

OWEB Focused Investment Partnership (FIP) Program 2021-2023 Implementation FIP Evaluation Criteria Review Worksheet

Name of Initiative:

Ecological Priority:

Purpose of this worksheet: Implementation FIP proposals shall be evaluated on the criteria listed in a-g below. These criteria are outlined in OWEB's FIP administrative rules (695-047-0060) and depicted in the attached bubble diagram.

These worksheets will not be collected by OWEB staff, instead they are meant to be a tool for reviewers to prepare for expert review meetings. These criteria and rating definitions will also serve as the basis for the review meeting discussions.

For **FIP Expert Review Meetings**, reviewers will focus on criteria (d)-(g) but will discuss criterion (a) at the end of the review meeting.

For **FIP Partnership Capacity Review Meetings**, reviewers will focus on criteria (b) and (c).

However, all reviewers are welcome to share input on the criteria not specific to their review meeting.

Note on reapplications: Partnerships that have previously received OWEB Implementation FIP funding are eligible to reapply to the Implementation FIP grant offering, either with a different geography and/or different conservation actions or for the same conservation actions in the same geography. Reviewers will focus on reapplications in criteria (c) and (d).

(a) The extent to which the initiative addresses a Board-identified priority

(Application: Section 4 questions 8-10 & 12)

Because this criterion is linked to Board-identified priorities and materials, it will be evaluated by Board members with assistance from OWEB staff. However, you are welcome to provide your qualitative assessment. Please refer to the [priority memo\(s\)](#) describing the relevant Board-adopted habitat/species ecological priority.

STRENGTHS:

CONCERNS:

ADDITIONAL COMMENTS/QUESTIONS:

OWEB Focused Investment Partnership (FIP) Program 2021-2023 Implementation FIP Evaluation Criteria Review Worksheet

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

(Application: Section 3 questions 1, 3, 5, 6; Section 4 question 14; Section 7)

HIGH:

- The proposal demonstrates the partnership has an identified leader or leaders and has allocated sufficient staff and financial resources to ensure timely communication, coordination and decision-making among partners.
- The partnership has a clear, thoughtful plan for communicating with and engaging a broad range of stakeholders within the community throughout the life of the initiative and has allocated sufficient staff and financial resources to implement the plan.
- The partnership has a specific process for catalyzing additional investments and demonstrates the investments have a high likelihood of being secured for the duration of the FIP investment.

MEDIUM:

- The proposal demonstrates the partnership has allocated staff and financial resources for management of the partnership, but may lack either clear leadership or sufficient resources to ensure timely communication, coordination and decision-making across partners.
- The partnership has an adequate plan for informing but perhaps not fully engaging the broader community throughout the life of the initiative and has allocated sufficient staff and financial resources to meet some but not all of the plan's actions. The plan may reach some audiences better than others.
- The partnership has a conceptual plan for catalyzing additional investments that may lack detail but has identified potential sources of match funding that have a reasonable chance of being secured for the duration of the FIP investment.

LOW:

- The proposal demonstrates the partnership has allocated insufficient staff and financial resources for the care and management of the partnership, raising concerns that there could be miscommunications, poor coordination and ineffective decision-making that could limit project and partnership success.
- The partnership has a vague or no plan for engaging the broader community throughout the life of the initiative and/or has allocated few to no staff and financial resources so a plan appears unlikely to be implemented.
- The partnership has an informal or no plan for catalyzing additional investments and has identified either no potential sources of match funding or sources that have a low likelihood of being secured beyond the first biennium of the FIP investment.

STRENGTHS:

CONCERNS:

ADDITIONAL COMMENTS/QUESTIONS:

OWEB Focused Investment Partnership (FIP) Program 2021-2023 Implementation FIP Evaluation Criteria Review Worksheet

(c) The performance history and composition of the partnership

(Application: Section 3 questions 1- 4 & 7; attached partnership governance documents)

HIGH:

- The proposal demonstrates the partnership members have developed a productive, resilient partnership consisting of committed partners with a successful history of working collaboratively on both planning and implementing conservation actions.
- The partnership has a formal decision-making process which has been effectively used to support the partnership's organizational and project implementation efforts. Decisions are shared and documented for use throughout the life of the partnership.
- The composition of the partnership fully supports the proposed ecological outcomes of the FIP Initiative, including the necessary stakeholder engagement, project implementation, monitoring, and partnership coordination expertise to achieve those outcomes. The right partners are involved given the proposal's ecological objectives.
- *For partnerships that have previously received OWEB Implementation FIP funding*, the partnership has demonstrated regular internal and external communication pathways and strong, clear and fair processes that have allowed them to make decisions that are supported and implemented, prioritize projects and successfully execute work plans, and sustain partner involvement in and local support for the initiative.

MEDIUM:

- The proposal demonstrates the partnership members have developed an emerging partnership consisting of committed partners, some of whom have a successful history of working collaboratively on implementing conservation actions.
- The partnership has an informal or loosely described decision-making process which supports the partnership's organizational and project implementation efforts but could be more structured, efficient or better documented.
- The composition of the partnership mostly supports the proposed ecological outcomes of the FIP Initiative, including some but not all of the necessary stakeholder engagement, project implementation, monitoring, and partnership coordination expertise to achieve those outcomes. The critical partners are involved, but the partnership may benefit from additional partners to meet the ecological objectives.
- *For partnerships that have previously received OWEB Implementation FIP funding*, the partnership has established either internal or external communication pathways and clear and fair processes, but could have implemented projects and executed work plans better if they had better supported and unequivocal decisions or better sustained partner involvement in and local support for the initiative.

LOW:

- The proposal demonstrates the partnership members have developed a loosely organized partnership consisting of partners with a limited history of working collaboratively on implementing conservation actions.
- The partnership lacks a clear decision-making process and does not describe how the process supports the partnership's organizational and project implementation efforts.
- The partnership is missing key people, partners or expertise to support the intended purpose and desired ecological outcomes described in the FIP proposal.

OWEB Focused Investment Partnership (FIP) Program 2021-2023 Implementation FIP Evaluation Criteria Review Worksheet

- *For partnerships that have previously received OWEB Implementation FIP funding, the partnership's ability to complete timely and successful projects was hampered by irregular or poor internal and external communication, unclear or ineffective processes, unsupported decisions or diminished partner involvement and local support over time.*

STRENGTHS:

CONCERNS:

ADDITIONAL COMMENTS/QUESTIONS:

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

(Application: throughout Section 4, particularly questions 9, 10, 13, 15, & 17; Section 6)

HIGH:

- The partnership demonstrates a thorough understanding of the historic and present habitat conditions, future habitat needs, limiting factors, social context, potential barriers and appropriate conservation actions. As a result, the proposal describes a strong restoration trajectory with a high likelihood for achieving and sustaining the proposed ecological outcomes beyond the completion of the initiative within a regionally significant geography.
- The initiative work plan (Section 6) outlines a robust approach to achieving conservation outputs that support the proposed ecological outcomes. In particular, the proposal clearly describes thoughtful consideration of logical timing and sequence of conservation actions that makes ecological sense and scaffold (i.e., projects build upon each other) towards meeting outcomes, particularly in the first biennium.
- *For partnerships that have previously received OWEB Implementation FIP funding, the partnership placed their accomplishments within the context of the FIP initiative results chain and progress monitoring framework to demonstrate significant progress towards the intended outcomes of the previous 6-year FIP initiative. The proposal justifies further investment by describing what conservation actions are still needed, how the actions will build upon previous work, and how the actions will achieve more ambitious or long-lasting ecological outcomes in the same or new geography.*

OWEB Focused Investment Partnership (FIP) Program 2021-2023 Implementation FIP Evaluation Criteria Review Worksheet

MEDIUM:

- The partnership understands the nature and extent of restoration needs but may lack details on historical or social context, limiting factors, or potential barriers. As a result, the proposal describes a restoration trajectory that may be sufficient for achieving and sustaining the proposed ecological outcomes of the initiative in the near-term and demonstrates a fair likelihood of success within a locally significant geography.
- The initiative work plan (Section 6) sufficiently outlines an approach to achieving conservation outputs that support the proposed ecological outcomes. In particular, the proposal describes some consideration of the timing and sequence of conservation actions, but lacks either detail or a logical step-wise approach.
- *For partnerships that have previously received OWEB implementation FIP funding*, the partnership has demonstrated positive progress towards the intended outcomes of the previous 6-year FIP initiative. However, because the proposal does not clearly place the accomplishments within the context of the FIP initiative results chain and/or progress monitoring framework, it is difficult to ascertain if the progress is significant. The proposal describes what conservation actions are still needed but does not describe how the actions will achieve more ambitious or long-lasting ecological outcomes; the proposal could better justify why further investments in the same or new geography would be valuable.

LOW:

- The partnership lacks understanding of the nature and extent of restoration needs, including the historical or social context, limiting factors, or potential barriers. The proposal describes a restoration trajectory that is not adequate to achieve the proposed ecological outcomes of the initiative within the geography of the ecological priority.
- The initiative work plan (Section 6) outlines an approach to conservation actions that suggests it will not be successful in attaining the proposed ecological outputs. The proposal lacks consideration of the timing and sequence of conservation actions for implementing the proposed FIP initiative.
- *For partnerships that have previously received OWEB Implementation FIP funding*, the partnership has not implemented enough successful conservation actions to demonstrate progress towards the intended outcomes of the previous 6-year FIP initiative. The proposed additional conservation actions are not likely to achieve previously-identified or new ecological outcomes so do not justify further investments in the same or new geography.

STRENGTHS:

CONCERNS:

ADDITIONAL COMMENTS/QUESTIONS:

**OWEB Focused Investment Partnership (FIP) Program
2021-2023 Implementation FIP Evaluation Criteria Review Worksheet**

(e) The ability to track progress towards proposed outcomes

(Application: Section 4 questions 16, 18, 19, 20)

HIGH:

- The proposal clearly describes measurable outcomes and a rigorous yet realistic approach to monitoring for the purpose of tracking proposed conservation outputs and ecological outcomes over time. The monitoring approach is designed to measure programmatic effectiveness across multiple project sites as opposed to implementation metrics or individual project success. This approach uses baseline conditions and baseline monitoring data, which provide a clear point of comparison for measuring progress. Proposed monitoring parameters, design and methods are tied to conservation actions and ecological outcomes and will appropriately track change over time. The proposal clearly explains appropriate long-term data management and use for informing adaptive management at strategically determined intervals of time.

MEDIUM:

- The proposal describes measurable outcomes. While the proposal outlines an adequate approach to monitoring for the purpose of tracking proposed conservation outputs and ecological outcomes over time, it may lack details in referencing baseline conditions and data, may not be designed to measure programmatic effectiveness, may not have fully developed parameters and methods, or may not fully describe how data will be managed and used for adaptive management.

LOW:

- The proposal lacks measurable outcomes and/or describes an approach to monitoring that is inadequate for tracking proposed conservation outputs and ecological outcomes over time. The approach is limited to implementation metrics and is not designed to measure programmatic effectiveness. This approach provides limited discussion of baseline conditions and baseline monitoring data and/or proposes parameters or methods that are not adequate to measure conservation actions or ecological outcomes. The proposal does not demonstrate appropriate management of data or clear pathway for adaptive management.

STRENGTHS:

CONCERNS:

ADDITIONAL COMMENTS/QUESTIONS:

**OWEB Focused Investment Partnership (FIP) Program
2021-2023 Implementation FIP Evaluation Criteria Review Worksheet**

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

(Application: throughout Section 4, particularly questions 9-11, 14, 15, 16)

HIGH:

- The proposal strongly demonstrates that the initiative and the prioritization of actions are based on, and integrating, principles of sound science and the use of effective planning tools, including but not limited to Miradi, Atlas, and Project Tracker. Proposed restoration methods reflect an understanding of current, effective approaches and may include innovative methods informed by scientific principles.
- The initiative will clearly implement elements of the appropriate recovery conservation, tribal and/or other key plans.

MEDIUM:

- The proposal adequately demonstrates that the initiative is based on, and integrating principles of sound science and effective planning tools; however, the ecological reasons for some conservation actions may not be clearly described or the prioritization of restoration actions may not be fully supported by sound science or planning tools. Restoration methods reflect an understanding of current, effective approaches but may not include innovative approaches.
- The proposed actions are linked to but don't explicitly implement elements of the appropriate recovery, conservation, tribal or other key plans.

LOW:

- The proposal poorly demonstrates that the initiative and prioritization of conservation actions are based on, and integrating principles of sound science and use of effective planning tools. The proposed conservation actions include outdated or ineffective methods which will likely limit success. The lack of effective planning tools may make project prioritization and implementation difficult.
- The initiative does not appear to implement or reference key elements of the appropriate recovery, conservation, tribal or other key plans.

STRENGTHS:

CONCERNS:

ADDITIONAL COMMENTS/QUESTIONS:

**OWEB Focused Investment Partnership (FIP) Program
2021-2023 Implementation FIP Evaluation Criteria Review Worksheet**

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

(Application: Section 6 Initiative Work Plan; Section 7 Budget)

HIGH:

- The proposal includes a diversity of potential grant types (e.g., partnership capacity, stakeholder engagement, technical assistance, restoration, land acquisition, water acquisition, monitoring) or other funding sources necessary to support the variety of actions needed to achieve the proposed ecological outcomes. Allocation of potential funding across different action types is carefully considered and justified.

MEDIUM:

- The proposal supports a diversity of grant types (e.g., partnership capacity, stakeholder engagement, technical assistance, restoration, land acquisition, water acquisition, monitoring) or other funding sources, however it has not identified potential grant types or funding sources necessary to achieve one or more of the proposed ecological outcomes. Funding is generally allocated appropriately across different action types but may be skewed in a way that could limit success (e.g., the proposal has insufficient stakeholder engagement for the large suite of projects planned on private land or the proposal includes complex restoration projects but does not include a plan to gain the technical assistance needed to design the projects).

LOW:

- The proposal lacks a diversity of grant types (e.g., partnership capacity, stakeholder engagement, technical assistance, restoration, land acquisition, water acquisition, monitoring) or funding sources to the extent that most of the ecological outcomes are unlikely to be achieved. Allocation of funding across different funding types is not described, unclear, or unlikely to lead to success.

STRENGTHS:

CONCERNS:

ADDITIONAL COMMENTS/QUESTIONS: