect data that will complement the historic data collected at many of the sites since the 1990s.
- The applicant is working with experienced contractors to collect and analyze the data, the uploaded report demonstrates the ability to collect and report the data as proposed.
- This project will share results with a technical team that consists of OWEB, OWRD, ODA and DEQ and have them review the final data analysis report before it is completed.
- Findings from this monitoring project will be presented in watershed council meetings, to landowners and featured in outreach efforts in their newsletter.
- The application includes a detailed budget that describes how expenses were estimated across this three-year project.

Monitoring Team Concerns

- The application doesn't show a clear plan to describe how irrigation efficiency projects and agricultural practices will be quantified to interpret water quality results.
- The application doesn't describe how this monitoring project connects to the BOR Water Smart grant to focus their efforts in the Vale area.
- The application justifies monitoring stream water level every four hours because it is cheaper than standard methods to collect it every 15 minutes. It was not clear how they determined that 6 water level measurements every day is sufficient to meet their data analytical needs that ultimately allows them to answer their monitoring questions.
- The application cites multiple methods for measuring streamflow, including the velocity index method for estimating flow at gaging stations but it was not clear how they would determine which sites this method would be applied.
- The monitoring protocols detailed in the "Water Quality Monitoring Guidebook" that is cited is over 20 years old and is considered outdated. This document does not include monitoring methods for total suspended solids or E. coli.
- The data management approach includes storing their data in a master excel file and relies on the BOR lab to back up their water quality data. It is not clear what approaches are taken to store their streamflow data to ensure it is backed up.

Monitoring Team Comments

Review Team Evaluation

Strengths

- The application addresses concerns identified in the previous application by describing how long-term water quality trends will be determined and describing methods to engage the agricultural community.
- The summarized water quality data, maps, and photos included with the application help describe the proposed water quality and flow monitoring work.
- Three years of monitoring are proposed in this application, which is appropriate and necessary to inform priority areas for water quality improvement and to identify eligible restoration work.

- Previous data indicates Bully Creek, Willow Creek, the Malheur River, and the Owyhee River have impaired water quality. Data collection using Department of Environmental Quality (DEQ) approved methods for temperature, flow, phosphorus, E. coli, and total suspended solids will contribute critical data that will support the Malheur Total Maximum Daily Load (TMDL) implementation.
- The West Bench, Harper, Little Valley, and Willow Creek areas are prioritized by Oregon Department of Environmental Quality (DEQ), Oregon Department of Agriculture (ODA), Natural Resources Conservation Service (NRCS), and Bureau of Reclamation (BOR) for irrigation water management improvement. The proposed monitoring will track water quality changes and help prioritize upcoming restoration work in these geographies.
- The proposed water quality data collection will be used to demonstrate the need for future restoration work that will be proposed in funding applications to NRCS, BOR, and Oregon Water Resources Department (OWRD).
- The applicant has a proven track record collecting, analyzing, distributing, and presenting water quality data for the Malheur and Owyhee basins.
- The project team consisting of the Malheur and Owyhee Watershed Councils, Vale Oregon Irrigation District (VOID), BOR, NRCS, Owyhee Irrigation District (OID), and Idaho Power have successfully partnered on past monitoring projects.
- Incorporating existing stream flow data from BOR, Idaho Power, and U.S. Geological Survey is a cost-effective approach.
- Project costs are commensurate with the expected water quality data collection, analysis, and distribution benefits.

Concerns

- The application does not describe why the proposed monitoring is necessary for the implementation of the BOR Water Smart grant recently awarded to the Malheur Watershed Council.
- Water quality monitoring in the winter months will add clarity to the overall water quality picture in the basin, and it is unclear why monitoring is not conducted during this time.

Concluding Analysis

The Malheur Watershed Council proposes to monitor flow and water quality in the Lower Malheur and Owyhee River basins where improved irrigation water management is a priority. The data collection will inform and prioritize conservation work, document before and after conditions, and facilitate restoration partnerships.

Review Team Recommendation to Staff

Fund

Review Team Priority

1 of 3

Review Team Recommended Amount

$258,826

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$258,826

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5048-23000

Project Type: Monitoring

Project Name: Powder Basin Macroinvertebrate Status and Trend Monitoring

Applicant: Powder Basin WC

Region: Eastern Oregon

County: Baker

OWEB Request: $38,111

Total Cost: $51,932

Application Description This project proposes continued status and trend macroinvertebrate monitoring by the Powder Basin Watershed Council (PBWC) to assess water quality and condition in the Powder, Burnt, and Brownlee sub-basins. Previous macroinvertebrate surveys in 2018 found results showing significant impairments in biodiversity throughout many of the sampled stream reaches, particularly lower elevation reaches. Given the changes in hydrological conditions and restoration actions in the basin since 2018, identifying trends in macroinvertebrate biodiversity is a high priority for the PBWC and provides baseline data toaddress several important watershed issues. First, this project allows the council to assess the changes in biodiversity at reference sites between 2018 and 2024, and to correlate them to water quality metrics, allowing us to identify important or limiting water quality variables and sites where these issues can be addressed through restoration efforts. Next, the council is looking to use this project to identify changes in macroinvertebrate biodiversity in and near restoration sites by establishing baseline data at current and future restoration projects and at nearby natural beaver dams. The Council is also using this project to help our organizational partners use macroinvertebrate samples to identify and inform management activities in the basin. Wallowa-Whitman National Forest will partner in this project with a focus on monitoring the impact of forest management activities in the Baker City Municipal Watershed. Oregon Department of Environmental Quality will also partner with an interest in using this data to establish status and trends in the Powder Basin as part of their ongoing monitoring and TMDL assessment efforts. Finally, the Council’s intention is that the data generated by this project will be useful in identifying reaches where restoration efforts to improve water quality and habitat conditions for macroinvertebrates, fish, wildlife, and people.

Monitoring Team Evaluation

Monitoring Team Strengths

- This proposed project will complement the macroinvertebrate data that was collected in 2018 and the long-term water quality monitoring data set.
- The application clearly states the different monitoring questions they are trying to answer with the collection of macroinvertebrates.
- The data will be submitted to DEQ to be stored in their database and shared with the Wallowa-Whitman National Forest.

- This project will engage volunteers to assist in data collection that will assist in community engagement.
- The project will follow the same targeted riffle field methods for the sites that will be repeated and will follow the multi-habitat sampling field methods to evaluate the effectiveness of beaver dam analogs which are appropriate given the different objectives proposed in the application.
- The application provides a thorough description of the analyses they will complete for each of the monitoring questions that are proposed in the application.
- The staff listed in the application have the necessary qualifications and experience and are working with a qualified contractor to process the macroinvertebrate samples.
- The budget costs are appropriate for the work necessary to complete the objectives proposed in the application.

Monitoring Team Concerns

- The application lacked details on the previously funded monitoring grant that is referenced and informed the development of this project.
- The value of using macroinvertebrate data across the three different objectives may be different based on which questions they are asking.
- It is not clear how the applicant will incorporate available streamflow data to characterize the variable flow conditions across the 2018 and 2024 sampling periods to assist in interpreting the results.
- The applicant doesn’t describe how the results of the thinning project will be communicated with interested community partners beyond the Wallow-Whitman National Forest.

Monitoring Team Comments

Review Team Evaluation

Strengths

- Monitoring proposed in this application is timely and relevant because the Powder Basin Watershed Council (PBWC) previously collected macroinvertebrate data in Baker County, and this follow up monitoring may inform future restoration project locations.
- Monitoring locations are strategically selected to resample locations with prior collected macroinvertebrate data, as well as the addition of sites to characterize the results of implemented restoration work.
- The Oregon Department of Environmental Quality (DEQ) is engaged with the monitoring design and the applicant will seek volunteer assistance to gather the macroinvertebrate data, demonstrating engagement with community stakeholders.
- DEQ will assist with the data analysis and the PBWC will submit the data to the DEQ database demonstrating that the data will be properly stored, reported, and made publicly available.
- Project costs are commensurate with the proposed monitoring data collection, analysis, and distribution and the use of volunteers to collect the data is a cost-effective approach.

Concerns

- It is unclear how the proposed macroinvertebrate monitoring ties into the larger water quality monitoring effort conducted by the PBWC in Baker County.
- The application proposes status and trend monitoring but describes effectiveness monitoring (EM) for low tech restoration work in the basin and it is unclear if the monitoring as proposed can accomplish EM objectives.

Concluding Analysis

The PBWC proposes to sample macroinvertebrates in Baker County where improved water quality is a priority. The data collection will inform Oregon Department of Agriculture and DEQ water quality improvement planning in the Powder Basin and will inform future restoration work.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 3

Review Team Recommended Amount
$38,111

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$38,111

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Eastern Oregon (Region 5)

Application Number: 223-5049-23054
Project Type: Monitoring
Project Name: Ecological linkages between birds, water patterns, and vegetation
Applicant: Audubon Society of Portland
Region: Eastern Oregon
County: Harney
OWEB Request: $132,908
Total Cost: $273,855

Application Description The Harney Basin is a snowpack-dependent closed-lake basin in southeastern Oregon. As with other regions in the west, increasingly variable weather patterns (i.e. prolonged drought and wetter wet years) has created concern for myriad migrating and breeding bird species which depend on a gradient of wetlands habitat. Much attention has been paid to migrating waterfowl use of the Harney Basin during migration, less attention has been paid to nesting birds and migrating shorebirds, for whom stopover habitat (rest and refueling locations) is diminishing at an alarming rate.. Several species of landbirds (bird species that depend primarily on terrestrial habitats) have experienced population declines and are predicted to experience shifts in distribution and abundance associated with climate change, particularly in woody riparian and upland habitats. Understanding temporal and spatial use patterns of birds in the Harney Basin is essential to prioritizing, developing and evaluating the efficacy of restoration projects in this region.

For over a decade, Portland Audubon has worked with Harney Basin partners, largely through the Harney Basin Wetlands (HBWC) and the Comprehensive Conservation Plan Collaboratives to inventory and monitor bird populations at Malheur National Wildlife Refuge (MNWR). In 2019, we expanded our efforts to the Silvies Floodplain. As our work expands, continued funding for our on-the-ground staff (including seasonal staff) has become increasingly important to implement projects to understand the ecological linkages between birds, water patterns, and vegetation.

This project will fund our continued work to assist with monitoring migrating and breeding birds in the Harney Basin by supporting both a seasonal and permanent staff working on these projects. Data collected and a report summarizing findings will be provided to project partners as an outcome to this project.

Primary partners on this project include USFWS and HBWC partners .

Monitoring Team Evaluation
Monitoring Team Strengths

- This proposed project will complement the existing data set on Malheur National Wildlife Refuge and in surrounding areas that were funded in a previous OWEB monitoring grant.
- The applicant will follow established bird monitoring methods that are cited in the application.
- The applicant describes how the different data sets will be managed and stored in a variety of databases depending on the data type ensuring long term data storage and availability.
- The data will be reported in official reports to OWEB, through social media, peer reviewed journals, and Audubon publications which will help in making the data widely available to a variety of audiences.
- The applicant has experience collecting bird data in the area for 5 years and working with volunteers that have experience with the monitoring methods.
- The applicant engaged a variety of technical experts and community partners that are working in the area to provide input on the sites to be selected, monitoring questions to be answered and how data will be used.
- The applicant will incorporate training and overlapping surveys to ensure the data that is collected by volunteers is useful.

Monitoring Team Concerns

- The applicant does not describe how the monitoring that was completed with the previous OWEB monitoring grant informed restoration to demonstrate how additional monitoring can inform future restoration or acquisition projects.
- It was not clear what data is needed to feed the WET model to understand if this is a useful tool to understand how wetland extent and transitions are occurring.
- The application was challenging to understand all the different bird monitoring efforts and the accompanying study design that will be followed to answer the monitoring questions posed in the application.
- The application only provides study design details (site selection, parameters and frequency) for the song meter data collection and the Project IBiS surveys, there is no information provided for the bird monitoring projects at Malheur National Wildlife Refuge, the Silvies Floodplain and in the Harney Basin, Silvies and Harney Lake Breeding Bird Surveys.
- The monitoring methods for collecting drone data are not described or cited.
- The application doesn’t describe how data will be analyzed to determine long term population trends of key bird species, how the proposed drone imagery will be incorporated into the hydroperiod and vegetation data analysis or how they plan to compare bird use of wet meadow and riparian habitat in the Buena Vista unit to the southern end of Blitzen Valley.
- The application doesn’t include a description of staff qualifications or experience with vegetation monitoring and analyses.
- The application doesn’t include a description of the work to justify the $16,000 in the budget to purchase a drone.

Monitoring Team Comments

Review Team Evaluation

Strengths

- The proposed monitoring data will support a long-term bird species inventory and contribute to building an improved monitoring plan for the Malheur National Wildlife Refuge (refuge).
- There is a clear need for the monitoring work and the data is relevant, applicable, and timely and will inform future restoration projects.
- Data and results from the monitoring is identified as needed in local strategic planning documents, the data will be stored appropriately, and results will be made publicly available.
- The applicant has the organizational capacity to implement the project as proposed and has relevant experience implementing similar monitoring work.
- The monitoring work incorporates bird song meters that can gather a large volume of data. The song meters operate remotely without project staff attendance, and this is a cost-effective method for gathering bird presence information.

Concerns

- The application is unclear regarding why a drone purchase is necessary to complete the monitoring as proposed. The use of a federally approved drone is required for use on the refuge, and while not articulated in the application, this issue was clarified during the project site visit.
- It is unclear in the application how the proposed monitoring complements past monitoring accomplished during the Harney Basin Wetlands Focused Investment Partnership (FIP) and how this monitoring is guided by past monitoring results.
- The need, relevance, applicability, and timeliness of the proposed monitoring is not clearly linked to future restoration, and it is unknown how past monitoring has led to restoration on the refuge.
- The budget does not clearly describe how salary match contributes to the monitoring goals and objectives.

Concluding Analysis

The Audubon Society of Portland proposes to continue monitoring migrating and breeding birds in the Harney Basin and this work is a priority to inform conservation and habitat restoration. The monitoring will identify needed habitat types, help the partnership prioritize restoration locations, and facilitate restoration partnerships.

Review Team Recommendation to Staff

Fund

Review Team Priority

3 of 3

Review Team Recommended Amount

$132,908

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Fund

Staff Recommended Amount

$132,908

Staff Conditions

N/A

Mid-Columbia - Region 6 Spring 2023 Funding Recommendations



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Funding Recommendation

- Staff Recommendation For Funding (SRF)
- Below Funding Line (BFL)

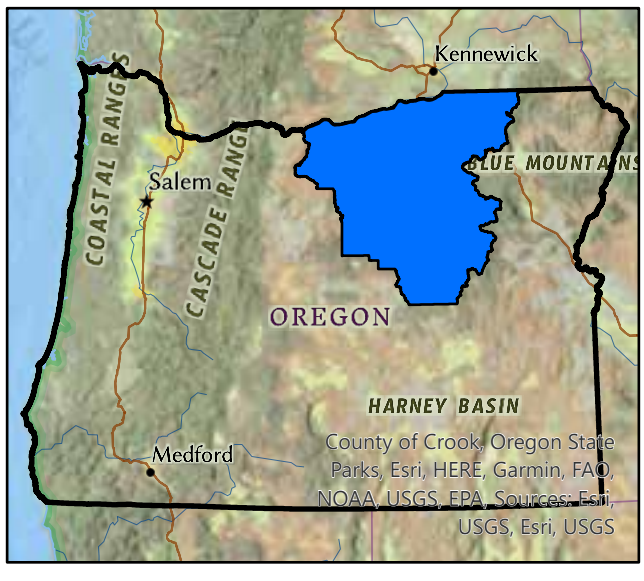
Previous Grants 1998 - Spring 2022

- Land Acquisition
- Restoration
- Region 6 Cities
- Region 6 Streams
- OWEB Region 6 Boundary

OREGON WATERSHED ENHANCEMENT BOARD

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Region 6 - Mid-Columbia Basin Restoration

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-6024	North Fork John Day WC	Sixmile Creek Habitat Restoration	A suite of restoration actions will be implemented to improve fish habitat and watershed function on Sixmile Creek, a tributary to the Middle Fork John Day River.	139,460
223-6020	Monument SWCD	Upper Cottonwood Creek Instream Restoration	Large wood, beaver dam analogs, and fencing will be installed to improve floodplain connection and increase streamside vegetation on Cottonwood Creek, near Monument.	141,907
223-6022	Gilliam SWCD	Rock Creek Riparian Fencing, Planting, and Livestock Distribution	Native vegetation and grazing management will be improved by installing streamside fencing, plantings, and off-channel livestock water on Rock Creek in Gilliam County.	208,279
223-6018	Grant SWCD	Jones SF Long Creek Fence	Streamside fencing will be installed to improve steelhead habitat on the South Fork Long Creek, a tributary to the Middle Fork John Day River.	165,837
223-6019	South Fork John Day WC	High Izee Enhancements	Rangeland health and wildlife habitat will be improved in the Pine Creek watershed, a tributary to the South Fork John Day River, by thinning forests, treating aspen and mahogany communties, and developing upland water sources.	124,263
223-6021	Wheeler SWCD	Cottonwood - Butte Creek Upland Renovation	Rangeland health and water quality will be improved in the Cottonwood-Butte Creek watershed near Fossil by removing juniper and installing livestock water developments.	99,766
Total Restoration Projects Recommended for Funding by RRT and OWEB Staff				**879,512**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Recommended
None				

Projects *Not Recommended* for Funding by RRT

Project #	Grantee	Project Title	Amount Requested
223-6015	Morrow SWCD	Morrow County Grassland Restoration of Annual Grass-Invaded Habitat	191,950
223-6016	South Fork John Day WC	Battle Creek Upland Improvements	106,428
223-6017	Wheeler SWCD	Gable and Thompson Creek Hydrologic Improvement	103,928
223-6023	Wheeler SWCD	Thirtymile Watershed Forest Management	311,686

Region 6 - Mid-Columbia Basin Technical Assistance

Projects Recommended for Funding in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
223-6027	Wheeler SWCD	West Branch Bridge Creek Aquatic Inventory and Fish Passage Assessment	Aquatic habitat surveys will be conducted on West Branch Bridge Creek to assess current conditions and identify watershed restoration actions in Wheeler County.	74,656
223-6026	Walla Walla Basin Watershed Foundation	Strategic Action Plan Update	An updated strategic action plan will be developed for the Walla Walla River basin that incoporates climate change impacts.	54,796
Total Technical Assistance Projects Recommended for Funding by RRT and OWEB Staff				**129,452**

Projects Recommended but Not Funded in Priority Order

Project #	Grantee	Project Title	Brief Description	Amount Recommended
None				

Projects *Not Recommended* for Funding by RRT

Project #	Grantee	Project Title	Amount Requested
223-6025	Walla Walla Basin Watershed Foundation	Big and Little Meadow Canyon Creeks Assessment and Action Plan	70,527

Region 6 - Mid-Columbia Basin Stakeholder Engagement

Projects Recommended for Funding in Priority Order				
Project #	**Grantee**	**Project Title**	**Brief Description**	**Amount Recommended**
223-6030	Walla Walla Basin Watershed Foundation	Dry Creek and Lower Pine Creek Assessment Stakeholder Engagement	Landowners will be engaged through outreach materials and events to build support for a watershed assessment on Dry and Lower Pine Creek near Milton-Freewater.	24,517
223-6029	Walla Walla Basin Watershed Foundation	Watershed Stewardship Workshops	Urban and Hispanic community members in Milton-Freewater will be engaged through workshops and meetings that are focused on urban watershed issues to identify future restoration actions in the Walla Walla basin.	62,834
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				**87,351**

Projects Recommended but Not Funded in Priority Order				
Project #	**Grantee**	**Project Title**	**Brief Description**	**Amount Recommended**
None				

Projects *Not Recommended* for Funding by RRT			
Project #	**Grantee**	**Project Title**	**Amount Requested**
None			

Region 6 - Mid-Columbia Basin Monitoring

Projects Recommended for Funding in Priority Order				
Project #	**Grantee**	**Project Title**	**Brief Description**	**Amount Recommended**
223-6028	Walla Walla Basin Watershed Foundation	Hydrological Trend Monitoring in the Walla Walla Basin	Data will be collected to continue long-term monitoring efforts measuring water temperature, stream flow, and aquifer levels that will be used to inform watershed planning in the Walla Walla basin.	113,273
Total Stakeholder Engagement Projects Recommended for Funding by RRT and OWEB Staff				**113,273**

Projects Recommended but Not Funded in Priority Order				
Project #	**Grantee**	**Project Title**	**Brief Description**	**Amount Recommended**
None				

Projects *Not Recommended* for Funding by RRT			
Project #	**Grantee**	**Project Title**	**Amount Requested**
None			

Region 6 Total OWEB Staff Recommended Board Award	**1,209,588**

Region 1 - 6 Grand Total OWEB Staff Recommended Board	**12,461,865**

Open Solicitation-2023 Spring Offering
Mid Columbia (Region 6)

Application Number: 223-6015-22911

Project Type: Restoration

Project Name: Morrow County Grassland Restoration of Annual Grass-Invaded Habitat

Applicant: Morrow SWCD

Region: Mid Columbia

County: Morrow

OWEB Request: $191,950

Total Cost: $280,700

Application Description Our proposed project is focused on restoring grassland habitat located within the Columbia Plateau Ecoregion, specifically the foothills to the north of the Umatilla National Forest. This area is identified by Oregon Department of Fish and Wildlife as a conservation opportunity area extending from Rock Creek to Butter Creek. Historically this habitat was comprised of lush bunchgrass prairies and healthy riparian corridors. It has since been degraded by agriculture, over grazing, fire, urban growth, changing climate, and encroachment by invasive species including exotic annual grasses. Invasive annual grasses have out competed desirable species, reduced native species diversity, suppressed forage production, decreased the nutritional quality of forage, and disrupted the historical fire regime. These shifts have negatively impacted livestock and wildlife species by reducing the quantity and quality of available forage resulting in poor production and population declines. Research conducted throughout our county over the last 4 years found that annual grass selective herbicides applied in a moderately infested area can be an effective way to restore rangeland habitat and improve the quantity, quality, and composition of vegetation. Given these results we propose the Morrow County Grassland Restoration of Annual Grass Invaded Habitat project. The proposed project aims to restore 3,500 acres of annual grass invaded rangeland habitat using the selective herbicide Rejuvra. Project partners contributing financially and with project implementation include Morrow Soil and Water Conservation District, Oregon Department of Fish and Wildlife, Natural Resource Conservation Service, Morrow County Weed Department, and Heppner Rural Fire District.

Review Team Evaluation

Strengths

- Invasive grass control is a top priority for landowners in this area and there is support for treatment from the owners of 3,500 acres.
- The applicant is engaging appropriate partners, including the Weed Department, Fire District, ODFW and NRCS.
- The applicant has a successful track record of implementing and managing OWEB grants.
- The budget is appropriate for the identified project components. Estimates are based on local vendor quotes and neighboring counties to develop accurate costs.

Concerns

- Priority areas for treatment are unclear. Without this information it is not possible to understand the watershed context for the proposed work.
- A more strategic approach is needed before the work proceeds. The treatment areas appear to be scattered across the County.
- The application lacks a grazing plan post invasive annual grass treatment. One year of rest may be insufficient to maximize treatment success.
- Without locations selected it is unclear if work will occur near areas of high infestation, which may negate benefits of the work.
- The map in the application is unclear regarding values the colors represent.

Concluding Analysis

Invasive annual grasses have outcompeted desirable species and reduced native species diversity in the area. Using Rejuvra© to combat invasive annual grasses has shown to be effective. Morrow SWCD proposes to treat 3,500 acres of annual grasses by selecting acres for treatment within Morrow County using an application and ranking process. Applications will include multiple screening questions and SWCD staff will then rank them based on selection criteria. The proposed project lacks a strategic approach to identifying treatment areas.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Mid Columbia (Region 6)

Application Number: 223-6016-22953
Project Type: Restoration
Project Name: Battle Creek Upland Improvements
Applicant: South Fork John Day WC
Region: Mid Columbia
County: Grant
OWEB Request: $106,428
Total Cost: $142,077

Application Description The Battle Creek Ranch is located in Grant County, Oregon, approximately 2.5 miles West of the town of Dayville. This property includes the Battle Creek watershed, with multiple side tributaries. The Battle Creek Ranch is approximately 1,462 acres with approximately 5,000 acres of BLM allotted ground intermixed with the private land. The South East corner of the property is bordered by the ODFW Phillip W. Schneider Wildlife Area, and classified as critical winter range habitat for mule deer.

Battle Creek is listed as a Critical Habitat Stream for Mid-Columbia Steelhead and is also listed on the DEQ 303d list for temperature with a 7-day average of daily maximum of 74.5 with 122 days exceeding temperature standards.

Vernoy Walker recently purchased this property in 2022, and we have toured the property multiple times with many partners in order to assist in developing a master restoration plan for the ranch. This property is dealing with legacy livestock use issues, degraded upland vegetation, stream channel incision, Juniper encroachment, and invasive species (annual grass and noxious weeds). With the assistance of the landowner, Grant SWCD, and NRCS, we are approaching this property with a phased approach. We will first address the Juniper encroachment issue, so that Grant SWCD Weed Control can treat noxious weeds, and annual grasses. Then we will begin a low-tech process based riparian restoration effort for Battle Creek.

Review Team Evaluation

Strengths

- The project as proposed is technically sound, with a well laid out plan to remove juniper and other invasive plants from the property.
- The work described in the application will implement specific actions in prioritized geographies identified in local and regional planning documents.
- Juniper is outcompeting desirable native grasses, forbs, and shrubs and the removal of juniper will help ameliorate this condition.
- The applicant has a proven track record of implementing similar projects and continues to improve their restoration approach by incorporating lessons learned from previous projects.

Concerns

- Bureau of Land Management (BLM) lands are interspersed in the project area, and it is unclear how treatment on BLM lands will be integrated with treatment on private land.
- As a project component listed in the application, the landowner completed work on the reservoir to increase capacity, but the dam that feeds the reservoir is a partial passage barrier, potentially negating the project's habitat benefits.

Concluding Analysis

The South Fork John Day Watershed Council is working with a new landowner to address legacy land management issues in the Battle Creek watershed. The project proposes to improve upland health in critical mule deer winter range by removing juniper in Mid and Lower Battle Creek. In addition to annual grass and noxious weed control, future efforts are planned to include low-tech process-based restoration; however, watershed benefits from work to increase capacity on the reservoir is not clear.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Mid Columbia (Region 6)

Application Number: 223-6017-22954

Project Type: Restoration

Project Name: Gable and Thompson Creek Hydrologic Improvement

Applicant: Wheeler SWCD

Region: Mid Columbia

County: Wheeler

OWEB Request: $103,928

Total Cost: $136,295

Application Description 1) This project is located in the southern portion of Wheeler County, in the Bridge Creek Watershed, near the headwaters of Gable Creek and the confluence of Thompson Creek, on privately owned property, west of the town of Mitchell, OR. 2) The landowner farms all agriculture fields across the property through an 11-line pivot system that is all gravity fed from a pond; however, Western Juniper expansion in the uplands and riparian areas has resulted in encroachment on all the agricultural production and the multiple perennial stream systems that feed into the ESH listed portion of Gable Creek and Bridge Creek. Juniper encroachment, with an effect of reduced precipitation infiltration, has increased over the years due to historical wildfire suppression. This has created a limitation on stream and aquifer availability creating water quality and quantity issues, as well as a loss of native vegetation with increasing annual grass invasions that degrade wildlife habitat and their food source. In addition, the spring sources are in need of redevelopment as the springs were developed many years ago and no longer function as desired. The pipeline that feeds into a series of troughs have become clogged with algae matter restricting the flow and creating water quality and quantity concerns for livestock and wildlife. Also, the trough system lacks storage and stability causing sedimentation from ground disturbance by heavy animal use under wet conditions. 3) This project seeks to strategically conduct mechanical and hand cut Juniper treatments along priority northern slopes, excellent for producing forage and groundcover essential for wildlife species. This release of sequestered upland water supply will restore the upland conditions and the watersheds dynamic function. In addition, two springs will be developed to distribute grazing and provide terrestrial wildlife upland water source. 4) Project partners include OWEB, Wheeler SWCD, and the landowner.

Review Team Evaluation

Strengths

- The application includes detailed maps and photos with descriptive captions, which is useful in reviewing the project objectives.
- The applicant has the capacity to manage and implement OWEB-funded projects.
- Applicant staff are getting trained on developing grazing management plans.

Concerns

- It is not clear how the proposed work will improve ecological conditions, rather than improve forage for domestic livestock on the property.
- The application does not address the “why” each juniper stand will be treated, which is needed to evaluate the technical soundness of the application.
- Spring developments are not always exempt from regulation by OWRD. The proposed spring developments must be coordinated with OWRD to ensure regulatory compliance.
- It is unclear how the proposed work fits with the larger RCPP effort in the area.
- The stated benefits of carbon sequestration and improved water flow may be overstated in the application.
- Streambanks on the property are severely altered by livestock management on the property and there are no grazing management strategies articulated in the application.

Concluding Analysis

Wheeler SWCD proposes to remove 399 acres of Western juniper in Gable and Thompson Creek watersheds. The proposed project may provide some upland ecological benefits by removing juniper and developing springs as upland water sources; however, water quality and quantity benefits from the project are unclear based on the information provided in the application.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation
Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Mid Columbia (Region 6)

Application Number: 223-6018-22959
Project Type: Restoration
Project Name: Jones SF Long Creek Fence
Applicant: Grant SWCD
Region: Mid Columbia
County: Grant
OWEB Request: $165,837
Total Cost: $227,229

Application Description This project includes the construction of approximately 5.5 miles of 4-strand wire fence, water gaps, stream crossings, and riparian escape gates, to improve riparian conditions around approximately 2.75 miles of the South Fork of Long Creek; this reach provides spawning and rearing habitat for ESA-listed summer steelhead. The allotment contains multiple other water sources including developed and undeveloped springs, intermittent streams, and stock ponds. Fence construction will be consistant with the Oregon Department of Fish and Wildlife's fencing specifications. Title II funds will support construction costs for approximately 3 miles of fence; Oregon Watershed Enhancement Board looks to support the remaining 2.5 miles. The Oregon Watershed Enhancement Board will supply all materials, for 5.5 miles of fence.

Without a riparian fence, cattle tend to loiter near the stream causing degraded streambanks, lack of diverse channel morphology, diminished riparian vegetation, degraded water quality, lack of fish and wildlife habitat, and uneven distribution of grazing through the allotment. A riparian fence would address these issues by excluding cattle from the stream allowing the natural vegetation to regrow and banks to heal.

The South Fork of Long Creek is a perennial tributary of Long Creek, a tributary of the Middle Fork John Day River. Project partners include the landowner, the permittee, the Malheur National Forest, and Grant SWCD. Unrestricted livestock access to the creek and associated riparian areas have degraded site conditions affecting aquatic habitat, water temperatures, and streamside vegetation.

Review Team Evaluation

Strengths

- The application articulates the project benefits of excluding livestock grazing in the riparian area of the South Fork Long Creek, including improved channel morphology and riparian vegetation.
- The area is a high priority for restoration of steelhead habitat and actions are supported by several restoration plans.
- The applicant is experienced and qualified for this type of work.
- Fencing cost and installation rates are reasonable for the work proposed.

- The project cost is commensurate with expected watershed benefit in this active steelhead spawning and rearing area.

Concerns

- It is unclear if NEPA and environmental compliance has been initiated for the project, which is important to complete the project in a timely manner.
- The application provides detailed fence specifications, but it is unclear whether the design meets ODFW wildlife friendly specifications.
- A map showing this project and past projects would help determine how the proposed project fits within the watershed context.

Concluding Analysis

The application proposes to protect 2.75 miles of South Fork Long Creek in an area that is critical habitat for steelhead. Proposed work will protect spawning and rearing habitat; however, there is no letter of support from the USFS which would help demonstrate support for this project on public lands. Additional information on required project maintenance would strengthen the application.

Review Team Recommendation to Staff
Fund

Review Team Priority
4 of 6

Review Team Recommended Amount
$165,837

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$165,837

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Mid Columbia (Region 6)

Application Number: 223-6019-22962
Project Type: Restoration
Project Name: High Izee Enhancements
Applicant: South Fork John Day WC
Region: Mid Columbia
County: Grant
OWEB Request: $124,263
Total Cost: $198,353

Application Description The High Izee Ranch is approximately 14,000 acres that includes the headwaters of Pine Creek (a main tributary to the South Fork John Day River) and is within winter range for both Rocky Mountain Elk and Mule Deer. The ranch is located about 5 miles west of the junction between the South Fork Road and Izee-Paulina Hwy.

The High Izee Ranch has a recent new landowner that reached out to the South Fork John Day Watershed Council to improve their natural resources. They are hoping to maximize their efforts with this grant from already secured projects through the NRCS Sage Grouse Initiative which includes forestry thinning on 2000 acres (Crooked River watershed) and the South Fork John Day Watershed Regional Conservation Partnership Program (RCPP) entailing forestry thinning on 202 acres. This project is just one piece of the ongoing efforts with hopes of continued restoration in the form of low-tech process-based restoration on the property streams.

We are requesting funds to cut, pile, and burn 100 acres of mixed conifer as well as develop 2 spring sources including protective fencing and wildlife escapement ramps. The forestry unit is on a north facing slope with species of Ponderosa pine, Douglas fir, Grand fir, and Western Juniper. About 5 acres of aspen and 10 acres of large mountain mahogany are included in the 100-acre thinning project to promote healthy stands.

Project partners include the South Fork John Day Watershed Council (SFJDWC), High Izee Ranch, and the Natural Resource Conservation Service (NRCS).

Review Team Evaluation

Strengths

- The proposed project includes forest thinning with a future phase addressing process-based stream restoration through consideration of beaver dam analogs (BDAs), a phased approach will make work more achievable and a higher likelihood of success.
- The proposed actions are supported by conservation plans in the area and are prioritized in the NRCS-funded Regional Conservation Partnership Program.
- Removing juniper and thinning conifers may result in improved stream flows, although technical evidence for this should be referenced in the proposal.

- This project complements Regional Conservation Partnership Project (RCPP) funding in the South Fork John Day to remove Western juniper, thin overstocked forest, and promote native vegetation including the protection of aspen.
- The landowner has completed similar work and has worked with the applicant for assistance on projects providing watershed benefits on their properties.

Concerns

- Addressing invasive annual grasses following forest thinning may be needed and is not discussed in the application or included as an objective.
- The spring developments may provide more benefit to domestic livestock than native wildlife.
- There may not be enough troughs prescribed for the number of livestock on the property.

Concluding Analysis

This project builds on efforts from the South Fork John Day Watershed Council to remove juniper and thin conifers, improving watershed health in the South Fork John Day. Proposed work will also improve aspen and mountain mahogany stands that are critical to wildlife in the project area. Future work is to include low-tech process-based restoration actions in streams on the property. In future applications, the applicant should clearly articulate expected watershed benefits.

Review Team Recommendation to Staff
Fund

Review Team Priority
5 of 6

Review Team Recommended Amount
$124,263

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount

$124,263

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Mid Columbia (Region 6)

Application Number: 223-6020-22974

Project Type: Restoration

Project Name: Upper Cottonwood Creek Instream Restoration

Applicant: Monument SWCD

Region: Mid Columbia

County: Grant

OWEB Request: $141,907

Total Cost: $214,890

Application Description 1) The proposed project is located in northwest Grant County approximately 13 miles south of the town of Monument, Oregon in the Cottonwood Creek drainage (HUC 170702020905).
2) Cottonwood Creek is critical spawning and rearing habitat for ESA listed Threatened Middle-Columbia River steelhead that drains into the North Fork John Day River.
3) This project will implement various low- tech process-based restoration (LTPBR) structures including beaver dam analogues (BDA) and large woody debris (LWD) within Cottonwood Creek. This will improve LWD retention, attenuate flows, improve floodplain connectivity, aggregate sediment, and increase riparian hardwood productivity. The increased physical complexity within the channel will be utilized by steelhead and benefit steelhead and their habitat. Along with instream restoration work 14,200 feet of riparian fence will be built. The area of Cottonwood Creek where instream habitat will be implemented, is currently protected by a riparian fence. However, a section of fence will be moved back farther from the stream to protect a wet meadow feature from cattle disturbances. Additionally, a 4 strand barbed wire fence will be built downstream of the project site in preparation of phase 2. This restoration action will limit the duration and extent of grazing on Cottonwood Creek. Cattle exclusion will result in reduced trampling of hydric soils, decreased soil compaction, increased soil porosity, and accelerated recovery of sensitive plant communities. This project will reroute ~ 400 feet of an access road that is at high risk of erosion; which will allow the landowner continued use of the access of road, minimize road related water quality concerns, and allow for natural erosion including good spawning gravels and fines. Lastly, the project includes the develop of 3 upland water sources (i.e. springs).
4) Partners for this project include Chad Engle (Landowner), Monument SWCD, The Warm Springs Tribe, USFWS, & ODFW.

Review Team Evaluation

Strengths

- The treatment sites selected for this project will benefit from the proposed instream restoration work and riparian fence.

- The restoration plan uploaded with the application is helpful to determine project appropriateness and provides necessary background watershed data to inform the project development.
- The application cites information sources that supports the need for instream habitat.
- Local and regional conservation plans identify the need for the proposed work to improve fish habitat.
- Multiple funding partners are engaged demonstrating the capacity of the applicant and the project partnership.
- Monument SWCD is capable of managing, designing, and implementing this type of project.
- The landowner is an engaged natural resource steward and has implemented similar work on lands they manage.

Concerns

- It would be helpful to know where mussels are in the project reach and to incorporate habitat and best management practices during construction.

Concluding Analysis

Monument SWCD proposes to install low-tech process-based restoration structures within Cottonwood Creek. The proposed work will increase floodplain connectivity and channel complexity that will improve steelhead habitat. The need for improved fish habitat is clearly outlined in the restoration plan, as well as local and regional conservation plans. The applicant has the capacity to adaptively manage the project which improves the likelihood of success.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 6

Review Team Recommended Amount
$141,907

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$141,907

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Mid Columbia (Region 6)

Application Number: 223-6021-22989

Project Type: Restoration

Project Name: Cottonwood - Butte Creek Upland Renovation

Applicant: Wheeler SWCD

Region: Mid Columbia

County: Wheeler

OWEB Request: $99,766

Total Cost: $206,531

Application Description 1)This project is located in the Cottonwood - Butte Creek Watershed HUC 6 (170702040501) Southeast of Fossil, Oregon in Wheeler County. 2) Over the years Western Juniper encroachment has increased due to the restriction and suppression of fire creating issues both with water quality and water quantity. This has also created the loss of native bunchgrass communities, vegetation, increasing annual invasives that overall degrade and compromise wildlife habitat and their food source. 3) This project proposes to reduce the negative impacts that Western Juniper imposes on the watershed function by mechanically removing 318 acres of invasive Western Juniper, developing 7 springs, installing 9 600-gallon stock water tanks to improve water quantity and quality for distributing proportional livestock grazing. In addition, 155 acres of broadcast seeding will be dispersed throughout areas that were disturbed within the juniper treatments. 4) Project Partners include OWEB, NRCS, Wheeler SWCD, and the landowner.

Review Team Evaluation

Strengths

- The project aligns with both the Natural Resources Conservation Service (NRCS) Conservation Implementation Strategy (CIS) in Butte Creek and the Lower John Day Canyons Restoration Initiative.
- The application includes a juniper management plan with a description of post-project maintenance.
- Treating the juniper while it is still small is both efficient and protects existing shrub and grass communities from becoming degraded by encroaching juniper competition.
- The landowner has completed similar projects with positive results that inform this project.
- Grazing will be managed post-project to improve native grass growth.
- NRCS Regional Conservation Partnership Program (RCPP) funds will be leveraged to expand the restoration footprint and multiply the benefits of the project.
- The budget uses NRCS rates and design standards and reflects current market values for the project components.

Concerns

- Some quantified benefit statements in the application are pulled from the literature, may not be appropriate for this location, and may be overstated.

Concluding Analysis

This project focuses on upland health by removing 318 acres of Western juniper and developing spring sources. Proposed project components complement other NRCS work in the watershed focused on upland watershed health. The SWCD has successfully completed similar projects and is working with the landowner to manage the property to improve watershed conditions.

Review Team Recommendation to Staff
Fund

Review Team Priority
6 of 6

Review Team Recommended Amount
$99,766

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$99,766

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Mid Columbia (Region 6)

Application Number: 223-6022-23020

Project Type: Restoration

Project Name: Rock Creek Riparian Fencing, Planting, and Livestock Distribution

Applicant: Gilliam SWCD

Region: Mid Columbia

County: Gilliam

OWEB Request: $208,279

Total Cost: $498,159

Application Description This project is located in Gilliam County on 3.2 miles of Rock Creek. The project begins on river mile 27 of Rock Creek on two landowners. This reach of Rock Creek remains one of few that have not been fenced, planted, and enrolled in the Conservation Reserve Enhancement Program (CREP). This project would enroll over 100 acres into CREP, install 38,680 feet of riparian fence, plant nearly 6,000 riparian plants, install 20,000 feet of cross fence, and develop seven sources of off-site water. The CREP contracts will be effective October 1st, 2023. This section of Rock Creek in nearly void of riparian vegetation, and the need for plantings and exclusion fencing is a priority.
Project partners include OWEB, Farm Service Agency, Natural Resources Conservation Service, Gilliam-East John Day Watershed Council, Gilliam SWCD, and private landowners.

Review Team Evaluation

Strengths

- The proposed project is adjacent to similar work, both planned and completed, in Rock Creek.
- There is active steelhead spawning and rearing in the area, but steelhead habitat is lacking in the reach and the proposed work will help improve conditions.
- Enrolling in CREP will improve riparian, instream, and fish habitat conditions that will benefit steelhead.
- The landowner is engaged in the project and is willing to fence off productive farm ground with the riparian fence in order to achieve project objectives.
- The applicant is experienced and successful in their planting methods, which include tillage and weed control.

Concerns

- The application lacks clarity on the planting plan, it is unclear what the planting methods and locations are.
- The watering system appears large for the number of animals run on this operation; additional engineering input may provide clarity.

Concluding Analysis

Gilliam SWCD proposes to exclude 3.2-miles of Rock Creek from grazing, plant the riparian area and develop off-site water. This project builds on over 30 miles of Rock Creek already enrolled in CREP, adding to the cumulative benefits for steelhead. The applicant is encouraged to consult with a professional engineer for the design of the stock water system to ensure propre sizing.

Review Team Recommendation to Staff
Fund

Review Team Priority
3 of 6

Review Team Recommended Amount
$208,279

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$208,279

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Mid Columbia (Region 6)

Application Number: 223-6023-23022
Project Type: Restoration
Project Name: Thirtymile Watershed Forest Management
Applicant: Wheeler SWCD
Region: Mid Columbia
County: Wheeler
OWEB Request: $311,686
Total Cost: $418,994

Application Description 1)This project is located in the Thirtymile Watershed, approximately 15 miles Northeast of the town of Fossil, OR in Wheeler County. Thirtymile Creek is one of the three highest priority areas in the Atlas Prioritization ranking {John Day Basin Partnership Strategic Action Plan pg 53}. 2) The expansion of Western Juniper, over-stocked forests, limited water availability, and the invasion of annual grasses has degraded the state of the Thirtymile Watershed. Historical wildfire suppression has allowed the encroachment of Western Juniper into forest stands and grasslands where the species previously did not inhabit. This encroachment has created a limitation on aquifer availability resulting in water quality and quantity issues, as well as the loss of native vegetation that degrades wildlife habitat and their food source. As Western Juniper has expanded into these forests stands, all deciduous species are compromised. This amount of canopy cover creates additional competition for water and nutrients, and increases fuels loads that risk catastrophic wildfires. This has also made these dense forest stands vulnerable to disease and pest infestation as canopy cover restricts healthy mature trees from thriving. 3) This project proposes to address the negative impacts Western Juniper imposes and thin overstocked forest stands to a healthy density to restore multiple functions in the Thirtymile Watershed. The project will also develop one spring and install pasture/crossing fencing to improve water storage capacity and help distribute grazing. 4) Project partners include OWEB, NRCS, ODF, and the landowner.

Review Team Evaluation

Strengths

- The landowner is using a forest management plan for the property to improve forest health conditions including reducing beetle infestations and improving fire resilience.
- Similar work is occurring in the watershed through the Lower John Day Canyons Restoration Initiative RCPP.
- The proposed work addresses actions in a specific geography identified in local and regional planning documents.

Concerns

- The application is unclear regarding watershed benefits and if the project is improving flow or making the property more fire resilient.

- The application lacks clarity on what is needed on the property and what is proposed in the application.
- The capacity of the landowner to complete the work as proposed is unclear.
- Technical soundness is difficult to determine since it is unclear how the project objectives and actions will result in identifiable watershed benefits.
- The costs outlined in the budget seem high for forest thinning in the region.

Concluding Analysis

The landowner has demonstrated commitment to pursuing restoration on the property; however, the proposed project may not be ready for implementation. The application lacks details necessary to evaluate the ecological benefits to fish and wildlife habitat. If resubmitted, the applicant is encouraged to address the concerns noted above.

Review Team Recommendation to Staff
Do Not Fund

Review Team Priority
N/A

Review Team Recommended Amount
$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Do Not Fund

Staff Recommended Amount
$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Mid Columbia (Region 6)

Application Number: 223-6024-23032
Project Type: Restoration
Project Name: Sixmile Creek Habitat Restoration
Applicant: North Fork John Day WC
Region: Mid Columbia
County: Grant
OWEB Request: $139,460
Total Cost: $194,780

Application Description 1)This project will take place on Sixmile Creek, a tributary of the lower Middle Fork of the John Day in Ritter, Oregon. Specifically this first phase of work will take place on the Titus property, above the 15 road culvert, and the upper half of the Kennedy property. 2)The Ritter Fish Habitat Assessment performed in 2021 identified several deficiencies in fish habitat on Sixmile Creek as well opportunities to improve hydrologic function and water storage. Limiting factors within the creek include Degraded riparian area, channel structure and complexity, floodplain degradation, altered hydrology, sediment, water quality, and low flows. A general lack of instream complexity driven by a lack of wood structures drives the vast majority of these factors. 3) This project proposes to improve fish habitat and watershed function in Sixmile Creek via the placement of large wood structures and construction of beaver dam analogues (BDAs) and post assisted log structures (PALS) . This project will also involve planting and fencing to improve stream shading and riparian conditions. 4) This project is a cooperative effort between the North Fork John Day Watershed Council (NFJDWC), the Ritter Land Management Team (RLMT), the Oregon Department of Fish and Wildlife (ODFW), and the United States Fish and Wildlife Service (USFWS). NFJDWC will be the project lead, providing primary project oversite, contract oversite, planting, some materials, and project monitoring. RLMT will assist with project oversite, planting, and maintenance, ODFW will provide direct assistance with implementation as well as consultation to project design and oversite of instream work. USFWS will provide assistance with permitting and funding for habitat improvements on two additional properties.

Review Team Evaluation

Strengths

- The proposed work will add significant aquatic habitat within Sixmile Creek.
- Steelhead occupy Sixmile Creek below the culvert downstream of the project, with redband trout present throughout the creek.
- Project partners, including Ritter land Management Team, ODFW, and USFWS, are appropriate and capable of completing the proposed work.
- The prescription for each property as described in the basis for design report, is appropriate and reflects the current conditions and restoration needs for each location.
- The letters of support and the site visit showed the landowners are engaged and enthusiastic for the proposed restoration work.

- The ODFW Habitat Program is a partner and will be involved in project implementation.
- Low-tech process-based restoration is new for the Council, but ODFW has appropriate experience and expertise and will assist in implementation.
- Project costs are commensurate with anticipated watershed benefits of instream and riparian improvements and protection.

Concerns

- The watershed assessment was not uploaded with the application; it would have helped clarify the phases described in the application
- There is a downstream barrier that may preclude upstream access to one of the proposed locations, but the watershed council is starting to work with the landowner.

Concluding Analysis

The North Fork John Day Watershed Council proposed to improve fish habitat and overall watershed process and function within Sixmile Creek. Appropriate partners are engaged, and landowners are enthusiastic to improve instream and riparian habitat. The watershed council is working on implementing actions identified in a 2021 fish habitat assessment and this project is likely to lead to additional work in the Sixmile Creek watershed addressing fish habitat needs.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 6

Review Team Recommended Amount
$139,460

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount

$139,460

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Mid Columbia (Region 6)

Application Number: 223-6025-22960

Project Type: Technical Assistance

Project Name: Big and Little Meadow Canyon Creeks Assessment and Action Plan

Applicant: Walla Walla Basin Watershed Foundation

Region: Mid Columbia

County: Umatilla

OWEB Request: $70,527

Total Cost: $105,321

Application Description Big and Little Meadow Canyon Creeks are located approximately 12 miles southeast of Milton-Freewater in Umatilla County, Oregon. Both creeks are tributaries of the North Fork Walla Walla River, which flows into the mainstem Walla Walla River approximately 9 miles downstream of its confluence with Big and Little Meadow Canyon Creeks. The two creeks are neighboring sub watersheds with a smaller unnamed creek in between them. (See Big and Little Canyon Creek Assessment and Action Plan Map). The creeks originate where springs drain into two large wetted meadows in their uplands. The assessment area encompasses 4.86 square miles from their confluences with the North Fork Walla Walla River up to their headwater springs. The current conditions of aquatic habitat, water temperature and flow are unknown for these subwatersheds.
The Big and Little Meadow Creeks Assessment will complement other water quality and habitat improvement efforts in the basin. Several floodplain and habitat restoration, spring reconnection, fish passage, and riparian restoration projects downstream of this assessment area have been completed or are in the design stage, including the North Fork Sam's Rea five-mile restoration project.

Big and Little Meadow Canyon Creeks have the potential to provide off-channel rearing habitat for ESA-listed steelhead, bull trout and redband trout and deliver additional spring and summer flow to the North Fork Walla Walla River. This assessment will allow us to understand current aquatic habitat conditions, temperature and flow rates for Big and Little Canyon Creeks. This will be done by conducting stream and habitat surveys as well as setting up two monitoring sites for flow and temperature. This assessment area is also located in a Strategic Implementation Area (SIA) designated by the Oregon Department of Agriculture, which focuses on implementing projects that improve water quality in local watersheds.

Review Team Evaluation

Strengths

- There is a high likelihood for watershed restoration in the work area proposed, with multiple landowners already working with the watershed council on habitat restoration in the North Fork Walla

Walla River.

- The SWAT model mentioned in the application is an appropriate tool to accomplish project objectives.
- The applicant has the experience and capacity to implement the work as proposed.
- The watershed council is familiar with the survey protocols mentioned in the application and has completed similar analyses on other projects.

Concerns

- Landowner maps would be helpful to understanding the geography of the project area.
- Upland stock watering/pond development may not fit well with the SWAT modelling proposed, as springs, ponds, and upland resources may be confounding factors to the SWAT model output.
- It is important for the habitat surveys to be completed at the same time of year across years.
- The application does not include an adequate calibration and validation approach for the SWAT model. The described use of the model may not lead to the results sought in the application. One year of stream flow is not sufficient to inform the resulting water balance.
- The project team may need more landowner buy-in to accomplish the work across the geography identified in the proposal.
- The proposal may be more compelling with participation from the upper most landowner. Additional stakeholder engagement may be necessary prior to developing the action plan.
- Mussels should be included as a variable to be considered during the planning and development phase.

Concluding Analysis

The Walla Walla Basin Watershed Council is proposing to develop an assessment and action plan for Big and Little Meadow Canyon Creeks, tributaries to the North Fork Walla Wall River. The Big and Little Meadow Canyon Creeks Assessment will complement other water quality and habitat improvement efforts in the basin. While the applicant is familiar with the proposed SWAT modeling, the application lacked information to understand the calibration and validation approach for analysis.

Review Team Recommendation to Staff

Do Not Fund

Review Team Priority

N/A

Review Team Recommended Amount

$0

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation

Do Not Fund

Staff Recommended Amount

$0

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Mid Columbia (Region 6)

Application Number: 223-6026-22992

Project Type: Technical Assistance

Project Name: Strategic Action Plan Update

Applicant: Walla Walla Basin Watershed Foundation

Region: Mid Columbia

County: Umatilla

OWEB Request: $54,796

Total Cost: $74,124

Application Description This strategic action planning effort will focus on the Walla Walla River Watershed in northeastern Oregon, with particular attention given to the impacts of climate change and the promotion of diversity and inclusivity in watershed management. The Walla Walla River Watershed area encompasses 1776 square miles, 487 square miles in Oregon, and 1288 square miles in Washington. The Walla Walla Basin Watershed Council (WWBWC) last updated its Strategic Action Plan (SAP) in 2014 (see ProposalLinks upload for a link to the current SAP). Since then, the watershed council and its partners have completed numerous projects in the basin that were identified in the prior SAP. Additionally, funding for watershed projects has evolved to focus on areas not currently covered in the existing SAP, including climate change adaptation, resilience measures, and inclusivity initiatives.
Critical components such as clear and concise Communications and Funding Plans are also missing from the current SAP. This proposal seeks to address the changes in the current conditions of the watershed, complete an update to the 2014 SAP, and produce a watershed council Communications and Funding Plan. The updated SAP will emphasize the need to address climate change impacts, such as increased drought, flooding, and wildfire risks, and promote the engagement of underrepresented communities in watershed management and decision-making processes.
The partners of this process include the current WWBWC Board of Directors, representing different sectors within the basin. These partners will work collaboratively to ensure that climate change adaptation and mitigation strategies are integrated into the updated SAP and that the plan fosters an inclusive, equitable, and diverse approach to watershed management.

Review Team Evaluation

Strengths

- A varied and relevant list of actions are addressed in the application that will result from the planning effort.
- A data driven adaptive management strategy is described in the application and this will lead to relevant restoration in the future.
- Project objectives are sequential and relevant to achieving conservation and restoration work post planning.
- The application includes letters of support from relevant partners enhancing the capacity of the planning effort.

- The watershed council has a successful track record of implementing this type of project.

Concerns

- The mission, goals, and objectives for the council are not articulated in the application.
- The application is unclear regarding how the watershed council will fully strategize with the Walla Walla 2050 planning effort.
- It is unclear how this planning effort will address climate change and flooding that is present and becoming more frequent in the Walla Walla basin.

Concluding Analysis

The Walla Walla Basin Watershed Council is taking the next steps in updating their strategic action plan and identifying a roadmap for achieving the council's goals and objectives, which include the recovery of ESA-listed steelhead and bull trout populations. The watershed council is engaging the appropriate partners, and the team is working across state lines to accomplish planning for the Walla Walla basin in addition to the Oregon portion of the basin.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 2

Review Team Recommended Amount
$54,796

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$54,796

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Mid Columbia (Region 6)

Application Number: 223-6027-23010

Project Type: Technical Assistance

Project Name: West Branch Bridge Creek Aquatic Inventory and Fish Passage Assessment

Applicant: Wheeler SWCD

Region: Mid Columbia

County: Wheeler

OWEB Request: $74,656

Total Cost: $136,545

Application Description 1) This project will take place in the subwatershed of West Branch Bridge Creek HUC 12 (170702040302), located on 10.58 miles of West Branch Bridge Creek, where West Branch Bridge Creek leaves Ochoco National Forest entering privately owned property to the confluence of Bridge Creek. 2) As a result of topography and the elevation of its headwaters relative to its mouth, West Branch Bridge Creek subwatershed encompasses important climate refugia containing critical habitat for ESA listed Mid-Columbia O. mykiss and Redband Trout. Although past restoration activities towards the headwaters have improved parts of the system, the effects of channelization, floodplain degradation, and other upland problems remain. To lead into a ridgetop to ridgetop watershed restoration effort to ecologically restore the landscape; a full assessment of the system is needed. 3) Despite the relative importance of West Branch Bridge Creek in maintaining water quality and anadromous fish populations, no comprehensive assessment of the watershed has yet occurred. This proposed assessment will help landowners and managers understand the current watershed conditions and how land use practices may have affected watershed conditions and functions. In addition, USFS will be contributing to part of the assessment by taking inventory on 0.94 miles of West Branch allowing this project to have data from the headwaters to the confluence. The Wheeler SWCD views the assessment as a necessary first step in systematically working towards and accomplishing restoration goals. This assessment and subsequent action plan will facilitate the planning and prioritization of future projects. 4) Project partners include OWEB, Wheeler SWCD, ODFW AQI, USFS, and participating landowners.

Review Team Evaluation

Strengths

- The narrative is complete in its description of the problems, partnerships, landowner support letters, goals and objectives.
- Proposed work will utilize the Oregon Department of Fish and Wildlife (ODFW) Aquatic Inventories Project (AQI) surveys that will result in a clear picture of habitat conditions on both USFS and private lands.
- The data gathered will be readily available to the public and agencies post data collection. The data will inform future restoration by assessing post-restoration effectiveness.
- The proposed work is in an Oregon Department of Agriculture (ODA) focus area and the water quality and fish habitat data will be analyzed in combination.

- Fish passage is a key issue addressed in the assessment.
- Multiple contributing partners including the Oregon Department of Fish and Wildlife Aquatic Inventories Project (ODFW AQI), the United States Forest Service (USFS), and landowners are identified in the application, showing support for the project.

Concerns

- The survey methods described in the application would benefit from additional clarity in the narrative on how the different surveys will be integrated together.
- Mussels need to be part of the restoration planning baseline leading to restoration work so that restoration projects do not adversely affect mussel habitat.
- The budget for ODFW under contracted services is a lump sum, making it unclear how this budget item relates to project objectives and deliverables.

Concluding Analysis

Bridge Creek is identified in many plans as a priority for conservation and restoration of steelhead habitat and other aquatic species. The proposed assessment leverages work already occurring within the ODA focus area to identify conservation and restoration actions aimed to improve water quality. The applicant is taking a strategic approach to the assessment, proposing additional fish habitat assessment utilizing ODFW AQI surveys.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 2

Review Team Recommended Amount
$74,656

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount

$74,656

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Mid Columbia (Region 6)

Application Number: 223-6029-22998
Project Type: Stakeholder Engagement
Project Name: Watershed Stewardship Workshops
Applicant: Walla Walla Basin Watershed Foundation
Region: Mid Columbia
County: Umatilla
OWEB Request: $62,834
Total Cost: $152,208

Application Description In the 29 years the Walla Walla Basin Watershed Council (WWBWC) has operated, the organization has effectively identified opportunities and engaged with rural stakeholders in pursuit of projects to improve multiple aspects of the watershed. Demographically, past contacts allude to missed opportunities; previous partners have all been Caucasian, a fractional majority in our basin. Additionally, projects have historically not been performed within city limits. This not only overlooks important opportunities for beneficial projects, but also hinders the visibility of the work being done by WWBWC.
The WWBWC proposes to increase the number of urban and/or Hispanic stakeholders through a series of workshops, offered in both English and Spanish, that will focus on informing the community about our basin's issues including inadequate stream flow, high water temperatures and sediment loads, poor habitat complexity, groundwater declines, and fish passage obstructions, which impact the basin's populations of ESA-listed salmonids (summer steelhead and bull trout) and spring Chinook salmon. For increased accessibility, these will be recorded and uploaded to our website. As relationships with new, diverse stakeholders grow we will have more access to information from both urban and Hispanic basin water stewards. Community members will be able to engage with WWBWC staff and partners to identify future projects, volunteerism, and ecologically safe practices.
The WWBWC will partner with local, state, and tribal organizations to present topics such as water trusts/transactions/rights, river habitat restoration, basin groundwater, working with beavers, urban water conservation, pesticide stewardship, and living in a changing climate. This approach aims to foster a sense of unity while promoting shared responsibility and collaboration among diverse community members, empowering active participation in the protection and enhancement of our basin's health and sustainability.

Review Team Evaluation

Strengths

- The project proposes to engage appropriate audiences, including underserved, urban, and Hispanic community members.
- The application specifies restoration actions in the watershed, including stream and riparian complexity, floodplain connection, and streamflow that would result from the engagement work.

- This model of engagement is new in the community and there is merit to testing this method to reach underserved populations.
- The applicant is coordinating with the library and other community institutions and facilities to engage the target audience.
- The proposed work is timely in combination with watershed council strategic planning and Walla Walla 2050 planning efforts in the basin.
- The budget is reasonable for the expected engagement of the Hispanic community in the Milton-Freewater area.
- All the concerns summarized in the previous application evaluation are addressed.

Concerns

- A cohesive approach to engagement beyond Milton-Freewater is not clearly articulated in the application.
- Objectives are not quantifiable, and it is unclear how meaningful discussion will be evaluated.
- It Is not clear how the Hispanic community will be effectively engaged in the proposed work.

Concluding Analysis

The Walla Walla Basin Watershed Council proposes to engage underserved community members to identify future projects and present a variety of practices to enhance watershed health. Stakeholder engagement efforts to expand diversity, equity, and inclusion in outreach targeting water quality and restoration is important. The Watershed Council is taking the lead in addressing urban water quality improvement needs. However, there is concern that workshops and online surveys may not be the correct platform for the intended engagement. The application does not identify specific entry points to engage the Hispanic community.

Review Team Recommendation to Staff
Fund

Review Team Priority
2 of 2

Review Team Recommended Amount
$62,834

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation
Fund

Staff Recommended Amount
$62,834

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Mid Columbia (Region 6)

Application Number: 223-6030-23013

Project Type: Stakeholder Engagement

Project Name: Dry Creek and Lower Pine Creek Assessment Stakeholder Engagement

Applicant: Walla Walla Basin Watershed Foundation

Region: Mid Columbia

County: Umatilla

OWEB Request: $24,517

Total Cost: $31,998

Application Description Project Location: The project's primary focus will be the Dry Creek subwatershed. However, Dry Creek is a tributary to Pine Creek, so this project will also encompass the lower ten miles of Pine Creek to ensure connectivity to the Walla Walla River (see attached project map). This is a bi-state project with 1353 acres of the total 32,469 acres located in Washington state. BPA funding will be used for work that's being conducted in Washington state.

Project need: The Dry Creek subwatershed faces numerous threats to its ecological health, including habitat fragmentation, lack of riparian vegetation, water quality degradation, loss of native anadromous fish populations, and fish passage barriers. The stakeholder engagement project is the first phase in a more significant subwatershed assessment planned to begin in the fall/winter of 2024.

Proposed work: The proposed work will focus on stakeholder engagement activities, including outreach events, educational materials, and one-on-one and group meetings with landowners to discuss the need for and potential benefits of a subwatershed assessment and the potential for restoration or water acquisition projects in the Lower Pine and Dry Creek subwatershed. The project will also include developing an outreach plan and identifying potential funding sources and other partners.

Project partners: Project partners will include the Umatilla County Conservation District, state and local government agencies, the Walla Walla Water 2050 Basin Advisory Committee (led by Oregon, Washington, and CTUIR), and other stakeholders interested in the health of the Dry Creek subwatershed and the Walla Walla River Watershed as a whole. These partners will be involved in planning and implementing stakeholder engagement activities and will help ensure the long-term sustainability of the proposed assessment and restoration or water acquisition projects.

Review Team Evaluation

Strengths

- Relevant participants including the Umatilla County Conservation District, the Walla Walla Water 2050 Basin Advisory Committee, and private landowners are involved.
- The proposed work is appropriate and a high likelihood that it will lead to restoration work in the watershed, with a clear line from engagement to technical assistance and restoration.
- Steelhead and Chinook use the lower watershed, while redband trout occupy the upper reaches; the proposed engagement will address limiting factors impacting fish populations including habitat fragmentation, water quality degradation, and fish passage barriers.
- This effort may lead to addressing known fish passage barriers in this system.
- The Walla Walla Basin Watershed Council has the necessary experience and is capable of the proposed work.

Concerns

- Letters of support would be helpful to understand the need for community engagement and likeliness that engagement will result in restoration; it is unclear if there is a receptive audience for the proposed engagement.
- Success indicators may not be quantifiable as described in the narrative.

Concluding Analysis

The Walla Walla Basin Watershed Council proposes to engage partners and local landowners to build support and increase participation in a sub watershed assessment. The proposed work is intended to increase participation in the assessment that will lead to identifying restoration actions in the Dry Creek and Lower Pine Creek watersheds. Addressing the need for partner and landowner engagement prior to implementing the watershed assessment is an appropriate action to strengthen the future assessment.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 2

Review Team Recommended Amount
$24,517

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team

N/A

Staff Recommendation
Fund

Staff Recommended Amount
$24,517

Staff Conditions

N/A

Open Solicitation-2023 Spring Offering
Mid Columbia (Region 6)

Application Number: 223-6028-23006

Project Type: Monitoring

Project Name: Hydrological Trend Monitoring in the Walla Walla Basin

Applicant: Walla Walla Basin Watershed Foundation

Region: Mid Columbia

County: Umatilla

OWEB Request: $113,273

Total Cost: $185,566

Application Description This project is located in the Oregon portion of the Walla Walla Basin in Umatilla County near the town of Milton-Freewater. The project will measure water temperature and stream flow in the Walla Walla River, its tributaries and distributaries, and also measure water levels in the underlying shallow alluvial aquifer during a 2 year period. Data are needed to guide current planning efforts aimed to address the Basin's inadequate water supply to meet the needs of aquatic life as well as agricultural and municipal uses. The Walla Walla Watershed is utilized by ESA-listed bull trout, summer steelhead, and reintroduced spring Chinook salmon, which are limited by lack of summertime flow and high water temperatures. Monitoring will document current conditions and describe trends to inform development of projects to restore watershed function and increase in-stream flows.

BPA will be the source of match for this project and project partners (non-match) include private landowners, Confederated Tribes of the Umatilla Indian Reservation, Oregon Water Resources Department, City of Milton-Freewater, Hudson Bay District Improvement Company, Walla Walla River Irrigation District, Fruitvale Water Users Association, and members of the Walla Walla Water 2050 project and Bi-State Flow Enhancement Study.

Monitoring Team Evaluation

Monitoring Team Strengths

- This project will provide data that supports several efforts including the Walla Walla Water 2050 Plan, the Bi-State Flow Enhancement Study, and a basin-wide hydrology study led by the US Geological Survey (USGS).
- This project will complement the existing water temperature, ground water and surface water data that the applicant has collected over the last 20 years.
- The applicant provides a clear path on how the monitoring questions will be answered by continuing to collect data at existing sites for the next two years.
- The applicant follows established monitoring methods and are cited and described in the application.
- The applicant will update their existing Sampling and Analysis Plan and submit it to DEQ for review.
- The applicant is using specific software to manage the large amount of continuous data and will develop comprehensive annual reports that are posted on their website.

- The applicant has the necessary qualifications and experience to collect and report the data and has a proven track record to share the information with partners in the basin to inform on the ground actions.
- The applicant is engaging with technical experts from the Oregon Water Resources Department, Washington Department of Ecology, Confederated Tribes of Umatilla Indian Reservation and the USGS as part of the Walla Walla Water 2050 Plan.
- The applicant has a history of working with private landowners and partners within the community as demonstrated by the large number of monitoring sites on private land and the letters of support that were uploaded to the application.
- The budget is extremely cost effective given the number of sites to be monitored over two years.

Monitoring Team Concerns

- The application mentions a need to collect more air temperature data to understand the impacts of the flood of 2020, but it was not clear how this additional data will be incorporated into the trend analyses.
- It was not clear if the applicant will be able to sustain collecting streamflow measurements every two to six weeks at all the 25 gaging stations over the next two years.
- It was not clear why funding is needed for a fiscal technician to complete this project as proposed.

Monitoring Team Comments

Review Team Evaluation

Strengths

- Data collected in this project is used by partners, such as the US Geological Survey (USGS), in the Walla Walla Water 2050 planning process that will lead to OWEB eligible restoration or acquisition projects.
- The applicant has access to multiple monitoring sites, demonstrating an effective working relationship in the community.
- The website and data sharing portal the applicant uses is important in distributing data to local users.
- The watershed council staff are qualified to implement the project and coordinate with multiple organizations, including across the state line in Washington.

Concerns

- It is not clear how the data collected has been used to inform water management over time.
- Some of the proposed data will be collected using methods that are not typically used and the data may not integrate with other agencies data sets.

Concluding Analysis

The proposed project will provide data that supports several efforts, including the Walla Walla Water 2050 Plan, the Bi-State Flow Enhancement Study, and a basin-wide hydrology study led by the US Geological Survey (USGS). The applicant has a history of working with private landowners and partners within the community as demonstrated by the large number of monitoring sites on private land and the letters of support that were uploaded to the application. This project complements a long-term data set that has been collected over the last 20 years.

Review Team Recommendation to Staff
Fund

Review Team Priority
1 of 1

Review Team Recommended Amount
$113,273

Review Team Conditions

N/A

Staff Recommendation

Staff Follow-Up to Review Team
N/A

Staff Recommendation
Fund

Staff Recommended Amount
$113,273

Staff Conditions

N/A

OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item J

FIP Partnership Learning Project

Board Meeting October 23-25, 2023

Oregon
Tina Kotek, Governor

OREGON WATERSHED ENHANCEMENT BOARD

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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: Jillian McCarthy, Partnerships Coordinator
Denise Hoffert, Partnerships Coordinator
Eric Hartstein, Senior Policy Coordinator

SUBJECT: Agenda Item J – Partnership Learning Project III
October 23-25, 2023, Board Meeting

I. Introduction

This report introduces the Partnership Learning Project – Part 3. The full report is available as Attachment A to the staff report.

II. Background

OWEB has two primary partnership-focused grant programs:

1. The Focused Investment Partnership (FIP) program, which seeks to invest in partnerships who's approach strategically prioritizes activities at a large scale with the goal of accelerating progress toward restoration of priority species and habitats. FIP funding supports partnerships in pursuing conservation initiatives with up to $12 million over six years. Since the program's inception in 2015, there have been three cohorts of partnerships awarded funding throughout the state, and OWEB is currently soliciting for a fourth cohort (see Item D-5 Focused Investment Partnership Update).
2. The Partnership Technical Assistance (P-TA) grant program, which supports planning and coordination efforts. The P-TA grant program was initially associated with the FIP program and grants were described as FIP 'Development' or 'Capacity Building'. As the intent of this grant program was to broadly develop and maintain high-performing partnerships, P-TA grants were moved out of the FIP program in order to differentiate the two programs more clearly. Since 2015, there have been multiple offerings for this program as it has transitioned from FIP to P-TA.

In previous biennia, the board has awarded funds for FIP Effectiveness Monitoring, including some funding for the Bonneville Environmental Foundation to engage contractors in comprehensive evaluation of the FIP grants. This latest version of the Partnership Learning Project was awarded funding during the January 2023 board meeting.

III. Partnership Learning Project

The purpose of the Partnership Learning Project is to better understand what partnerships need to be resilient and to maintain a high level of performance, and how OWEB can support these partnerships to achieve desired ecological outcomes.

Jennifer Arnold of Reciprocity Consulting has led the development of the project in multiple phases. Part one was focused on partnerships receiving planning and coordination grants (now P-TA grants). This was presented to the board at its July 2017 meeting. Part two brought in the first cohort of FIP partnerships and was presented to the board at its June 2018 meeting. Part three of the project includes outreach to the over 30 funded partnerships associated with the P-TA and FIP programs to examine strengths of high performing partnerships, strategies to enhance accountability and performance, and elements of partnership resilience.

IV. Recommendation

This is an information item only. Ms. Arnold and OWEB staff will be at the October board meeting to present the report and answer questions about the Partnership Learning Project III.

Attachments

A. Partnership Learning Project III

PART THREE

Partnership Learning Project



OREGON WATERSHED ENHANCEMENT BOARD

BONNEVILLE ENVIRONMENTAL FOUNDATION

A REPORT FOR Oregon Watershed Enhancement Board

In collaboration with Bonneville Environmental Foundation

PREPARED BY

Jennifer Arnold, Ph.D.

RECIPROCITY CONSULTING, LLC

October 2023

Acknowledgements

This project was funded by the Oregon Watershed Enhancement Board in coordination with Bonneville Environmental Foundation.

The findings presented here were made possible through the generous and thoughtful reflections of participating partners, in alphabetical order:

Ashland Forest All-Lands Restoration Partnership
Baker Sage-Grouse Local Implementation Team
Clackamas Partnership
Deschutes Basin Partnership
East Cascades Oak Partnership
Grande Ronde Restoration Partnership
Harney Basin Wetland Collaborative
Hood River Basin Partnership
John Day Basin Partnership
Klamath Siskiyou Oak Network
Oregon Central Coast Estuary Collaborative
Oregon Model to Protect Sage-Grouse
Partners of the North Santiam
Pure Water Partners
Rogue Basin Partnership
Rogue Forest Partners
Salmon SuperHwy
Siskiyou Coast Estuaries Partnership, formerly Wild Coast Estuaries Partnership
Siuslaw Coho Partnership
Upper Willamette Stewardship Network
Umpqua Basin Partnership
Wallowa Fish Habitat Restoration Partnership
Warner Basin Aquatic Habitat Partnership
Willamette Mainstem Anchor Habitat Working Group

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Thank you to everyone who shared your experiences and insights. We hope this report will support your continued success. We will recognize you in any publications resulting from this work.

FRONT COVER Willamette Mainstem Anchor Habitat Working Group. Early winter weather adds frost to the project at Green Island.
STEVE SMITH PHOTOGRAPHY

BACK COVER Willamette Mainstem Anchor Habitat Working Group. An aerial view of the FIP III project at Green Island.
STEVE SMITH PHOTOGRAPHY

REPORT DESIGN & GRAPHICS CASEY DAVIS

Ongoing dialogue with OWEB staff was foundational to this project. The following staff took findings to heart, reflected on their own learning and pushed forward meaningful program changes, even over the course of this study (in alphabetical order):

Lisa Charpilloz Hanson, Executive Director
Ken Fetcho, Effectiveness Monitoring Coordinator
Miriam Forney, Land Acquisitions Coordinator
Eric Hartstein, Board and Legislative Policy Coordinator
Audrey Hatch, Conservation Outcomes Coordinator
Denise Hoffert, Partnership Coordinator
Jillian McCarthy, Partnership Coordinator
Stephanie Page, Deputy Director
Courtney Schaff, Monitoring and Reporting Manager
Eric Williams, Grant Programs Manager

We also honor the late ***Andrew Dutterer,*** former OWEB Partnership Coordinator, who was a champion of OWEB's partnership-focused investments throughout the early years of the program.

The recommendations in this report were refined through collaboration with the Bonneville Environmental Foundation team, including two subconsultants, who collectively have been working with OWEB over the past seven years to support the evolution of the FIP program, including direct support to many of the FIP partnerships:

Robert Warren, Bonneville Environmental Foundation
Lauren Mork, Upper Deschutes Watershed Council and
Ann Moote, Mamut Consulting, LLC

RECIPROCITY CONSULTING

ABOUT RECIPROCITY CONSULTING

Reciprocity Consulting, LLC is a women-owned small business based in Tacoma, Washington that provides customized support to strengthen organizations, engage communities and build resilient, collaborative partnerships emphasizing equity, diversity and inclusion.

Founder Jennifer S. Arnold, Ph.D. has over 20 years of experience in research, facilitation, and training focused on engaging diverse people in collaborative learning and decision-making to have lasting positive impacts in our communities and our environment.

PART THREE

Partnership Learning Project

A THREE-PART REPORT

1 **PART ONE** explores what it takes to initiate or formalize a partnership and work through the growing pains of planning and governance, synthesizing learning from eight partnerships that received P-TA grants.

2 **PART TWO** explores the dynamic nature of partnerships and the resources, support and guidance from funders that can build resiliency and boost impact, synthesizing learning from six partnerships that received FIP grants.

3 **PART THREE** develops a refined framework to understand partnership performance and resilience and examines four specific strategies to enhance performance, synthesizing learning from twenty-four partnerships that received FIP and/or P-TA grants.

Common Terms in OWEB Programs

The Oregon Watershed Enhancement Board (OWEB) is a state agency that provides grants to help Oregonians take care of local streams, rivers, wetlands and natural areas. OWEB grants are funded from the Oregon Lottery, federal dollars, and salmon license plate revenue. The agency is led by a 17-member citizen board drawn from the public at large, tribes, and federal and state natural resource agency boards and commissions.

Focused Investment Partnership (FIP) Grant is a six-year OWEB grant of up to $12 million that is awarded to high-performing partnerships with a strategic action plan and a formalized decision-making process to implement on-the-ground restoration projects addressing ecological priorities, which are defined by the OWEB Board. Although the goal is to allocate all funding within the six-year timeframe, most partnerships will take longer to implement the funded projects.

A FIP Restoration Initiative refers to the work that will be completed with the FIP grant.

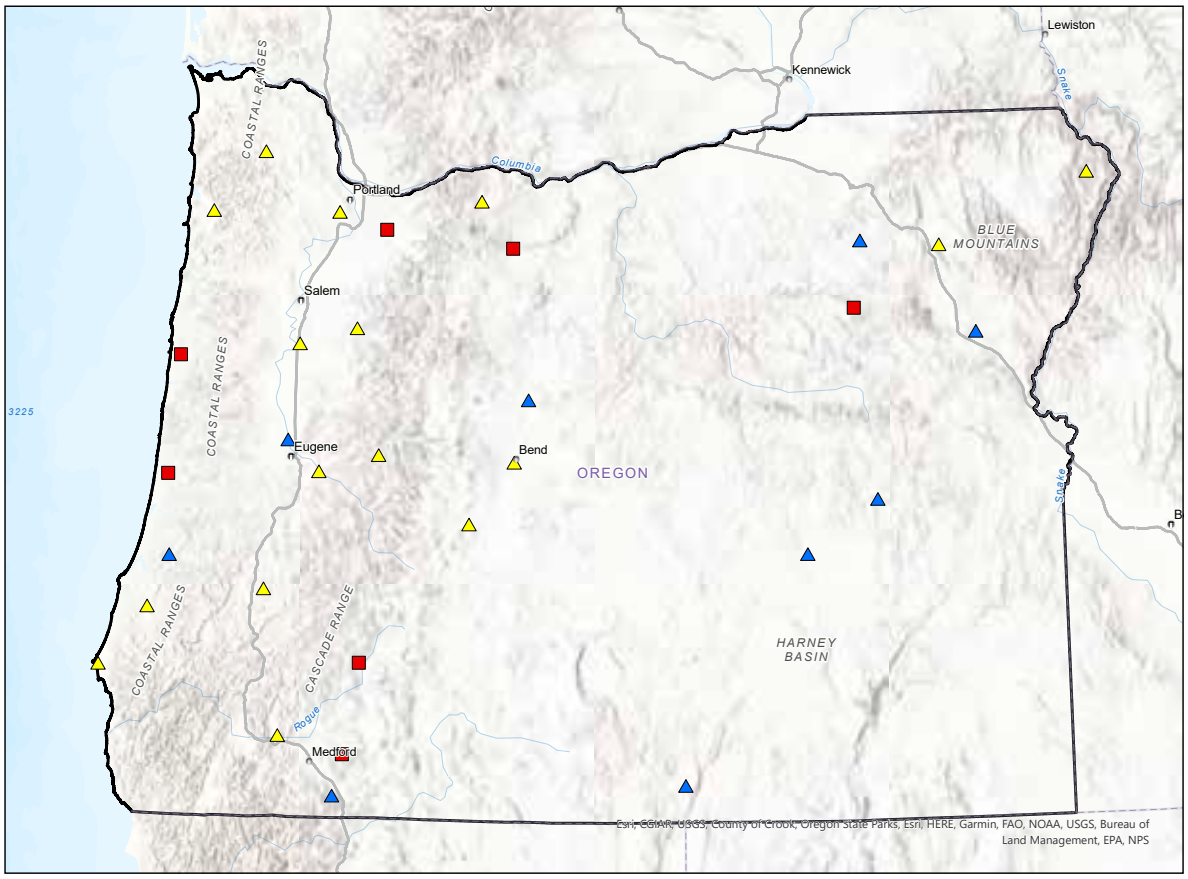
Board-identified Priorities for FIP Investments

- Aquatic Habitat for Native Fish Species
- Closed Lakes Basin Wetland Habitat
- Coastal Estuaries
- Coho Habitat and Populations along the Coast
- Dry-Type Forest Habitat
- Oak Woodland and Prairie Habitat
- Sagebrush / Sage-Steppe Habitat

FIP funding categories include partnership coordination, stakeholder engagement, technical assistance, restoration, land and water acquisition and monitoring. Partnerships awarded a FIP grant submit project-level grant applications in these categories at least once a biennium.

For the FIP Project-Level Technical Review, OWEB facilitates a team of technical experts to review project applications with the goal of fine-tuning project design. Because the FIP grants include a list of approved projects for six years, reviewers are not asked to approve or reject projects, but if significant changes are needed, reviewers can ask applicants to make revisions and resubmit.

A Partnership Technical Assistance (P-TA) Grant is an OWEB grant of up to $150,000 for up to three years that is awarded to partnerships to i) develop or update a strategic action plan, ii) strengthen their governance and decision-making and/or iii) support ongoing coordination of a partnership. This was formerly called a Capacity Building FIP grant and a Development FIP grant.



Partnerships awarded P-TA grants and/or FIP grants (2015 - 2022)

- Partnerships awarded a P-TA grant only
- Partnerships awarded a FIP grant only
- Partnerships awarded a P-TA grant, then a FIP grant
- Oregon Boundary

Note: Partnerships work in large geographic areas. The points, shown here in the center of their work area, give a sense for their geographic distribution.

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N

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Common Terms Found in this Report

Accountability refers to a shared responsibility to check-in on performance or follow-through with respect to informal or formal agreements.

Capacity refers to the time, energy, resources and/or skills needed to undertake an action or activity. In the context of funders and non-profit organizations, capacity often refers to the funding needed for to pay for people's time to do work.

Expanding the circle refers to the intentional effort of including new people, organizations, government agencies and/or tribes in some aspect of a partnership's work, sometimes with a focus on including new partners.

A partnership refers to two or more organizations voluntarily working together to advance goals that cannot be accomplished independently. Non-voluntary partnerships, created through statute, have different structures and mechanisms of accountability and are not the focus of this study.

Performance refers to the ability of a partnership to achieve their goals and make an impact.

Resilience refers to the capacity of a partnership to withstand stressors and undergo change, while maintaining the integrity of the partnership's vision, identity and focus (adapted for partnerships from Walker et al. 2004).

A theory of change describes the rationale and underlying assumptions for how strategies and actions are expected to lead to short-term, intermediate and long-term goals.

Underrepresented groups refers to demographic groups or types of organizations that are have less involvement or influence than you would expect given their presence in an area. Special considerations are given to groups potentially impacted or able to contribute to an effort. Groups can be underrepresented because of historical patterns that restrict their power and influence – or because their interests do not easily align or overlap with the effort among other reasons.



Imnaha River. PHOTO: OWEB

OWEB aims to accelerate the pace and scale of restoration across the state by investing in and supporting **high-performing partnerships.**

A Partnership refers to two or more organizations voluntarily working together to advance goals that cannot be accomplished independently.

OREGON WATERSHED ENHANCEMENT BOARD'S

THEORY *of* CHANGE *for* PARTNERSHIP INVESTMENTS

Why partnerships?

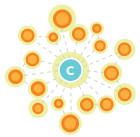
High-performing partnerships bring together the skills, capacities, perspectives and relationships from different organizations and individuals. Partners learn together, plan together and in many contexts act together to advance ecological restoration at larger scales and in more complex landscapes.

Building up Partnerships

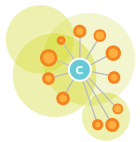
Partnerships across Oregon

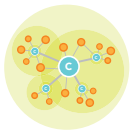
- Partnerships across the state work together to plan for and implement restoration at different scales, geographies and focus areas.
- Each has a unique structure and function, which may change over time as their work evolves and as they respond to changes in leadership, funding, policies and external events.

(see OWEB's Partnership Types document to learn more)









OWEB Investments in Partnerships

OWEB invests in the following **resources and funding opportunities** to boost partnership performance and resilience alongside ecological and social benefits:

- **Resource Guides**
  Self-guided resources accessible to all partnerships:
  - Strategic Action Planning
  - Monitoring
  - Adaptive Management
  - Partnership Governance
- **Partnership Technical Assistance (P-TA) grants**
  - Competitive grants open to all partnerships across the state
  - Funding to support planning, improved governance and/or coordination of a partnership
- **Focused Investment Partnership (FIP) grants**
  - Highly competitive grants open to partnerships that address ecological priorities identified by the OWEB board *(see list below)*
  - Multi-million dollar funding over a longer time frame to implement projects and accelerate restoration
- **Grantee forums for peer learning, training and networking**

FIP Ecological Priorities

- Aquatic Habitat for Native Fish Species
- Closed Lakes Basin Wetland Habitat
- Coastal Estuaries
- Coho Habitat and Populations along the Coast
- Dry-Type Forest Habitat
- Oak Woodland and Prairie Habitat
- Sagebrush/Sage-Steppe Habitat

Impact of Partnerships

Increased Partnership Performance & Resilience

- With these investments, partnerships will attract new funders, compete well for grants and secure funds over the timescales needed to achieve restoration goals.

We expect partnerships will be:

- Better coordinated, drawing on partners' strengths and reducing duplication
- Better able to engage diverse constituencies
- Better able to work through challenges, including scaling up and working in complex landscapes
- Better able to secure resources
- Better able to incorporate best available science and collective learning, and
- More likely to achieve their goals and sustain their impact.

Ecological & Social Benefits

- High performing partnerships working across the state are able to advance restoration at larger scales and sustain benefits in terms of:
  - Healthy, resilient watersheds *(Ecological)*
  - Healthy people and communities *(Quality of Life)*
  - Knowledge of how to restore watersheds *(Learning)*
  - 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)*

Partnerships are dynamic

They take on different forms over time in response to funding, commitment of key partners, external events and how the purpose and scope are defined.

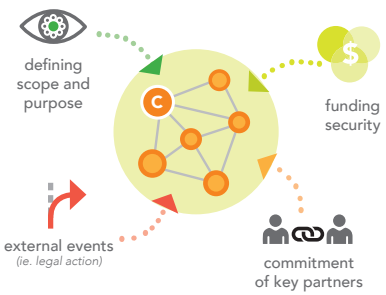


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Executive Summary

When OWEB first started their partnership-focused investments in the 2015-17 biennium, they recognized that they needed to learn more about how partnerships functioned and how OWEB, as a funder, could best support partnership success and the likelihood for impact.

OWEB contracted with independent social scientist Jennifer Arnold, Ph.D. for the Partnership Learning Project Parts 1 and 2 to confidentially hear from grantees and understand what it takes to initiate a partnership and how funders can support performance and resilience. OWEB took those lessons learned to evolve the program. Now five years later, they initiated Part 3 to develop a refined framework for understanding partnership resilience and performance.



Willamette Mainstem Anchor Habitat Working Group – CFWWC Projects Manager repairing Western Bluebird Boxes at Native Oaks Ridge.
PHOTO / COAST FORK WILLAMETTE WATERSHED COUNCIL

OWEB's partnership-focused investments:

P-TA
Partnership Technical Assistance grants[1]
support planning and coordination for up to three years

FIP
Focused Investment Partnership grants[2]
focus on implementing strategic actions to address a Board-identified ecological priority over a six-year timeframe.

[1] *P-TA grants were formerly called Development FIP and Capacity Building FIP grants and originally provided funding for up to two years.*

[2] *Focused Investment Partnership (FIP) grants were formerly called Implementation FIP grants.*

Guiding Questions

Working closely with OWEB, we developed the following guiding questions to more deeply explore partnership structure, resilience and four specific aspects of performance:

Partnership types
What aspects of partnership structure, function and context promote greater understanding and clearer expectations for performance among partners and funders?

Partnership Resilience
What elements of resilience help partnerships withstand changes, such as changes in funding, changes in leadership and other disruptive events?

Partnership Performance
What does high performance look like for partnerships?

Strategies to Enhance Accountability and Performance
How do partnerships maintain accountability and a high level of performance?

Specifically looking at:

1. Trust among partners to work through challenging questions together
2. External technical review at the project level for FIP grantees
3. Expanding the circle of people involved in a partnership's work, and
4. Tracking progress and telling the story of impact.



Oregon Model to Protect Sage-Grouse – Working with landowners.
PHOTO / LAKE COUNTY SWCD



Deschutes Basin Partnership PHOTO / CROOKED RIVER WATERSHED COUNCIL

Methods

In October 2022, Jennifer reached out to 31 funded partnerships inviting participation through confidential interviews, group discussions and an online survey emphasizing that this was a voluntary study and not a requirement or expectation associated with grant funding. Partnerships with at least two people participating received a $250 stipend.

Between October 2022 and June 2023, 72 people representing 24 partnerships participated in the survey, individual interviews and/or group discussions, including 21 partnerships that provided enough detail to estimate their partnership type.

The data were analyzed using a 'grounded theory' approach (Charmaz 2006) to identify patterns relevant to the guiding questions. Findings were further developed with iterative rounds of feedback and opportunities for dialogue with partnerships and separately with OWEB staff. Findings from partnerships are paired alongside insights and reflections from OWEB, shown as green speech bubbles throughout.

Findings

Reflecting on the foundational assumptions of OWEB's partnership-focused investments, this study found many examples of partnerships accomplishing more complex restoration work and at larger scales than would be possible with organizations working independently.

Partnership types as a tool for setting expectations

As people in this study more deeply considered the structure and function of the partnerships they participated in, their reflections informed a revised typology, or description of partnership types. Partnerships embraced the value of this tool for reflection and setting expectations internally and with funders. Some partnerships could clearly trace their evolution from one partnership type to another, while other partnerships described different layers to their partnership's work seeing themselves simultaneously operating as multiple partnership types.

OWEB
affirmed that they would like the FIP and P-TA grants to support a diversity of partnership types. The P-TA grant could be a good fit for any of the partnership types. The FIP grant, with its emphasis on implementing projects together, could be a good fit for all but the least interdependent partnership type, called a learning-oriented partnership.

Partnership resilience

Echoing findings from Part 2, funding was found to be a consistent driver of partnership commitment and performance. When other aspects of performance were going well and partners wanted to work more collaboratively, more funding enabled them to prioritize shared work, solidify their commitments and boost their collective performance. The FIP grant was like "rocket fuel" in the words of one partnership. In that sense, there was consistent evidence that the FIP program boosted partnership resilience, as expected in OWEB's theory of change.

Partnerships that were not able to secure funding to operate their partnership as planned were found to follow a few trajectories:

- Maintain their structure for a period of time with lower levels of activity,
- Shift to a less resource-intensive structure,
- Reorganize as a new partnership with a shifted scope, geography and/or core partners, or
- Dissolve fairly quickly with partners advancing their work independently.

Many partnerships described overcoming severe stressors, most commonly loss of a key leader or coordinator, and emerging with a greater sense of trust and pride in shared accomplishments. In a few cases, the stressors led to instability and a reorganization or dissolution of the partnership.

"Funding has driven change. A lack of funding for a long time meant that we were [only] able to accomplish goals that had funding associated with them, or were directed by funders. Now that the partnership has received a FIP, I'm hopeful that we will be able to properly staff and support the partnership to achieve the lofty goals laid out in our Strategic Action Plan."

Several elements or 'threads' of partnership resilience emerged from this study that individually or collectively contribute to a partnership's ability to withstand stressors and maintain its integrity and focus:

- **Camaraderie** among partners
- **Success** that creates opportunities for more success
- **Formalized commitments** in the form of plans, agreements and governance documents
- **Consistent funding** especially for coordination
- **Organizational anchors** that provide stability for the partnership and mentoring for smaller organizations
- **Shared leadership** that represents the partnership over individual interests
- **Openness** to learning and change, and
- **External relationships** with people and organizations who can introduce new perspectives and resources.

Greater awareness and focus on these elements will help partnerships prepare for and navigate the challenges that come up.



Warner Basin Aquatic Habitat Partnership – A partnership meeting at the Honey Creek Town Diversion. PHOTO / GRACE HASKINS

High-performing partnerships

Considering what it takes to perform well, four categories of performance emerged from the data: 1) Clarity and Direction, 2) Action, 3) Learning and 4) Alignment. Clarity and Direction were important to all partnership types, while the other categories were more or less important for a particular partnership type to perform well overall.

Defining performance in this way relative to partnership types provides a tool for partnerships and funders to have deeper conversations about how a partnership is structured and why – along with realistic expectations for performance and funding associated with a particular structure. These conceptual tools are designed to be used in dialogue to help set expectations together, rather than as a formula for partnerships to follow.

Strategies to enhance performance and accountability

Fundamental to OWEB's theory of change is that the FIP and P-TA programs are structured in ways that boost partnership performance and accountability.

For this study with a focus on continuous improvement, OWEB was particularly interested in:

1. **trust among partners** to ask challenging questions,
2. **external technical review** of FIP projects,
3. **expanding the circle** of people involved in a partnership and
4. **tracking progress** and telling the story of impact.

The survey questions and interview guides (See Appendix) were structured to illicit partnerships' experiences and suggestions for OWEB in these areas. Detailed findings for each of these sections are included in the full report, including steps OWEB is already taking to implement recommendations.

Synthesis - OWEB's Role in Supporting Partnership Performance and Resilience

Partnerships have been eager to participate in the FIP program because the scale of funding over six years allows them to tackle more ambitious projects over larger landscapes. However, there was evidence that this hard push for implementation has sometimes kept them from pausing to check-in on trust, reflect on whether projects are meeting strategic priorities and consider opportunities to expand their circle. Yet, there were also many examples of partnerships effectively scaling up their work, while still dedicating time to reflection and strategic thinking. Overall, there is evidence that the supportive culture within OWEB mitigates for this tension to perform at an accelerated pace and that benefits for performance and resilience outweigh the costs and stressors.

Overall, OWEB's investments in partnership planning, governance, coordination, project implementation and monitoring have been found to be well-positioned to support high performance and resilience. This study finds that the biggest near-term change that OWEB could make to support partnership resilience would be streamlining administrative burdens from the FIP program so that partnerships could dedicate more of their time to the operation of their partnership – specifically, streamlining project applications, technical review, reporting guidelines for monitoring and use of the online application portal and grants database. OWEB is working on integrating some of the recommendations from this study, while others like the database are not possible at this time.

Further investments in institutional support for monitoring, such as near-term investments in peer learning opportunities and training workshops, were also identified as a high priority for investment to support resilience. Monitoring is especially important since partnerships who can learn from their efforts and tell the story of their success have been better positioned for success and additional funding. OWEB holds a gathering for FIP and/or P-TA grantees every biennium, and OWEB staff are interested in more frequent peer learning or peer mentoring opportunities. However, they are considering what is possible given their staff capacity. Over the long-term, support for partnerships to expand their circle, including an emphasis on underrepresented groups, has the potential to boost resilience by tapping into the creative potential of broader constituencies and more diverse funding sources.



OWEB-BEF retreat, January 2023. PHOTO / JENNIFER ARNOLD

Conclusion

Overall, most of the assumptions of OWEB's partnership-focused investments have held true with some fine-tuning of assumptions about performance and resilience. OWEB's effort is striking in its long-term commitment to invest in a breadth of partnerships working in different ecosystems across the state, its openness to learn alongside partners and its commitment to continually evolve the program to have the greatest impact possible.

However, program innovations must fit within the funding OWEB has for staff and infrastructure such as the online application portal and grants database – funding which is decided through the legislative budget process and relatively modest compared with their large funding portfolio. Program innovations must also fit within the statutes that govern the use of lottery funds for the benefit of water quality, watershed function, native fish, wildlife, plants and ecosystems. As OWEB continues to clarify their values and commitment to equity and environmental justice and as they learn from ongoing innovation led by partnerships and tribes, the interpretation of these statutes may play a key role in the future evolution of their partnership-focused investments.

OWEB's focused commitment to learning and adaptation in support of high performing partnerships has yielded many insights and practical tools that will be of use to partnerships and funders working in restoration and across sectors.



Salmon SuperHwy – Fish salvage for Clear Creek with multiple partners present: ODFW, USFS,Tillamook County Public Works.
PHOTO / JUSTIN BAILIE



John Day Basin Partnership - Members and agency partners tour a process-based restoration project funded by the FIP in the Thirtymile Watershed, May 2023.
PHOTO / HERB WINTERS



Warner Basin Aquatic Habitat Partnership – ODFW Fish Biologist Justin Miles doing fish salvage before Relict Diversion Construction. PHOTO / BRANDI NEIDER

Introduction

In the 2015-2017 biennium, the OWEB Board dedicated a portion of their spending plan to invest in restoration work carried out by high-performing partnerships with the belief that partnerships can work at a larger scale and more effectively tackle complex restoration challenges than individual organizations. They created two grant offerings: a multi-million dollar Focused Investment Partnership (FIP) grant focused on implementing their strategic action plan in a specific geography over a six-year grant period and a Partnership Technical Assistance (P-TA)[3] grant for partnerships to develop a strategic action plan or improve their governance.

When the first grants were awarded, OWEB recognized that this was a new area for their grantmaking and they wanted to learn more to inform the evolution of their programs. Their organizational culture is marked by openness to learning, responsiveness to feedback, commitment to continuous improvement and care for the relationships they have with partners and grantees throughout the state. They have an impressive funding portfolio with long-term dedicated funds from Measure 76 state lottery revenue, which gives them financial stability from which to evolve their programs. And yet their staffing and infrastructure is funded through the state legislative budgeting process, which is modest compared with the size of their funding portfolio. The evolution of their grant programs must also fit within the Oregon statutes that define how lottery funds can be spent for the benefit of water quality, watershed function, native fish, wildlife, plants and ecosystems.

[3] *Formerly called a Development FIP grant and a Capacity Building FIP grant.*

Background

In 2017 and 2018, OWEB contracted with independent social scientist Jennifer Arnold, Ph.D. of Reciprocity Consulting, LLC to conduct the Partnership Learning Project Parts I and II with the guiding questions:

- **What do partnerships need to be resilient and maintain a high level of performance?**
- **How can OWEB improve and innovate their partnership-focused investments to support high-performing, resilient partnerships that can make progress toward desired ecological outcomes?**

From Fall 2016 to Spring 2018, findings were developed from meetings with 14 funded partnerships, interviews with 47 individual partners and survey responses from 137 partners. Findings helped define the diversity of partnership types and the support they need to establish and evolve. The study also illuminated misconceptions about the two granting programs among other feedback.

OWEB applied findings from this project to acknowledge that their partnership-focused investments are intended to serve a range of partnership types and that partnerships are not expected to fit just one model of success. OWEB clarified that the P-TA planning grant was not intended to directly lead to a FIP grant. They made the following program changes to differentiate the two grant programs:

- Renamed the planning grant from a Capacity Building FIP grant to a Development FIP grant to a Partnership Technical Assistance grant, now completely removing FIP from the name.
- Moved the P-TA grant administratively to a different program, and
- Expanded eligibility requirements for P-TA applicants so that they do not have to focus on a Board-identified ecological priority, which is a requirement of FIP applicants.



Siuslaw Coho Partnership - Partners gather on Waite Ranch in preparation for implementing a large-scale restoration project. PHOTO / ELIZABETH GOWARD



Oregon Model to Protect Sage-Grouse – Completed juniper and fencing projects. PHOTO / LAKE COUNTY SWCD

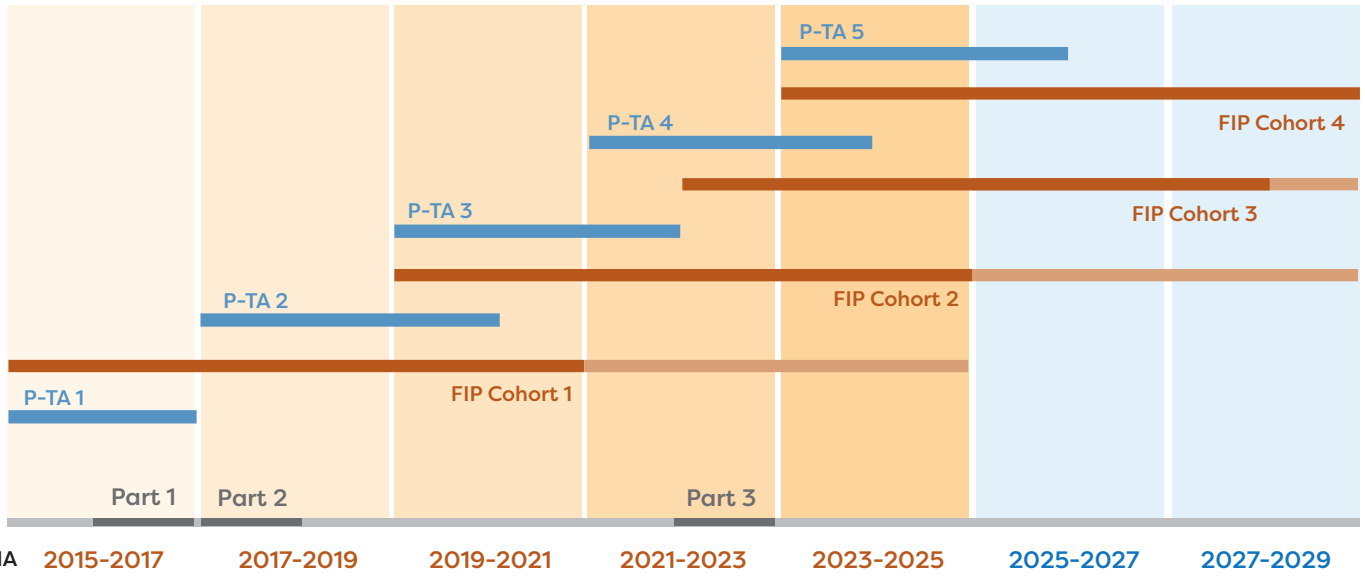
In response to the finding that capacity funding to coordinate a partnership was not covered by most funding sources, OWEB also added a new funding category to the P-TA grant offering called "partnership capacity" which could be used to fund a facilitator and/or staff time for coordination. They also allowed partnerships to apply for a P-TA grant for partnership capacity funding only, whereas previously P-TA funding needed to be used for strategic planning and/or strengthening a partnership's governance. OWEB emphasized that partnerships finishing a FIP grant could apply for a P-TA grant for partnership coordination only or to update their strategic action plan and governance documents.

In all, the Partnership Learning Project Parts I and II helped clarify program goals and assumptions, which OWEB used to provide clearer guidance for grantees and prospective applicants.

Now, more than six years after the first grants were awarded and just as the first cohort of FIP grantees are working to complete their final round of funded projects, OWEB initiated the Partnership Learning Project Part 3, again contracting with Jennifer Arnold, Ph.D., to more deeply understand partnership performance and resilience in specific areas defined by the guiding questions below. This research study was implemented with iterative cycles of reflection and feedback throughout to promote collaborative learning and growth for the benefit of both OWEB and the partnerships.

Timeline of OWEB Grant Awards with Partnership Learning Project Parts 1, 2 and 3

The dark orange line indicates the duration of a FIP grant award, but projects can take another 2-4 years after funding is awarded to complete, indicated with the lighter orange line. This means the work of a FIP initiative could extend 8-10 years in total.



Guiding Questions

- *What aspects of partnership structure, function and context are most relevant to the goals of the P-TA and FIP grant offerings?*

  What tools support greater understanding and clarity among partners and funders?

- *How do partnerships build resilience to withstand changes, such as changes in funding, changes in leadership and other disruptive events?*

  Partnership dynamics: *How do partnerships respond to sudden changes in funding or leadership? How do partnerships anticipate their structure, funding or focus may change after the current OWEB grant is complete?*

  Threads of resilience: *What are threads, or elements, that individually or together allow a partnership to more effectively respond to changes and maintain their focus?*

  Barriers to increasing resilience: *What barriers do partnerships face in building resilience? How can the P-TA and FIP grants support greater resilience?*

- *What does high performance look like for partnerships?*

  Are there differences by partnership type?
  What tools support greater understanding among partners and funders?

- *How do partnerships maintain a high level of performance and accountability?*

  1. Trust to ask challenging questions: *How do partnerships build the capacity to ask challenging questions of each other and direct their collective work where it is most likely to have the greatest impact?*
  2. External technical review: *Within the FIP Program, in what ways does OWEB's technical review process add value and support high performance? What are areas for improvement?*
  3. Expanding their circle: *To what extent are partnerships working to expand their circle to enhance their accountability, relevance and ability to implement their theory of change? Expanding the circle refers to including new partners and/or expanding the circle of people who contribute to their work or benefit from it.*
  4. Tracking progress and telling the story of impact: *To what extent are partnerships able to track progress toward their goals by measuring long-term ecological outcomes and tell the story of their impact? What successes and challenges have they experienced? What adaptations or recommendations emerge?*

Methods

To guarantee confidentiality and encourage candid feedback, OWEB contracted with independent social scientist Jennifer Arnold, Ph.D. of Reciprocity Consulting, LLC.

Coordinating with OWEB staff, we sent out an email to the coordinators of 31 partnerships who received either a P-TA grant or a FIP grant. We excluded partnerships in the third cohort of FIP recipients who did not receive a P-TA grant since they had little interaction with the grant programs at the time the study began.

Partnership coordinators were asked to encourage everyone from their partnership to participate in whichever method they preferred: an online survey, a virtual individual conversation and/or a virtual group discussion. OWEB directly communicated with partnerships that participation was not a requirement of their grant and that whatever they shared would be confidential and not linked to their name or their partnership. All partnerships who had at least two people participating received a stipend of $250 to demonstrate appreciation for their time and energy. Reminder emails were sent to encourage participation, including personal outreach to individuals suggested by other participants.

Altogether, 73 people representing 26 partnerships participated with some individuals representing more than one partnership. Twenty one partnerships provided enough detail to understand the structure and function of their partnership and estimate their partnership type, including how it has changed over time and how it relates to their performance and accomplishments.

The data were analyzed using a 'grounded theory' approach (Charmaz 2006) to identify patterns relevant to the guiding questions and develop theories about partnerships inductively from the data. Findings were further developed with iterative rounds of feedback and opportunities for dialogue with partnerships and separately with OWEB staff. Findings from partnerships



Deschutes Basin Partnership - Three Sisters Irrigation District Manager Marc Thalacker oversees canal piping, enabling flow restoration in the Creek.
PHOTO / DESCHUTES RIVER CONSERVANCY

are paired alongside insights and reflections from OWEB relative to these findings, shown as green speech bubbles throughout. OWEB has begun making some improvements even during the course of this study.

Select quotes are shown throughout the text to highlight key findings. They represent individual perspectives that are meaningful to the larger picture, but may not be representative of all partnerships. [Brackets] indicate text added or modified for clarity or to protect confidentiality and ellipses … indicate text omitted for brevity.

Some quantitative survey data are also presented throughout; however, these only represent a subset of the responses. Seven partnerships chose to participate in interviews and groups discussions only, including 29 people total. Their responses are not included in quantitative survey data, but their responses were not markedly different from the survey responses.

Preliminary findings were shared with OWEB at a January 2023 retreat focused on the evolution of the FIP and P-TA Programs in addition to discussions of findings and recommendations monthly throughout the spring and summer. Partnerships and OWEB staff had a chance to review the draft report and provide feedback, which has been incorporated into the final report.

Findings

Reflecting on the foundational assumptions of OWEB's partnership-focused investments, this study found many examples of partnerships accomplishing more complex restoration work and at larger scales than would be possible with individual organizations working independently.

"Our initial hope was that the partnership would result in a much more cost-effective program implementation for our needs. As information evolved on the required costs of implementation, it is difficult to say if cost-effectiveness was an end-result, but we know we are getting a much better product for the community and the environment. And we have program strength in having so many partners committed to the same goals and project successes than if we had gone it alone. For that, it is well worth it and we will be at the table for a long time."



Oregon Model to Protect Sage-Grouse – Landowner collaboration. PHOTO / LAKE COUNTY SWCD

Partnership Types as a Tool for Setting Expectations

A typology, or description, of different partnership types was developed to promote dialogue about realistic expectations for partnership structure and function, not as a prescription for partnerships to follow.

This typology has its origins in the Public Administration literature (Mandel and Steelman 2003; Cigler 1999), but was further developed using a 'grounded theory' analysis of the data from this study. As part of the Partnership Learning Project Parts 1 and 2, a typology of partnerships from the Public Administration literature was used that describes partnership types on a continuum from more autonomous to more interdependent (Mandell and Steelman 2003; Cigler 1999). The relative autonomy or interdependence influences the structure and function of the partnership and the level of funding needed to support operations and performance.

With greater independence and alignment, greater funding is needed to work through differences and hold each other accountable. In the Partnership Learning Project Parts 1 and 2, we developed the continuum adding details that emerged from a comparison of the data, for example describing differences in the partnership's purpose, role of the coordinator and funding needed to sustain specific parts of the structure and function (Arnold 2018).

OWEB said this description of partnership types resonated with them and they used it subsequently to talk with partnerships interested in the FIP and P-TA grants. However, OWEB shared feedback that the continuum, as a linear graphic with greater autonomy on the left and greater independence on the right, gave the impression that grantees should aspire to the partnership type on the right with the highest degree of collaboration and interdependency. However, this is not what they intended. **OWEB wants to support whatever type of partnership is best suited to advance their restoration goals.**



Pure Water Partners - Partners work to replant the Blue River Park as a part of ongoing fire response work in the McKenzie River valley. PHOTO / ELIZABETH GOWARD



Siuslaw Coho Partnership - Restoration Project Managers Kyle Terry (CTCLUSI) and Nathan LeClear (MRT) prepare to break ground at Waite Ranch, July 2023.
PHOTO / ELIZABETH GOWARD

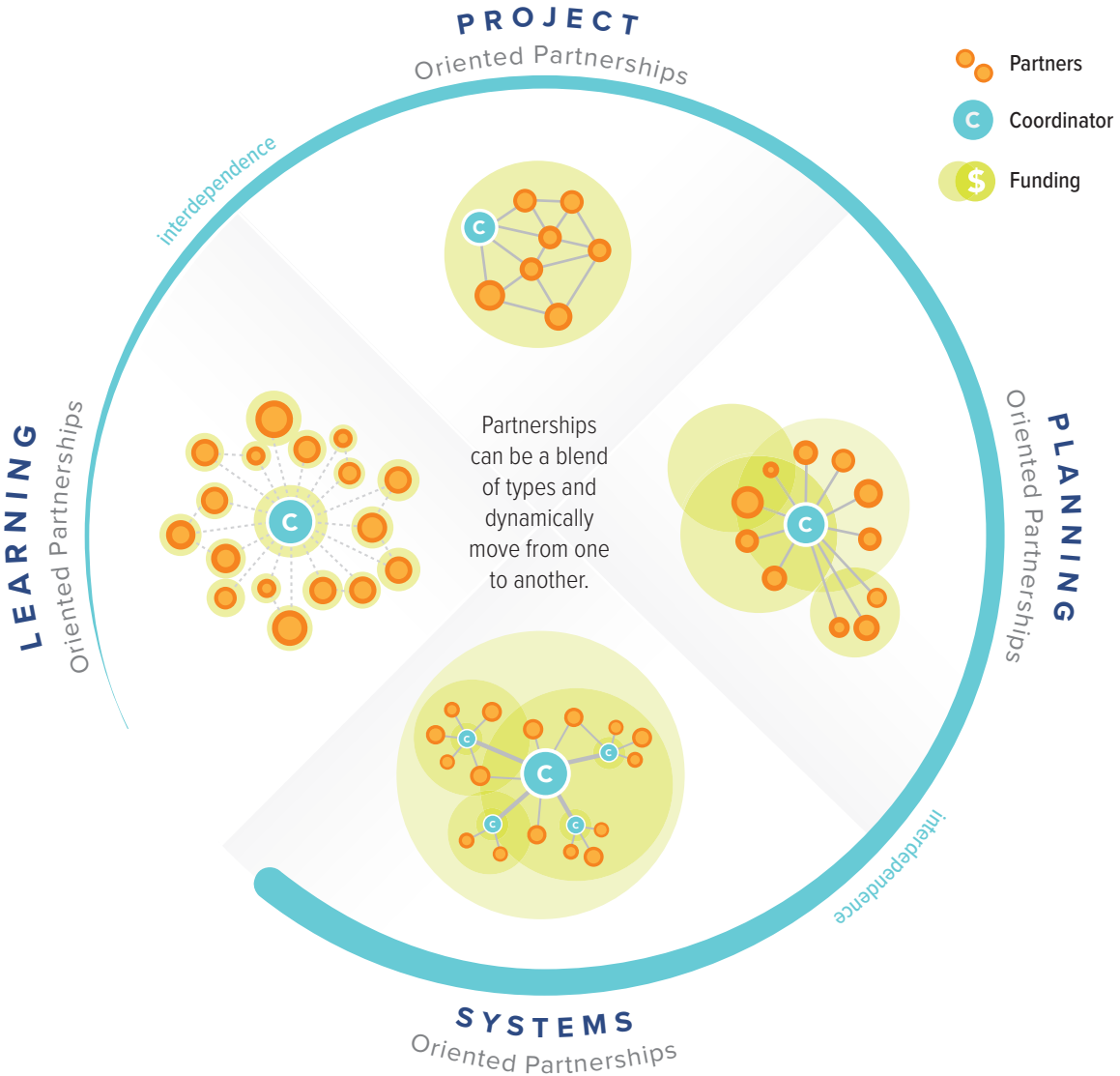
We also received consistent feedback that the partnership type names from the literature were confusing: Cooperative, coordinating and collaborative partnerships were too similar to easily remember. Also, although partnership types were described as a gradient, people often misinterpreted them as discrete types.

Incorporating this feedback, the partnership types are now described as a circular continuum with no assumed endpoint or preferred type. The types were also renamed – learning-oriented partnerships, project-oriented partnerships, planning-oriented partnerships and systems-oriented partnerships – to emphasize the focus of the collaborative work, which is correlated with the level of interdependence. Partnerships can still do various types of work, but they are named for the focus of their collaborative energy. For example, all partnership types may implement projects. A project-oriented partnership will focus their collaborative energy on coordinating and implementing projects, while a planning-oriented partnership will focus their collaborative energy achieving the goals of a long-term strategic action plan, which would include project implementation but also collaboration in fundraising, monitoring and ongoing updates to their plan. A project-oriented partnership typically engages in planning at the beginning of their collaborative work together as they define priority actions and secure funding, but partners might not be committed to working together on an ongoing basis to reach long term goals.

To maintain confidentiality and minimize the influence on any future funding decisions, partnership types are not described with reference to specific partnerships, but rather fictionalized descriptions of each type were created by merging details from different partnerships that best fit each type. Some of the details from these descriptions may not match a particular partnership, even if it fits well within that type, because there is natural variation in how partnerships operate, even within a given type.

It is important to note that some partnerships may be a blend of different partnership types and others may not fit well into any partnership type if they do not have a well-defined focus or structure or if they are struggling to operate as intended.

The partnership types below are defined by the relative autonomy or interdependence of partners. This originates from the Public Administration literature (Mandell and Steelman 2003; Cigler 1999) and was further developed inductively through 'grounded theory' analysis of data from the partnerships in this study.



OWEB's Partnership Technical Assistance grants would be suitable for any partnership type. OWEB's Focused Investment Partnership grants, with their focus on implementation, would be suitable for project-oriented, planning-oriented or systems-oriented partnerships.

A TYPOLOGY OF

Partnership Types

$ Funding for Coordination Interdependence among partners



Learning-Oriented

*Partners are **fully autonomous** with **little interdependence.***

Partners come together to tackle shared questions to improve strategies, practices or policies. Partners independently apply their learning. A coordinator serves as convenor.



Project-Oriented

*Partners are **mostly autonomous** with **some interdependence.***

Partners go through an initial period of collaborative planning and commit to a set of shared actions. Their main focus is coordinating implementation, often with each partner leading their own projects. After projects are complete, the partnership may dissolve or reorganize around a new focus. A coordinator serves as a project manager, a role which may be rotated among partners.



Planning-Oriented

*Partners are **moderately interdependent.***

Partners engage in iterative cycles of collaborative long-term planning and work together to implement shared priorities. Individual partner organizations may have to shift how they operate to align with the partnership overall. A coordinator serves as a facilitator, planning coach and project manager, a role which is usually held by a partner organization who may also contract with an independent facilitator.



Systems-Oriented

*Partners are **greatly interdependent.***

Partners engage in iterative cycles of collaborative long-term planning and establish shared standards, practices and systems to hold each other accountable to systems change. They work through differences, achieve alignment and coordinate for implementation. A coordinator serves as collaborative leader, facilitator and project manager, a role which may be held by a partner or host organization who may also contract with independent facilitators.

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Learning-oriented partnerships

Partners are fully autonomous. They come together to tackle shared questions to improve strategies, practice or policies. Partners independently apply their learning, or in some cases collaborate with one or a few other partners. A coordinator serves as an a convener. A partner organization may serve this role.

A hypothetical learning-oriented partnership

- **Initiation** – A partnership forms around the desire to learn together and improve the use of a particular restoration treatment.

- **Structure** – The convenor and leadership team frame up the issues, develop a schedule for regular meetings and organize workshops, conferences or trainings that may include experts and peer learning. They secure funding for the gatherings, communicate with partners about opportunities to participate and disseminate new learning.

- **High performance** – The partnership performs well when partners ask hard questions, integrate the latest science and engage in dialogue. When learning is salient to their work, individual partners apply what they learn to their individual projects. If the learning is salient to a broader policy context, partners might coordinate to share their findings with policymakers or advocacy organizations, individually advocating for a policy change that they developed collaboratively.

- **Potential evolution** – If a subset of partners find synergies in how they want to apply their learning, they might develop a project together, secure funding and implement it together, forming a project-oriented partnership within the larger partnership.

- **Potential evolution** – If partners want to work more closely together over a longer timeframe and they develop enough interest from funders and/or political officials, the partnership can secure funding to transition to a structure with greater interdependence, potentially any one of the other three partnership types.

- **Low performance** – A learning-oriented partnership that is not performing well might be reduced to a series of meetings where partners report what they are doing, which typically does not provide enough value to stimulate learning or improvement. Learning-oriented partnerships that are not effective lag in participation and dissolve or pause until there is new energy and direction.



John Day Basin Partnership PHOTO / HERB WINTERS



John Day Basin Partnership PHOTO / HERB WINTERS

Project-oriented partnerships

Partners are somewhat interdependent. They go through an initial period of collaborative planning and commit to a set of shared goals and actions. Their main focus is coordinating implementation to maximize impact and efficiency, often with each partner leading their own projects. After projects are complete, the partnership may go through another period of planning to secure funding to work together again, they may dissolve, or they may reorganize around a new focus. A coordinator serves as a project manager, a role which may be rotated among partners.

A hypothetical project-oriented partnership

- **Initiation** – A group of partners starts with a regional restoration plan to identify a set of actions and a theory of change that they are well positioned to implement. They draw from the regional plan to develop a strategic action plan and work plan, agree on the terms of their partnership, secure funding and implement the work plan together.

- **Structure** – The partnership meets regularly to coordinate and streamline implementation. They work together to develop a database to track implementation.

- **High performance** – They trust each other that each partner is following through on the tasks they agree to. They address questions as they come up. If problems arise, they work to quickly resolve the issue, typically through compromise, so they can resume their focus on implementation.

- **Potential evolution** – After they complete their funded projects, they might seek out additional funding to continue working together or they might transition to focus on implementing projects individually. If they do not find funding to implement projects together, they are unlikely to stay together. However, they may find value in maintaining relationships and informally sharing updates.

- **Low performance** – If project partners do not communicate openly about their activities and progress with implementation, they may start to form negative judgments about each other's performance. Once mistrust flares up, partners are less likely to share information or ask questions as issues come up, which leads to more problems with implementation and coordination. The ability for the partnership to deliver on their work plan can suffer overall even though some partners are still performing well individually. With low performance, partners tend to stay together to satisfy the terms of their funded work and then part ways.

Planning-oriented partnerships

Partners are moderately interdependent. They engage in iterative cycles of collaborative long-term planning and establish work together to implement shared priorities. Individual partner organizations may have to shift how they operate to align with the partnership overall. A coordinator typically serves as facilitator, planning coach and project manager, roles which may be shared among partners or covered by a team of staff from a sponsoring organization, sometimes also contracting with independent consultants.

A hypothetical planning-oriented partnership

- **Initiation** – A group of partners come together to systematically work through a planning process, create a partnership structure and launch fundraising efforts to implement their plan. Partners identify key questions and uncertainties and a monitoring plan to track progress of the initiative overall.

- **Structure** – They establish a partnership structure, including some kind of steering committee with representatives who are asked to make decisions in the partnership's best interest, not the interest of their individual organizations. Steering committee members rotate every few years. They raise funds to hire staff, such as a partnership coordinator, a communications lead and a monitoring coordinator.

- **High performance** – Different partners take the lead on securing funds to implement different parts of the plan, and they coordinate to ensure that work from different funding sources is aligned with the plan they collaboratively developed. Partners periodically reflect on their progress overall and what they are learning from implementation and monitoring so that they can update their plan and adjust their priority actions.

- **Potential evolution** – Their work typically spans more than a decade so they develop their partnership structure and governance practices to be resilient in the face of staff turnover, changes in funding and new learning. Their structure shifts over the years, but they can continue to operate in a similar form for many years.

- **Low performance** – A planning-oriented partnership that is not able to secure funding may stay together with low level activity implementing the plan they developed together. People's commitment may lag, and it may be difficult to follow the governance practices and maintain the structure. It may be difficult to convene partners to regroup and adjust.



John Day Basin Partnership PHOTO / HERB WINTERS



John Day Basin Partnership
PHOTO / HERB WINTERS

Systems-oriented partnerships

Partners are highly interdependent. Partners engage in iterative cycles of collaborative, long-term planning and establish shared standards, practices and systems to hold each other accountable to long-term change. They work through differences, achieve alignment and coordinate for implementation. The complexity of their work may require committees. A coordinator typically serves as a collaborative leader, facilitator, planning coach and project manager. A partner organization may take on these roles, often hiring staff and contracting with facilitators.

A hypothetical systems-oriented partnership

- **Initiation** – A group of partners is highly motivated by the potential for coordinated learning, action and systems change. They have the support of funders and/or elected officials that gives them confidence that they can invest in the infrastructure to support a more interdependent model of collaboration over a longer time frame.

- **Initiation** – As they collaboratively develop a strategic action plan, partners consolidate the latest science and best practices and develop standardized protocols and procedures for all partners to follow. They also frame up key questions and uncertainties, which they use to develop a monitoring plan to track progress.

- **Structure** – The partnership is governed by a steering committee that includes representatives from partner organizations and external members including tribes and neighboring communities. They have various committees that oversee implementation of different parts of their work, but all of the committees gather and engage in learning together once to twice a year.

- **Structure** – The partnership has centralized staff housed in one of the partner organizations that includes a partnership coordinator, a tribal liaison, a community outreach coordinator, a monitoring coordinator and part-time leads for each of the committees that serve as project managers for that section of the work plan.

- **High performance** – Centralized staff work with restoration leads, monitoring leads and researchers to track progress, tell the story of their cumulative impact and apply findings to adaptively manage their future approaches and actions.

- **Potential evolution** – As the partnership evolves, their initial investment in the partnership infrastructure pays off in terms of well-coordinated implementation of complex projects across a large geography. They build relationships with university and agency researchers to focus research on high priority questions. They secure long-term consistent funding, including congressional appropriations and/or a local bond.

- **Low performance** – Despite high initial investment in partnership infrastructure, if a partnership is overly ambitious with their goals or the complexity of their work, they may not be able to show progress with implementation fast enough to secure enough additional funding to keep the partnership operating. Because it is so expensive to operate a highly interdependent partnership, it is likely that partners will not be able to maintain the structure or processes they built. The partnership is likely to dissolve or refocus on less complex projects at a smaller scale.

Partnership focus and context

To clarify, all partnership types may implement projects or focus on learning, but the type is determined based on where the primary focus of collaborative work lies, which is closely correlated with the degree of autonomy or interdependence partners have as they work together. If a partnership's primary focus is learning, the structure, function and level of interdependence among partners will be very different from a partnership who holds annual meetings for reflection and learning but whose primary focus is working together on strategies to reach their long-term vision of restoration.

Partnership type is influenced by who is motivated and invited to join, how partners define their vision, the leadership style of core partners and the level of commitment and resources partners are willing to dedicate.

The context of a partnership's work can also shape the partnership type and what performance looks like. Partnerships working in social-ecological systems that are well-understood with well-established best practices are more often structured as project- or planning-oriented partnerships with more focus on the efficiency and coordination of actions. Partnerships working in social-ecological systems with many unknowns and little to no research to draw from require a focus on learning, which means they are more often structured as learning-oriented or systems-oriented partnerships, sometimes planning-oriented partnerships if there is a moderate level of understanding of the system.

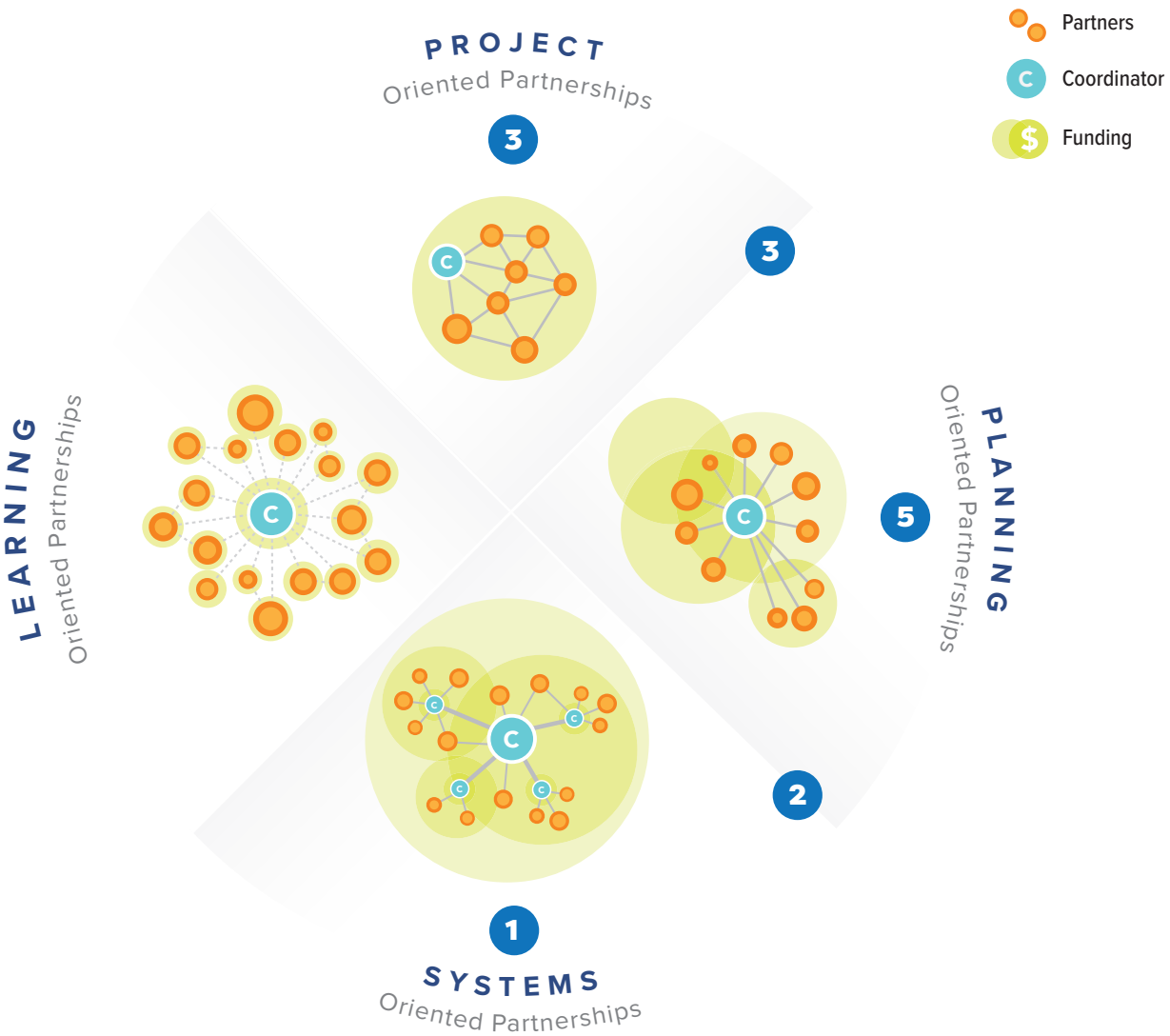
In situations when the system is not well-understood but funders or political leaders put great importance on the issue or problem, a partnership is more likely to attract the funding and commitment needed for a systems-oriented partnership to focus resources on learning alongside action and systems of accountability. However, there is greater risk for individual partners in these situations that it may take substantial time to build the learning and capacity to determine the best course of action and then more time before results are seen. If funders or political leaders do not see progress quickly enough and reduce funding prematurely, the value in ramping up the infrastructure needed for a systems-oriented partnership may be lost if they need to transition to a lower level of commitment and infrastructure, such as a project- or learning-oriented partnership.



John Day Basin Partnership - Members and agency partners tour a process-based restoration project funded by the FIP in the Thirtymile Watershed, May 2023.
PHOTO / HERB WINTERS

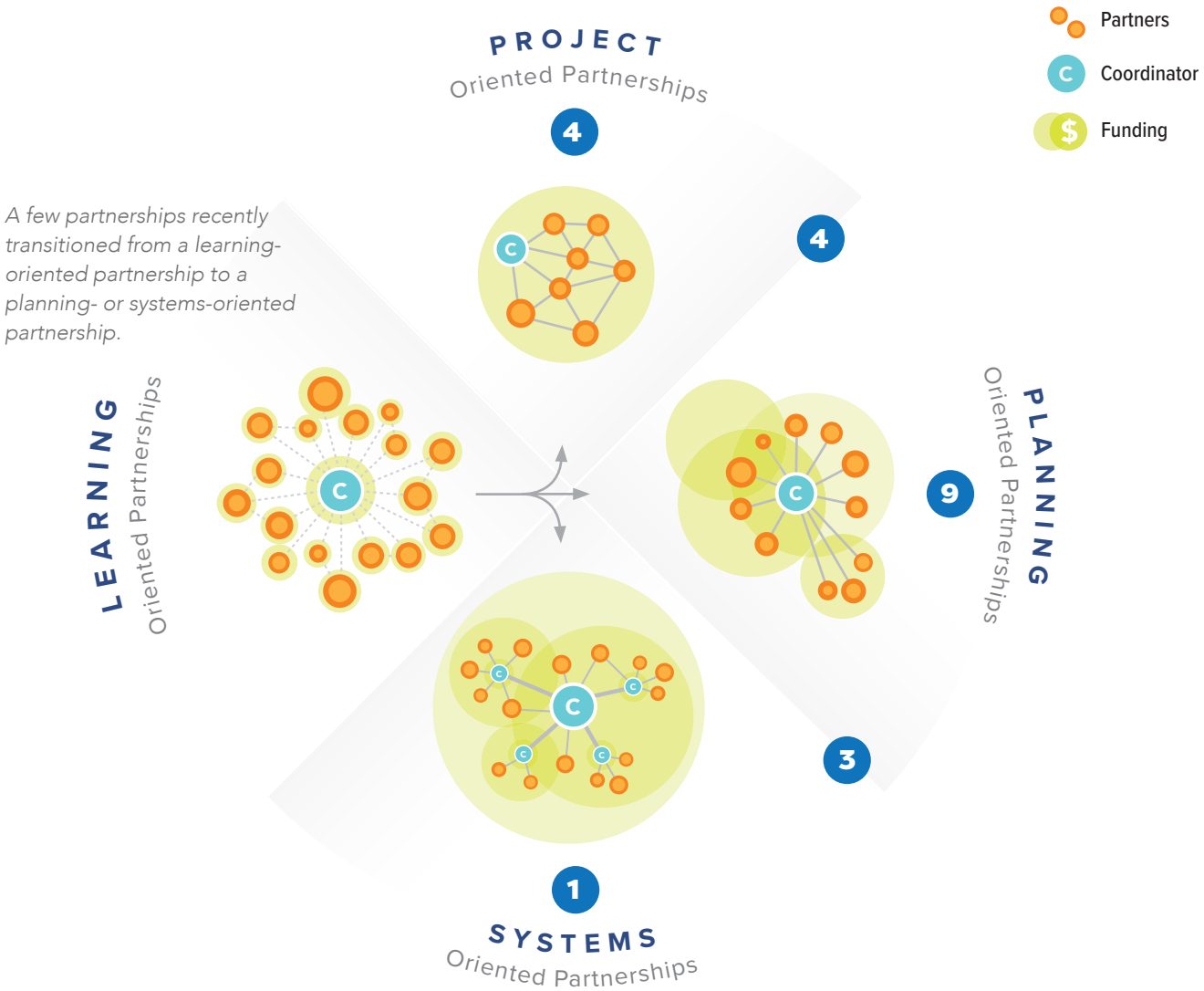
Estimation of partnership types for funded partnerships

Based on the 14 FIP partnerships that provided enough detail to estimate partnership type, FIP partnerships were mostly in the range of project-oriented to planning-oriented partnerships with a few leaning toward systems-oriented partnerships. None of the FIP partnerships fully operated as a systems-oriented partnership, and none were structured as a learning-oriented partnership.



Numbers above indicate the number of FIP partnerships associated with each partnership type or the gradient between types.

Looking at all 21 partnerships that received a FIP and/or P-TA grant and provided enough detail to estimate partnership type, they followed a similar pattern. None of the partnerships who responded are currently structured as a learning network, but several clearly had been functioning that way in the past, including two learning-oriented partnerships who later became FIP grantees operating in the range of planning-oriented to systems-oriented partnerships.



Numbers above indicate the number of FIP and/or P-TA partnerships associated with each partnership type or the gradient between types.

Reflections on partnership types

During this study, partnerships were asked to reflect which partnership type best describes how their partnership operates now, in the past and where they would like to be in the future. Many partnerships felt that this reflective exercise was helpful, especially as a group reflection.

When discussed as a group, new partners expressed how helpful and interesting it was to hear more senior members describe their partnership's history and current context. Some partners shared it with new colleagues to orient them to their partnership's context. This type of reflective activity, in which partners collectively reflect on their past, present and future, is a well-established practice for building group cohesion and revisiting governance practices (Arnold and Bartels 2014). Incorporating this tool into a reflective exercise can help support clarity in structure, function and expectations among partners and funders.

Many people responded that they could see themselves in multiple partnership types depending on which projects or activities were going on. For example, if they had a series of learning-focused meetings, a few large project-focused grants and ongoing work with their strategic action plan, they wanted to respond that they were a learning-oriented, project-oriented and planning-oriented partnership. However, with encouragement to identify which one was the focus of their collaborative energy, people were able to choose one type or a blend of different types.

"[The partnership types] were really helpful and eye opening for describing and thinking about our partnership.

I think this partnership will never be a systems partnership. I mean there are just too many distinctly different missions of the various partner organizations, which gives it huge strength. A huge part of the strength of the partnership is that it is so diverse [and] able to accomplish so much, [plus] the fact that the trust has been built and we have [farmers] involved so strongly."

"Initially, when I looked at this, I jumped right to the project-oriented partnership... [since] for the most part, we're all kind of working off that one funding pool, and individually, we all kind of have our own different opportunities for funding as well.

But the more I looked into this, I would agree that I think we're a systems-oriented partnership with a little bit of all these other partnership types tied in. There's a learning-oriented piece to our partnership with our [annual meetings, which is a] big effort to merge research and management and revisit [our strategic action plan] as information comes in.... So yeah, we've got an interesting dynamic with our partnership. Half of our programs are supported in a large way by [a couple of funding programs] and then the other half of our partnership is funded through other avenues – but what really brings us together are our common goals and objectives. That is kind of an interesting dynamic."

"I think the partners have gotten more committed over the years as the [partnership] has achieved a track record of success in securing funding and project implementation. There were initially some doubts from local partners about whether to join in the effort, or whether it would impact their own strategic priorities and funding opportunities."

A few findings emerged from people's reflections on partnership types:

- Project-oriented partnerships described going through an intensive period of collaborative planning after which they remained fairly autonomous, coordinating and tracking progress in an agreed upon format as they independently implemented projects described in their plan.

- Any partnership type may have a subgroup of partners who form a smaller project-oriented partnership, typically in response to a funding opportunity with specific tasks and timelines that are consistent with and nested within the larger partnership structure and focus.

- All partnership types may have peripheral partners who are tracking but not directly participating in partnership activities. These peripheral partners may have a very different view of the function and structure of the partnership from core partners, who are in a better position to understand and accurately describe how their partnership operates. If core partners do not see the partnership similarly, then this is an area that likely could use improvement for greater clarity and cohesion.

- As partnerships evolved toward increased interdependency, several described perceptions of increased risk and the opportunity costs associated with greater commitment. Perceptions of risk and benefits go into the internal calculations for each partner's desired level of commitment and collective negotiations to decide the structure and function of the partnership.

As an example of what this risk might look like, one partnership, during a group interview, described a somewhat intense negotiation process among partners. They were deciding which grant proposals would lead with the branding and logo of the partnership instead of a collection of logos from different partners, which had been their usual practice. One partner pointedly talked about the risk that this posed to their organization.

"We are many organizations [that make up this] partnership. As a non-profit organization, I'll speak [from my organization's] point of view, and this comes from a lot of experience. [Our organization] works in partnership with just about everything we do. It's very rare that we've got something that isn't involving some other organization or agency. We've got decades of experience with that. It is always a risk when you are working in a partnership that starts to take on its own identity, its own branding, that you suddenly get lost. As a nonprofit, who's trying to survive in this world and raise funds and be recognized, that's a risk. That can be detrimental.

For example, when people in [this area], which is the heart of our home, don't start recognizing [our organization, but] they recognize [the partnership instead], what does that mean for us? That's something that we have to constantly make sure that we're keeping in balance as we move forward in partnership."



Pure Water Partners - Volunteers work to replant a restoration area on the McKenzie River. PHOTO / BRETT ROSS

The acute pinch-point described here was most clearly felt by partnerships with a high degree of interdependence leaning toward a systems-oriented partnership type. However, these tensions may be felt for any partnership type. Some partners from different project-oriented partnerships described tensions when one or more partners shifted the energy and focus of the partnership in seemingly subtle ways that ended up causing a shift in outcomes and a reduction in the predicted benefits for one or more partners. In these situations, when these tensions were openly discussed and negotiated, the partnership maintained high levels of trust and buy-in. When the affected partners had relatively less influence within the partnership and were not able to have open conversations about their concerns and the direction of the partnership, those partners described lingering mistrust, even resentment when questions raised had no response. This type of mistrust can build up over time and impact the cohesiveness of a partnership.

Reflecting on these findings, **OWEB** felt this was an accurate description of the breadth of partnership types. They also felt that any partnership type except for the learning-oriented partnership should be eligible for the FIP grant and all partnership types should be eligible for the P-TA grant.

Currently, partnerships must have a strategic action plan or be developing one to be eligible for a P-TA grant. However, reflecting on the partnership types, **OWEB** wondered if perhaps a learning-oriented partnership did not need a fully developed strategic action plan and would be better served by some other type of planning document more appropriate to their focus and low level of interdependence.

OWEB also reflected that perhaps some of their expectations for FIP grantees may be based on unconscious assumptions that they should be operating as systems-oriented partnerships. **However, OWEB affirmed that they would like the FIP and P-TA grants to support a diversity of partnership types.** They will continue to consider these findings relative to their expectations of grantees and applicants.

Partnership Resilience to Withstand Stressors and Change

Resilience refers to the capacity of a partnership to withstand stressors and undergo change, while maintaining the integrity of the partnership's vision, identity and focus (adapted for partnerships from Walker et al. 2004). While there are many types of stressors, funding has a strong influence on the commitment of core partners and the ability to maintain the integrity of the partnership, referring to the integrity of the vision and scope even if the structure changes.



Grande Ronde Restoration Partnership - Sheep Creek, upstream mainstem near meadow. PHOTO / GRANDE RONDE MODEL WATERSHED

Resilience in the context of OWEB's theory of change

Referring back to OWEB's theory of change for partnership-focused investments, OWEB expected that P-TA grants would boost partnership performance and resilience by developing clarity around a partnership's theory of change, priority actions and governance to coordinate implementation. They expected some P-TA grantees would go on to become FIP grantees, but that most P-TA grantees, now highly competitive with their strategic action plans and strengthened governance, would find funding for implementation elsewhere, including OWEB's Open Solicitation program and other state, federal and private sources. To ensure that P-TA grantees got the most from this opportunity and developed strong plans and governance, OWEB developed resource guides on Strategic Action Planning, Monitoring, Adaptive Management and Partnership Governance, also publicly available for any partnership (referenced in OWEB's theory of change).

Most partnerships who received P-TA grants did describe this grant opportunity as a way to increase their readiness to do more complex work and position themselves to secure competitive funding.

"Our partners are invested in [our shared] goal, and it is helpful that one organization is coordinating the effort. The track record of success has built momentum, and partner commitments are likely to keep things moving. The [P-TA] funding from OWEB that enabled us to develop our [charter], strategic action plan, financial plan and communications plan has been important in building resilience. The process, though sometimes a bit painful, helped resolve many lingering disagreements or issues and got everyone on the same page. Now we have those documents to refer to and guide us."

- Quote from a P-TA grantee

As for the FIP grants, OWEB expected that dedicated implementation funding for six years would boost the performance of grantees accelerating progress toward their restoration goals, while also showcasing their successes making them highly competitive for other funding sources. OWEB never intended to fund individual partnerships on a long-term basis, but rather to invest in their performance for six years with the expectation that FIP grants would be a catalyst for greater investment and impact beyond that timeframe. Funding partnerships for six years also allows OWEB to fund different types of partnerships over time, focused on different ecological priorities in different parts of the state.

Partnerships consistently described the value of the FIP grant in terms of boosting performance like 'rocket fuel' and supporting resilience.

Several partnerships that received the FIP grant were explicit that the FIP grant didn't make or break them, but accelerated the work they were already doing. While other partnerships identified the FIP grant, and in some cases even the P-TA grant, as a primary driver of their forward momentum.

OWEB reflected that providing funding for more than six years would stretch partnerships to try to propose on-the-ground projects beyond a realistic planning horizon. Costs beyond that timeframe are also difficult to predict due to fluctuating material and labor costs, which have been especially challenging in the last few years. In OWEB's experience, some FIP partnerships struggled to put together strong project proposals in their last biennium of funding due to changing conditions and new information since they developed their FIP application. They also found it can take partnerships 2-4 years to implement projects, which means up to 8-10 years to complete all funded projects.

"The FIP funding has been a wonderful come-alongside for our partnership; our partnership does not exist because of it."

"[After the FIP funding,] we may just go our different ways unless we find another funder to keep it going."

"When our partnership was first founded, we were trying to grapple with all of the threats to [the species] and their habitat and figure out how pooling our knowledge, resources and projects could move the needle. After a number of discussions, we realized we needed a formalized [strategic action plan], which two very smart partners authored for the group. We next explored how to take action on [the plan], and one of our partners encouraged the group to apply for a FIP grant. We tried it, and I don't know how to describe what a tremendous difference it has made for our partnership to be able to fund the work we knew needed to be done – and utilize FIP grant funds to leverage other funds, expand impact with other projects, and encourage private landowners to get involved. It was like adding rocket fuel to our plan.

In all, our partnership structure, function and partner composition hasn't changed much over time, but our impact has grown so much farther than we could have done without OWEB coming alongside our vision. The funding through OWEB has allowed us to address many urgencies, and we are in place as a partnership where we are able to step back and start thinking more deeply about our next steps in order maximize investment of time and resources on a scale we couldn't imagine being at prior to the FIP grant."

Partnership dynamics after the end of a P-TA or FIP grant

As of 2022, seven out of 25 P-TA grantees went on to receive a FIP award. These partnerships reflected on the power of receiving both grants, one after another.



OWEB-BEF retreat, January 2023. PHOTO / JENNIFER ARNOLD

"In [our watershed], partnerships have been occurring for 10-20 years, but on a smaller scale than today. Once [this partnership was] formally created, the group was awarded a [P-TA grant] that led to the creation of [governance documents] and a steering committee, [which] were critical to our success. Then the hard work began to develop a strategic action plan that brought everyone to the table to start looking at the long-term planning and prioritization in the basin. [We created our plan, which] remains the backbone of the partnership's vision. A successful FIP proposal shifted the focus to project implementation with a smaller focus on planning. … There have been small hiccups along the way, but generally, the partnership has remained cohesive and highly functioning. Some key steering committee members with institutional knowledge of the effort have moved on, but these positions were quickly filled with ambitious individuals that kept the momentum going. Recently, the steering committee has begun discussing more long-term initiatives, but this is still being evaluated."

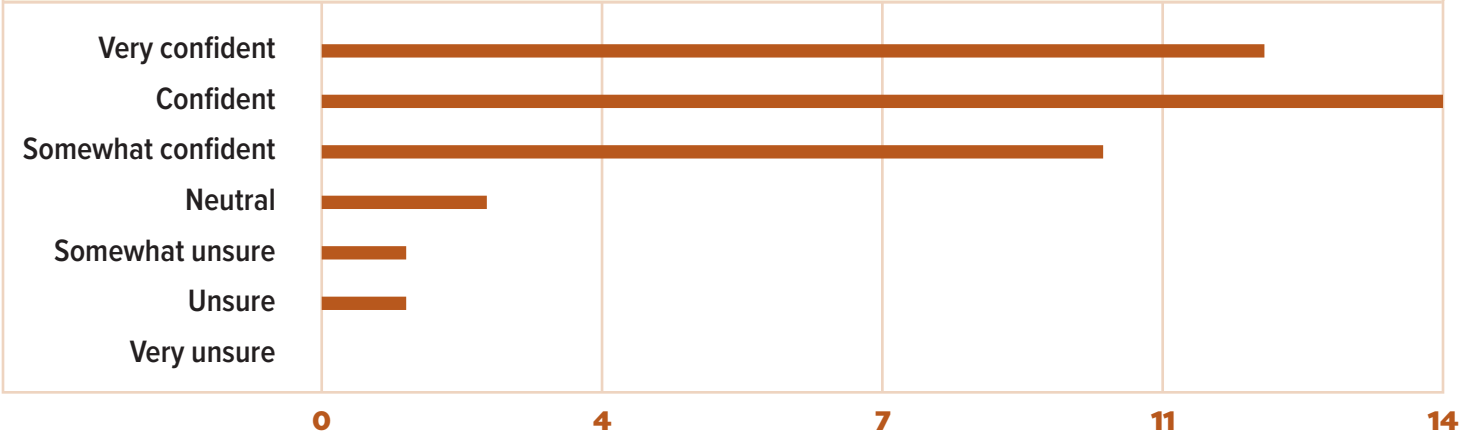
Several other P-TA grantees, who applied for a FIP but were not selected, also reported that they have been highly successful securing other funds, including OWEB's Open Solicitation grant, state, federal and local funding sources. One partnership reported that they have been so successful in raising funds that they recently declined a large federal award that had too many administrative strings attached. They were able to make this choice because they had other large grants.

When asked about their future outlook, many partnerships felt confident that they would be able to sustain their partnership's work as different funding opportunities come and go. Several partnerships expressed confidence based on their history of securing tens of millions of dollars in federal funds and/or hundreds of thousands of dollars in private funds. Two partnerships developed a steady source of funding from rate-payer fees to balance out the ups and downs of funding from grants.

Resilience to Funding Changes

To what extent do you feel confident that your partnership will be resilient and sustain its work as different funding opportunities come and go?

Note: This reflects survey responses only and not responses from interviews or group discussions.



A few of the FIP grantees anticipated that they might have to scale back their work after the FIP was over and/or rely more on federal resources, while a few considered potentially restructuring the partnership, merging with another or splitting off to focus on a different issue or geography, potentially applying for another P-TA or FIP grant. A few other partners anticipated a state of flux and uncertainty after their FIP or P-TA grants.



Oregon Model to Protect Sage-Grouse - Installing sage grouse fence markers.
PHOTO / LAKE COUNTY SWCD

"We have a diverse funding pool at this time. However, the funding commitments are linked to the timeframe of the FIP – 6 years. [We are] uncertain if funders will continue to invest after that timeframe."

"I'm confident in our [partnership] and the existing OWEB FIP support. What might come next for [us] after the FIP funding is over? I suspect that partners will lean heavily on funded government agencies to continue the work with limited and less formal wider collaboration."

However, not all P-TA grantees went on to implement the strategic action plans they developed with their P-TA funding. After the end of the P-TA grant, three partnerships described their partnership as somewhat or completely dormant until they can secure additional funds and/or re-energize a potentially new configuration of partners, which likely would also require an updated planning effort. Those partnerships that have been able to hang on until more funding is secured often rely on one or more partners who are fiscally and organizationally well-established and/or private funding sources to keep at least a minimum of communication and coordination. One partnership described a series of work groups within the partnership that "dissolved overnight" as soon as private funding for the work group coordinators ended.

One partnership described a process of dissolving a previous partnership structure and reorganizing around a new focus, after which they described being ready to respond to emergent funding opportunities. This newly structured partnership quickly launched into implementation with a sudden large funding opportunity, gaining new energy and momentum.

"[Our partnership] began largely as a group of organizations with similar goals and overlapping geography to prioritize planning and actions that worked in tandem and leveraged one another. As we worked together, we coalesced around the notion of a [partnership fund] through which partners would pool resources and facilitate partner-approved projects and priorities. As we further developed [governance documents] for working together, we focused more on the roles and strengths that each organization brings to the table in terms of Coordinator, Funder, Implementer, etc. The partnership framework paid dividends in being nimble and ready to respond to [needs that emerged suddenly in the region] and to best execute the various landowner, implementation, and oversight [tasks required with the large amounts of funding available]."

Partnership dynamics in response to other stressors

Besides changes in funding, another prominent stressor that was mentioned by at least 12 of the 26 partnerships we heard from was the loss of a coordinator and/or key leaders in the partnership. Several partnerships described the process as challenging but ultimately rewarding and positive as partners pitched in during the transition and onboarding process. Several FIP grantees reflected that it can be hard to retain a highly skilled coordinator or leader as they may be actively seeking opportunities to advance their career before the end of a big grant. This may be especially true in rural areas as hiring and retaining employees and board members overall is a challenge given smaller local populations to recruit from and limited housing for people moving to the area.

"Turnover among leaders at participating organizations has both delayed some actions and changed the nature of conversations as well as the focus – or what is considered the work that needs attention."

"Following the emergency response phase, the partnership is now trying to transition away from a task force incident command operation with its top down decision-making to collaborative system-oriented decision making – while we are still working at a pace that is not sustainable (we have not slowed down and are still running as if we are in emergency in some respects), and we are trying to scale up. [There are] a lot of inefficiencies due to growth of organizations (onboarding new people quickly), expansion of the type of work we are doing, and scaling up work with the influx of funding."



Oregon Model to Protect Sage-Grouse – Spring development trough with wildlife ramp. PHOTO / LAKE COUNTY SWCD

One partnership also discussed a natural disaster in their area as a stressor that ended up reshaping the partnership and refining their theory of change, integrating a focus on human health and wellbeing. In this case, the stressor ended up bringing more resources and activating the partnership more than ever. However, the stressor also created a partnership structure modeled after a hierarchical emergency response incident command system, and now after the emergency has passed, the partnership has had to work through tensions associated with that structure to evolve to be more transparent and collaborative. The pressures they describe from quickly ramping up their pace and scale alongside the need to take care of staff and evolve their partnership is perhaps not as intensely felt in other partnerships, but definitely a common theme when large amounts of implementation funding are suddenly available.

Threads or elements of resilience

Throughout as partners reflected on what helped get them through various stressors, several threads or elements of resilience emerged as important across partnerships and partnership types. The analogy of thread is used with the idea that each thread helps hold the integrity and focus of a partnership, and together multiple threads reinforce each other, as in strands of twine, for even greater resilience.

1 Camaraderie – People like each other and are willing to go above and beyond to help each other when there is a need or crisis, which develops a sense of pride and care for each other. They enjoy their time together and feel energized working on shared passions and interests. This was frequently highlighted by partners when asked what inspired them to invest their time and energy into the partnership.

2 Success – Success breeds more success. Demonstrated success leads to a feeling of pride and shared accomplishment which then leads to more confidence and often more opportunities and more success. Referring specifically to success with funding, several people used a variation of a common phrase: Funding begets more funding. However, people also referred to smaller successes such as an inspiring meeting that catalyzed deeper engagement and commitment.

3 Formalized Commitment – Partners document agreements and plans. Partners unite around a common vision, partnership structure and a set of strategies and practices to get there, which is collaboratively developed. They formalized it into a plan and charter with partners as signatories. The level of commitment, complexity of the partnership structure and detail needed in the plan are dependent on the partnership type and the focus and context of their work.

4 Consistent Funding – Partnership coordination is consistently funded. Dedicated, consistent, flexible funding or in-kind support helps fulfill critical needs for coordination and also grant writing that keep partners together. Consistent flexible funding can also take care of unexpected needs. Even a small amount of consistent flexible funding can contribute greatly to resilience.



Rogue Basin Partnership – First annual Network of Networks gathering, May 2023.

5 Shared leadership – Partners work together to share responsibilities and decision-making to shape the vision and direction of the partnership. When shared leadership is a part of a partnership's culture and institutionalized in their structure and processes, they are better able to transition through staff changes, promote innovation and draw on the diverse strengths of partners to respond to challenges.

6 Openness – Leaders and partners are open to learning and change. They are able to reflect on the whys behind strong opinions, consider other views and recognize unknowns in the work. This gives them space to incorporate new learning and bring in people who have different perspectives.

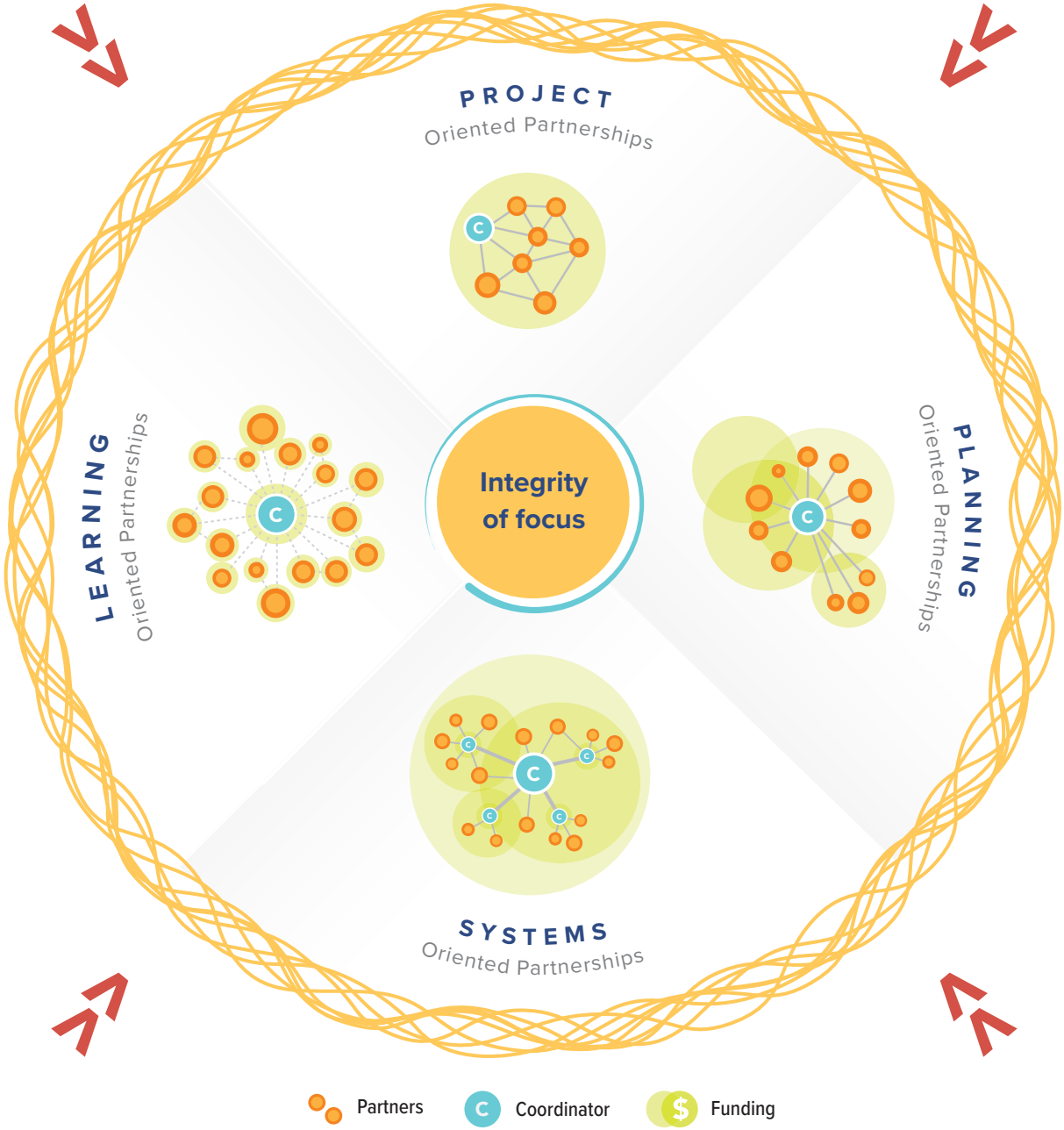
7 Organizational anchors – Fiscally strong partner organizations add stability and capacity. Partners draw from the leadership, stability and in-kind support of financially strong organizational partners to get through challenges. Strong organizational partners may lend particular expertise and experience that open up new opportunities and promote innovation. When strong organizational partners mentor and support other partners to build skills and capacity, the overall partnership becomes stronger and more resilient.

8 External Relationships – Partners have relationships with people and organizations external to the partnership who may introduce new perspectives, serve as a sounding board or help secure resources to extend the capacity, relevance and influence of a partnership.

As partnerships experience stressors, they may change from one partnership type to another while maintaining their clarity of purpose and core members - or they may dissolve, merge with another partnership or shift in purpose, scope and structure to form a new partnership.

Examples of stressors:

>> Loss of a coordinator and/or key leaders
>> Catastrophic events like fire or drought
>> Loss or gain of substantial funding
>> Inaccurate assumptions in the theory of change
>> Strong critiques and/or opposition



THREADS OF

Partnership Resilience

Resilience refers to the ability to withstand changes and stressors and still maintain the integrity of a partnership.

The following threads, or elements, contribute to a partnership's resilience with multiple threads reinforcing each other.

- **Camaraderie**
  Partners like each other and pitch in to help
- **Success**
  Success creates more opportunities for success
- **Formalized commitments**
  Partners document agreements and plans
- **Consistent funding**
  Partnership coordination is consistently funded
- **Organizational anchors**
  Fiscally strong partner organizations add stability and capacity
- **Shared leadership**
  Leadership is shared among partners, both structurally and in the culture of how partners work together.
- **Openness**
  Leaders and partners are open to learning and change
- **External relationships**
  Partners connect with individuals and organizations who can be a source for new ideas and resources



Grande Ronde Restoration Partnership - Dry Creek Pre-Implementation, 2017.
PHOTO / GRANDE RONDE MODEL WATERSHED

Quotes describing threads of resilience

Camaraderie and organizational anchor

"It feels like a family at this point, and seeing the scale of projects increase significantly is particularly rewarding. The additional security added to the smaller organizations in the partnership is also appreciated."

Camaraderie

"When we face difficulties, we face them as a team instead of pointing fingers. I think we were all worried when our coordinator left, but members, myself included, were happy to take on the tasks to ensure that the [partnership] continued to operate smoothly until the position could be filled. Our new coordinator hit the ground running through the support/assistance of members and [the outgoing coordinator] and the transition has been relatively smooth. Our group is made up of individuals who want to get things done and are happy to help others (even if is outside of their duties) when needed in order to get something done."

Shared leadership

"The relationships that have developed over time have made our partnership more resilient to changes in funding. The steering committee, outreach committee, and fundraising committee have established the structure to find additional funding through long-range planning."

Shared leadership, formalized commitment, success and openness

"I feel [our partnership] has always focused on creating diversified funding sources that are more stable and predictable, moving away from living grant to grant. … I think once we complete our transition … to collaborative governance with the tools built to support the larger more complex partnership [goals and functions from operations to prioritization and equity to database upgrade, monitoring and reporting], the collaborative will become highly functioning and will attract funding over time…plus current large funding is over 5 years. We have seen that success breeds more investment and success. Adaptive management has been the cornerstone of [our partnership] over the last 2-3 years."

Formalized commitment and consistent funding

"Our partnership built relationships over time with stable funding sources. The structure and agreements in place provide stability from several sustainable sources. … The partner composition includes sources with large funding reserves dedicated to the partnership."

Consistent funding

"What's helped with the resilience for our partnership? Funding. Just even the $10,000 level of regular, consistent, very flexible funding has been instrumental."

Openness

"In the short time I have been working with these partners, I do believe we have something different here. Along with increased community engagement, the understanding of the ecological science of [this region and ecosystem] continues to grow. I have held past positions where collaboration was not a part of the problem solving process. And because of that, projects lost momentum, partners lost their passion and frustrations grew amongst colleagues. Progress stalled. I came to [this partnership] because I wanted something different and to be a part of something that can make a difference."

Openness

"I'm incredibly proud to be part of a group who is motivated and optimistic over the years. We don't dwell on failures, instead we try to learn from them and move on in a productive manner. We celebrate our achievements, but always realize there's more to do. We continually communicate and ask questions to make sure we are moving forward in the best way possible and assessing any mistakes we may have made. It's an honest group where egos and emotions get checked at the door. It's allowed us to focus on what needs to be done and we are lucky enough to have accomplished quite a bit because of that."

Organizational anchors

"Individual organizational financial strength is a big one. Financially stronger organizations frequently carry the day on partnership work. Individual leadership abilities and availability (time) also play a role."

Organizational anchors

"Commitment to the outcome. Our partnership came together and began the work with no external resources (just what our collective agencies already had) and we will continue to do the work we can ,as we can, regardless of how the partnership is funded. Obviously, we will get much more done with funding, but the partnership will not dissolve without it."

Organizational anchors

"There has been a lot of turn over at the local levels. One watershed council has completely disbanded with no staff for about five years. [Another] watershed council is on its fourth coordinator since the inception of this partnership. The [partnership] has also had complete turnover with four staff having left over time, and all of the current staff are brand new to the watershed. [One organizational partner] has been the single binding thread at the local level to maintain continuity. Having their national program strength and expertise has been very important, and they've expanded to having two staff, now potentially moving to three. However, the imminent departure of their coordinator will be a big setback to keeping momentum. More structurally sound local capacity and a stronger local central coordinating body are big missing pieces for long-term success for restoration in general in this basin."



Grande Ronde Restoration Partnership - Dry Creek Aiwohi Restoration Project Complete, 2022. PHOTO / GRANDE RONDE MODEL WATERSHED

Relationships, success and openness

"I think having a long history of working in a basin, building trust with community members and consistently performing good work while adapting and incorporating new findings, all help to add to our resilience. Our board members are a big part of providing credibility to the work we do within the community and supporting our staff. Our reputation helps us leverage and strengthen partnerships and apply to funding sources."

External relationships

"Having these relationships just really helps move the needle forward on all of our projects. I guess you could say we all know who to pick up the phone and call for what issue and what geography because we have this partnership. And it definitely helps us just strengthen our abilities across the board."

External relationships

"The breadth of the partnership provides many avenues to funding from federal, state and private funding."



Rogue Basin Partnership – First annual Network of Networks gathering, May 2023.

"Funding for partnership coordination or facilitation is very important, as the coordinator can be the 'glue' that keeps things cohesive."

Partnerships completing their FIP appreciated the opportunity to apply for a P-TA grant to support ongoing partnership coordination and/or refine their strategic action plan.

"Aside from the large consistent funding [from the FIP], I think what OWEB has done with providing some smaller grant opportunities to bridge the gap [after a FIP is very helpful]. It allows a bit of an update to our restoration plan and [for us to] spend some time really thinking about what we've accomplished and where our next highest priorities are in the basin. Having some of those other smaller funding opportunities allows the partnership to go through those cycles, while we still continue to implement a bunch of projects. Yeah, that's been really helpful, and hopefully our partnership can get there."

Barriers and gaps to increasing partnership resilience

Considering their resilience and long term outlook, partnerships reflected on barriers or gaps that OWEB and other funders could potentially address.

Not surprisingly given the focus of this study, a strong theme was the need for long-term consistent funding that includes partnership coordination, capacity funding for partners, implementation funding and notably also funding for monitoring, including coordination of monitoring efforts. Some people suggested that partnership coordination funding as part of the P-TA grant should be extended to five or ten years.



Salmon SuperHwy – This new bridge on Peterson Creek restored access to over 6.2 miles of upstream habitat to ESA listed Coho Salmon as well as Chinook Salmon, Chum Salmon, Steelhead, and Cutthroat Trout. Fish were documented spawning upstream of the bridge within weeks of project completion. PHOTO / JUSTIN BAILIE

Partnerships awarded FIPs frequently commented that the time needed to administer their grants was considerable and aspects of the program were described as time-consuming, repetitive, clunky and frustrating that took energy away from their partnership operations and project implementation. In contrast, partnerships awarded P-TA grants regularly appreciated the flexibility, support and efficient administration of P-TA grants. There were many specific suggestions for ways to streamline the FIP programs, described in the recommendations below. *(See also Findings: External Technical Review, Findings: Tracking Progress and Telling the Story)*

"In my experience with the [P-TA] grants, OWEB was very flexible. It felt like there was trust and professional credibility, and the administration of those grants was efficient and straightforward. That was all really appreciated. With other grant programs in OWEB [including FIP], people have had different experiences, and it can be a burden – to the point that we have some partners who just won't apply for OWEB funding."

Partnerships emphasized that monitoring was central to their resilience since it helped them both understand the effectiveness of their actions and tell the story of their progress to secure funding for ongoing implementation. Several partnerships also suggested that it would be helpful if OWEB can help communicate the value of a partnership approach to restoration to amplify their own communications efforts.

As funding was identified as a prominent driver of commitment and performance, partnerships had several suggestions for how OWEB could support, including looking for opportunities for greater alignment among funders and directly linking partnerships to funders.

Partnerships applauded OWEB for the FIP and P-TA programs, which in many ways addressed the gaps they identified, while also making suggestions for further ways that OWEB can support their resilience.

"Courtney [administered our P-TA grant, and she] is a great touchstone person [for all our partners.] There have been moments [in our planning process when we] just called her up and said, "Oh, my gosh, what is going on?" ... Because [OWEB is] so dialed in with all of the other groups throughout the state, for me anyway, it really provided this sense of perspective, kind of like, "You're not alone. It's okay. Other folks are dealing with it. [Your partnership] is doing amazing work, and your reputation is still fine. This is normal." And I could go back and put one foot in front of the other again. [That support has been] important!"



Salmon SuperHwy – A new bridge over Clear Creek, a tributary to the Nestucca River, and streambed reconstruction opened the watershed up for native fish use and natural stream function. Salmon were observed upstream of the bridge weeks after project completion. PHOTO / BRETT ROSS

Recommendations for OWEB to continue

- **A culture of openness and flexibility in grant administration** where grantees feel supported to share questions, challenges and new learning.
- **FIP grants with funding for six years of implementation**, including a breadth of funding categories that can be flexibly used: partnership coordination, stakeholder engagement, restoration, land and water acquisition, monitoring and technical assistance.
- **P-TA grants with up to three years of funding** for strategic action planning, strengthening governance and/or partnership coordination, including the streamlined and flexible administration of these grants.
- **Capacity funding for partnership coordination** as part of the P-TA and FIP grants, including the option for partnerships to apply for a P-TA grant after completing a FIP.
- **Clarify that capacity funding can be used for a monitoring coordinator position,** not to collect data, but for the coordination, synthesis and flow of information, including facilitation to interpret monitoring results together.
- **Learning opportunities for FIP and P-TA grantees** to support skill-building, peer learning and networking, especially in the areas of: monitoring, tribal relations, equity and inclusion, partnership coordination, fundraising and restoration strategies.

Recommendations for OWEB for further support

- **A clearer articulation of what OWEB considers successful performance**, especially with the FIP program.
- **More streamlined FIP grant administration** to minimize the time spent on administrative tasks so that more time can be dedicated to the partnership and its work, specifically in the areas of:
    - **Clear expectations of what is required with the FIP grant** explaining everything that OWEB will ask for over the course of the grant so partnerships can plan for the staff time needed,
    - **Shorter, more concise FIP project applications and ideally ways to reduce the number of project applications** to reduce redundancy with information explained in the strategic action plan and reduce time spent managing so many separate grants,
    - **More user-friendly online application portal and grants database** to to reduce the time spent with a clunky application and reporting interface (See Findings: External Technical Review)
    - **Clearer guidance for partnerships and technical reviewers** to address the concern that some revisions are time-consuming and do not change project design or outcomes (See Findings: External Technical Review), and
    - **Clearer expectations for reporting on monitoring projects** to reduce time spent with revisions. (See Findings: Tracking Progress)
- **Introducing partnerships to other funders** in federal and state agencies to minimize the time for each partnership to track down contacts for each funding program and potentially create a mechanism to share funding opportunities.
- **Alignment among funders,** especially around goals, timing, grant requirements and reporting, for example with the Oregon Water Resources Department's Place-Based Planning Grants, but also coordinating with other state agencies to collectively lobby for federal funding and make a strong business case for increased investment, for example with the Infrastructure Investment and Jobs Act.
- **Communicating the value and uniqueness of this partnership approach** to increase the visibility of partnership work across the state, which partnerships can use to amplify their own messages.



South Coast. PHOTO / OWEB

Understanding High-Performing Partnerships

One of the goals OWEB had for this study was to develop a framework for understand high-performing partnerships and better articulate what success looks like in the FIP and P-TA programs.

Performance refers to the ability of a partnership to achieve their goals and make progress toward their vision and desired impact.

"This partnership took a 'good idea' that was extremely ambitious and turned it into an on the ground, verifiable, actual success. What this partnership has achieved, at halfway to our goal, has been monumental."

Comparing across partnerships and inductively looking for patterns, it became clear that high performance looked different for different partnership types. Several categories of partnership performance emerged - **Clarity and Direction, Action, Learning** and **Alignment.**

Clarity and Direction, which included strengths related to mobilizing people and resources and securing commitment to advance the work, was needed for all partnership types to perform well. Performance in the categories of **Action, Learning** and **Alignment** were more or less important depending on the partnership type. Performance overall for a particular partnership type was driven by one or more categories of performance. Other categories could be beneficial but were not necessary for high performance.

If the partnership type is not considered when evaluating performance, the performance of learning-oriented or project-oriented partnerships may be underestimated due widely-held assumptions that more collaboration is better (Christen and Inzeo 2015).

The categories of performance are show on the next page and described in some detail here.

Clarity and direction

Leadership, dedicated partners and funding

Leaders mobilize knowledgeable people and organizational partners with diverse skills and perspectives who understand the issues and can advance the work. Partners have good relationships with each other and people outside of the partnership that can make things happen. Together, they secure funding that crystalizes people's commitment of time and energy toward a common purpose.

Clear purpose and scope

Partners are clear about the reason they are coming together, including the scope and focus of their work, which is realistic given the people and resources they have dedicated to the work.

Clear roles and decision-making

Partners clearly understand the roles and responsibilities of themselves and others, including how someone can join the partnership, if applicable. The structure of any steering committees or technical work groups is clear, including how people are chosen for those roles. For planning-oriented or systems-oriented partnerships, partners in leadership positions make the best decisions for the partnership and not necessarily their organization. Decision-making rules are clearly written, openly discussed and shared with everyone, including attention to the details that matter most to partners.

Effective communication and coordination

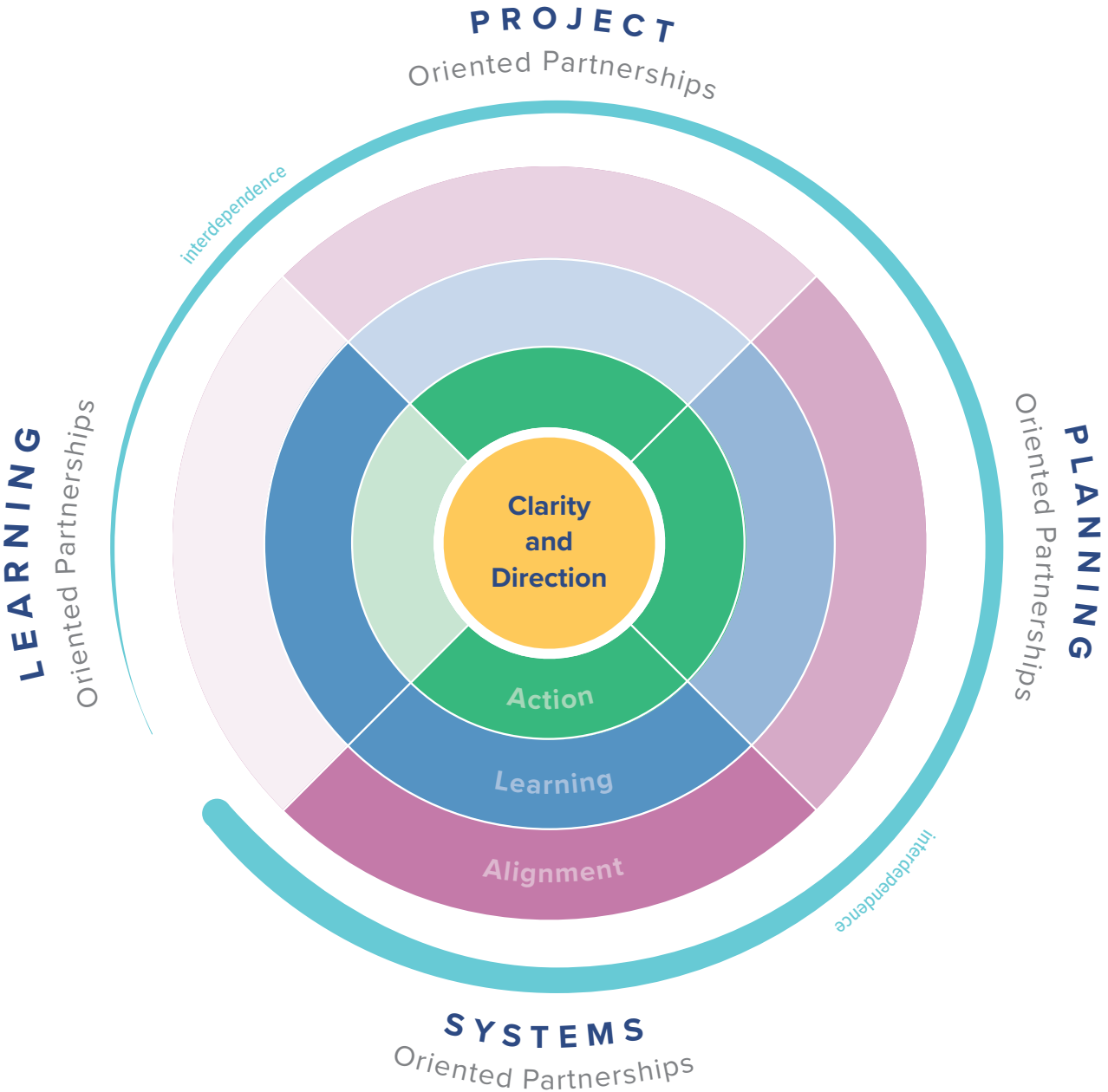
Partners share information with each other and engage in dialogue and problem-solving to build the understanding and relationships needed to advance the work. They coordinate so that their individual contributions effectively contribute to the overall goals and vision, avoid unnecessary duplication and minimize conflicts and inefficiencies. Partners who represent an organization maintain two-way communication between their organization and the partnership so that their organization's leadership is engaged and authentically supportive.

"[Our] partnership has significantly increased communication and collaboration among our local restoration partners. Due to this increased communication conveyed via email or during monthly meetings and/or site visits hosted by the lead coordinator, there has been more efficient evaluation, ranking, and prioritization of projects, as well as overall information dissemination and partner collaboration since 2016."

LOW HIGH

Performance refers to the ability of a partnership to achieve their goals and make an impact.

High performance looks different for different partnership types. Greater color intensity below denotes categories of performance that are highly important for overall performance for each partnership type.



UNDERSTANDING

High-Performing Partnerships

The following categories of performance were inductively developed from the data.

Clarity and Direction
- Leadership, dedicated partners, and funding
- Clear purpose and scope
- Clear roles and decision-making
- Effective communication and coordination

Action
- Strategic plan with prioritized actions
- Well-executed actions
- Ability to track progress and make improvements

Learning
- Trust to work through hard questions
- Incorporation of new learning and latest science
- Dissemination of learning

Alignment
- Standardized practices and norms
- Systems for feedback and accountability
- Ability to tell the story of learning and impact

Clarity and Direction are important for all partnership types to perform well, while other categories may be more or less important for overall performance depending on the partnership type (See Partnership Types). Partnerships can be a blend of different types and dynamically move from one to another.

Action

A strategic action plan with prioritized actions

Partnership actions are directed by a strategic action plan that explains the partnership's vision, long-term goals and context alongside strategies and prioritized actions. They have a clear theory of change that explains how their work is expected to lead to desired impacts over a specified timeframe.

- Project-oriented partnerships: Emphasis on prioritizing actions in a specific geography and timeframe after an initial planning effort, often based on an existing regional plan
- Planning-oriented partnerships: Emphasis on collaboratively developing a strategic action plan and prioritized actions and updating it together periodically
- Systems-oriented partnerships: Emphasis on identifying questions and uncertainties together as the strategic action plan is developed, implementing actions to test questions, reflecting on outcomes and incorporating learning into plan updates

Well-executed actions

Partnerships have a track record of well-executed actions with evidence that outcomes will be reached in time.

- Project-oriented partnerships: Emphasis on efficiency, scaling up and/or proof of concept
- Planning-oriented partnerships: Emphasis on implementation of a sequence of actions that together will yield a cumulative impact greater than individual actions
- Systems-oriented partnerships: Emphasis on learning so that well-executed actions lead to improved understanding of the system and standardization of strategies and practices that have the greatest likelihood for impact

Ability to track progress and make improvements

Partners have a framework for tracking progress based on their theory of change. They are able to collect data or evidence to learn from mistakes and improve as they plan future projects.

- Project-oriented partnerships: Often increasing the efficiency or effectiveness of projects
- Planning-oriented partnerships: Often increasing efficiency or effectiveness and/or re-prioritizing actions as conditions change or new learning emerges to have a greater chance of impact
- Systems-oriented partnerships: Often increasing efficiency or effectiveness and developing best practices, reprioritizing actions and/or revising the theory of change, sometimes restructuring the partnership with new committees to address new learning

Learning

Trust to work through hard questions

Partners bring up questions or suggestions that could increase the likelihood for impact, even when it may include uncomfortable or surprising feedback for others. Partners demonstrate respect for each other and work through discomfort to promote learning and improvement. Partnerships using skilled facilitation are able to discern which hard questions or topics will move them toward their goals and which may be distracting or unhelpful.

Incorporation of new learning and latest science

Partners create forums to deepen learning, share latest science and help people incorporate it into their work.

Dissemination of learning

Partners find creative ways to articulate what they are learning and share it with others.



PHOTO / ROBERT WARREN

Alignment

Standardized practices and norms

Partners work together to standardize best practices and norms, for example related to partnership culture, conservation practices, landowner outreach and engagement, monitoring and commitments to diversity, equity and inclusion. Systems-oriented partnerships may also align themselves in fundraising approaches, for example using the partnership's branding rather than individual branding.

Systems for feedback and accountability

Partnerships institutionalize processes and structures for feedback and accountability, for example technical review, post-implementation field site review and more formally adaptive management. These processes and structures create time and space for partners to ask questions of each other, reflect on progress, invite constructive criticism and commit to changes that have a greater likelihood for impact. Systems-oriented partnerships tend to be able to justify more detailed, time-intensive processes like formal adaptive management and more explicit mechanisms for accountability among partners.

Ability to tell the story of learning and impact

Partners are able to take all the project-level success stories and tell the larger story of what they are learning together and the cumulative impact of their work over time.

"We have a circular image of our process as a feedback loop. It basically has our prioritization in one corner, our implementation in another corner and then the other half is research, monitoring and evaluation, and then we have a shortcut in the middle, and that's [our annual meeting to look at the most recent science and data], [which leads to] ultimately adaptive management.

And [at our annual meeting] this past week, we hit that diagram on the head. It was awesome, and the reason why is because, better than we have ever before, we really looked at the data that we have and the data that was new, and we asked ourselves, "How does this change what we are going to do?" and we documented it."



PHOTO / ROBERT WARREN

Four Strategies to Enhance Performance and Accountability

OWEB wanted to better understand several specific dimensions of performance and accountability with respect to what they can expect from partners and how they can best support, focusing on the following four topics with findings described in the following sections:

1. **Trust among partners to ask challenging questions** to maximize the likelihood for impact, for example during the development of budgets, prioritization of projects, internal technical review or implementation
2. **External technical review of FIP projects**
3. **Expanding the circle** of people involved either as core partners or some other role, including consideration of underrepresented groups, and
4. **Tracking progress** toward goals by measuring ecological outcomes and telling the story of impact



PHOTO / ROBERT WARREN

Performance within any organization or team is linked to systems of accountability or checks and balances. People with relevant knowledge, expertise or perspectives are positioned to review work, provide feedback, ask questions, and provide support for resolution or improvement where needed.

Voluntary partnerships like those in this study, which do not have formal lines of authority typical of of hierarchical organizations, must rely on trust to develop and enforce internal processes of accountability. External accountability in this context is shaped by funders, technical reviewers and broader constituencies.

Many FIP grantees expressed recognition that with greater investment comes a greater sense of responsibility to use the resources well and have the greatest impact.

"As [we] build all this momentum, I want to make sure it is in service to conservation outcomes and we remain responsive to partner interests and needs. It just feels like with more investment, we have got to make this matter."

"The process that we went through in the development of the FIP grant was super helpful. There was sort of this desire to see success in delivering the best possible proposal that we knew how, and in doing that it meant asking hard questions of all of our projects – and to me that's a fantastic learning benefit of the partnership."

1 Trust among partners to ask challenging questions

From Part 2 of this study, many partnerships felt that relationships were somewhat fragile. Some people described how their partners tip-toed or shied away from bringing up challenging questions about performance and how to best target their efforts for the most impact. Partnerships emphasized that building trust at this level requires substantial investment in relationships along with skilled facilitation to create the space to listen to each other and make decisions together. Some partners felt that they had the facilitation capacity and relationships to do this, while others could see what they were lacking, often without knowing how to improve. In some cases, they requested more training and support for facilitation and consensus building.

In this study, partnerships again echoed the importance of relationship building, and many partnerships described success in regularly working through challenging discussions.

With the FIP and P-TA grant programs, **OWEB** has emphasized the value of governance documents and planning tools to structure collaborative work in ways that can support trust among partners. However, they also recognize that investments in relationships building, such as spending time together at site visits, are vital to working through challenging questions and directing work toward the greatest likelihood for impact.

"I think the challenging questions are asked at every single internal project review meeting, and there are no hard feelings when the group is split on a decision to fund. The partners have made really great changes and clarifications to their project in response to the group's questions and sometimes criticisms of the project. The group is always careful to make it about the project, not the presenter, which helps keep trust high."

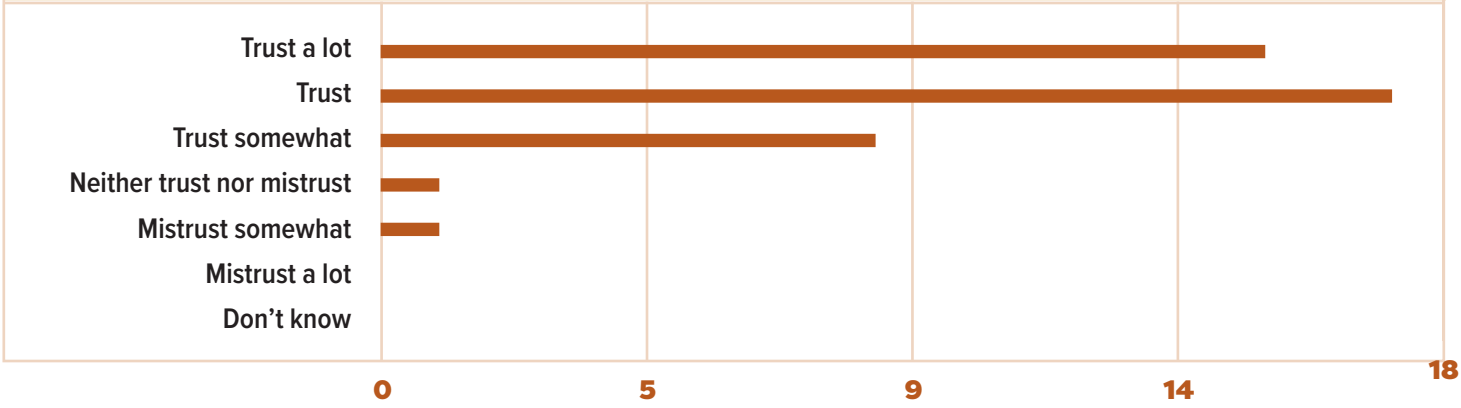


Oregon Central Coast Estuary Collaborative – Field trip, September 2023.
PHOTO / MIDCOAST WATERSHEDS COUNCIL

Current Trust Levels

To what extent do you currently trust your partnership to ask hard questions of each other so that collective decisions and actions have the greatest chance for impact?

Note: This reflects survey responses only and not responses from interviews or group discussions.



The literature on trust describes different sources of trust: i) dispositional trust, which refers to innate tendencies to trust that are shaped by a person's disposition, life history, cultural norms and social context, ii) relational trust, which refers to the investment in relationship building where people get to know and appreciate each other's strengths, weaknesses and unique characteristics, iii) rational trust, which refers to an intentional process of creating a clear track record showing follow-through on commitments and responsiveness to feedback, and iv) systems-based trust, which refers to setting up systems, procedures or rules for accountability (Robbins 2016; Stern and Baird 2015). Additionally, historical and sociopolitical forces that privilege some groups over others influence the potential for trust and power dynamics among partners (Wollenberg et al. 2005; Brouwer et al 2015). The context and these different sources of trust together shape what is possible within a partnership.



PHOTO / ROBERT WARREN

"Our partnership has been one of the highest functioning teams I've ever had the pleasure of being a part of, and I believe that is due to a high personal and organizational commitment to [restoration goals] in our specific area."

"The collective trust has increased through time, as the partnership has had lots of stability and chances for many partners to support each other through key processes."

Generally Increasing Trust

Reflecting on years of working together, most partners expressed trust in their current partnership and growing trust over time, which was often linked to collective pride in their accomplishments. Pride was described in terms of what they accomplished with their P-TA and/or FIP grants and in getting through difficult situations, for example partners going beyond their normal duties to collaboratively respond to leadership changes or natural disasters.

Sources of Trust

People from many partnerships expressed liking the people in their partnership and being inspired by their work together addressing issues they are passionate about.

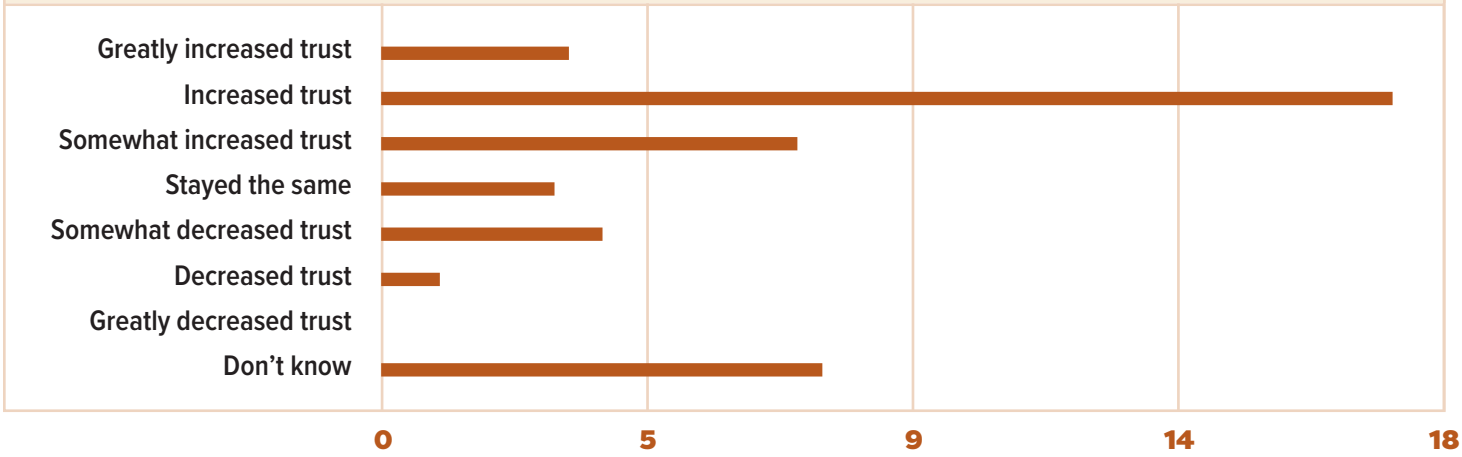
Several partnerships specifically referenced aspects of their governance, such as regular check-ins, an internal review process and a steering committee with representatives from different partnerships, that contributed to greater trust and performance.

Spending time together was highlighted frequently. One partnership reflected that sharing an office built foundational relationships that made deeper collaboration possible.

Changes in Trust

To what extent do you think that trust among partners has changed over the years, thinking about the trust needed to ask hard questions and make planning and budget decisions together to hold the bar high for performance and impact?

Note: This reflects survey responses only and not responses from interviews or group discussions.





Grande Ronde Restoration Partnership, Hall Ranch OSU Visit, 2015.
PHOTO / GRANDE RONDE MODEL WATERSHED

People from some of the rural partnerships reflected on how intertwined their professional and personal lives are. Several other partnerships reflected on the value of field trips for building trust, allowing people to talk about questions naturally as they come up and see connections between different projects.

People newer to a partnership with less understanding of its history tended to be trusting and optimistic about partnership performance. At the same time, many long-time partners who had personally experienced the ups and downs were also very trusting of their partners and some of the biggest champions of the value of their partnership.

One partnership directly referenced their culture of openness as a strength that has contributed to trust – for example openly discussing assumptions from their theory of change and recognizing when they were wrong about initial assumptions. They also appreciated that they could talk openly and honestly about their learning with OWEB, which reinforced trust in their approach.

> *"I think that's one of the strengths of what we've all learned together – admitting [when we got something wrong]. Celebrating successes also, but [admitting] maybe we should do it another way."*

OWEB has long been recognized by grantees for their open, supportive and responsive culture. Specifically, partnerships expressed gratitude to Courtney Schaff, Andrew Dutterer, Ken Fetcho, former OWEB Director Meta Loftsgaarden and former Deputy Director Renée Davis.

> *"Yeah, it's kind of fun to look back and joke with [each other] that we used to snorkel together all the time. Yeah, there are handful of us that have been around. And because we are rural and a smaller community, the connections outside of work are big. We connect on many, many levels, which is a good thing."*

Challenges related to trust

While trust is a good thing for partnerships, sometimes high levels of trust can create a sense of inflated confidence, where partners assume things will go well and place less attention on tracking each other's performance. Several partnerships described this pattern, including some which had been operating as a planning-oriented partnership but evolved into a project-oriented partnership, which makes sense since they are structured to allow each partner autonomy to accomplish their tasks with less investment in centralized processes for accountability. One partner, who shared a long list of accomplishments and examples of pulling through difficulties together, reflected that people in their partnership trust each other so much that they haven't set up a mechanism to check-in with each other. The partnership realized that regular check-ins would have been helpful when one partner experienced challenges with monitoring and it took a while for other partners to find out and offer support.

Strong opinions can also create challenges in a partnership and lead to reduced trust to ask questions for fear of strong responses. Two partnerships described experiences where key people with strong opinions closed down opportunities to work through challenging questions together. They found this inhibited trust and affected performance, where people avoided speaking up for fear of being attacked or blamed. In both cases, the strong opinions and division among partners reflected larger patterns of political divisions in the region. In both situations, things improved after the person with strong opinions left and partners made an intentional effort to improve communication and relationships. In one situation, the partnership structure remained intact, while in the other, relationships remained strained and partners openly talked about restructuring.

Lack of time and energy dedicated to reflection and open discussion was a common theme among partnerships who felt that trust has eroded somewhat, particularly those partnerships focused on implementation with ambitious goals and work plans. One partner reflected that despite all that they have accomplished as a partnership, some partners still do not share data freely, even when asked. Another partnership reflected that they used to have big heated discussions that everyone contributed to, but now over time, there are so many different funded projects that each person is more focused on their own and not as engaged in other projects or the big picture. With both of these partnerships, they described their current meetings as update round tables with little discussion.

Suggestions for partnerships

Even when performance is strong and trust is high, it is still recommended to put at least simple accountability measures in place to regularly check-in on performance. Reflective time to check-in on strategic direction is also recommended periodically to maintain partnership performance and resilience.

Recommendations for OWEB on trust

- **Continue to nurture a culture of learning,** where partnerships are encouraged to ask questions, work through challenges and celebrate new learning with each other and OWEB.
- **Encourage partnerships to use their funds for professional facilitation and/or build their own facilitation skills** to work through challenging topics, for example facilitating consensus, team building and agenda design.
- **If partners with strong opinions are impacting trust, encourage partnerships to seek professional facilitation or mediation support** to better understand and mitigate the situation.

"Larger projects have brought a much greater pressure and doubling down on getting the work done with less time to reflect and discuss. With several organizations involved in the same kind of work, there are more meetings, responsibilities and tracking responsibilities."



Grande Ronde Restoration Partnership, Sheep Creek culvert before bridge construction, May 2018. PHOTO / GRANDE RONDE MODEL WATERSHED

2 External technical review of FIP projects

FIP applicants go through an initiative level technical review as part of the selection and award process. When a partnership is awarded a FIP grant, they technically have an approved list of projects for the next six years; however, each project still needs to go through a more detailed project review to ensure that public funds are spent on well designed projects with the likelihood for impact. OWEB conducts external technical review at the project-level for FIP grantees at least once a biennium.

With this study, **OWEB** prioritized this topic to inform ongoing improvements in FIP project-level technical review. Their goal is to encourage challenging questions that keep the bar high for strong projects, while also respecting that projects have already been vetted through the FIP selection process and with some partnerships an internal technical review process.

Strengths

Overall, most partnerships felt that the FIP project-level technical review process plays an important role in developing good projects, recognizing project strengths and weaknesses and supporting stronger partnerships. Even partnerships who had their own internal technical review valued the added layer of OWEB's external technical review.

> *"I would say the presence of the technical review has been important. We've built more robust proposals because we knew they weren't just going to be taken carte blanche. It is important to have that technical review there as a motivator. And they do ask good questions."*

Partnerships consistently valued technical review for two reasons:

- Good questions that led to stronger projects and
- Transparency in how public funds are spent.

> *"I think the value is partly to improve outcomes but it also has value because it provides transparency and understanding among stakeholders."*

Important design features

Overall, partnerships consistently mentioned two important design features that made the review process meaningful:

- Local reviewers who understand local geography, local issues, project proponents and the partnership's history and track record, and
- The opportunity to discuss proposals with reviewers, in some cases even visiting field sites together.

"I appreciate that [the FIP technical review process] is more of a back and forth meeting to get questions answered, less formality. I also appreciate that we can suggest technical experts for the review. [It is] still kind of clunky but much better than how it started."

Several partnerships reflected that the FIP technical review is a stark contrast to OWEB's Open Solicitation technical review process, where regional reviewers are often not familiar with local issues and where there is no opportunity to interact. One partnership described their transition from the FIP program back into the Open Solicitation review process and noted a drastic contrast in reviewers' understanding of the context of their proposals. With the FIP project-level technical review, reviewers asked better questions because they understood the context of the strategic action plan and connections to other projects.



Siuslaw Coho Partnership - Partners gather on Waite Ranch in preparation for implementing a large-scale restoration project, 2022.
PHOTO / ELIZABETH GOWARD

Areas for improvement

The most commonly discussed area for improvement was the tedious work of filling out long project applications with repetitive questions to prepare for project-level technical review. A few people from different partnerships expressed frustration that FIP reviewers didn't always review their materials or understand the context, which they felt was related to the length of application materials. Many partnerships suggested that OWEB could do more to streamline application materials and be clearer with reviewers about their expectations. One partnership perceived that FIP staff were inconsistent in their guidance for what could and could not be included in a project application based on conversations with another FIP partnership.

Some partnerships were frustrated with the time it took to respond to minor questions that didn't change the projects or potential outcomes. Several partnerships commented that the online application portal was clunky and difficult to use. One partnership found it tedious to edit a project application to incorporate changes from multiple partners as part of the technical review process. (Currently, only one person can edit a project application at a time, and they asked OWEB if the online application portal can be changed to allow for multiple editors.)

OWEB responded that they know there are challenges associated with the online application portal and are working to streamline and update it as resources allow. They recommended that partnerships download the application template into a program that allows group editing and then, when ready, insert those responses into the online application.

Two people from one partnership described their challenges as a new OWEB grantee trying to navigate complicated rules for each of the FIP funding categories and prepare their applications with the appropriate level of detail for technical review. They described struggling to figure out what OWEB and external reviewers were

looking for. They strongly suggested that OWEB provide orientation to new FIP grantees – or even FIP applicants – so they would know what to expect twith project applications and project review. They strongly encouraged new FIP applicants to read through the detailed rules for each grant type to inform how partnerships put together the projects in their FIP application. Although these challenges were more prominently felt and openly expressed by this new FIP grantee, other FIP partnerships expressed similar comments that it took them time to figure out how to fit their work into project applications and the appropriate level of detail needed.

Another theme from the data was the emotional nature of some technical review discussions. A couple of individuals from different partnerships expressed concern that some reviewers' comments reflected personal bias or preference more than science, requesting that OWEB could play a role more effectively facilitating these situations so that reviewers explain the reasons for their concerns.

Several partnerships discussed the potential value of moving OWEB's technical review earlier in the design process – or using a two-phased review – so reviewers could comment on preliminary design ideas and have more of a chance to influence the final design. Otherwise, if significant changes were needed and only discovered later in the design process, applicants would have to make changes and resubmit in the next review cycle.

There were a few people who were skeptical about the value of the FIP project-level technical review process because they already had their own internal review process. One person felt it was sufficient that projects were already vetted through the FIP initiative level review process as part of the FIP selection process. However, the number of partnerships who valued OWEB's FIP technical review process far outweighed the few people who doubted its value.

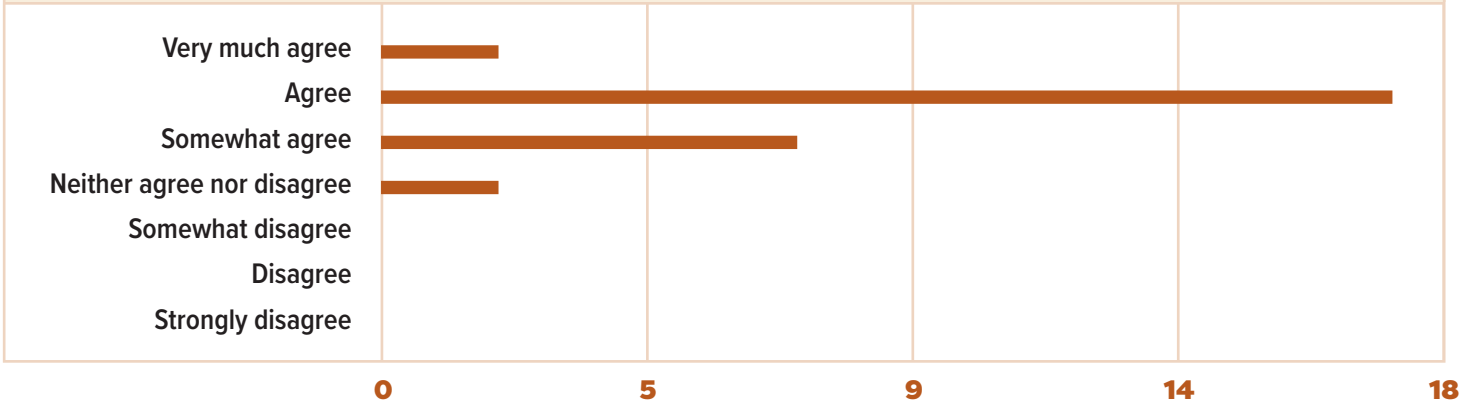
There were also concerns from two partners who valued the process and wanted it to be more comprehensive. Two people from different partnerships expressed disappointment that they felt their internal project-level review was not comprehensive enough. They wanted a strategic review to evaluate project proposals against the partnership's strategic action plan, theory of change and priority actions so that they could draw attention to projects that aren't being proposed. They expressed a desire for the OWEB's project-level technical review to make up for this strategic review that they felt was lacking in their partnership.

OWEB reflected that this more comprehensive strategic review is something that they would hope high-performing partnerships are doing. Once a FIP is awarded with its list of prioritized projects, their due diligence is clearly focused on technical review to ensure those projects, or alternates, are well-designed and likely to have the desired impact.

Value of OWEB's Technical Review

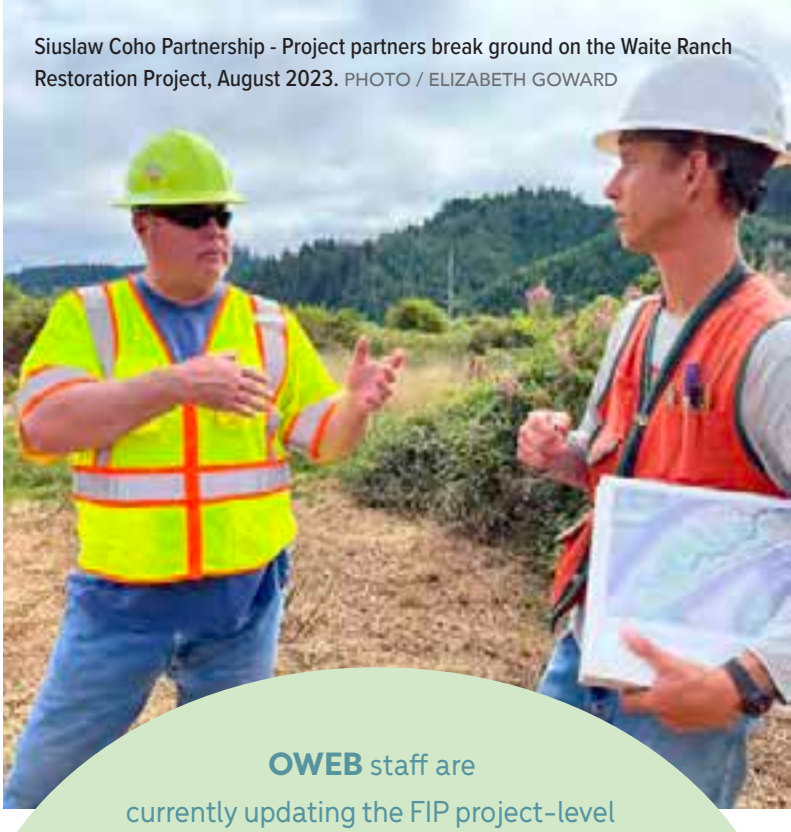
To what extent do you think OWEB's role in technical review has led to a better outcome for implementation and greater likelihood for impact?

Note: This reflects survey responses only and not responses from interviews or group discussions.



Recommendations for OWEB's technical review

- **Retain the FIP project-level technical review,** including two important design features: local reviewers and opportunities for reviewers and partners to discuss proposals.
- **Revise guidance for the FIP project-level technical review and provide an orientation for FIP grantees** to include clear explanations of roles, responsibilities and expectations for OWEB, reviewers, project applicants and the partnership as a whole. Include expectations that:
    - o Partnerships will work together to consider the technical design of each project and how well proposed projects collectively compare with the theory of change and prioritized actions before submitting it for OWEB's technical review,
    - o OWEB will facilitate a fair process where people ask challenging questions, listen to each other and consider the breadth of science and best practices above personal preference or biases, and
    - o Reviewers will read materials and come prepared to ask questions, listen and provide justification for any changes requested.
- **Provide the option, if time allows, for earlier review or a two-step review process.**
- **Continue dialogue and coordination among OWEB staff** to ensure consistency in how they advise partnerships to prepare project applications and how they facilitate technical review team meetings.
- **Strengthen the facilitation skills** and toolkit of OWEB staff facilitating technical review.



Siuslaw Coho Partnership - Project partners break ground on the Waite Ranch Restoration Project, August 2023. PHOTO / ELIZABETH GOWARD

OWEB staff are currently updating the FIP project-level technical review process and orientation for the next cohort of FIPs integrating many of the above recommendations. The project application is the same for FIP and Open Solicitation, and OWEB is streamlining some of the questions so they are not as repetitive. They are also considering to possibly create an even more simplified project application for FIP considering that all the background and context is described in their SAP.

Responding to interest in moving the technical review earlier in the design process, **OWEB** is working on an option to hold site visits with partners and technical reviewers early in the design process to discuss project proposals, well in advance of writing project applications so that reviewers have more of a chance to influence designs. OWEB still needs reviewers to evaluate project applications later in the design process, but that can be a shorter meeting, even held virtually, as a follow-up to an earlier site visit.



PHOTO / HARNEY BASIN WETLANDS COLLABORATIVE

3 Expanding the circle

Expanding the circle refers to the intentional effort of including new people, organizations and/or tribes in some aspect of a partnership's work.

- Sometimes efforts to expand the circle are directed at recruiting new partners.
- Sometimes the focus is to be more inclusive of underrepresented groups who are impacted by a partnership's work but may not have any connection to the partnership or means to participate.
- Often, but not always, efforts to expand the circle overlap with a partnership's commitments to diversity[4], equity[5], inclusion[6], and justice[7], especially when working with underrepresented or historically marginalized groups.

Some of these terms can be polarizing so care was taken in this study to encourage people to interpret this topic 'expanding the circle' as they liked and share their views freely.

Some aspects of OWEB's grant programs relate to people's ability to access grant funding, for example offering individual consultations to anyone interested in a FIP and advertising this widely. Referred to as equitable grantmaking, OWEB has contracted two studies examining their grantmaking practices with an equity lens, one specifically looking at impacts to tribes (Miller 2021) and another broader analysis (ECONorthwest in progress). They have also developed new climate-related evaluation criteria, applicable to all grants, that include an environmental justice component for "Local Communities Disproportionately Impacted by Climate Change." Some of the findings and recommendations in the Synthesis section of this report also relate to this topic.

Other aspects of OWEB grant programs relate to the rules and programs that shape what funded partnerships work on and how they work together, which influences their ability to expand their circle. OWEB provides a lot of flexibility in their rules and guidance for partnerships to decide what is right for their context and needs, for example flexibility in planning frameworks, governance structures and monitoring plans. OWEB also emphasizes dialogue with grantees, partners and tribes and is responsive to feedback, which are all core tenets of equity, and yet particular details in grant rules and programs can still have a significant impact on grantees and their extended networks. The findings and recommendations in this section provide context for these types of changes that OWEB may want to consider.

OWEB identified this topic to include in the study because they have been undergoing their own process of learning and engagement to articulate their values around diversity, inclusion, equity and environmental justice, for example through the development of the Board's equity statement.

Because of the timing of this study, **OWEB** saw this as an opportunity to listen and learn from partnerships about their approaches and experiences with expanding the circle.

[4] ***Diversity*** *is the breadth of differences in a group, in this context most often referring to differences in race, culture, language, economic stability and age.*

[5] ***Equity*** *is an approach that recognizes some groups have been systematically disadvantaged and works to mitigate those disadvantages by engaging people impacted to design systems and practices for everyone to thrive.*

[6] ***Inclusion*** *is the intentional practice of welcoming diverse people to participate meaningfully and nurturing a sense of belonging among everyone.*

[7] ***Justice*** *refers to making amends for wrongdoings and creating a fair system that provides opportunity for everyone.*

A range of perspectives

Partnerships expressed a range of perspectives on expanding their circle. Most partnerships felt it was important to expand their circle in some way to achieve their goals, while a few partnerships felt they have just the right circle of partners and participants to advance their vision without the need to expand.

When describing who they wanted to better include, partnerships often named tribes, landowners and farmers, sometimes also researchers. A few partnerships described a clear focus on engaging low-income residents, Spanish-speaking residents and/or Spanish-speaking restoration workers.

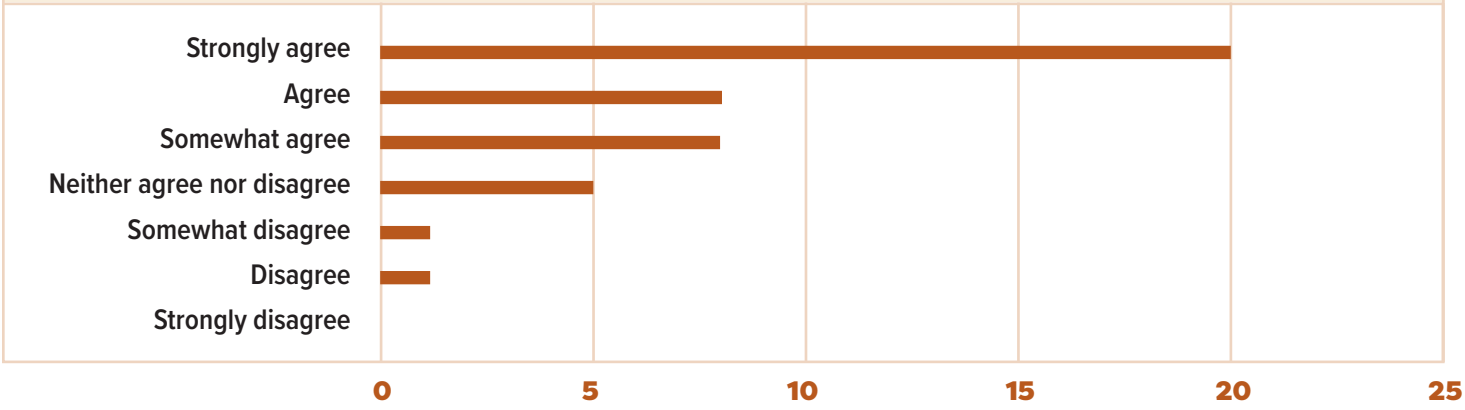


Willamette Mainstem Anchor Habitat Working Group - Cottage Grove High School students interplanting a riparian restoration project at My Brothers' Farm.
PHOTO / COAST FORK WILLAMETTE WATERSHED COUNCIL

Belief that Expanding Your Circle Will Help Achieve Your Goals

To what degree do you feel that expanding your circle of partners and/or building relationships with underrepresented groups in your watershed will help you achieve your goals?

Note: This reflects survey responses only and not responses from interviews or group discussions.



The breadth of views among grantees about expanding their circle is not surprising since the P-TA and FIP grant offerings provide partnerships a lot of flexibility to define their partnership on their own terms, widely considered a strength of the program. OWEB does not provide specific guidance or expectations associated with expanding the circle, except that:

- Partnerships need to develop a stakeholder engagement strategy and consider tribal engagement,
- Partnerships are expected to communicate effectively with all partners, and
- Partnerships should not exclude any organization who works on the same issues and geography and wants to become a partner.

Perspectives from across the state

A few people openly talked about the politics that can come up when discussing equity and underrepresented groups, especially in the context of funding and sometimes influenced by cultural differences between urban and rural areas. They urged OWEB to think carefully about how they use these words and concepts as their words carry a lot of weight with the potential to be misunderstood or misrepresented.



East Cascade Oak Partnership. PHOTO / PALOMA AYOLA

Considering power and representation

Power refers to access to resources, opportunities, knowledge and social networks that allow a person or entity to have influence over decisions and ultimately achieve their goals.

Some groups historically have not had power and have been disproportionately impacted by environmental burdens. For example, low-income immigrants who speak limited English and live in flood-prone areas are typically underrepresented in decisions about flood risk and mitigation.

Other groups may be underrepresented because their perspectives or goals are very different from the leadership and/or direction of a partnership. For example, the goals of farmers or academic researchers may not necessarily align well with the goals of a restoration initiative – or may require listening and dialogue to develop alignment.

It is also important to consider how power has changed over time. Some groups who have had more power and influence historically than they do today may be considered underrepresented, even though they may still have power and influence.

Understanding power and representation is nuanced and not straightforward. These are a few considerations that provide context for what is meant by expanding the circle to include underrepresented groups.

As an example, a couple of people from one rural partnership felt that buzzwords like equity, inclusion and underrepresented groups were applicable in urban areas with more diverse populations but not in rural areas. They were nervous that funders like OWEB would use these terms in ways that would reduce their chances for funding. And yet separately, someone from the same partnership described their ongoing work to engage tribes, which indicates awareness of this issue within the partnership alongside nervousness about what funders expect of them.

To put this comment in context and summarize responses from across the state, partnerships in both urban and rural areas working in different ecosystems have been engaged in thinking about expanding their circle in terms of diversity, equity and inclusion and integrating it into their work. Many are focused on learning, while a few have transformed the way they work by integrating new voices and perspectives into their partnership. A few haven't discussed expanding their circle as a partnership recently or at all with partners, in many cases admitting everyone is too busy implementing projects to discuss it. Some partnerships felt they have the partners and relationships already in place to confidently implement their work. For example, some partnerships already have more landowner interest than they have capacity to work with. In a few partnerships in both Eastern and Western Oregon, tribal partners are in leadership positions and integral to the momentum and direction of the partnership. One partnership in Eastern Oregon noted that a majority of their partners are female in a professional field that has been dominated by males.

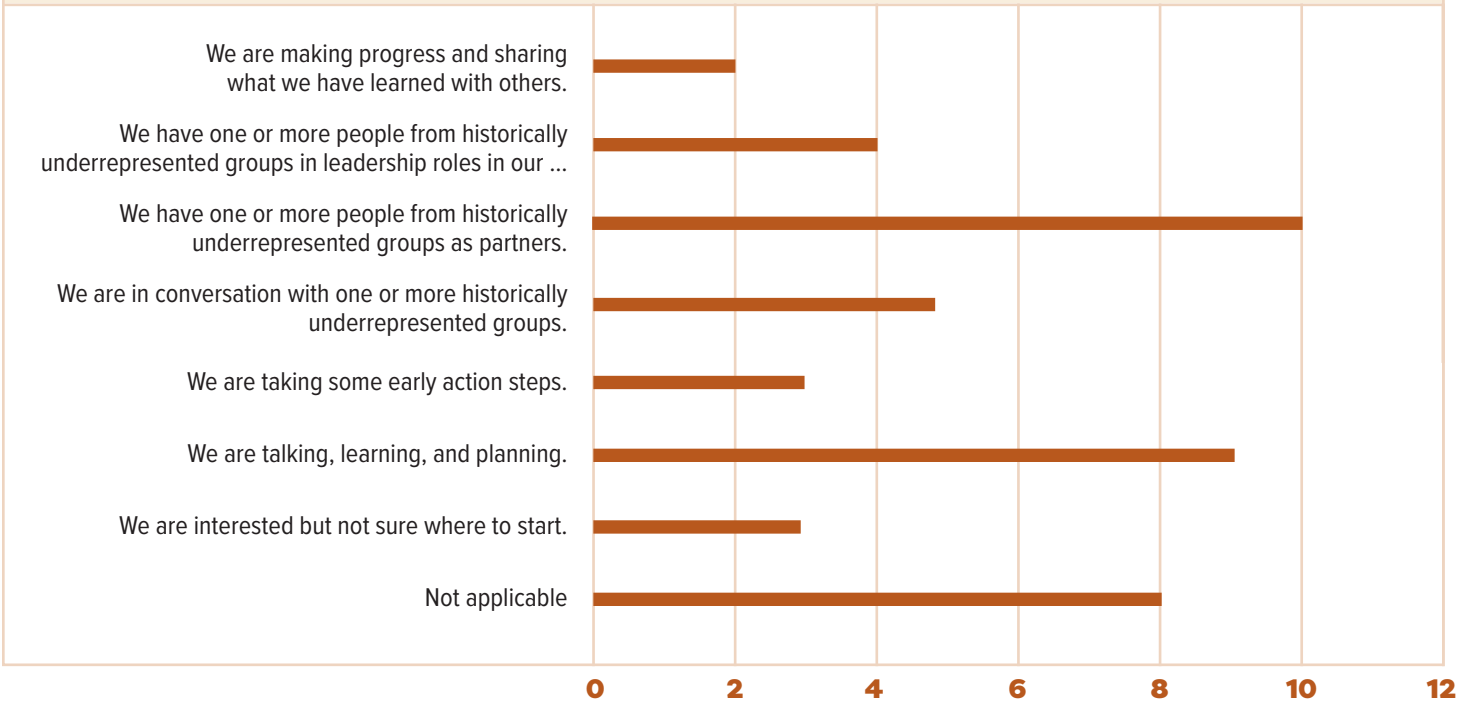
Efforts to expand the circle

Considering those that want to expand their circle, many partnerships described themselves still in the learning stages, not sure where to start or taking early action steps to expand their circle, while several other partnerships have been actively taking strides and providing a model for others.

Work to Expand Your Circle

To what degree are you working on expanding your circle of partners to include underrepresented groups?

Note: This reflects survey responses only and not responses from interviews or group discussions.



Partners described learning and early action steps to expand the circle.

"It is tough at [my agency] to work on this topic because of our mission, funding and culture, but we are thinking, learning and trying to develop plans and actions that are realistic and meaningful."

"The coast is largely white, working class folk. We have been really successful in working with our tribal partners, however there is much more work we can do in properly engaging, learning from, and being led by tribal members."

"[Our basin], as a whole, inherently lacks diversity, and the partnership has recognized this and is looking into ways to expand our circle of partners. Many [partners] have recently taken DEI training. ... This is something we could use help with."

"Our partners are working to fund tribal liaison positions to better coordinate collaborative efforts and ease the time burden on tribes to participate in conservation/restoration planning."

As partnerships engaged in deeper learning, one partner reflected on patterns of structural inequality[8] that can feel overwhelming.


South Coast. PHOTO / OWEB

"Expanding the diversity of voices heard is a difficult task in rural coastal communities, not because we haven't tried, but because the diversity is tribal and socioeconomic and the priorities of these diverse groups are different. Tribal engagement is critically important, but people available within the tribes to participate are extremely limited. Poverty issues related to housing and medical care continue to plague the small coastal towns. Bringing a range of voices to the table on restoration, conservation and natural resource issues likely feels like a 'nice to do' to most who are struggling day to day."

Addressing structural inequality is possible, but requires creative energy for relationship building and often reframing of a partnership's goals to open up new possibilities for broader engagement. As part of that reframing, several partnerships discussed the distribution of costs and benefits from restoration projects, a cornerstone of environmental justice work, observing that if this question is not considered, economic benefits will often be highest for wealthier residents who own riparian areas or large upland properties.



Oregon Central Coast Estuary Collaborative Field Trip, September 2023.
PHOTO / MIDCOAST WATERSHEDS COUNCIL

Several partnerships described how the process of reframing their goals, vision and work together took place in tandem with new partners taking leadership positions. They also discussed how their governance structures, roles and/or decision-making processes evolved through this process.

- One partner described how tribes have become pivotal partners and taken on a leadership role in several projects as the partnership has deepened their commitment to tribal interests – transforming their planning processes with benefits including protection of culturally important resources.

- Two other partnerships described how local government agency partners with missions that emphasized public health and economic stability helped shift the partnership's work to minimize or mitigate environmental burdens to low-income residents and increase benefits, for example when deciding which projects to implement first and investing in workforce development.

[8] ***Structural inequality*** *refers to a society where different groups have vastly different life outcomes and opportunities. It occurs when bias is embedded in the policies and practices of organizations and governments across sectors, such as housing, education, economic development, health care, clean water infrastructure, etc. People who experience disadvantages in one area are more likely to experience disadvantages in another, and vice versa, people experiencing advantages in one area are more likely to experience advantages in another, which structurally reinforces disparities over time.*

While leaders have a clear role to play in expanding the circle and introducing new ways of thinking, the diversity of perspectives among staff and participating partners can also be transformative in the evolution of a partnership. Several partnerships described the value of having diverse perspectives both at the leadership level and also embedded throughout the general partnership and partner organizations. One partner, who is a citizen of a tribal nation, reflected that having more people with indigenous perspectives embedded within their organization has influenced the thinking, conversations and direction of their organization and the partnership overall with transformative results.



East Cascade Oak Partnership, Wildflower Walk. PHOTO / COLUMBIA LAND TRUST

Another partnership shared how they are continually investing in conversations with tribal partners and looking for ways to create more touchpoints, knowing that it takes time to build trust and understanding, which can then lead to deeper engagement.

"Equity is layered into how we operate. We don't have a formal tribal representative on the board, but I am in a leadership role with [my organization] and a citizen of [a tribal nation.] One person on staff is a citizen of [another tribal nation.] While we are not officially representing the tribes, we bring indigenous perspectives to our work. When I bring up issues, I guess yes, I feel like my voice is being heard. A bunch of collaboration is happening with tribes and other partners also. The tribes are collaborating in ways they didn't before. This engagement is changing projects in the watershed and how we look at watershed restoration overall. Maybe not with landowners yet, but definitely within the partnership."

"Through [funded projects] and our monitoring work, we're having a lot of conversations [with our tribal partners]. I just talked with three tribal members last night about our shortages for monitoring consultants, and they said, 'Well, we have these crews that are busy for three quarters of the year, and then don't have anything to do for another quarter of the year.' There might be some opportunity for us to train them up and hire them to implement some of our monitoring for us. And you know seasonally, it might not be ideal, but it might be from an equity perspective to more deeply engage tribal members in the work that we're doing and for us to learn more from them about the things they're seeing in the landscape and the lens that they view this work through."

In addition to reframing the work, one partnership highlighted compensation for people to participate in meetings who otherwise wouldn't be able to attend – as a way to reduce barriers for engagement. OWEB provides flexibility within the P-TA and FIP grants to pay people to participate meetings, so partnerships are allowed to use this funding to reduce barriers for historically marginalized groups that otherwise couldn't attend. Some partnerships described using this funding to ensure that grant-based organizations, and especially small watershed councils, could dedicate their time, but no one spoke of specific examples where partnerships are using this funding with historically underrepresented groups.

Challenges to expanding the circle

A challenge expressed by several partnerships focused on implementation is lack of time to slow down and discuss questions like who to involve, why and how. One partner expressed frustration that there was never time on the agenda to discuss opportunities to bring in new partners who could help shape ideas for long-term planning. A lack of time or focus for these types of discussions is exacerbated even more when there is turnover among leadership or staff. Some partnerships that have been successful managing the power dynamics and interests within their existing circle were hesitant to think about including new partners because of the uncertainty and risk that it would slow them down.

"I can see problems in certain watersheds, where adding too many groups could result in less restoration. If it takes too much time to come to consensus or if certain groups do not get along, that might be more problematic than reducing the number [of groups involved] to get good restoration projects done in an effective manner."

In some partnerships, progress working with underrepresented groups has been led by one or a few partners that have many years of experience integrating equity into their programs and operations. Some examples include workforce development that includes



Grande Ronde Restoration Partnership, Hall Ranch OSU Visit, 2015.
PHOTO / GRANDE RONDE MODEL WATERSHED

recruiting from Native and Latino communities, labor representation at the highest level of the organization and healthcare benefits for restoration workers. In one or two partnerships, it appears that the partnership as a whole has been less engaged in expanding their circle because one partner has been making strides that benefit the whole partnership.

It takes a concentrated effort for people who are relatively comfortable in a given context to understand the forces that marginalize others or even see that people are marginalized at all. Several partners felt fairly confident they had the right people involved, but then emphasized that they would gladly expand their circle if it turns out they are missing anyone. Several partnerships emphasized that this is an area where learning and support are needed and that they want to be thoughtful and intentional when bringing in new partners and attempting to expand their circle.

This was a common theme that it takes time for partnerships to consider whether to expand their circle, how and why, then time to make decisions together and take steps to follow through. This is challenging for many partnerships who have a heavy workload and other complications such as turnover among leadership and staff. It is very humbling work that requires trust and openness recognizing that there is no single right way and everyone will make mistakes.

Expanding the circle in the context of OWEB grant programs

As OWEB continues to clarify their own internal values related to equity, diversity, inclusion and environmental justice, there likely will be aspects of their grant programs that they will want to clarify, change or further develop. Two examples below – land transactions and planning frameworks – illustrate how seemingly small details in program guidance can influence whether potential partners feel included or not.



Willamette Mainsteam Anchor Habitat Working Group - Public tour of project work at Snag Boat Bend, June 2017. PHOTO / LONG TOM WATERSHED COUNCIL

Land transactions – an example

The example of OWEB's land transactions and the conservation easements they include is used here to better describe how program rules – and perceptions about what is allowed or not - can restrict a partnership's efforts to expand their circle. A few partnerships expressed concern that OWEB-funded land transactions exclude tribal harvest of culturally important plants, which is a high priority issue for tribes.

In the words of one tribal partner, who urged OWEB to change their policy, OWEB's restrictions on land transactions make tribes not want to participate, which can negatively affect the momentum and direction of a partnership overall.

"The significance of restrictions on land transactions is heavy. If OWEB doesn't change the restrictions in ways that recognize and respect tribal uses and needs, tribes will struggle with land acquisitions. Tribes may prefer not to have them. I would want OWEB to add language to conservation easements that 'When this land is returned to tribes, this easement will be dissolved.' It is a recognition of tribal sovereignty."

"Stewardship for us as indigenous people is about going out on the land, using resources, observing, talking about what you see, involving young people. When we take care of the land, we harvest and gather foods, medicines and materials for baskets and other culturally important purposes. We may want a simple structure to protect us from the weather as we process materials. Sometimes we may want to have a community space to hold a ceremony before we harvest. Our elders might need parking, maybe a bathroom to make it possible to be there with us. When we are observing, protecting and teaching about our resources across the generations, we are active stewards.

OWEB needs to change this policy - for tribes that are ready, it can bring about healing."

OWEB's response to concerns about land acquisition from Tribes

When this concern was brought up to OWEB, their response was that tribal harvest of culturally important plants is allowed on lands acquired with OWEB funds as long as the harvest is consistent with the protection of conservation values for that property and is described in the management plan required by OWEB.

OWEB staff explained that the language in the conservation easement template for fee simple transactions says that vegetation removal is not allowed until either a management plan is developed that includes vegetation removal or OWEB approves vegetation removal separately in writing. From the comments received in this study and similar comments expressed directly to OWEB, it seems that this nuance has not been understood. OWEB staff also shared they have approved one management plan that includes the harvest of culturally important plants, so there is more flexibility than what people are perceiving.

OWEB's land acquisitions staff and regional staff work together to review proposed management plans for newly acquired property interests and management plan updates for prior transactions, in what they describe as a fairly straightforward process.

Land acquisitions staff emphasized they hope people pick up the phone and call if they have questions. They would be more than willing to work with tribes to include harvest of culturally important plants in OWEB-required management plans.

The question about other improvements such as a simple structure to protect people from the weather, parking, bathrooms and other infrastructure would need further discussion and would depend on the specific context of each property to determine what would be consistent with the protection of the property's conservation values. For example, some acquired properties are old farms so there might be an existing turn-around for a few cars to park and an easy spot to put a temporary port-a-potty with little risk of negative impacts. If there was a desire to have more extensive infrastructure like permanent bathrooms and shelters, or regularly host lots of people, other funding sources that align with community use of the property would be a better fit.

With respect to transferring **OWEB** -funded properties over to tribes, OWEB staff described a property that was purchased by a land trust and then transferred to the Confederated Tribes of Siletz Indians. They emphasized that OWEB uses conservation easements in all transactions including transfers because Oregon statues require that properties acquired with OWEB funds are managed in perpetuity for the conservation purposes of the grant and give the Board certain authorities regarding the sale or transfer of the property. Changing this requirement would necessitate changing the statutes, which tribes could advocate for.

Recognizing the need for more clarity on this issue, **OWEB** is already beginning to reach out to tribes to discuss concerns associated with the land acquisition grant program. They want to listen to better to understand tribal perspectives and ways they can address concerns.

Planning frameworks – an example

As another example, at least one partnership felt strongly that the Open Standards for Conservation Planning framework referenced in OWEB's Strategic Action Planning Guide with its emphasis on 'threat reduction' did not align with their values and approach. They explained that an emphasis on 'threat reduction' positions people as causing threats that need to be managed instead of partners who work together to develop a vision and plan of action.

"We approached our strategic planning a little bit differently than [other] partnerships who start with the ecological outcomes that they want to see and then threats and then figure out strategies to address those threats. We rejected the concept of 'threats' out of the box. Instead, we wanted to talk about impacts both positive and negative that people's behaviors have on ecological systems, just recognizing that we're all a part of them."

Instead, this partnership created a modified planning framework that fit their values and approach. Their planning included broad outreach interviewing more than 60 people outside of the partnership to expand the ideas and perspectives that went into development of their results chain beyond their circle of partners.

While OWEB allows partnerships flexibility to choose their own planning frameworks and tools, which is widely celebrated as a strength including in this example, their planning guidance is largely shaped by the Open Standards approach, which caused friction in this case and has been critiqued more broadly for similar reasons (Arnold and Wilson 2021). This example provides a reminder of how values are embedded in planning tools and grant guidance, which may have unintended consequences for who feels included or not in the work.



East Cascade Oak Partnership, Wasco Collaborative Tour. PHOTO / COLUMBIA LAND TRUST



Deschutes Basin Partnership - Whychus Creek near Sisters now flows year-round after historically running dry most summers, supporting reintroduced salmon and steelhead.
PHOTO / DESCHUTES RIVER CONSERVANCY

Recommendations for OWEB for expanding the circle

- Use terms such as diversity, equity, inclusion and underrepresented groups very intentionally, clearly articulating their definitions and why they are being used considering how this will be understood by different audiences.

- Continue proactively analyzing grantmaking practices and program rules to identify and eliminate barriers and increase accessibility to OWEB grant programs, especially inviting feedback from new applicants, new grantees and grantees working to include underrepresented groups.

- Consider how and when to integrate concepts of equity and environmental justice into grant programs and rules considering OWEB's strategic plan and equity statement, in development, alongside existing laws, policies and capacity to implement changes.

- Continue to provide resources and tools to grantees to support greater awareness of tribal issues, including sovereignty, treaty rights and the specific issues and cultural practices relevant to tribes in Oregon.

- Consider training or peer learning opportunities to raise awareness and share innovations related to engagement, equity, inclusion and environmental justice as they relate to restoration, for example how asking about the distribution of costs and benefits may help identify new groups to involve and/or new approaches.

- Invest in opening communication and building trust with tribes around concerns that OWEB-funded land acquisitions are not inclusive of tribal approaches to stewardship – clarify that harvest of culturally important plants is allowed and potentially other activities – and stay open to suggestions that may emerge from further dialogue.

- Confirm with grantees that they can use P-TA or FIP funds to compensate people for participating in meetings, which may reduce barriers for some underrepresented groups.

OWEB identified tracking progress and telling the story of impact as a priority topic aligned with their ongoing efforts to understand the real challenges of monitoring and tracking progress so that they can support grantees to be as successful as possible (Boulay 2021; OWEB 2018). Tracking progress is valued as a means to understand the effectiveness of actions and adaptively manage future actions to increase the likelihood for impact. Tracking progress is also valuable for showing the impacts of a partnership's work to gain public support and increase competitiveness for funding.

Since the start of the FIP Program, **OWEB** Board, staff and partnerships have shifted their thinking and expectations. They now recognize that while six years of funding is longer than most grants, the work needed to see ecological and social outcomes will take much longer. With this part of the study, OWEB hopes to elevate common challenges experienced by partnerships and any innovative strategies that all partnerships may benefit from.

4 Tracking progress and telling the story of impact

Success alongside common challenges

Overall partnerships expressed pride and confidence in their ability to track outputs and demonstrate progress toward meeting their strategic action plan's goals and objectives. Many partnerships relied on their theory of change to infer progress toward outcomes based on tracking of near-term indicators. In some cases, partnerships conducted effectiveness monitoring at the project level. However, landscape-level effectiveness and telling the larger story of impact was much more challenging.

One partner described having a thoughtful, science-based discussion within their partnership, where they determined it was neither feasible, financially or economically, nor a good use of the partnership's time and attention to focus on landscape-level ecological trends.

Another partner noting the substantial cost and complexity of monitoring change at the landscape level, encouraged creativity in telling the story of impact, for example integrating anecdotes, storytelling, traditional knowledge and observations at the ecosystem level.

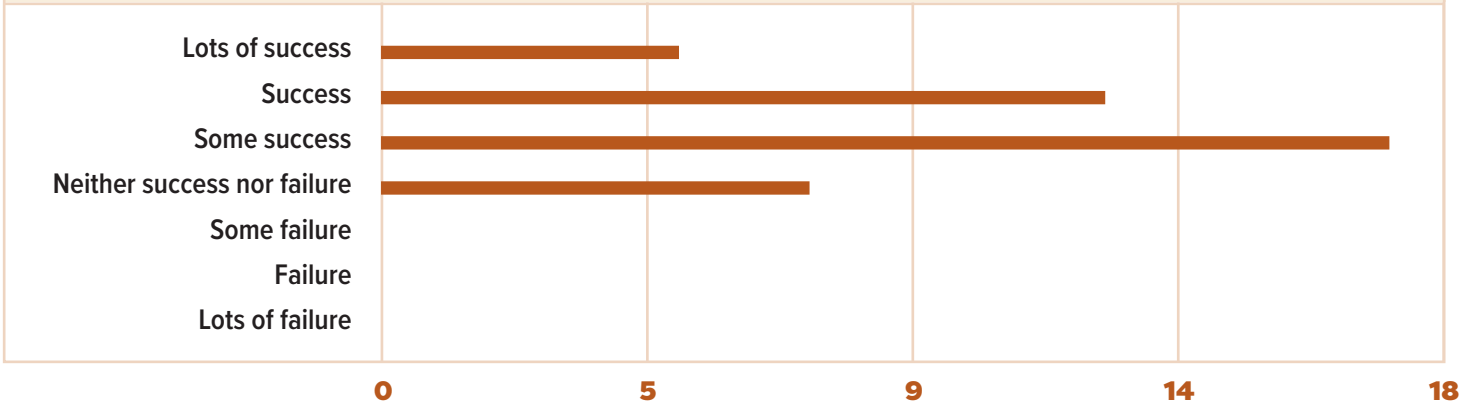
"We have a lot of project level success stories to tell…. We can't link our work directly to anything at the population level, and we struggle at the landscape level as well. But at the project level, we have a lot of good data. …

One of the landowners, when we started a project, was like, 'Hey, there's no trout in my river!' And then we built this project, and he went out and had a 20-fish morning! His response was, 'I never knew how important large pools were.' It's learning you can touch."

Success Tracking Progress

To what extent have you had success tracking progress toward your long-term goals?

Note: This reflects survey responses only and not responses from interviews or group discussions.



Common monitoring challenges

OWEB initiated this study by recognizing common challenges partnerships face with monitoring short- and long-term ecological and social outcomes:

- External changes, such as extreme flooding, catastrophic fire, economic recession, climate change, etc.
- Shifting understanding of how systems work and what we should be tracking to measure change
- Managing large complex data sets with multiple partners
- Funding for monitoring over the timeframe needed for outcomes to emerge, and
- Linking your work to the changes observed when there are other influences and unknowns.

Partnerships heartily agreed with this list – sharing examples of facing many of them at once.

Partnerships also added several more challenges to monitoring short- and long-term outcomes:

- Selecting the most relevant metrics out of all of those that interest partners and funders
- Lack of regionally standardized protocols
- Complexities of monitoring ecological and social outcomes, especially when integrating goals around diversity, equity, inclusion and justice
- Lack of historical data to establish trends
- Limited personnel with the capacity and expertise to develop monitoring plans and conduct analysis
- The time and expense to meet funders' monitoring and reporting requirements that may not align with the partnership's goals or available funding
- Limited time to turn around results and discuss together what they mean, and
- Trust to ask hard questions so what is learned from monitoring can improve future work.

"Funding opportunities for monitoring habitat at the project scale are rare or may not be practical. Monitoring that is occurring at the population level is not detecting change, likely from the lack of habitat restored compared to what has been degraded over time. Remote sensing has provided another tool for monitoring projects that may be more cost effective, however, time scales and costs could prevent timely nature of effectiveness monitoring that can be applied."



East Cascade Oak Partnership, USFS Prescription Fire Tour with Roland Rose. PHOTO / COLUMBIA LAND TRUST

Again, partnerships described experiencing many of these challenges all at once. One partnership recommended that it would be more practical to develop regionally standardized protocols that would be implemented by highly trained and funded regional monitoring crews rather than expect that each partnership or organization lead their own monitoring.

A shared need for increased monitoring infrastructure

Many partnerships expressed wanting to assess the effectiveness of their actions at a larger scale and over a longer timeframe – and yet an overwhelming theme was that more institutional support and monitoring infrastructure are needed to do so. Partnerships with monitoring expertise emphasized this point.

"With only two staff dedicated to restoration work [from our organization], we simply do not have the time, funding, training, or capacity to track/monitor short and long-term outcomes on all of our projects.

Another challenge is that even if we did have the ability 'in-house' to do so, there is generally a lack of regionally standardized protocols established to track/monitor these various projects.

If there were in fact regionally standardized protocols, it would be most efficient to have a highly trained and funded regional or perhaps county-wide monitoring crew(s) dedicated to collecting and analyzing data to determine if short and long-term goals are being met.

This would be an extremely useful form of support to the partnership."

"We all are monitoring on our own, including an incredibly robust program [that one partner is leading]. Everyone is doing a portion. All of us are putting in some of the ingredients, but the cake never actually gets baked. We are always just bringing our individual part. If you ask us, how did you change x, we can give you that answer. But telling you the whole story, that is what's hard.

[We are waiting] for that moment when you actually have the final product that everyone can look at and say, 'Okay! This is everything that we have done, and this is what's been achieved.' And we finally getting to eat the cake! I want that moment where I get to see all of it. It would be good to have a well-baked cake."



Grande Ronde Restoration Partnership, Hall Ranch OSU Visit, 2015. PHOTO / GRANDE RONDE MODEL WATERSHED

Many partnerships, including both FIP and P-TA grantees, expressed specific needs for institutional support for monitoring. Partnerships with much less capacity and expertise required more support, for example the earlier suggestion for monitoring conducted with standardized protocols and regional monitoring teams. The priority needs highlighted here were commonly identified as critical gaps by partnerships, both FIP and P-TA grantees, who have relatively high capacity and expertise in monitoring.

***Priority** needs for institutional monitoring support:*

- Systems to manage and share data,
- Expertise for analysis, especially addressing multi-scale data, and
- Support to interpret results to tell the story of progress and inform adaptive management.

Possible types of institutional support:

- An institute within the university system supported by federal funds, similar to the Southwest Ecological Restoration Institutes,
- Greater leadership by state and federal agencies,
- Contracts with private consultants, and
- Peer learning through conferences and workshops.

A prominent theme in these suggestions was the desire for more monitoring workshops or peer learning opportunities with at least seven partnerships expressing a strong interest. Some partners expressed preference toward in-person sessions that provide more targeted, directly useful guidance over written materials or virtual sessions.

> *"A widely known scientific challenge is analyzing multi-scale data. I think a watershed restoration monitoring workshop would be very helpful so that we could all learn from each other on things like: monitoring different parameters, monitoring effectiveness of different types of restoration projects, writing monitoring plans for watersheds, funding for monitoring personnel and equipment, managing monitoring data, etc."*

Several partnerships noted their disappointment that the universities haven't played a bigger role in providing expertise and capacity for training, analyses and interpretation.

Suggestions for ways to fund additional monitoring infrastructure and institutional support included partnerships:
- Lobbying state and federal agencies for funding and/or
- Advocating for a statewide bond.

> *"Looking forward, I think that OWEB and the state and federal agencies may need to look toward a high-level longer lasting institutional support [for monitoring and restoration] and lobby for the creation of something like the Ecological Restoration Institutes at Northern Arizona University, Colorado State University, and New Mexico Highlands University. This type of organization would support FIPs with science, monitoring, coordinated outreach and improved engagement by local partners." (Link to SWERI and federal authorizing legislation)*

Suggestion for partnerships

Convene partnerships to explore a unified strategy to advocate for funding from state and federal agencies and/or some kind of bond measure.

OWEB reflected that these comments could help to reinvigorate the vision from the Oregon Plan, where the responsibility for landscape level monitoring is shared among state and federal agencies. This approach integrates two priorities from OWEB's 2018 Strategic Plan – the need to define monitoring priorities and working with agencies and private foundations to align funding for those priorities.

Feedback for OWEB on monitoring

Overall, OWEB monitoring staff were consistently recognized for their ability to understand the real challenges partnerships faced and provide meaningful, individualized support.

However, two partnerships felt that OWEB could do better providing clear guidelines or expectations for monitoring reports at the beginning of the FIP grant, especially given the limited timeframe and the complexity of the work. One partnership in particular was frustrated by the different metrics required by different funding sources that were not apparent at the beginning of the grant. OWEB responded that this issue was flagged in a 2021 assessment of granting practices (Miller 2021) and that they have been coordinating with the staff responsible for reporting on Pacific Coastal Salmon Recovery Funds to prevent this from happening again.

Partnerships consistently expressed appreciation for FIP funding that could be used to hire a monitoring coordinator and fund monitoring projects. FIP grantees further along in their workplan recommended to newer FIP partnerships that they reserve funding in the second and third biennia for monitoring since the need would grow as projects were completed. Partnerships emphasized grant writing should also be included in the second and third biennia.

Suggestion for partnerships

For FIP grantees, reserve funding in the second and third biennia for monitoring and grant writing.

Partnerships also realized that even though all grant funds would be awarded in six years, many projects might take one to four years or more to complete after the award. One partnership emphasized the value of the supplemental effectiveness monitoring funds that OWEB provided, in addition to their FIP funding, which was critical in responding to concerns by an oversight agency early in the project. The additional monitoring grant allowed them to show progress and gain the support needed to move forward with the project.



PHOTO / HARNEY BASIN WETLANDS COLLABORATIVE

"That first round of restoration was a little messier than people were used to. … And we really had to pause for several years and do monitoring and tell that story. Having that extra funding and that space to be able to tell that story [was an added] boost. We've restarted [the work] now, and it's going much better. It helped us continue with that restoration effort overall. Having the funding and space to do that was really critical."



Grande Ronde Restoration Partnership, Longley Meadows Post Construction, June 2022. PHOTO / GRANDE RONDE MODEL WATERSHED

Several partners pointed out that ongoing capacity for monitoring will be needed well beyond the FIP grant to tell the story of progress – and that they felt OWEB still has unrealistic expectations of how long it will take to observe ecological outcomes.

"It takes decades to do this work to the extent we want to do it."

"Post FIP, we will need to find a way to continue monitoring, which increases with each new project. If we are not able to find funding, it will be difficult to meet the monitoring requirements. I think that it would be helpful to have long-term funding associated with FIPs that covers monitoring expenses post-FIP."

"We're talking decades of monitoring. One brood year is 4 or 5 years out in terms of fish return. And then we need multiple generations coming back to be able to look at any trends. And then we have decadal oscillations in ocean productivity. Right now, if you look at our nice graph, we are at the bottom of yet another decadal oscillation. That's the temporal scale that we need [consistently funded] monitoring programs guaranteed. The data doesn't tell you a lot because you have to look at 50 years of data."

OWEB's grants database was another area for improvement. FIP grantees are required to describe 'lessons learned' when they enter their grant reports in OWEB's database. One partner highlighted that these lessons learned could be a source for peer learning across similar project types, except that this field in the grants database is not searchable. They recommended that OWEB update this function of the grants database or provide some type of annual summary of lessons learned by project type.

OWEB's learning around monitoring and tracking progress

OWEB recognizes the inherent challenges in monitoring and tracking progress in complex systems, and they also understand the desire for grantees to have more clarity about what they are looking for in terms of monitoring. With this in mind, OWEB staff met with the third cohort of FIP grantees individually at the start of their grant to clarify monitoring expectations. They said they expect FIP grantees to conduct some type of monitoring that can be used to track progress towards meeting ecological outcomes and inform adaptive management, as described in their theory of change.

OWEB staff emphasized that they can provide tools, resources and guidance on general principles, but the partnerships are the ones that need to decide what is most important for them to monitor relative to their goals and theory of change, ideally involving the breadth of partners in these decisions.

As for changes to the grants database, there are not funds or capacity to do so at this time, but **OWEB** emphasized that it is good to document this request for future consideration and it echoes feedback they have heard previously.

OWEB has also learned the importance of flexible resources to respond to emerging monitoring needs, for example the supplemental effectiveness monitoring grants that were available to the first two cohorts of FIP grantees. OWEB is considering ways to set aside funding for similar sorts of emerging monitoring needs in the future.

While recognizing the need for consistent, long-term funding for monitoring, OWEB clarified that the FIP program is not the vehicle to address this need. In the near term, OWEB is very interested in having partnerships report on all they accomplished with their FIP grants. They acknowledge that there were not resources budgeted for this step and that reporting at this scale requires time and collaboration among partners. With this in mind, OWEB is piloting a post-FIP reporting project with a FIP grantee from the first cohort. The purpose is to synthesize and communicate information collected during the FIP, not to collect any new data. They are looking to use what they learn from this pilot to better define post-FIP reporting.

OWEB does aim to share lessons learned across partnerships, for example sharing Project Completion Reports with a partnership's permission. They also suggested that lessons learned can be found in a FIP grantee's Progress Tracking Reports, especially in the adaptive management section.



Salmon SuperHwy - Bridge construction on Peterson Creek to allow fish passage. PHOTO / TRAV WILLIAMS

Recommendations for OWEB for tracking progress

- Clarify expectations for monitoring and reporting requirements at the start of each FIP grant in an individualized manner.
- Continue to allow flexibility in monitoring and reporting so that grantees don't have to invest energy into metrics or reporting that may be outside of the partnership's main focus.
- Invest in workshops, trainings and/or conferences to encourage peer learning and learning from experts and guest consultants, for example working through the challenges of multi-scale data including monitoring different parameters, monitoring effectiveness of different types of restoration projects, writing monitoring plans for watersheds, funding for monitoring personnel and equipment, managing monitoring data, cultural considerations, etc.
- Work with state and federal agencies to explore ways to increase investment in monitoring infrastructure, for example a restoration research institute or regional monitoring teams supported with legislative funding or a bond.
- Continue offering supplemental effectiveness monitoring grants to allow flexibility to support overarching monitoring needs identified by each partnership.
- Consider long-term funding for a monitoring coordinator through the P-TA grant.
- Given the long-term need to track progress beyond the six-year FIP grant, consider offering funding to all FIP partnerships for post-FIP reporting.
- Update OWEB's grants database to be able to search completed projects for lessons learned – or consider how to compile lessons learned and distribute to partnerships.



PHOTO / ROBERT WARREN

Synthesis – Partnership Types, Performance and Resilience

Partnerships are often fragile arrangements built on a delicate calculation that the individual roles and responsibilities that partners are willing and able to commit to add up to the collected effort needed to advance their shared vision. Ambitious work in complex systems that are not well-understood puts additional pressure on the partnership since uncertainties in the work make it harder to accurately estimate roles and responsibilities and puts a greater emphasis on learning. Resilience is centrally important in these contexts.

"Money drives commitment in a big way. However, not all project concepts evolve the way they were initially thought of, so commitments have to also evolve."

Compromise *refers to a quick resolution of differences with the goal of at least partly giving each party what they want.*

Collaboration *refers to a deeper exploration of differences, engaging in dialogue to understand the 'whys' behind what each party wants with the goal of developing more creative and inclusive solutions that address common interests and overarching goals.*

Partnerships that engaged in more straightforward work in relatively well-understood systems may experience fewer stressors and be able to perform well with less emphasis on resilience.

For many partnerships, especially project-oriented partnerships, that calculation is negotiated as the partnership is formed so that each partner, or a subset of core partners, will get some portion of the budget and will be afforded the trust that they have the professional skills and judgment to carry out high quality work. These financial expectations may be spelled out in a charter or grant agreement, but more often, they are an implicit premise that keeps everyone showing up and is foundational to the stability of the partnership. If one partner falters in their performance, the threads of resilience can help a partnership stabilize, for example camaraderie and openness to talk about problems and pitch in to resolve them, plus shared leadership to keep the overall focus on the partnership's work, rather than individual interests.



East Cascade Oak Partnership, Grass Identification.
PHOTO / COLUMBIA LAND TRUST

In the context of this delicate calculation, many partnerships are set up to compromise when issues arise about overall performance or accountability, for example which actions are most likely to have a positive impact or which partner is best suited to take on specific roles. In the ideal sense, collaboration may seem like a better approach to boost performance, where partners engage in deeper dialogue for mutual understanding and problem-solving.

However, if partnerships have a solid understanding of their socio-ecological systems, if there are best practices to address their resource concerns and if partners have the capacity and expertise to advance the work, then they may be able to operate at a high level of performance relying on compromise without the need to have deeper conversations about performance and accountability. In fact, they may be able to maximize their efficiency and performance by relying on compromise.

Further, most partnerships are not structured for this level of higher level of interdependence and accountability. Even if their intent is to be structured in this way, they may not have enough stability or resilience to do this well, in terms of that negotiated division of labor and budget that keeps everyone showing up. This may be especially true when individual partners depend on the partnership for their financial stability or reputation. If funders push partnerships too hard expecting them to hold each other accountable with performance issues and the stability and resilience isn't there, performance could suffer. For example, tensions caused by the attempt to talk about performance issues could close down communication making it harder to address concerns. Partnerships that have more threads of resilience, for example camaraderie, success, organizational anchors, shared leadership and openness, are better able to withstand the destabilizing forces of working through these types of challenging questions.

A focus on compromise instead of collaboration is common for project-oriented partnerships and to some extent planning-oriented partnerships. Compromise and 'splitting the pie,' for example splitting budgets evenly among partners, may contribute well to performance in relatively well-understood systems with straightforward work plans, especially if a number of actions are considered equally important and the roles align well to split the work.

However, **OWEB** has expressed that they do expect a higher level of collective attention on prioritizing projects and preparing projects for technical review. They explained that the FIP program provides a unique opportunity for partnerships to work together to strategically focus on actions that have the greatest potential benefit relative to their restoration goals. Splitting the budget evenly among partners could be a strategic approach to keeping partners at the table and sharing the workload, but not necessarily strategically focused on the highest priority restoration activities. OWEB believes partnerships who split the budget evenly would be a better fit in the Open Solicitation Program.

"We don't want partnerships to form and apply for the FIP simply so they each have access to a larger pot of money for projects. We want to fund partnerships that utilize their collective expertise to implement the most meaningful, priority projects in their geographies."
OWEB

Compromise may also be more common when partners work in separate geographies, for example with multiple watershed councils or Soil and Water Conservation Districts, which by definition only implement projects in their geographies respecting the territory and autonomy of their neighboring districts and councils. However, there were clear examples of partnerships with multiple watershed councils and Soil and Water Conservation Districts organized as a planning-oriented partnership where they were structured to work collectively to fund the best projects, rather than just 'split the pie.' Planning-oriented partnerships tend to emphasize shared leadership, as in a steering committee that includes representatives from different partners organizations that keeps the focus on what is best for the partnership. Partnerships that have their own internal review process often also rely on a steering committee to weigh in on proposed projects.

Systems-oriented partnerships are structured to have even greater accountability, where they collaboratively develop standards and expectations along with mechanisms to raise questions and a process to work through them to meet standards. Developing this level of infrastructure is resource intensive and requires a greater emphasis on resilience although none of the partnerships in this study were fully built out systems-oriented partnerships. Partnerships are better able to mobilize funding for this level of infrastructure when their work commands high interest and there is the potential for dedicated long-term funding. Several partnerships leaning towards a systems-oriented partnership were able to use the FIP grant as a catalyst to start to build that level of long-term funding, but the findings from this study caution not to expect such a high level of commitment without long-term consistent funding.

In contrast, learning-oriented partnerships are structured to ask challenging questions, since learning is the focus and what brings value to partners. However, they are structured to work independently, not to plan or implement projects together, and so the consequences of asking hard questions are not as destabilizing to partner reputations or finances in most cases. Each partner is responsible for securing funding to do their own work, and so the partnership can withstand partners coming and going, for example if there is a change in focus to improve performance that some partners dislike, with less risk to the partnership as a whole.

OWEB shared that they will continue to reflect on these findings to more clearly understand and articulate their vision of how successful FIP partnerships function.



East Cascade Oak Partnership, Wildflower Phenology Walk. PHOTO / COLUMBIA LAND TRUST

Synthesis – OWEB's Role in Supporting Partnership Performance and Resilience

Partnerships have been eager to participate in the FIP program because the scale of funding over six years allows them to tackle more ambitious projects over larger landscapes. However, there was evidence that this hard push for implementation has sometimes kept them from pausing to check-in on trust, reflect on whether projects are meeting strategic priorities and consider opportunities to expand their circle. Yet, there were also many examples of partnerships effectively scaling up their work, while still dedicating time to reflection, expanding their circle, and strategic thinking. **Overall, there is evidence that the supportive culture within OWEB mitigates for this tension to perform at an accelerated pace and that the benefits of the FIP and P-TA grants related to performance and resilience outweigh the costs and stressors.**

Overall, OWEB's investments in partnership planning, governance, coordination, project implementation and monitoring have been found to be well-positioned to support high performance and resilience.

"OWEB had a gathering a few years ago of funded partnerships to come and share at the Menucha Retreat Center. I thought that kind of thing is pretty helpful and would like the opportunity to do that again, to talk with other partnerships informally and get ideas. It was really useful, really great hearing [from others]. I just assumed OWEB wanted to see a perfect partnership, and I remember sitting with [another partnership] and hearing them talk about some of their [struggles]. It was just great to be like, 'Oh, good! Okay. So you can still be successful and have issues and are working through it.' And then just hearing and seeing what other people were doing, it was very reassuring for me. Yeah that was good." - *P-TA Grantee*

This study finds that the biggest near-term change that OWEB could make to support partnership resilience would be streamlining administrative burdens from the FIP program so that partnerships could dedicate more of their time to the operation of their partnership – specifically, streamlining project applications, technical review, reporting guidelines for monitoring and use of the online application portal and grants database. Some of these OWEB is working on, integrating recommendations from this study, while others like the database are not possible due to current capacity.

Further investments in institutional support for monitoring, such as near-term investments in peer learning opportunities and training workshops, were also identified as a high priority for investment to support resilience. OWEB holds a gathering for FIP and/or P-TA grantees every biennium, and OWEB staff are interested in more frequent peer learning or peer mentoring opportunities. They are considering what is possible given their staff capacity. Monitoring is especially important as partnerships who were able to learn from their efforts and tell the story of their success have been better positioned to be effective and secure ongoing funding. If OWEB can help introduce grantees to other funders, this would also contribute to resilience in terms of greater opportunity to secure ongoing funding. Over the long-term, support to help interested partnerships integrate equity into their vision and approach, including an emphasis on underrepresented groups, has the potential to boost resilience by tapping into the creative potential of broader constituencies and more diverse funding sources.

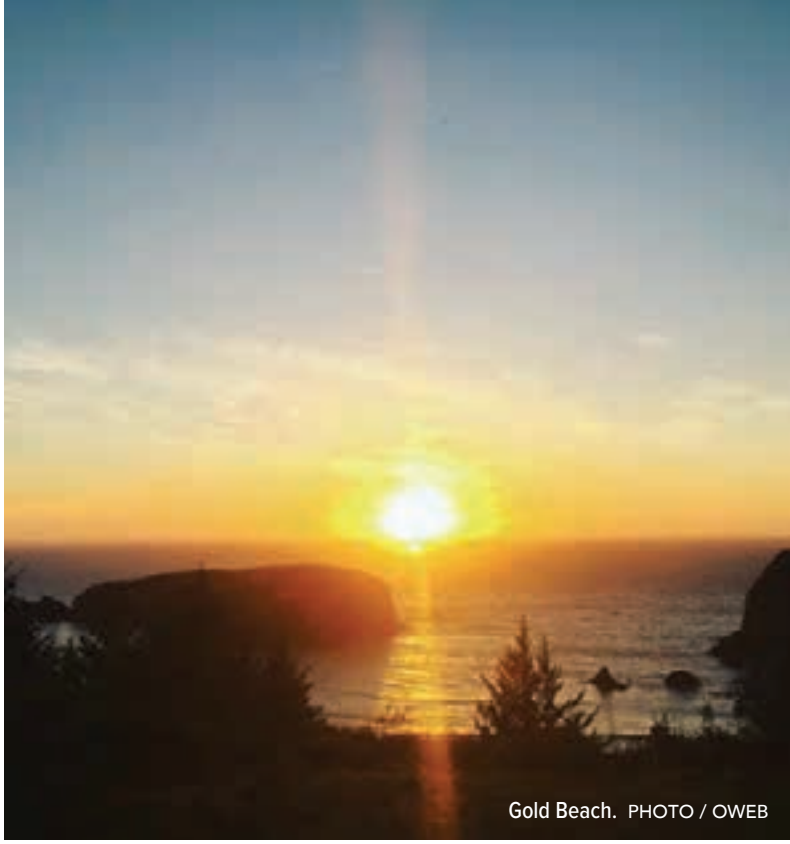
Conclusion

This in-depth, qualitative study found many examples of partnerships accomplishing more complex work at a larger scale than any one organization could do alone. Most of the assumptions from OWEB's theory of change have held up with some fine-tuning related to performance and resilience.

Partnerships emphatically described the value that the P-TA and FIP grants had to their performance, growth and resilience, including the cumulative value of these programs for partnerships that received both. FIP grants were described like 'rocket fuel' that launched partnerships into a higher level of performance, which also supported their resilience and competitiveness for future funding from other sources. P-TA grants created an opportunity for partnerships to formalize their focus, commitment and governance structure, which for most partnerships created momentum to then take advantage of large funding opportunities, including partnerships that were not selected for FIP grants. On the other hand, partnerships who weren't able to secure funding for the partnership to implement projects anticipated operating at a lower level until new funding was available, implementing the work individually or restructuring around a new focus and funding opportunity.

Thoughtful reflection on the function and structure of partnerships led to development of a series of conceptual tools describing:

- Partnership types defined by relative interdependence among partners,
- A framework for understanding high performance including categories of performance common to all partnership types and others that vary by partnership type, and
- Threads of resilience that maintain the integrity of a partnership despite stressors and change.



Gold Beach. PHOTO / OWEB

OWEB's efforts have been striking in their long-term commitment to invest in a breadth of partnerships working in different ecosystems across the state, their openness to learn alongside partners and their commitment to continually evolve the program to have the greatest impact possible.

However, program innovations must fit within the funding OWEB has for staff and infrastructure such as the online application portal and grants database – funding which is decided through the legislative budget process and relatively modest compared with their large funding portfolio. Program innovations must also fit within the statutes that govern the use of lottery funds for the benefit of water quality, watershed function, native fish, wildlife, plants and ecosystems. As OWEB continues to clarify their values and commitment to equity and environmental justice and as they learn from ongoing innovation led by partnerships and tribes, the interpretation of these statutes may play a key role in the future evolution of their partnership-focused investments.

OWEB's focused commitment to learning and adaptation in support of high performing partnerships has yielded many insights and practical tools that will be of use to partnerships and funders working in restoration and across sectors.

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Ashland Forest All-Lands Restoration Project – 2016 OWEB Board tour to the Roth Property, a private parcel that has Pacific Fisher dens. PHOTO / CITY OF ASHLAND

Appendix A

Partnerships awarded a FIP and/or P-TA grant: 2015-2022

The following partnerships were invited to participate in this study, except those with an asterisk who had only recently received funding when the study started. **Partnerships shown in bold participated in this study.** All of these partnerships are included on the map at the beginning of this report.

Partnerships awarded a FIP grant only: 2015-2022

Ashland Forest All-Lands Restoration
Baker Sage-grouse Local Implementation Team
*Coos Basin Coho Partnership
Deschutes Basin Partnership
Grande Ronde Model Watershed
Harney Basin Wetland Collaborative
Oregon Model to Protect Sage-Grouse All Counties
Warner Basin Aquatic Habitat
Willamette Mainstem Anchor Habitat Working Group

Partnerships awarded a P-TA grant only: 2015-2022

Umpqua Basin Partnership
Siskiyou Coast Estuaries Partnership, formerly Wild Rivers Coast Estuaries
Wallowa Fish Habitat Restoration Partnership
Rogue Basin Partnership
Willamette Valley Oak Prairie Collaborative
Hood River Basin Partnership
Intertwine Alliance Oak Prairie Working Group
Salmon Super Highway
Pure Water Partners
Upper Grande Ronde River Watershed Partnership
Partners of the North Santiam
Upper Deschutes Partnership
*Deschutes Basin Water Collaborative Partnership
*Nehalem Basin Partnership
*Coquille Coho Partnership
Upper Willamette Stewardship Network

Partnerships awarded a FIP grant and P-TA grant: 2015-2022

Clackamas Partnership Restoration for Native Fish Habitat
John Day Basin Fish Habitat Initiative
Rogue Forest Partners
Oregon Central Coast Estuary Collaborative
Siuslaw Coho Partnership
East Cascades Oak Partnership
Klamath Siskiyou Oak Network



Ashland Forest All-Lands Restoration Project



PHOTO / ROBERT WARREN

Appendix B

OWEB's Partnership Learning Project– Partnership Survey

Thank you for your willingness to participate!

Your thoughtful comments will contribute to a greater understanding of how partnerships grow and evolve under different circumstances. We hope this will benefit your partnership and others, while also directly informing the evolution of OWEB's Focused Investment Partnership (FIP) Program and Partnership Technical Assistance (P-TA) grants.

It is possible to complete the required questions in this survey in about 20-30 minutes. (Required questions are marked with an asterisk.) If you have more time to add comments and examples, it will contribute to a deeper understanding of partnerships and potentially more creative recommendations for OWEB.

Your responses for each page will be saved automatically each time you click on the 'next page' button. If you close your browser and have cookies enabled, you can open the survey link in the same browser and return to your responses to make changes or complete the survey.

If you would prefer an interview by phone or Zoom to share your thoughts instead of taking this survey, please reach out to the email below.

As a gesture of appreciation, each partnership that has at least two people complete the survey or participate in an interview will receive a check for $250 - which could be spent on meeting refreshments to celebrate your good work or whatever your partnership chooses.

All of your responses will be confidential and only seen by the research lead, Jennifer Arnold, Ph.D. of Reciprocity Consulting, LLC. Only aggregated summaries or anonymous quotes will be shared after all personally identifiable information is removed.

Findings will be presented to OWEB staff and board and if all goes well, we'll also develop an academic publication for a broader audience. We will recognize all of the organizations that participate.

If you include your email address, you will receive a copy of preliminary findings and be invited to share your feedback, likely sometime in early 2023. In the meantime, please reach out with any questions.

Thank you for the work you put in every day - and the opportunity to learn alongside with you!

Jennifer Arnold, Ph.D., Reciprocity Consulting, LLC
jennifer@reciprocityconsulting.com 520-990-6922
reciprocityconsulting.com

Partnership Survey

A Few Questions about You and Your Partnership

The following questions will help track patterns in responses across partnerships and allow for individual follow-up if questions come up during analysis.

1 Which partnership(s) are you a part of? Please mark all that apply.

- ◯ Ashland Forest All-Lands
- ◯ Baker Sage-grouse Local Implementation Team
- ◯ Clackamas Basin Partnership
- ◯ Deschutes Partnership
- ◯ East Cascades Oak Partnership
- ◯ Grande Ronde Restoration Partnership
- ◯ Harney Basin Wetlands Collaborative
- ◯ Hood River Watershed
- ◯ Intertwine Alliance Oak Prairie Working Group
- ◯ John Day Basin Fish Habitat Initiative
- ◯ Klamath Siskiyou Oak Network
- ◯ McKenzie Collaborative
- ◯ Millicoma Forks Coastal Coho Restoration Partnership
- ◯ Oregon All Counties Sage Grouse
- ◯ Oregon Central Coast Estuary Collaborative
- ◯ Partners of the North Santiam Watershed
- ◯ Pure Water Partners
- ◯ Rogue Basin Partnership - Little Butte Creek Watershed TRIB Initiative
- ◯ Rogue Forest Partners
- ◯ Salmon Super Highway
- ◯ Sandy River Basin Partners
- ◯ Siuslaw Coho Partnership
- ◯ Umpqua Basin Partnership
- ◯ Upper Grande Ronde River Watershed Partnership
- ◯ Upper Willamette
- ◯ Wallowa County Annual Invasive Grass Partnership
- ◯ Wallowa Fish Habitat Restoration Partnership
- ◯ Warner Basin Aquatic Habitat
- ◯ Wild Rivers Coast Estuaries
- ◯ Willamette Mainstem Anchor Habitat Working Group
- ◯ Willamette Valley Oak Prairie Cooperative

2 If you marked more than one partnership, which one are you most involved with?

Please answer the survey questions with this one partnership in mind. In the open comment boxes throughout the survey, you are also welcome to share reflections about other partnerships you have experience with.

3 Your Name

Your name is strongly preferred but not required. None of your responses will be linked to your name, organization or partnership. Research lead, Jennifer Arnold, will be the only person who will see personally identifiable information.

4 Your Email

If you provide your email, I will share preliminary findings for your review and feedback.

5 Your Organization

6 Your position in your organization and your role within the partnership, if you have a specific role.

7 Are you interested in being contacted for a follow-up conversational interview?
I am looking to talk to people from different types of partnerships to hear more about the questions in this survey.

- ○ Yes, I would like to have a conversation.
- ○ Maybe
- ○ No

8 Do you think your partnership might be interested in participating in a facilitated discussion?
If there is interest, I can virtually attend one of your partnership meetings to listen and/or facilitate a group discussion about some of the questions from this survey.

- ○ Yes
- ○ Maybe
- ○ No

Questions or comments?

9 How long has your partnership been operating in one form or another?

- ○ 0-2 years
- ○ 3-5 years
- ○ 5-10 years ago
- ○ 10-20 years
- ○ 20+ years
- ○ Don't know
- ○ No longer operating

10 How long has your partnership been operating in one form or another?

- ○ 0-2 years
- ○ 3-5 years
- ○ 5-10 years ago
- ○ 10-20 years
- ○ 20+ years

Comments?

11 Which OWEB grant has your partnership applied for?

- ○ Partnership Technical Assistance (P-TA) grant, formerly called Development FIP and Capacity Building FIP
- ○ Focused Investment Partnership (FIP) grant

12 Which OWEB grant has your partnership received?

- ○ Partnership Technical Assistance (P-TA) grant, formerly called Development FIP and Capacity Building FIP
- ○ Focused Investment Partnership (FIP) grant
- ○ None of the above

PARTNERSHIP TYPES

Partnerships work at different scales, geographies and focus areas. Each has a unique structure, function and focus, whichmay change over time as the work evolves and in response to changes in leadership, new partners, funding, policies, external events, etc.

The next few questions will ask you to refl ect on yourpartnership with respect to the four partnership types described below, where partners have differing levels ofrelative autonomy or interdependency. The four types are also described in the questions below, but this graphic is provided for more detail. Each of these types can be high-performing and generate impact.

Partnership Types

Partnerships work at different scales and in different geographies and contexts. Each has a unique structure, function and focus, which may change over time as the work evolves and in response to changes in leadership, new partners, funding, policies, external events, etc.

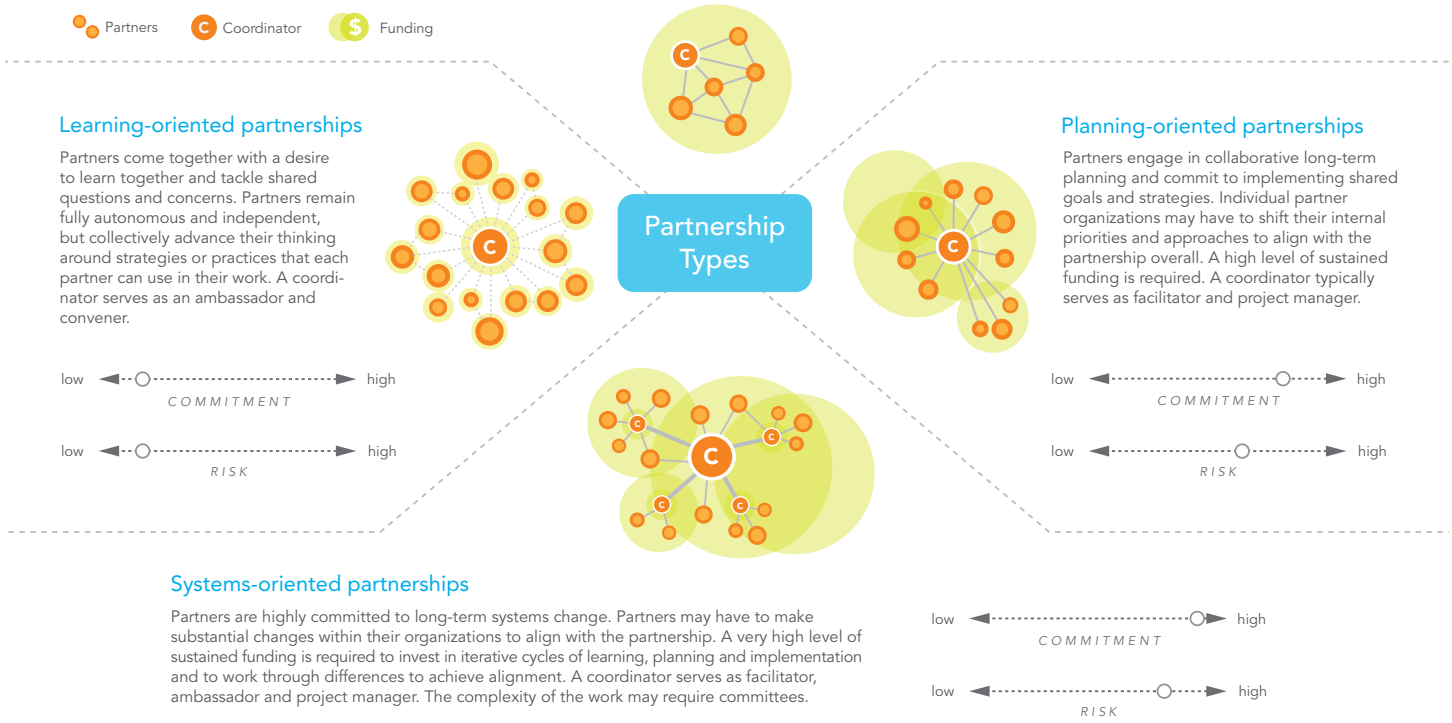
The partnership types below differ with respect to interdependency. In reality, this is a gradient, not discrete types. With more ambitious goals and greater interdependency, partners take on greater risk to meet shared commitments.

Project-oriented partnerships

Partners remain relatively autonomous and independent, but commit to a set of shared priorities and tasks, typically in response to funding opportunities. Usually there is a small number of partners. A coordinator serves as a project manager, a role which may be rotated among partners.

low ◄------► high
COMMITMENT

low ◄------► high
RISK



Systems-oriented partnerships

Partners are highly committed to long-term systems change. Partners may have to make substantial changes within their organizations to align with the partnership. A very high level of sustained funding is required to invest in iterative cycles of learning, planning and implementation and to work through differences to achieve alignment. A coordinator serves as facilitator, ambassador and project manager. The complexity of the work may require committees.

low ◄------► high
COMMITMENT

low ◄------► high
RISK

Draft - 2022 revised graphic based on partnership continuum from OWEB's Partnership Learning Project, 2018 - Feedback welcome **jennifer@reciprocityconsulting.com**

1 Which partnership type best describes how your partnership is currently structured?

- ○ **Learning-oriented partnership** – partners remain fully autonomous andindependent, but collectively advance their thinking
- ○ **Project-oriented partnership** - partners remain relatively autonomous andindependent, but commit to shared priorities and tasks
- ○ **Planning-oriented partnership** – partners engage in collaborative long-term planning andimplementation which may require individual partners to shift their internal priorities
- ○ **System-oriented partnership** - Partners are highly committed to long-term systems change and may have to make substantial changes within their organizations to achieve alignment
- ○ **Don't know**

2 Which partnership type best describes how your partnership has functioned in the past? *Mark all that apply.*

- ○ **Learning-oriented partnership** – partners remain fully autonomous andindependent, but collectively advance their thinking
- ○ **Project-oriented partnership** - partners remain relatively autonomous andindependent, but commit to shared priorities and tasks
- ○ **Planning-oriented partnership** – partners engage in collaborative long-term planning andimplementation which may require individual partners to shift their internal priorities
- ○ **System-oriented partnership** - Partners are highly committed to long-term systems change and may have to make substantial changes within their organizations to achieve alignment
- ○ **Don't know**

Comments?

3 Which partnership type best describes how you wouldlike your partnership to function in the future? *Mark all that apply.*

- ○ **Learning-oriented partnership** – partners remain fully autonomous andindependent, but collectively advance their thinking
- ○ **Project-oriented partnership** - partners remain relatively autonomous andindependent, but commit to shared priorities and tasks
- ○ **Planning-oriented partnership** – partners engage in collaborative long-term planning andimplementation which may require individual partners to shift their internal priorities
- ○ **System-oriented partnership** - Partners are highly committed to long-term systems change and may have to make substantial changes within theirorganizations to achieve alignment
- ○ **Don't know**

Comments?

4 Describe how your partnership has changed over the years – and share from your perspective, what are some of the influences that have driven those changes? *Consider partnership structure, function, partner composition and/or focus of your work.*

EXPANDING YOUR CIRCLE

OWEB believes that healthy watersheds are supported by people who reflect the diversity of their communities.

Increasingly, people are acknowledging that segments of the population have not been engaged in restoration efforts – and that the support and creativity from the breadth ofpeople in a watershed is important, or even necessary, forrestoring watersheds and realizing the full potential for socialand ecological benefits.

1 To what degree do you feel that expanding your circle of partners and/or building relationships with underrepresented groups in your watershed will help you achieve your goals?

- ○ Strongly agree
- ○ Agree
- ○ Somewhat agree
- ○ Neither agree nor disagree
- ○ Somewhat disagree
- ○ Disagree
- ○ Strongly disagree
- ○ Don't know

★ Please explain or provide examples.

2 To what degree are you working on expanding yourcircle of partners to include underrepresented groups? *Mark all that apply. Your name or partnership will not be linked to your answers.*

- ○ Not applicable
- ○ We are interested but not sure where to start.
- ○ We are talking, learning and planning.
- ○ We are taking some early action steps.
- ○ We are in conversation with one or more historically underrepresented groups.
- ○ We have one or more people from historically underrepresented groups aspartners.
- ○ We have one or more people from historically underrepresented groups in leadership roles in our partnership.
- ○ We are making progress and sharing what we have learned with others.

Please explain or provide examples. *If you are working to expand your circle, please share which groups or constituencies you are working with.*

PARTNERSHIP TRUST & ACCOUNTABILITY

When we spoke to OWEB-funded partnerships five years ago,some partnerships noted that trust was fragile and partners were hesitant to ask challenging questions of each otherduring project prioritization and technical review.

They recognized that holding each other accountable requires leadership and substantial investment in relationships and trust building. They also reflected that governance documents, a skilled facilitator and planning tools help too.

They wondered if it would become easier to ask challenging questions of each other over time as relationships and trust were built.

1 **To what extent do you currently trust your partnershipto ask hard questions of each other so that collective decisions and actions have the greatest chance for impact?** Your name and partnership will not be linked withyour response.

- ○ Trust a lot
- ○ Trust
- ○ Trust somewhat
- ○ Neither trust nor mistrust
- ○ Mistrust somewhat
- ○ Mistrust
- ○ Mistrust a lot
- ○ Don't know

Comments?

2 To what extent do you think that trust among partners has changed over the years, thinking about the trust needed to ask hard questions and make planning and budget decisions together to hold the bar high for performance and impact?.

- ○ Greatly increased trust
- ○ Increased trust
- ○ Somewhat increased trust
- ○ Stayed the same
- ○ Somewhat decreased trust
- ○ Decreased trust
- ○ Greatly decreased trust
- ○ Don't know

Comments?

3 If you can, please share an example of when partners asked challenging questions of each other to increase their chance for greater impact.

ACCOUNTABILITY IN THE TECHNICAL REVIEW PROCESS

Note: Only FIP grantees were asked the questions in this section.

OWEB works with partnerships in the technical review process to keep the bar high for performance and likelihood of impact. However, OWEB also appreciates each partnership's autonomy and investment in strategic planning and internal governance that was the basis for the FIP grant award.

1 To what extent do you think OWEB's role in technical review has led to a better outcome for implementation and greater likelihood for impact?

- ○ Very much agree
- ○ Agree
- ○ Somewhat agree
- ○ Neither agree nor disagree
- ○ Somewhat disagree
- ○ Disagree
- ○ Strongly disagree

2 What do you appreciate about OWEB's role in technical review and what could be improved?

TRACKING PROGRESS AND IMPACT

High performing partnerships are often very good at tracking progress with respect to implementation and outputs, such as miles of stream restored or acres of forest treated.

However, it is much more challenging to track short and long-term ecological and social outcomes, such as changes insalmon populations, the resilience of forests to extreme fi reevents or economic and human health benefits from healthy watersheds.

1 To what extent have you had success tracking progress toward your long-term goals?

- ○ Lots of success
- ○ Success
- ○ Some success
- ○ Neither success nor failure
- ○ Some failure
- ○ Failure
- ○ Lots of failure

★ Please explain and share examples.

2 The following are some examples of why it is challenging to track short and long-term ecological and social outcomes. Please mark all those that you've experienced and describe any others below.

- ○ External changes, such as extreme flooding, catastrophic fire, economic recession, climate change, etc.
- ○ Shifting understanding of how systems work and what we should be tracking to measure change
- ○ Managing large complex data sets with multiple partners
- ○ Funding for monitoring over the timeframe needed for outcomes to emerge
- ○ Linking your work to the changes observed when there are other influences and unknowns

3 Please share examples of your biggest challenges withtracking short and long-term outcomes. How have you navigated these challenges, which might include changes in staffing, technology, training, etc.? What support would be useful from OWEB or other funders?

PARTNERSHIP RESILIENCE AND FUNDING

Partnership resilience refers to the ability of partnerships towithstand stressors and changing circumstances and stilladvance their vision and goals. A partnership may change instructure, function, composition or focus over time, but it is resilient if it continues to advance its vision and goals. A partnership may face many different kinds of stressors, but inthis study, we are specifi cally looking at how partnerships respond to changes in funding.

1 To what extent do you feel confident that your partnership will be resilient and sustain its work as different funding opportunities come and go?

- ○ Very confident
- ○ Confident
- ○ Somewhat confident
- ○ Neutral
- ○ Somewhat unsure
- ○ Unsure
- ○ Very unsure

Comments?

2 From your perspective, what makes your partnership more or less resilient to changes in funding? Consider your partnership structure, governance, history, partner composition, community context, access to funders, etc.

3 Are there ways funders can better support partnership resilience, short of continuous long-term funding commitments?

4 What are you most proud of with respect to fundraising for the partnership? *Include any significant or impactful grants that you have received, not including OWEB, with amounts and funders, for example NRCS, Oregon Department of Water Resources, private foundations, etc. We would like this information to understand the range of funding sources across partnerships and get a sense for the diversification of sources. We appreciate that this is sensitive information, and these details will not be shared. If you include private foundations, please share the name of the foundation.*

FINAL THOUGHTS

1 What inspires you to continue investing your time and energy in this partnership?

2 Do you have any other comments, feedback or questions to share?

Thank you so very much for your time! Please reach out with any questions.

Jennifer
Questions: jennifer@reciprocityconsulting.com



OREGON WATERSHED ENHANCEMENT BOARD

BONNEVILLE ENVIRONMENTAL FOUNDATION

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OREGON WATERSHED ENHANCEMENT BOARD

Agenda Item K

PacifiCorp Interim Measure 11

Board Meeting October 23-25, 2023

Tina Kotek, 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; Strategic Plan priority #4: Watershed organizations have access to a diverse and stable funding portfolio; and Strategic Plan priority 7: Bold and innovative actions to achieve health in Oregon's watersheds.

MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Renee Davis, Acquisitions and Special Programs Manager
Heidi Hartman, Drought Program Specialist
Greg Ciannella, Region 4 Program Representative

SUBJECT: Agenda Item K – Approval of Receipt of PacifiCorp Interim Measure 11 Funding
October 23-25, 2023, Board Meeting

I. Introduction

This report requests the board approve receipt of $6,433,500 in grant funding from PacifiCorp for nutrient reduction projects in the Klamath Basin to provide water quality improvements in the mainstem Klamath River, as described in the amended Klamath Hydroelectric Settlement Agreement (KHSA).

II. Background

The amended KHSA includes Water Quality Improvements under Interim Measure 11 which is intended to address water quality needs in the Klamath River through restoration and conservation actions in the Klamath Basin. The emphasis of Interim Measure 11 (IM 11) is nutrient reduction projects. PacifiCorp, in consultation with the Interim Measures Implementation Committee, developed a Priority List of Projects (PLP) to be implemented to fulfill the objective of amended agreement. The priority categories include: natural wetlands restoration; riparian fencing and grazing management; irrigation efficiency and water management projects; and diffuse source treatment wetlands. Projects in these categories are intended to be implemented in strategic locations achieve water quality benefits. The amended KHSA, funding agreement for PLP implementation will be provided by PacifiCorp upon the Klamath River Renewal Corporation (KRRC)'s acceptance of the Federal Energy Regulatory Commission (FERC) license surrender order for the four hydroelectric dams operated by PacifiCorp on the Klamath River. This process is documented in the 2018 Phase 2 Final Report of the Interim Measures Implementation Committee.

In 2019, PacifiCorp and the Committee selected OWEB as the fiscal agent for the water quality improvement funding.

III. PacifiCorp Funding and IM 11 Grant Program Development

Now that the FERC license surrender order has been accepted by KRRC, grant funding in the amount of $6,433,500 for implementation of water quality improvements (including a modest amount for inflation) has been provided by PacifiCorp to OWEB. This funding, formally referred to as the KHSA Water Quality Improvements Fund, will be administered by OWEB as the designated fiscal agent. The Oregon Department of Environmental Quality (DEQ) is responsible for convening and facilitating a Steering Committee (Committee) to oversee grant-making for water quality improvements. An interagency agreement is in place between OWEB and DEQ that outlines roles and responsibilities for both agencies.

The Committee is comprised of members with relevant technical expertise in the Klamath Basin and tasked with oversight of the PLP implementation process. The Committee, led by DEQ as outlined in the 2018 Committee report, will review and approve both the grant solicitation process to be developed by OWEB and all projects that will be selected to receive available funding through this grant-making. DEQ and the Committee will provide oversight for OWEB's work as the fiscal agent and review reporting to be provided by grantees via OWEB. OWEB's role is to administer a defined process by which the Committee will select projects to receive grant awards made with the PacifiCorp funding.

Based on the grant solicitation process, local partners will develop project proposals within the Oregon portion of the Klamath Basin for submission to OWEB. The Committee will use evaluation criteria previously established in the 2018 report to review and prioritize projects for funding. Currently, it is not possible to predict how many grant cycles will be needed to fully allocate the funding. This timeframe will depend on the number of qualified projects proposed and the outcome of the review processes.

As of the writing of this staff report, DEQ has convened the Steering Committee twice, with discussions focused on development of the grant program structure and timeline.

IV. Recommendation

Staff recommend the board approve receipt of $6,433,500 in grant funding from PacifiCorp for water quality improvement projects in the Oregon portion of the Klamath Basin, and delegate authority to the Executive Director to distribute funds through the appropriate agreements with an effective date of October 25, 2023.