Oregon
Tina Kotek, Governor

OREGON WATERSHED ENHANCEMENT BOARD
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November 17-18, 2026 OWEB Partnerships and Capacity Committee Meeting
Staff report – Cohort Five Focused Investment Partnership Interviews and Recommendations

MEMORANDUM

To: OWEB Partnerships and Capacity Committee

From: Eric Williams, Grant Programs Manager
Denise Hoffert, Partnerships Coordinator
Jillian McCarthy, Partnerships Coordinator
Audrey Hatch, Conservation Outcomes Coordinator
Eric Hartstein, Senior Policy Coordinator

I. Introduction

The OWEB Board Partnerships and Capacity (PAC) Committee has an important role in selecting Focused Investment Partnership (FIP) initiatives. OAR 695-047-0080 provides for the committee to conduct interviews of partnerships who have applied to be a FIP initiative and for the committee to make FIP funding recommendations to the full OWEB Board.

II. Background

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

FIP funding supports partnerships in pursuing conservation initiatives with up to $15 million over six years.

III. Solicitation, Expert Review Process, and Staff Recommendation

In January 2026, staff announced the solicitation for the fifth cohort of FIP initiatives to begin in the 2027-2029 biennium. Interested partnerships were required to formally consult with OWEB staff prior to the July 13, 2026 FIP application deadline. OWEB staff met with 14 partnerships interested in applying for a FIP initiative, and 12 partnerships ultimately submitted applications (Attachment A).

Applications were reviewed according to the FIP evaluation criteria (Attachment B) by an expert review team in September. The reviewers included individuals with expertise in each of the board-identified ecological priorities that were included in the applications as well as specialists in partnership capacity.

Reviewers discussed strengths and concerns according to the evaluation criteria and provided a “Fund” or “Do Not Fund” recommendation for each application. For

applications recommended as “Fund,” reviewers also provided a ranking (1-8). Evaluations for each application reflect the fund recommendation, ranking, and detailed strengths and concerns identified by reviewers (Attachment C).

The board has not yet adopted a spending plan for the 2027-2029 biennium. In the past, the board has expressed interest in dedicating 25%-30% of its spending plan for FIP initiatives. Attachment D provides the FIP program funding history, the proportion of the board’s current spending plan currently dedicated to FIP initiatives and forecasts the next three biennia based on different funding scenarios. Based on these scenarios, staff recommend that up to three new FIP initiatives may be awarded in the 2027-2029 biennium.

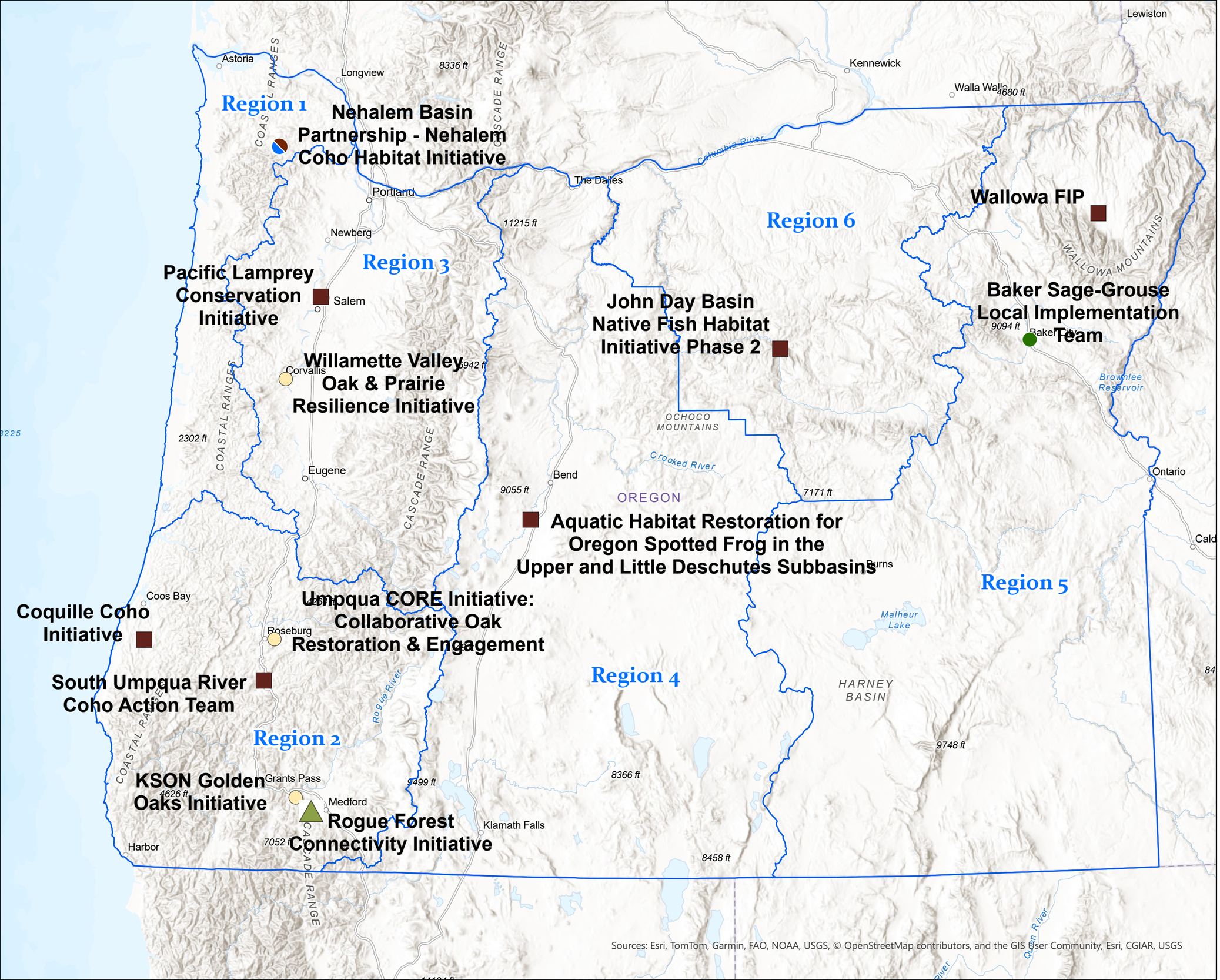
IV. PAC Committee Interviews and Recommendations

On November 18-19, 2026 the PAC Committee will meet to interview FIP applicant partnerships. Following the applicant interviews, the committee will deliberate and consider the results of the expert review process and the interviews. The committee will then make a funding recommendation for cohort five FIP initiatives in the 2027-2029 biennium for the OWEB Board to consider selecting at their January 26-27, 2027 meeting.

V. Attachments

A. Map of Proposed FIP Cohort 5 Initiatives Applications
B. Evaluation Criteria
C. Application Evaluations
D. Funding History and Scenarios

Proposed Focused Investment Partnership Initiatives Applications Cohort 5



Sources: Esri, TomTom, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community, Esri, CGIAR, USGS

Priority

- Aquatic Habitat for Native Species
- Dry-Type Forest Habitat
- Estuary Habitats and Aquatic for Native Species
- Oak and Prairie Habitat
- Sagebrush/Sage-Steppe Habitat
- OWEB Regions

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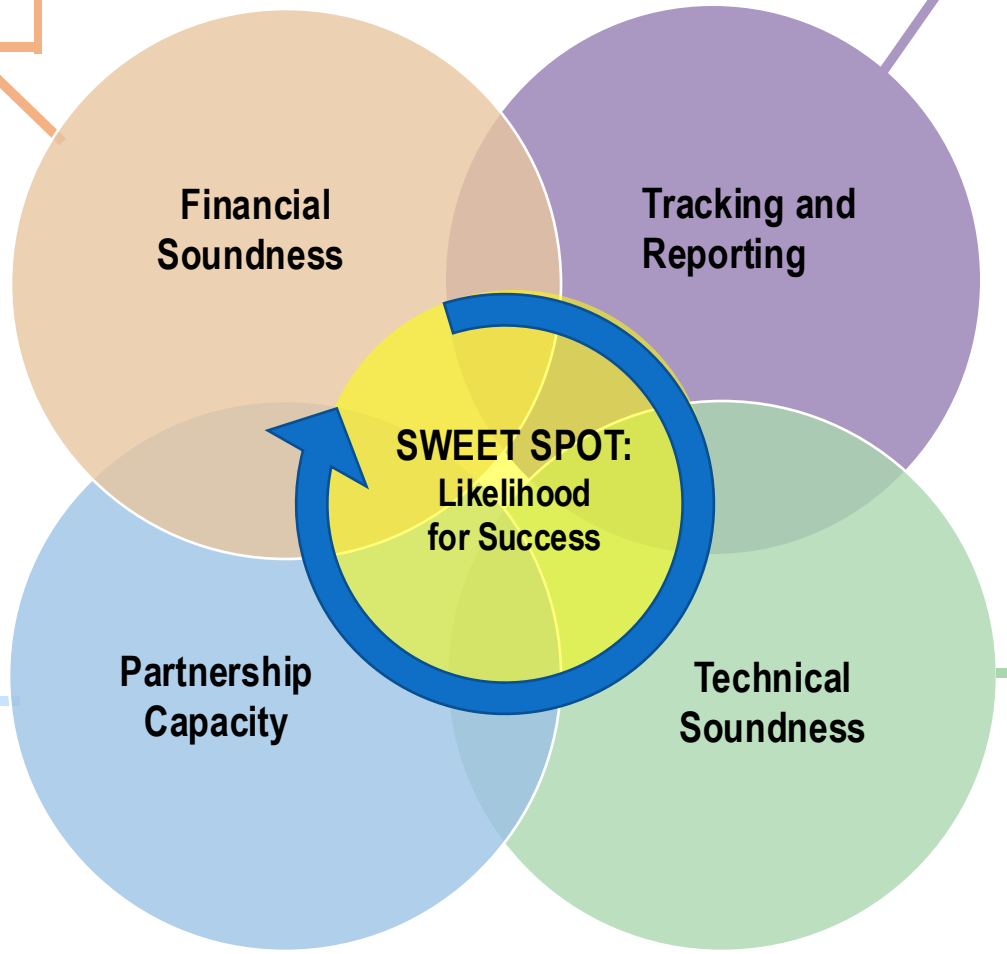
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FIP Evaluation Criteria

Evaluation Criteria
OAR 695-047-0060 and
OAR 695-005-0045

- Capacity to partner and engage the community within the Initiative geography
- Demonstrates an established governance structure
- Shared history of collaboratively implementing Conservation Actions and adaptively managing to achieve Conservation Outputs
- The composition of the partnership is appropriate to achieve Ecological Outcomes within the Initiative
- How engagement with, and input from, local communities disproportionately impacted by climate change has informed or will inform the project

- Ability to catalyze additional investments
- The allocation of funds across proposed grant types will support the achievement of the proposed Ecological Outcomes
- Demonstrates a process to track Conservation Outputs that are aligned with Ecological Outcomes



- Theory of Change supports the proposed Initiative and aligns with a Board identified ecological priority
- Conservation Actions and Conservation Outputs described in the proposed Work Plan will make progress toward Ecological Outcomes
- Consideration of greenhouse gas emissions or long-term carbon sequestration or storage
- Changing climate conditions are incorporated into the project and the project will contribute to durable adaptation and resilience for ecosystems, including human communities

2027-2029 Grant Offering

Focused Investment Partnership Program

Name of Initiative: Golden Oaks Initiative

Name of Partnership: Klamath Siskiyou Oak Network

Name of Applicant: Klamath Bird Observatory

Initiative addresses the following Board-identified Ecological Priority(ies): Oak and Prairie Habitat

Application Number: 228-0001-25261

Region: 2 **County(ies):** Jackson

Budget Overview:

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1 (2027 - 2029)	$4,885,629	$1,641,198
Biennium 2 (2029 - 2031)	$4,885,629	$1,479,407
Biennium 3 (2031 - 2033)	$4,885,629	$1,449,407
Total	**$14,656,887**	**$4,570,012**

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

Guided by the Klamath Siskiyou Oak Network (KSON) Strategic Action Plan, the Golden Oaks Initiative will restore 6,117 acres of priority oak woodland and mixed oak-conifer on private and Bureau of Land Management lands within the Gold Hill–Rogue River Watershed in Jackson County, Oregon. The Initiative addresses two high-priority threats aligned with OWEB's key limiting factors for Oak and Prairie Habitat—fire exclusion and conifer encroachment—while responding to accelerating Douglas-fir mortality. Climate models project that 48% of the Initiative landscape will become climatically suitable for oak habitat as conifer suitability declines, but this shift will not happen without restoration action.

KSON has a proven track record of delivering landscape-scale restoration through collaborative partnerships that integrate Tribal knowledge, western science, and adaptive management. Building on this foundation, the Initiative will strengthen partnerships among Tribes, private landowners, federal agencies, and conservation organizations and expand capacity to implement and sustain oak restoration.

Conservation actions include ecological thinning, slash treatment, prescribed fire, noxious weed management, and native understory restoration. Ecological monitoring and adaptive management will evaluate the following ecological outcomes: restore open-canopy oak habitat structure and plant species composition, reduce risk of habitat loss and fragmentation, protect legacy oaks, promote oak recruitment, sustain culturally important first foods, improve habitat connectivity; and increase resilience to climate change, insects, and high severity wildfire.

The Initiative will be implemented by the following core partners: Bureau of Land Management Medford District, Jackson Soil and Water Conservation District, Klamath Bird Observatory, Lomakatsi Restoration Project, Southern Oregon Forest Restoration Collaborative, The Understory Initiative, and U.S. Wildland Fire Service.

Attachment A: Initiative Map

Attachment B: Evaluation Criteria Ratings Worksheet

Attachment A: Initiative Map

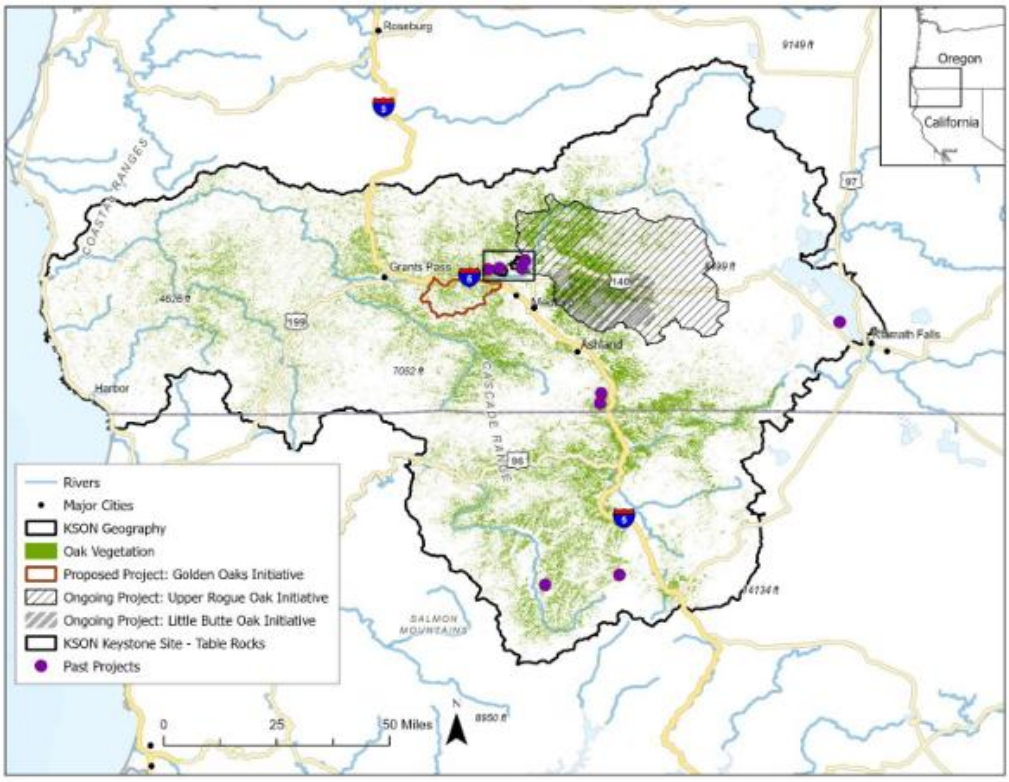


Figure 1. KSON's Golden Oaks Initiative (indicated by the red outline) falls within the Middle Rogue subbasin. This proposed Initiative is a FIP 2.0, building off of ongoing work in the Little Butte Oak Initiative, which was expanded with additional funding under the umbrella of the Upper Rogue Oak Initiative. KSON's keystone site, the Table Rocks, is located between the two Initiative areas. Additional past projects are indicated on the map.

Attachment B: Evaluation Criteria Ratings Worksheet

REVIEW

The review below is the staff prepared Expert Review Team evaluation of the application based on the evaluation criteria outlined in OAR 695-047-0060 and 695-005-0045.

Expert Review Team Funding Recommendation: Fund

Expert Review Team Ranking: 7 of 8

EVALUATION CRITERIA

PARTNERSHIP CAPACITY

Evaluation criteria: (1) The extent to which the partnership has the capacity to partner and engage the community within the Initiative geography; (2) The extent to which the partnership demonstrates an established governance structure and a shared history of collaboratively implementing Conservation Actions and adaptively managing to achieve Conservation Outputs; (3) The composition of the partnership is appropriate to achieve Ecological Outcomes within the Initiative and; (4) How engagement with, and input from, local communities disproportionately impacted by climate change has informed or will inform the project.

Strengths

- The partnership's Memorandum of Understanding is detailed and signed by partners. The partnership has identified clear roles and responsibilities for members and distributing work amongst the partners.
- The partnership demonstrates clear community engagement and the ability to balance social, cultural, and ecological threats identified through their engagement efforts.
- The partnership's Tribal engagement strategy is proven and brings Tribal values and voices into their proposed initiative.
- The partnership is nationally recognized and promotes workforce development in oak habitat restoration.
- Leaders in the partnership, including the proposed partnership chair, have demonstrated effective leadership ability and clear communication.

Concerns

- There are inconsistencies between the entities that signed the MOU and core parters identified in the application.
- The application is not clear about the level of landowner readiness to implement restoration with the partnership.

TECHNICAL SOUNDNESS

Evaluation criteria: (5) The extent to which the partnership's Theory of Change supports the proposed Initiative and aligns with a Board identified ecological priority; (6) The extent to which the Conservation Actions and Conservation Outputs described in the proposed Work Plan will make progress toward Ecological Outcomes; (7) Consideration of greenhouse gas emissions or long-term carbon sequestration

or storage; and (8) Changing climate conditions are incorporated into the project and the project will contribute to durable adaptation and resilience for ecosystems, including human communities.

Strengths

- The proposed restoration on BLM-managed land is compliant with relevant environmental impact assessments (i.e., NEPA), and treatments are ready to be implemented.
- The partnership utilizes established conservation strategies to identify and treat threats.
- The maps provide a clear visual representation of the partnership's strategy, landscape challenges, and demonstrate why they have prioritized certain areas.
- The partnership effectively documents adaptive management in the existing FIP initiative, which has resulted in improved oak habitat treatments.
- The partnership is working in a biologically diverse area and will be implementing cultural and prescribed fires that should provide significant ecological uplift.

Concerns

- The partnership's implementation strategy is vague and is dependent on long-term management that lacks assurance.
- The application does not clearly describe accomplishments associated with the existing FIP initiative.

TRACKING & REPORTING

Evaluation criteria: (9) The extent to which the partnership demonstrates a process to track Conservation Outputs that are aligned with Ecological Outcomes.

Strengths

- The partnership has demonstrated the ability to track projects and effectively report on project outputs.
- The application identifies clear metrics for tracking the proposed initiative.

Concerns

- None identified.

FINANCIAL SOUNDNESS

Evaluation criteria: (10) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed Ecological Outcomes and catalyze additional investments.

Strengths

- The partnership has an established ability to leverage outside funding sources.
- The budget for the proposed initiative is well-developed and spread across multiple groups. Relevant grant types for the proposed work are identified.

Concerns

- One organization is proposed to receive approximately 75% of the budget, which is a large responsibility for one entity that is already associated with other existing FIP initiatives.

2027-2029 Grant Offering

Focused Investment Partnership Program

Name of Initiative: Aquatic Habitat Restoration for Oregon Spotted Frog in the Upper Deschutes

Name of Partnership: Deschutes Partnership

Name of Applicant: Upper Deschutes Watershed Council

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

Application Number: 228-0002-25262

Region: 4 **County(ies):** Deschutes, Klamath, Jefferson

Budget Overview:

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1 (2027 - 2029)	$5,000,000	$5,225,403
Biennium 2 (2029 – 2031)	$5,000,000	$7,697,000
Biennium 3 (2031 – 2033)	$5,000,000	$4,760,323
Total	**$15,000,000**	**$17,682,726**

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

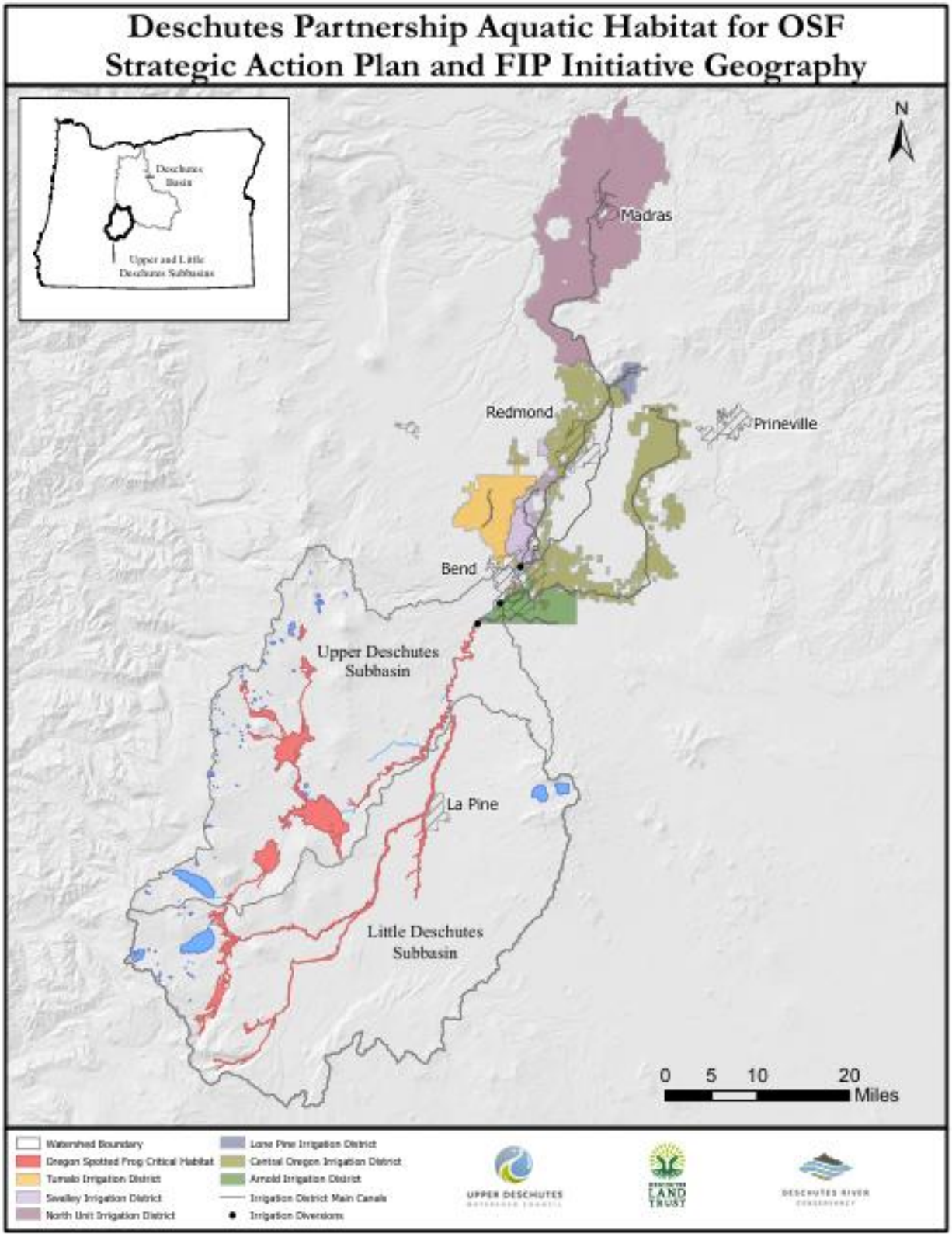
The Deschutes Partnership proposes to restore and protect aquatic habitat for ESA-listed Oregon spotted frog (OSF) under the Aquatic Habitat for Native Species ecological priority within OSF critical habitat in the Upper and Little Deschutes Subbasins south of Bend, OR. Initiative conservation actions include protection of 1200 acres and 5 river miles within or adjoining OSF critical habitat through easements or fee title purchases; habitat restoration in wetland, riverine, and other aquatic habitats on 300 acres and 5 river miles; permanent protection of 35 cfs of water instream through irrigation modernization and water rights acquisitions from willing sellers; doubling bullfrog control effort; monitoring habitat and OSF population outcomes to evaluate and inform restoration effectiveness; engaging 20 or more landowners to recruit participation in restoration and protection opportunities on private lands; and engaging the community in outreach about OSF conservation. Anticipated outcomes include more water available for instream use; increased area, quality, and duration of inundation of wetland habitats; vegetation structure and open water that support all OSF life stages; increased aquatic connectivity; decreased predation and predation risk; and increased OSF breeding success, abundance, site and population connectivity, and population resiliency. Deschutes Partnership implementing (core) partners include Deschutes Land Trust, Deschutes River Conservancy, and Upper Deschutes Watershed Council. Initiative technical partners include U.S. Fish and Wildlife Service, U.S. Forest Service, Oregon Department of Fish and Wildlife, and U.S. Geological Survey. Supporting partners include Bureau of Land Management; Confederated Tribes of Warm Springs; Deschutes Soil and Water Conservation District; Arnold, Central

Oregon, North Unit, and Swalley Irrigation Districts; and Oregon State Parks and may include others. Partnership roles are defined in our Strategic Action Plan.

Attachment A: Initiative Map

Attachment B: Evaluation Criteria Ratings Worksheet

Attachment A: Initiative Map



Attachment B: Evaluation Criteria Ratings Worksheet

REVIEW

The review below is the staff prepared Expert Review Team evaluation of the application based on the evaluation criteria outlined in OAR 695-047-0060 and 695-005-0045.

Expert Review Team Funding Recommendation: Fund

Expert Review Team Ranking: 6 of 8

EVALUATION CRITERIA

PARTNERSHIP CAPACITY

Evaluation criteria: (1) The extent to which the partnership has the capacity to partner and engage the community within the Initiative geography; (2) The extent to which the partnership demonstrates an established governance structure and a shared history of collaboratively implementing Conservation Actions and adaptively managing to achieve Conservation Outputs; (3) The composition of the partnership is appropriate to achieve Ecological Outcomes within the Initiative; and (4) How engagement with, and input from, local communities disproportionately impacted by climate change has informed or will inform the project.

Strengths

- The core partners have a long history of successful collaboration dating back to OWEB's Special Investment Program. The core partners include three of the four partners that implemented the previously awarded Deschutes FIP.
- The proposed partnership chair has demonstrated effective leadership ability.
- Each core partner has a clearly defined role to support the effective implementation of the partnership's work plan.
- The partnership's project implementation track record demonstrates ability to secure instream water rights and land acquisition projects.
- The partnership's MOU has been in place since 2015 and well describes the partnership's decision-making process.

Concerns

- The application lacks information on the role of supporting partners, including the Deschutes Soil and Water Conservation District.
- The application does not clearly describe how the partnership roles will be filled by the three core partners.
- It is unclear how the three core partners will represent the interest of technical partners who are not signed on to the MOU or letter of participation.
- The application notes that 20 parcels have been identified for landowner engagement activities but does not include a map or explanation as to why these parcels are important for Oregon Spotted Frog recovery.

- Outside of the Partnership Coordinator, the partners included in the application's Partnership & Roles table list each partner's current job title instead of identifying each person's role in the Partnership.
- The role of the Upper Deschutes Watershed Council Outreach Coordinator is not described in the application, even though the work plan identifies landowner engagement as a key component to the success of future land and water acquisitions.
- The application does not describe or identify individuals with Oregon Spotted Frog technical expertise within the partnership that are engaged in the initiative's planning and monitoring, which could have been included in the Partnership & Roles table.
- Engagement projects are included in the proposed work plan, but the partnership's communication strategy and messaging for the diverse audiences to be engaged is not described.
- Without a designated engagement lead and communication strategy, it is unclear how the partnership has or will engage with private landowners, including those irrigators disproportionately impacted by climate change. This partnership has not previously engaged landowners to implement restoration on private properties in this geography.

TECHNICAL SOUNDNESS

Evaluation criteria: (5) The extent to which the partnership's Theory of Change supports the proposed Initiative and aligns with a Board identified ecological priority; (6) The extent to which the Conservation Actions and Conservation Outputs described in the proposed Work Plan will make progress toward Ecological Outcomes; and (7) Consideration of greenhouse gas emissions or long-term carbon sequestration or storage; and (8) Changing climate conditions are incorporated into the project and the project will contribute to durable adaptation and resilience for ecosystems, including human communities.

Strengths

- The partnership's project prioritization and sequencing were developed through a robust process.
- The work plan includes multiple piping projects tied to conserving instream flows that will result in the permanent protection of an ecologically significant quantity of instream water rights.
- The Little Deschutes River is a location where bullfrog removal has the potential to be successful if actions to manage the invasive frogs can be maintained post-FIP.

Concerns

- The partnership's proposed actions and associated outputs lack sufficient detail to demonstrate how acquiring land leads to improved habitat for Oregon Spotted Frog.
- The initiative's success depends in part on bull frog removal; however, the application does not address whether this action will be durable over the life of the FIP initiative, nor does it describe a long-term management strategy for bullfrogs.
- The application does not provide a rationale for why recharging shallow groundwater aquifers, Strategy 4 in the Strategic Action Plan, is not included in the proposed work plan, but is included

in the Partnership's Theory of Change. The need for feasibility studies is identified, but no funding is requested to achieve this in the FIP initiative.
- The application does not describe the work plan's connection to the USFWS Oregon Spotted Frog Recovery Plan, which is essential for understanding the rationale for the proposed work, particularly the acreage identified for land acquisition, and for explaining the threats posed to Oregon Spotted Frog populations and habitat in a changing climate.

TRACKING & REPORTING

Evaluation criteria: (9) The extent to which the partnership demonstrates a process to track Conservation Outputs that are aligned with Ecological Outcomes.

Strengths

- Specific ecological indicators are described and linked to each output and ecological outcome.

Concerns

- The partnership's tracking and reporting processes are not well described. The application lacks specificity on how tracking and reporting will be coordinated.

FINANCIAL SOUNDNESS

Evaluation criteria: (10) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed Ecological Outcomes and catalyze additional investments.

Strengths

- The partners have experience leveraging significant funds.
- The sequencing and trajectory of funds being requested is easy to follow, with a focus on technical assistance and engagement in the first biennium followed by restoration and acquisition.
- The requested OWEB funding is primarily directed toward on the ground restoration and acquisition projects through the life of the FIP initiative and includes funding toward developing and implementing a monitoring plan.

Concerns

- Only 2% of the biennium 1 budget is directed toward engagement, and no other engagement funding is identified for biennia 2 and 3, which could limit the partnership's success in securing landowner agreements for the proposed acquisition projects.
- The work plan includes piping projects with Arnold Irrigation District and Central Oregon Irrigation District, but the application does not clarify whether these projects would proceed independently of the FIP initiative.
- The application lacks description of a process for catalyzing additional investment.

2027-2029 Grant Offering

Focused Investment Partnership Program

Name of Initiative: Advancing Sage-Steppe Resiliency in Baker County Through Enduring Partnership

Name of Partnership: Baker Sage-Grouse Local Implementation Team

Name of Applicant: Baker County

Initiative addresses the following Board-identified Ecological Priority(ies): Sagebrush/Sage-Steppe

Application Number: 228-0003-25263

Region: 5 **County(ies):** Baker, Union, Malheur

Budget Overview:

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1 (2027-2029)	$4,596,668	$2,543,679
Biennium 2 (2029 – 2031)	$4,822,056	$2,809,258
Biennium 3 (2031 – 2033)	$4,781,805	$2,670,780
Total	**$14,200,529**	**$8,023,717**

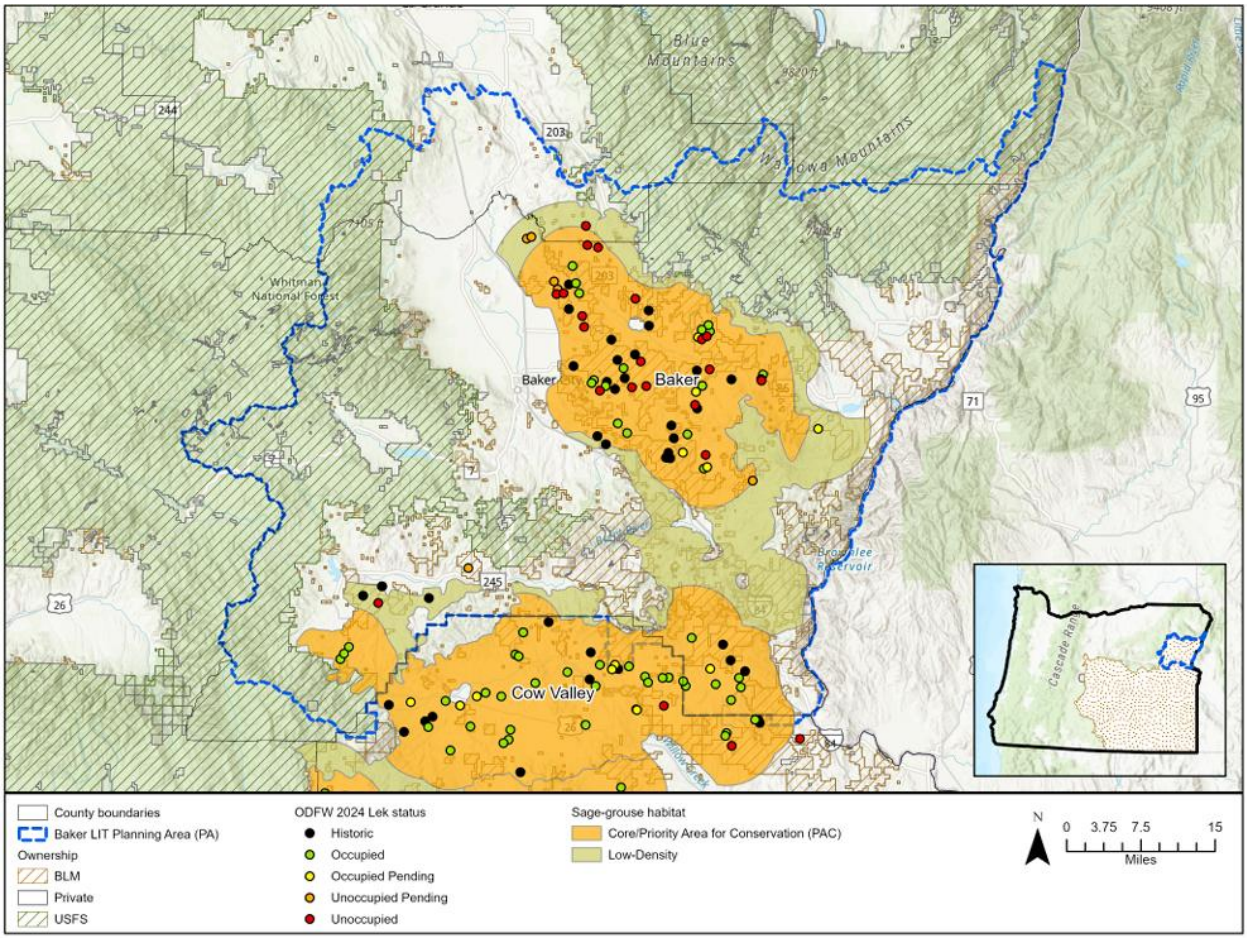
APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

The Baker Local Implementation Team (LIT) is a locally-driven collaborative formed to conserve and restore sagebrush ecosystems for the benefit of greater sage-grouse in Baker County, OR, where populations have significantly declined and are geographically isolated. Habitat loss driven by invasive vegetation, altered fire regimes, habitat fragmentation, and to a lesser degree, juniper encroachment, are the principal threats limiting recovery. Other factors such as improper grazing management, recreation impacts, predation, and disease pressures have either historically or currently compounded these risks. Small population size and low genetic diversity are also thought to be preventing sage-grouse from thriving despite efforts to address other threats. The overarching ecological priority of the LIT is to protect, restore, and maintain resilient sagebrush habitat that supports healthy sage-grouse populations and the broader suite of native plants and wildlife that depend on this ecosystem. To achieve this, the Baker LIT will advance eight integrated strategies: 1) maintain and expand technical capacity to plan and implement conservation actions; 2) increase enrollment of private landowners and public-land grazing permittees in voluntary habitat conservation programs; 3) prevent, treat, and manage invasive vegetation; 4) protect, enhance, and expand sagebrush and mesic habitats through targeted restoration and management; 5) maintain capacity to conduct restoration effectiveness monitoring needed to guide adaptive management; 6) reduce sage-grouse nest predation by addressing raven subsidies; 7) maintain a livestock forage reserve reimbursement program; and 8) implement sage-grouse translocations (ODFW-funded). Partners include Baker County (Lead Partner), private landowners, Tri-County CWMA, ODFW, USFWS, BLM, NRCS, and Powder Basin Watershed Council (PBWC). Technical assistance is provided by ODA, OSU Extension Service, and other members of the SageCon Partnership.

Attachment A: Initiative Map

Attachment B: Evaluation Criteria Ratings Worksheet

Attachment A: Initiative Map



Attachment B: Evaluation Criteria Ratings Worksheet

REVIEW

The review below is the staff prepared Expert Review Team evaluation of the application based on the evaluation criteria outlined in OAR 695-047-0060 and 695-005-0045.

Expert Review Team Funding Recommendation: Fund

Expert Review Team Ranking: 4 of 8

EVALUATION CRITERIA

PARTNERSHIP CAPACITY

Evaluation criteria: (1) The extent to which the partnership has the capacity to partner and engage the community within the Initiative geography; (2) The extent to which the partnership demonstrates an established governance structure and a shared history of collaboratively implementing Conservation Actions and adaptively managing to achieve Conservation Outputs; (3) The composition of the partnership is appropriate to achieve Ecological Outcomes within the Initiative and; (4) How engagement with, and input from, local communities disproportionately impacted by climate change has informed or will inform the project.

Strengths

- The partnership includes members from federal, state, and local governments along with nonprofit organizations and landowners. Clear leadership is demonstrated by the coordinating partner.
- The partnership governance document clearly describes how partners communicate, roles and responsibilities, and how decisions are made.
- The partnership includes partners with the expertise to implement sagebrush/sage-steppe habitat restoration and demonstrates that engagement with landowners is being incorporated into their work with novel projects related to reducing raven predation on sage-grouse.
- The partnership has a strong performance history associated with the FIP program and has embraced an adaptive management approach that guides their work.

Concerns

- The Partnership Technical Assistance grant type is not included in the budget, and while tasks associated with this grant type may be included in the Technical Assistance grant type, it would be helpful to see these tasks broken out into the PTA grant type.

TECHNICAL SOUNDNESS

Evaluation criteria: (5) The extent to which the partnership's Theory of Change supports the proposed Initiative and aligns with a Board identified ecological priority; (6) The extent to which the Conservation Actions and Conservation Outputs described in the proposed Work Plan will make progress toward Ecological Outcomes; (7) Consideration of greenhouse gas emissions or long-term carbon sequestration or storage; and (8) Changing climate conditions are incorporated into the project and the project will contribute to durable adaptation and resilience for ecosystems, including human communities.

Strengths

- The partnership demonstrates willingness to implement a wide variety of conservation and restoration activities for the benefit of a struggling sage-grouse population. Habitat restoration in this landscape can take at least eight years to show benefits, and the partnership is attempting to maintain sage-grouse long enough for the habitat benefits to be seen.
- The partnership is leading efforts on mesic habitat restoration, which is an important development given the relatively low elevation included in the initiative geography. This will provide important brood rearing habitat for sage-grouse that cannot migrate to higher elevations.
- The partnership is building habitat resiliency across the sagebrush/sage-steppe habitat in this geography, which includes benefits beyond sage-grouse, including resiliency to impacts from wildfire.

Concerns

- Habitat pressures in the proposed initiative geography are high. This is a relatively low elevation area where restoration efforts are susceptible to wildfire and other threats due to climate change.
- Sage-grouse populations are in decline in this area, and the application would benefit from broader discussion of why further investment that can involve several years of treating invasive species amongst other activities is warranted.

TRACKING & REPORTING

Evaluation criteria: (9) The extent to which the partnership demonstrates a process to track Conservation Outputs that are aligned with Ecological Outcomes.

Strengths

- The partnership has developed a rigorous monitoring protocol, which includes data analysis from USGS. Preliminary data show increased sage-grouse use of previously treated areas in the FIP.
- The initiative work plan includes specific and detailed conservation outputs. The partnership has a proven process to track these outputs through a geodatabase that has been utilized for several years.

Concerns

- None identified.

FINANCIAL SOUNDNESS

Evaluation criteria: (10) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed Ecological Outcomes and catalyze additional investments.

Strengths

- The initiative work plan highlights staffing capacity, using a combination of technical assistance and engagement grants to fund the positions which are important to coordinating and implementing this initiative.

- The partnership has an effective method of allocating funding amongst partners based on areas of expertise and capacity.

Concerns

- None identified.

2027-2029 Grant Offering

Focused Investment Partnership Program

Name of Initiative: Willamette Valley Oak & Prairie Resilience Initiative

Name of Partnership: Willamette Valley Oak & Prairie Cooperative

Name of Applicant: Institute for Applied Ecology

Initiative addresses the following Board-identified Ecological Priority(ies): Oak and Prairie Habitat

Application Number: 228-0004-25264

Region: 3 **County(ies):** Benton, Lane, Linn, Polk, Marion, Yamhill

Budget Overview:

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1 (2027 - 2029)	$4,997,306	$1,024,162
Biennium 2 (2029 – 2031)	$4,997,490	$1,053,602
Biennium 3 (2031 – 2033)	$4,999,995	$1,057,639
Total	**$14,994,791**	**$3,135,403**

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

The Willamette Valley has sustained an extraordinary mosaic of oak woodland, savanna, and prairie for thousands of years through the deliberate stewardship of the Kalapuyan people, who shaped this landscape with fire, harvest, and care long before European settlement. That tradition of active stewardship is the foundation upon which the Willamette Valley Oak and Prairie Cooperative (WVOPC) builds its work.

Oak and prairie ecosystems of the Willamette Valley support over 350 native plant species and more than 200 oak- and prairie-dependent wildlife species, including over a dozen federally listed threatened and endangered plants and animals. The WVOPC's Strategic Action Plan (SAP) identifies restoring natural disturbance as a key tool for restoring and maintaining oak and prairie ecosystems.

Over the next 3-5 years, the Initiative will measurably improve the condition, management, and connectivity of oak and prairie habitats across priority geographies in the Willamette Valley, restoring 3,802 acres across 55 WVOPC-designated Anchor and Core Conservation Area Sites. The WVOPC will treat priority Anchor Sites and Core Conservation Areas across three biennia: removing woody encroachment and invasive species to prepare sites for prescribed and cultural fire, and applying alternative disturbance regimes—mowing, grazing, or mechanical treatment—where fire is not feasible. The Initiative also builds the regional fire capacity and centers the Indigenous-led stewardship needed to sustain this work long after the grant period ends.

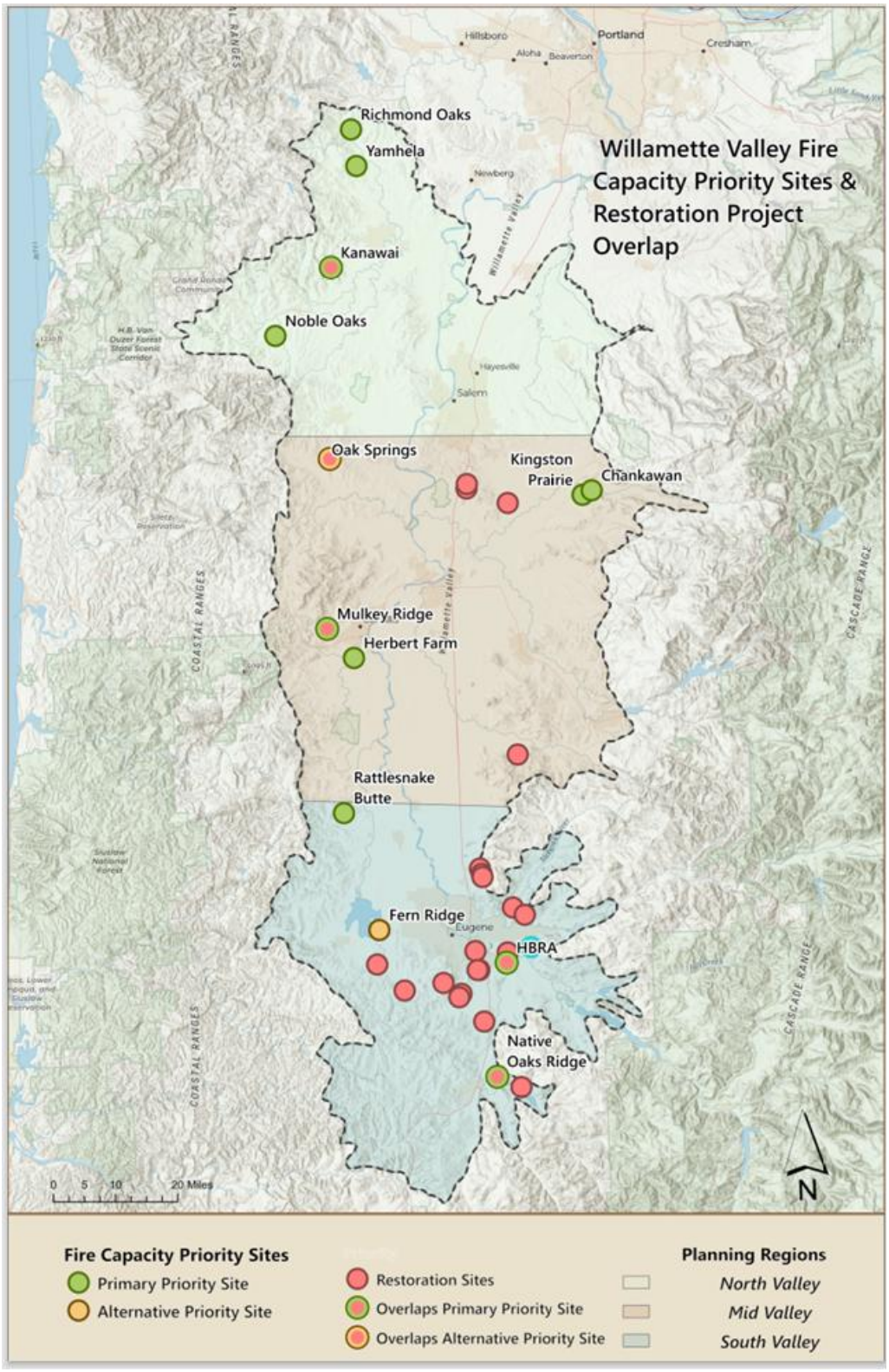
Core implementation partners include Institute for Applied Ecology, City of Eugene Parks and Open Space, Greenbelt Land Trust, Confederated Tribes of Grand Ronde, Confederated Tribes of Siletz Indians,

Long Tom Watershed Council, McKenzie River Trust, and Upper Willamette SWCD. Additional partners include Pacific Birds Habitat Joint Venture, OR Dept. of Fish & Wildlife, U.S. Fish & Wildlife Service, Benton SWCD, and Ducks Unlimited.

Attachment A: Initiative Map

Attachment B: Evaluation Criteria Ratings Worksheet

Attachment A: Initiative Map



Attachment B: Evaluation Criteria Ratings Worksheet

REVIEW

The review below is the staff prepared Expert Review Team evaluation of the application based on the evaluation criteria outlined in OAR 695-047-0060 and 695-005-0045.

Expert Review Team Funding Recommendation: Fund

Expert Review Team Ranking: 8 of 8

EVALUATION CRITERIA

PARTNERSHIP CAPACITY

Evaluation criteria: (1) The extent to which the partnership has the capacity to partner and engage the community within the Initiative geography; (2) The extent to which the partnership demonstrates an established governance structure and a shared history of collaboratively implementing Conservation Actions and adaptively managing to achieve Conservation Outputs; (3) The composition of the partnership is appropriate to achieve Ecological Outcomes within the Initiative; and (4) How engagement with, and input from, local communities disproportionately impacted by climate change has informed or will inform the project.

Strengths

- The Willamette Valley Oak & Prairie Cooperative is an expansive partnership with a shared history of habitat restoration implementation beginning in 2018.
- The partnership includes a multi-tiered governance structure with formalized partner commitments, a memorandum of understanding, a declaration of cooperation, decision-making processes, and a process to allow for the inclusion of new members.
- The partnership structure includes a 12-member steering committee comprised of appropriate partners and technical expertise for the region and the desired ecological outcomes.
- The role of the partnership coordinator is clearly defined.
- Partnership engagement includes diverse outreach strategies for communities, landowners, and agriculture, including the expansion of the Oak Accord program to work with vineyards and ranchers in the proposed initiative geography.
- The Upper Willamette Stewardship Network has established relationships with many partners and demonstrates strong local capacity for engagement.
- Tribal sovereignty and traditional ecological knowledge are incorporated into partnership agreements. This is particularly important regarding data management.
- Tribes are active participants in decision-making on the partnership's steering committee. The partnership's communication with the Tribal councils is well described.
- The charette concept map is a unique and creative way to inform outreach to partners.
- The Oregon Department of Forestry is a critical partner to support prescribed fire.

Concerns

- The Willamette Valley Oak & Prairie Cooperative is a large partnership. Large partnerships can be challenging to move from planning to on-the-ground project implementation.
- The partnership roles appear to focus on the southern portion of the initiative geography, and it is unclear how the roles will be implemented in the northern portion of the geography. The application would have benefitted from including the regions that each partner role will be working with and recognizing the distinct micro areas for engagement.
- It is unclear if the roles of core implementation partners are only to serve on the steering committee or also include implementation or other technical roles.
- The Declaration of Cooperation does not appear to include a watershed council in a decision-making role for the partnership. While the Upper Willamette Stewardship Network is on the steering committee, they do not represent all of the watershed councils in the region.
- It is unclear whether the partners are proposing true coordination and collaborative project implementation or will be working in parallel.

TECHNICAL SOUNDNESS

Evaluation criteria: (5) The extent to which the partnership's Theory of Change supports the proposed Initiative and aligns with a Board identified ecological priority; (6) The extent to which the Conservation Actions and Conservation Outputs described in the proposed Work Plan will make progress toward Ecological Outcomes; and (7) Consideration of greenhouse gas emissions or long-term carbon sequestration or storage; and (8) Changing climate conditions are incorporated into the project and the project will contribute to durable adaptation and resilience for ecosystems, including human communities.

Strengths

- The Initiative work plan for biennium 1 is well planned and demonstrates clear project readiness.
- The Strategic Action Plan is detailed and provides a logical 30-year conceptual plan with strategy options and alternatives.
- While the geography is large, the technical assessment of existing habitats, threats, and responses is thorough and identifies key locations for project implementation and strategic habitat restoration.
- The application includes an explicit description of habitat threats.
- The Theory of Change identifies appropriate actions to address woody encroachment.
- Building capacity for implementing prescribed fire is an important and collaborative element of this proposed initiative and can help ensure longer term sustainability of the investment.
- The application demonstrates consideration of long-term maintenance, stewardship, and durability beyond the life of the FIP initiative.

Concerns

- The 2020 Strategic Action Plan upload appears to be outdated.
- The logic chain from the identified habitat threats to the proposed actions in the Theory of Change is not clearly described.

- There are significant challenges to successful habitat restoration as a result of fragmented, unmanaged oak woodlands adjacent to development in the Willamette Valley. It is unclear if the strategy to protect and restore anchor sites is sufficient for habitat viability.
- The proposed initiative geography is expansive and will be difficult to achieve connectivity.
- The proposed geography may be too broad to implement a focused investment. It is unclear how partners will collaborate to implement a cohesive work plan as opposed to dividing the work into their various areas of the geography.
- While noted in the Strategic Action Plan, the work plan does not describe strategies to address urban development, which is one of the key threats to oak habitat.

TRACKING & REPORTING

Evaluation criteria: (9) The extent to which the partnership demonstrates a process to track Conservation Outputs that are aligned with Ecological Outcomes.

Strengths

- The application recognizes the importance of Tribal sovereignty for data management.

Concerns

- It is unclear how habitat connectivity will be measured to show progress over time.
- The output acres appear low for the scale of the proposed initiative.

FINANCIAL SOUNDNESS

Evaluation criteria: (10) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed Ecological Outcomes and catalyze additional investments.

Strengths

- The application demonstrates the ability of the partnership to leverage funding and clearly describes a process for catalyzing additional funding.
- The allocation of funds across proposed grant types appears to support the proposed ecological outcomes and recognizes the cost of oak and prairie habitat work in the Willamette Valley, which includes extensive prep prior to treatment and longer-term maintenance to sustain the ecological benefit.
- The restoration projects proposed in biennium 1 have completed designs and the technical assistance projects lead to restoration in subsequent biennia.

Concerns

- The cost per acre varies widely across the proposed projects in the work plan without context to describe the difference.
- The economy of scale from a focused investment could be lost on the proposed multiple, small acreage projects proposed.

2027-2029 Grant Offering

Focused Investment Partnership Program

Name of Initiative: John Day Basin Native Fish Habitat Initiative Phase 2

Name of Partnership: John Day Basin Partnership

Name of Applicant: Monument Soil and Water Conservation District

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

Application Number: 228-0005-25265

Region: 6 **County(ies):** Grant

Budget Overview:

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1 (2027 - 2029)	$4,950,583	$3,185,833
Biennium 2 (2029 - 2031)	$4,935,583	$2,832,833
Biennium 3 (2031 - 2033)	$3,774,333	$3,119,083
Total	**$13,660,499**	**$9,137,749**

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

The John Day Basin Partnership (JDBP) proposes its Phase II Initiative to restore site-capable native fish habitat in the 8100 square mile John Day River Basin in NE Oregon, one of the West's most important undammed river systems. The JDBP is a collective of 30 entities, including state and federal agencies, Tribes, Soil and Water Conservation Districts, Watershed Councils, and conservation groups working collaboratively to improve watershed health ridgetop-to-ridgetop for priority focal species. While the basin supports intact wild anadromous fish populations, much of its aquatic habitat is designated a priority for recovery in federal, state, and Tribal conservation plans.

Priority aquatic species include ESA-threatened Mid-Columbia summer steelhead and bull trout, spring Chinook salmon, westslope cutthroat trout, interior redband trout, Pacific lamprey, and other aquatic species. The JDBP's Strategic Action Plan (SAP) guides its aquatic Conservation Goal: by 2050, a suite of stream channel, floodplain, and flow treatments, consistent with natural disturbance regimes, support site-capable native fish spawning, rearing, and migration across basin priority geographies.

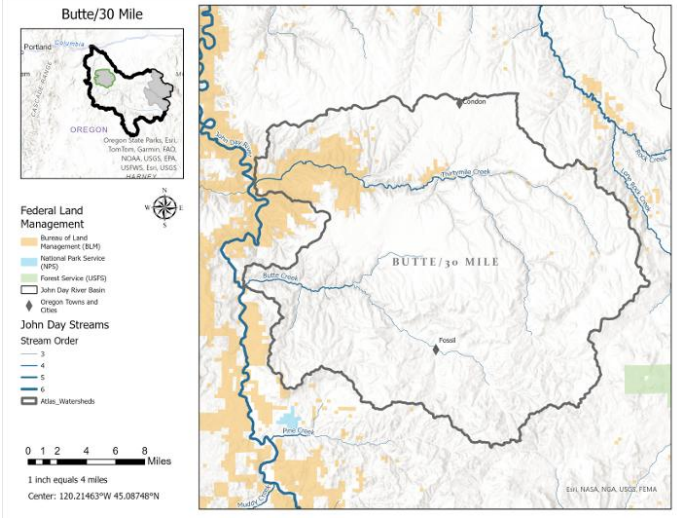
Phase II continues work in three focal geographies identified by a prioritization process to be the most critical to the Conservation Goal - Butte/Thirtymile Creek, the Upper North Fork John Day River, and the Upper Middle Fork John Day River. While restoration was completed in these geographies under a previous FIP (2019-2025), critical work remains to achieve measurable population response.

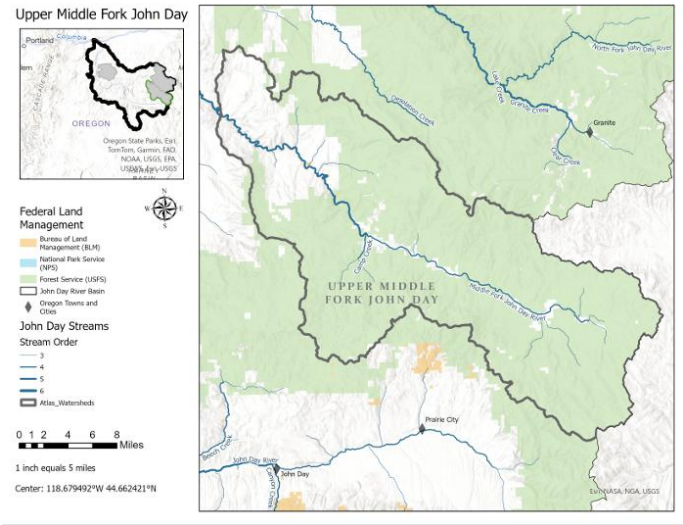
The JDBP will use 12 restoration strategies to pursue 8 Ecological Outcomes outlined in its SAP. The proposed work includes floodplain and channel reconnection, riparian vegetation treatment, barrier removal, large-wood and beaver-based process restoration, and land acquisition. Partners include CTUIR, CTWS, TU, Gilliam/Grant/Wheeler SWCDs, NFJDWC/MJDWC, BMLT, USFS, and ODFW.

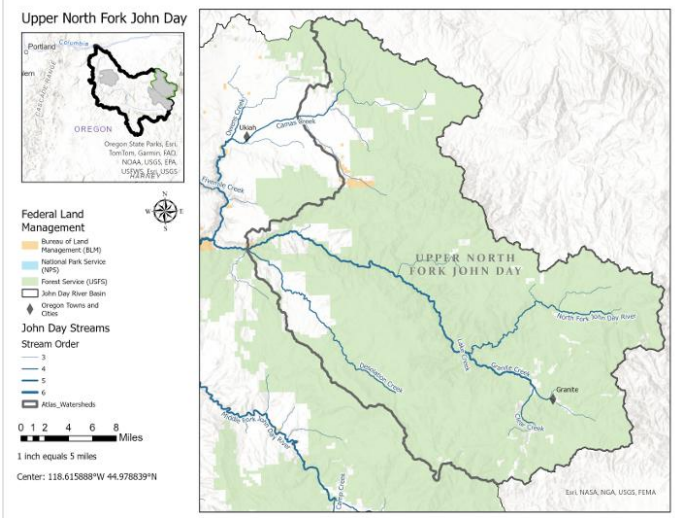
Attachment A: Initiative Map

Attachment B: Evaluation Criteria Ratings Worksheet

Attachment A: Initiative Map







Attachment B: Evaluation Criteria Ratings Worksheet

REVIEW

The review below is the staff prepared Expert Review Team evaluation of the application based on the evaluation criteria outlined in OAR 695-047-0060 and 695-005-0045.

Expert Review Team Funding Recommendation: Fund

Expert Review Team Ranking: 1 of 8

EVALUATION CRITERIA

PARTNERSHIP CAPACITY

Evaluation criteria: (1) The extent to which the partnership has the capacity to partner and engage the community within the Initiative geography; (2) The extent to which the partnership demonstrates an established governance structure and a shared history of collaboratively implementing Conservation Actions and adaptively managing to achieve Conservation Outputs; (3) The composition of the partnership is appropriate to achieve Ecological Outcomes within the Initiative; and (4) How engagement with, and input from, local communities disproportionately impacted by climate change has informed or will inform the project.

Strengths

- The partnership's operations manual is thoughtfully compiled and includes references to technical and monitoring groups and includes connections to the partnership's monitoring framework and tiered monitoring plan.
- The partnership spans over a decade of collaboration, engaging 30 formal partners including meaningful participation from three Tribes, state and federal agencies, and local non-profits.
- The partnership expanded Tribal participation in the steering committee to include a representative from each of the three Tribes in the partnership.
- The partnership's coordinator position is moving from a half-time to a full-time position and the partnership is adding a monitoring coordinator and data steward based on needs identified through the implementation of their first FIP initiative.
- The roles and responsibilities for the steering committee, supporting partners, voting partners, working groups, and coordinating staff are all well-described in their governance documents.
- The partners implemented several adaptive management strategies, including conducting a reflective review that enabled them to adjust their upcoming work based on what they learned from their first FIP initiative award.
- The partners conduct on-going conversations with landowners and underserved rural communities and have landowner buy-in with a demonstrated ability to achieve restoration on the ground.

Concerns

- The engagement activities planned for landowners disproportionately impacted by climate change are not well described.

- The proposed engagement activities are being implemented by individual partners, but lack an overall Partnership vision for engagement and community.

TECHNICAL SOUNDNESS

Evaluation criteria: (5) The extent to which the partnership's Theory of Change supports the proposed Initiative and aligns with a Board identified ecological priority; (6) The extent to which the Conservation Actions and Conservation Outputs described in the proposed Work Plan will make progress toward Ecological Outcomes; and (7) Consideration of greenhouse gas emissions or long-term carbon sequestration or storage; and (8) Changing climate conditions are incorporated into the project and the project will contribute to durable adaptation and resilience for ecosystems, including human communities.

Strengths

- The Atlas prioritization process that is based on limiting factors for focal aquatic species is used to prioritize projects in this application as well as for the first FIP initiative. It includes project readiness as part of the assessment.
- The near-term ecological outcomes and longer-term biological responses, including physical responses, are well-described.
- The action plan's proposed outcomes are appropriate for the ecological priority being addressed and directly tie to the Theory of Change. The processes for monitoring the progress and adapting as necessary are well described.
- Climate change is identified as a cross-cutting issue through all proposed strategies and is well-incorporated in the application.
- The application describes the partnership's decision to evaluate their geographic focus and the conclusion that more work needs to be implemented in the initial FIP geography rather than expanding to new areas.
- The work plan includes significant riparian planting and describes utilizing the release and recruit method, which is a shift in how partners establish vegetation based on adaptive management from the first FIP initiative.

Concerns

- The application focuses on improving habitat for fish, but other focal species are present in the geography including amphibians. Minor adjustments to the proposed projects could offer additional benefits to other focal species.
- The application describes that water acquisition is a high-priority action, but lacks detail on how this will be implemented, particularly without further investment in engagement activities.
- There are no final project designs and few secured landowner agreements for projects proposed for implementation in the first biennium. This has the potential to slow restoration implementation in the first biennium.

TRACKING & REPORTING

Evaluation criteria: (9) The extent to which the partnership demonstrates a process to track Conservation Outputs that are aligned with Ecological Outcomes.

Strengths

- The partnership has a plan for capturing and storing monitoring data and has identified staff to conduct these activities.
- The proposed three-tier monitoring framework tracks both outputs and outcomes and is used to inform adaptive management of the partnership's work.
- The near-term ecological outcomes have measurable indicators described.

Concerns

- None identified.

FINANCIAL SOUNDNESS

Evaluation criteria: (10) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed Ecological Outcomes and catalyze additional investments.

Strengths

- The partnership has demonstrated past success at securing match funding and leveraging additional funds.
- The partners have identified significant match resources to support the partnership's work plan implementation.

Concerns

- Securing instream water acquisitions requires extensive engagement with landowners, and the proposed funding for this engagement is modest.
- It is unclear if there is sufficient funding to support the landowner engagement proposed in this application.
- There is a heavy reliance on a single fund source (Bonneville Power Administration) for match, which could present a vulnerability to fully funding projects in the work plan.

2027-2029 Grant Offering

Focused Investment Partnership Program

Name of Initiative: Rogue Forest Connectivity Initiative

Name of Partnership: Rogue Forest Partners

Name of Applicant: Lomakatsi Restoration Project

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

Application Number: 228-0006-25266

Region: 2 **County(ies):** Jackson

Budget Overview:

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1 (2027 - 2029)	$5,000,000	$1,849,184
Biennium 2 (2029 - 2031)	$5,000,000	$1,631,300
Biennium 3 (2031 - 2033)	$5,000,000	$1,298,200
Total	**$15,000,000**	**$4,778,684**

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

The Rogue Forest Connectivity Initiative (RFCI) will advance dry-forest restoration across 64,606 acres in the Little Applegate and Jackson Creek watersheds of Jackson County, Oregon. Together, they connect existing Rogue Basin restoration investments and close a restoration gap across dry forests of mixed ownership. Notably, these watersheds have seen limited severe wildfire fire to-date despite extreme hazard, and OWEB and the RBS have both mapped them as needing disturbance restoration to address limiting factors.

More than a century of fire exclusion, past management, drought, climate stress, and expanding Douglas-fir mortality have left these dry forests dense, structurally simplified, and vulnerable to uncharacteristic wildfire, insects, and loss of ecological function. The focal areas support dry-type forest, wildlife-connectivity, community, and cultural values, including WUI lands around Jacksonville.

RFCI will implement and coordinate ecological thinning, fuels reduction, prescribed and cultural fire, invasive-species treatment, native seeding and planting, monitoring, field reviews, Tribal engagement, private-landowner outreach, and workforce development. Work will begin in ready-now areas such as Forest Park, BLM River Hills units, and private lands, then expand as Little Applegate federal authorizations are completed.

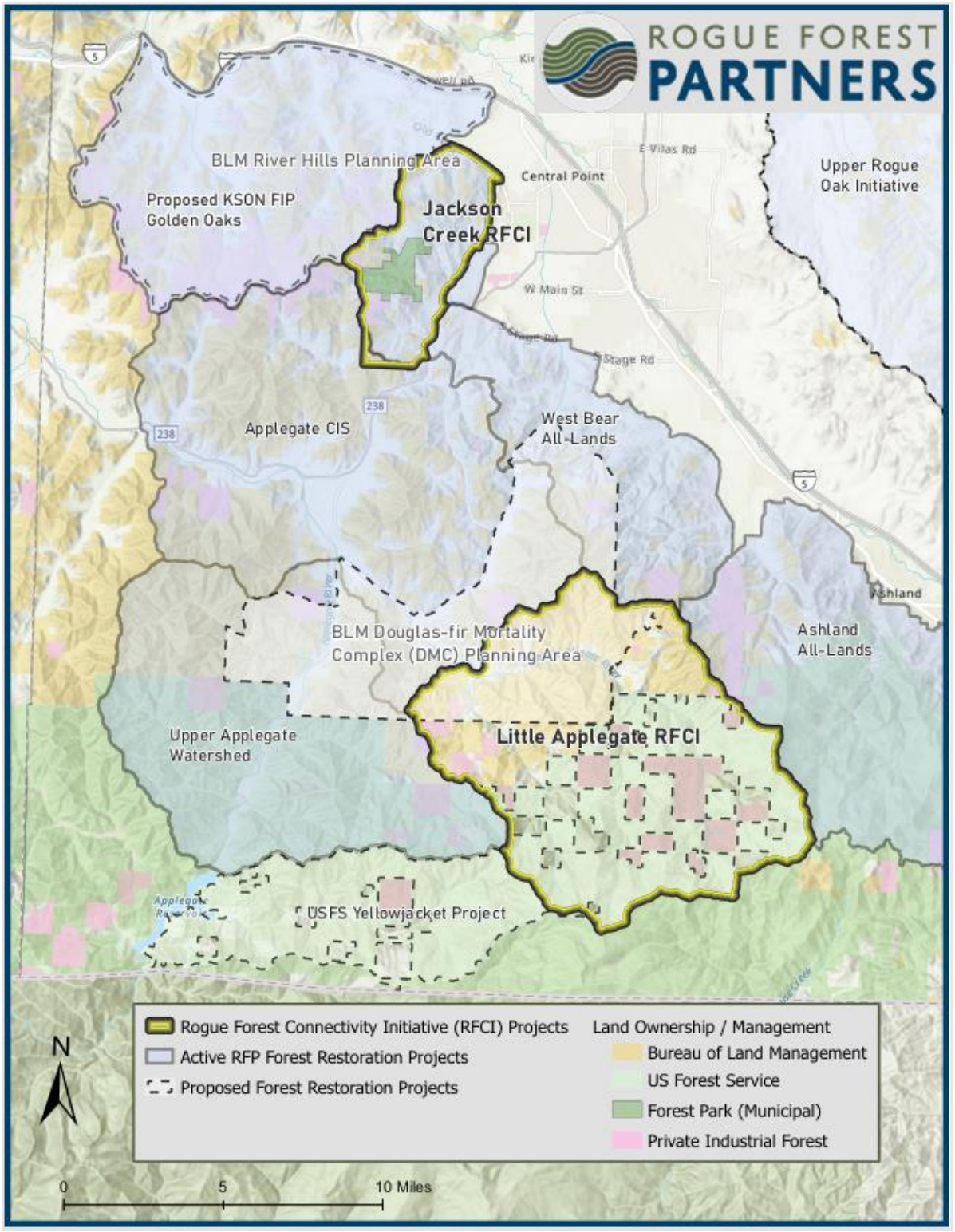
Rogue Forest Partners will guide the initiative, with Lomakatsi Restoration Project as lead applicant, FIP Manager, and primary implementer; Southern Oregon Forest Restoration Collaborative as partnership

coordinator; The Nature Conservancy as science and monitoring lead; and participation from Klamath Bird Observatory, The Understory Initiative, Applegate Partnership and Watershed Council, City of Jacksonville, Jacksonville Woodlands Association, Tribal partners through the Inter-Tribal Ecosystem Restoration Partnership and Inter-Tribal Advisory Council, Rogue River-Siskiyou National Forest, and BLM Medford District.

Attachment A: Initiative Map

Attachment B: Evaluation Criteria Ratings Worksheet

Attachment A: Initiative Map



Attachment B: Evaluation Criteria Ratings Worksheet

REVIEW

The review below is the staff prepared Expert Review Team evaluation of the application based on the evaluation criteria outlined in OAR 695-047-0060 and 695-005-0045.

Expert Review Team Funding Recommendation: Do Not Fund

Expert Review Team Ranking: N/A

EVALUATION CRITERIA

PARTNERSHIP CAPACITY

Evaluation criteria: (1) The extent to which the partnership has the capacity to partner and engage the community within the Initiative geography; (2) The extent to which the partnership demonstrates an established governance structure and a shared history of collaboratively implementing Conservation Actions and adaptively managing to achieve Conservation Outputs; (3) The composition of the partnership is appropriate to achieve Ecological Outcomes within the Initiative and; (4) How engagement with, and input from, local communities disproportionately impacted by climate change has informed or will inform the project.

Strengths

- The partnership has been built over decades, has demonstrated success, and features an established governance structure that identifies specific partner roles and outlines decision making for the partnership.
- The partnership has a strong workforce development component and is engaging youth with employment opportunities in forest restoration.
- The partnership strives to engage with Tribes, and the proposed initiative includes a specific conservation action dedicated to developing and implementing a Tribal engagement strategy.

Concerns

- The proposed private landowner engagement approach lacks details, and an overarching strategy is not well- described.
- The partnership charter appears to have been revised in 2026; however, it does not include every core partner that has signed on to the application. While the roles of long-standing members of the partnership are clear, it is less clear for newly added members.
- The process for securing contract foresters, and when they are used as opposed to in-house foresters, is unclear.

TECHNICAL SOUNDNESS

Evaluation criteria: (5) The extent to which the partnership's Theory of Change supports the proposed Initiative and aligns with a Board identified ecological priority; (6) The extent to which the Conservation Actions and Conservation Outputs described in the proposed Work Plan will make progress toward Ecological Outcomes; (7) Consideration of greenhouse gas emissions or long-term carbon sequestration

or storage; and (8) Changing climate conditions are incorporated into the project and the project will contribute to durable adaptation and resilience for ecosystems, including human communities.

Strengths

- The partnership focuses on habitat connectivity in the proposed initiative, linking the work to previous, current, and planned forest and oak habitat restoration efforts in the region.
- The partnership focuses on efforts to adapt to climate change and build forest resiliency with work tied to ongoing Douglas-fir mortality and changes to species composition. The partnership acknowledges that historic range of variability may not be as relevant in a changing climate and is planning their efforts accordingly.
- The partnership demonstrates a proven approach towards assessing landscapes, developing and implementing site specific treatments, monitoring, and incorporating adaptive management.

Concerns

- The level of implementation readiness of projects in the proposed work plan is unclear. It is uncertain whether NEPA clearance has been obtained and if landowners and managers are committed to implementing restoration in the 1st biennium.
- It is unclear where restoration efforts will be focused in biennia 2 and 3, how many acres will be treated, and whether the priority areas proposed are the most ecologically important to treat.
- The partnership's Theory of Change identifies the primary wildfire risk as occurring on private lands, yet most of the proposed work in the first biennium is on public lands.

TRACKING & REPORTING

Evaluation criteria: (9) The extent to which the partnership demonstrates a process to track Conservation Outputs that are aligned with Ecological Outcomes.

Strengths

- The partnership has robust baseline monitoring data to inform planning of landscape treatments and to quantify outcomes. Partners use established Collaborative Forest Landscape Restoration Program monitoring protocols.
- The partnership has an established track record of tracking outputs and outcomes, and monitoring efforts that are tied to vegetation/fuels and birds.

Concerns

- Similar monitoring efforts have been ongoing for several years, and it is not clear if this level of monitoring is necessary in all areas or if learnings from previous monitoring could carry over to nearby geographies.

FINANCIAL SOUNDNESS

Evaluation criteria: (10) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed Ecological Outcomes and catalyze additional investments.

Strengths

- A significant portion of the budget is dedicated to restoration, but appropriate levels of other grant types (i.e., engagement, capacity, technical assistance, and monitoring) are also featured.

Concerns

- The requested amount of $5 million per biennium is large considering the proposed acreage that is ready for implementation and the uncertainty of tangible outputs associated with restoration activities in the work plan.

2027-2029 Grant Offering

Focused Investment Partnership Program

Name of Initiative: Wallowa Native Aquatic Habitat Restoration Initiative

Name of Partnership: Wallowa Partnership

Name of Applicant: Grande Ronde Model Watershed Foundation

Initiative addresses the following Board-identified Ecological Priority(ies): Aquatic Habitat for Native Species

Application Number: 228-0007-25267

Region: 5 **County(ies):** Wallowa and Union

Budget Overview:

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1 (2027-2029)	$4,494,291	$2,410,000
Biennium 2 (2029 – 2031)	$4,933,610	$3,199,000
Biennium 3 (2031 – 2033)	$4,859,553	$3,224,000
Total	**$14,287,454**	**$8,833,000**

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

The Wallowa Partnership encompasses three priority watersheds within the Grande Ronde Basin of northeast Oregon: the Wallowa River, Minam River, and Joseph Creek watersheds. These watersheds support important strongholds for ESA-listed Chinook salmon, summer steelhead, bull trout, and Pacific lamprey. The Minam River supports one of the strongest remaining wild Chinook salmon populations in the region, while Joseph Creek supports one of the region's most productive wild steelhead populations. The Wallowa and Minam rivers also provide critical refugia increasingly essential for sustaining native fish populations as climatic conditions change.

Despite their ecological importance, these watersheds experience limiting factors, including disconnected floodplains, reduced habitat complexity, impaired riparian and floodplain function, fish passage barriers, altered flow regimes, and reduced habitat connectivity. These challenges constrain aquatic systems' ability to support resilient fish populations and maintain watershed function.

The Wallowa Partnership will advance a watershed-scale restoration strategy guided by its 25-year Strategic Action Plan, implementing prioritized actions to address limiting factors affecting native fish and aquatic habitats. Restoration efforts focus on reconnecting floodplains and channel migration zones, restoring instream habitat complexity, improving riparian and floodplain vegetation, enhancing fish passage, and strengthening landowner/ community engagement. Priority projects identified in the Strategic Action Plan are informed by the Wallowa Atlas Prioritization Framework and grounded in best available science, local knowledge, and demonstrated implementation capacity.

The Initiative will be delivered by the Grande Ronde Model Watershed, Nez Perce Tribe, Trout Unlimited,

Wallowa Resources, ODFW, and USFS, with support from the Wallowa Implementation Team and regional partners to accelerate measurable watershed restoration outcomes.

Attachment A: Initiative Map

Attachment B: Evaluation Criteria Ratings Worksheet

Attachment A: Initiative Map

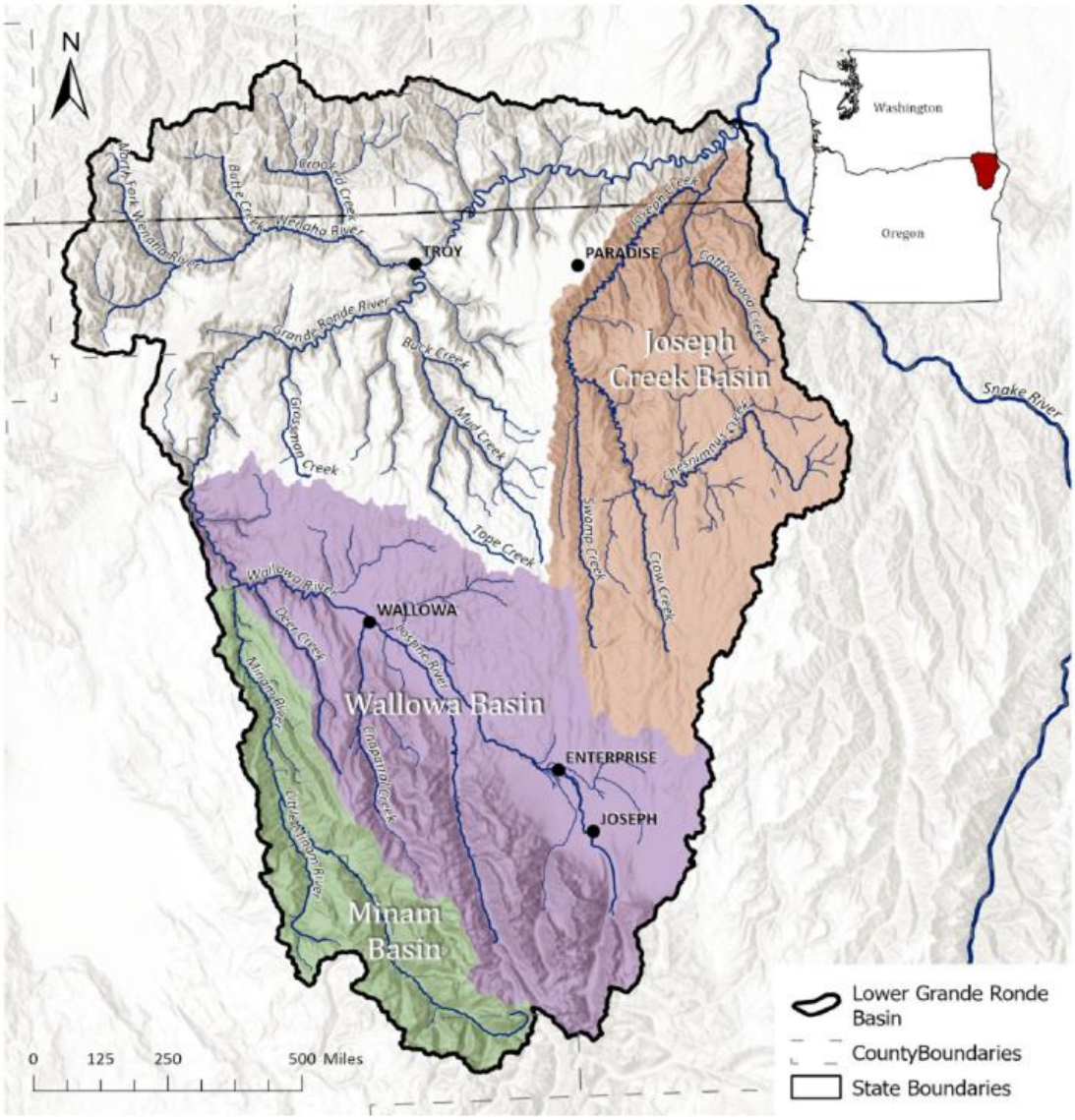


Figure 1. *Map of the three priority geographies of the Wallowa Partnership Strategic Action Plan: the Wallowa River watershed, the Joseph Creek watershed, and the Minam River watershed.*

Attachment B: Evaluation Criteria Ratings Worksheet

REVIEW

The review below is the staff prepared Expert Review Team evaluation of the application based on the evaluation criteria outlined in OAR 695-047-0060 and 695-005-0045.

Expert Review Team Funding Recommendation: Fund

Expert Review Team Ranking: 2 of 8

EVALUATION CRITERIA

PARTNERSHIP CAPACITY

Evaluation criteria: (1) The extent to which the partnership has the capacity to partner and engage the community within the Initiative geography; (2) The extent to which the partnership demonstrates an established governance structure and a shared history of collaboratively implementing Conservation Actions and adaptively managing to achieve Conservation Outputs; (3) The composition of the partnership is appropriate to achieve Ecological Outcomes within the Initiative and; (4) How engagement with, and input from, local communities disproportionately impacted by climate change has informed or will inform the project.

Strengths

- The partnership governance structure is well described and has been tested and refined over time; there are clear roles for the members and the ability to communicate and support one another is featured.
- The composition of the partnership is appropriate for the proposed initiative. The partners have a shared history of collaboration and implementing restoration activities.
- The partnership has demonstrated the ability to engage their community, including those disproportionately impacted by climate change.
- The Grande Ronde Model Watershed board is diverse and is chaired by commissioners from both counties in the initiative geography, which helps the partnership engage their communities.

Concerns

- One individual is identified as serving multiple coordination roles within the proposed initiative. This puts a lot of pressure on the individual and makes the partnership vulnerable, particularly if there is an employee transition in that role during the initiative.
- There is a strategy for engagement, but funding for engagement is not being sought.

TECHNICAL SOUNDNESS

Evaluation criteria: (5) The extent to which the partnership's Theory of Change supports the proposed Initiative and aligns with a Board identified ecological priority; (6) The extent to which the Conservation Actions and Conservation Outputs described in the proposed Work Plan will make progress toward Ecological Outcomes; (7) Consideration of greenhouse gas emissions or long-term carbon sequestration

or storage; and (8) Changing climate conditions are incorporated into the project and the project will contribute to durable adaptation and resilience for ecosystems, including human communities.

Strengths

- The Atlas prioritization process is well-described and demonstrates an effective planning tool that has led to successful restoration efforts.
- Building climate resiliency is a key element of the proposed initiative, with a focus on maintaining and restoring cold water refugia for fish.
- The partnership is strategically investing in watersheds that are strongholds for fish, including the Minam River watershed, which has increased in priority due to a recent large ODFW land acquisition.
- The partnership has a clear strategy for engaging with Tribes and conducting cultural resource surveys as a part of their work.

Concerns

- Water quantity is a key limiting factor in the proposed geography, and the application is lacking details on how stream flow will be maintained into the future.
- The partnership has focused certain work in areas deemed 'tier 2' or 'tier 3', which may indicate a more opportunistic approach to project selection based on landowner relationships.
- The proposed initiative focuses on a modest number of large restoration projects and there is risk associated with this approach if the projects do not result in the expected ecological outcomes.

TRACKING & REPORTING

Evaluation criteria: (9) The extent to which the partnership demonstrates a process to track Conservation Outputs that are aligned with Ecological Outcomes.

Strengths

- The monitoring approach utilized by the partnership includes guidance from federal, state, and Tribal partners. The monitoring is well-linked to the theory of change and can be completed within the proposed timeframe.

Concerns

- None identified.

FINANCIAL SOUNDNESS

Evaluation criteria: (10) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed Ecological Outcomes and catalyze additional investments.

Strengths

- The allocation of funding is heavily weighted towards restoration; the partnership appears ready to implement a FIP initiative with 'shovel-ready' projects.
- The partnership has demonstrated the ability to leverage significant funding, including sustained support from the Bonneville Power Administration.

Concerns

- As noted above, engagement is a partnership strategy but no funding for these activities is sought within the proposed initiative.

2027-2029 Grant Offering

Focused Investment Partnership Program

Name of Initiative: Coquille Coho Initiative

Name of Partnership: Coquille Aquatic Partnership

Name of Applicant: Coquille Watershed Association

Initiative addresses the following Board-identified Ecological Priority(ies): Aquatic Habitat for Native Species

Application Number: 228-0008-25268

Region: 1 **County(ies):** Coos, Curry, Douglas

Budget Overview:

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1 (2027 – 2029)	$5,000,000	$1,835,479
Biennium 2 (2029 – 2031)	$5,000,000	$1,475,538
Biennium 3 (2031 – 2033)	$5,000,000	$1,223,804
Total	**$15,000,000**	**$4,534,821**

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

This initiative is consistent with the Aquatic Habitat for Native Fish Species Priority and builds on the on-going work to protect and restore critical habitat for ESA listed Oregon Coast Coho in the Coquille Watershed as described in the Strategic Action Plan for Coho Salmon Recovery in the Coquille Basin (SAP). The SAP addresses limiting factors with actions that lead to improved watershed processes and functions. The Watershed lies in Coos, Douglas and Curry Counties, Oregon and includes tributary, mainstem, estuary, and near-shore marine habitats within coho's distribution in the Coquille Basin.

Through short-term projects identified in the SAP, the partnership intends to reach the following outcomes by 2033: 1) Improve water quality within 11.3 miles of tributaries and mainstems; 2) Increase instream complexity on 29.9 acres of tributaries and mainstems; Enhance a minimum of 116.5 acres of riparian areas; 3) Increase longitudinal connectivity on 16.4 miles of tributaries and mainstems; 4) Remove or upgrade 11 fish passage barriers; 5) Increase lateral connectivity on 2,036.8 acres of tidal and freshwater floodplains and; 6) complete sub-watershed assessments in 9 high-priority focal basins.

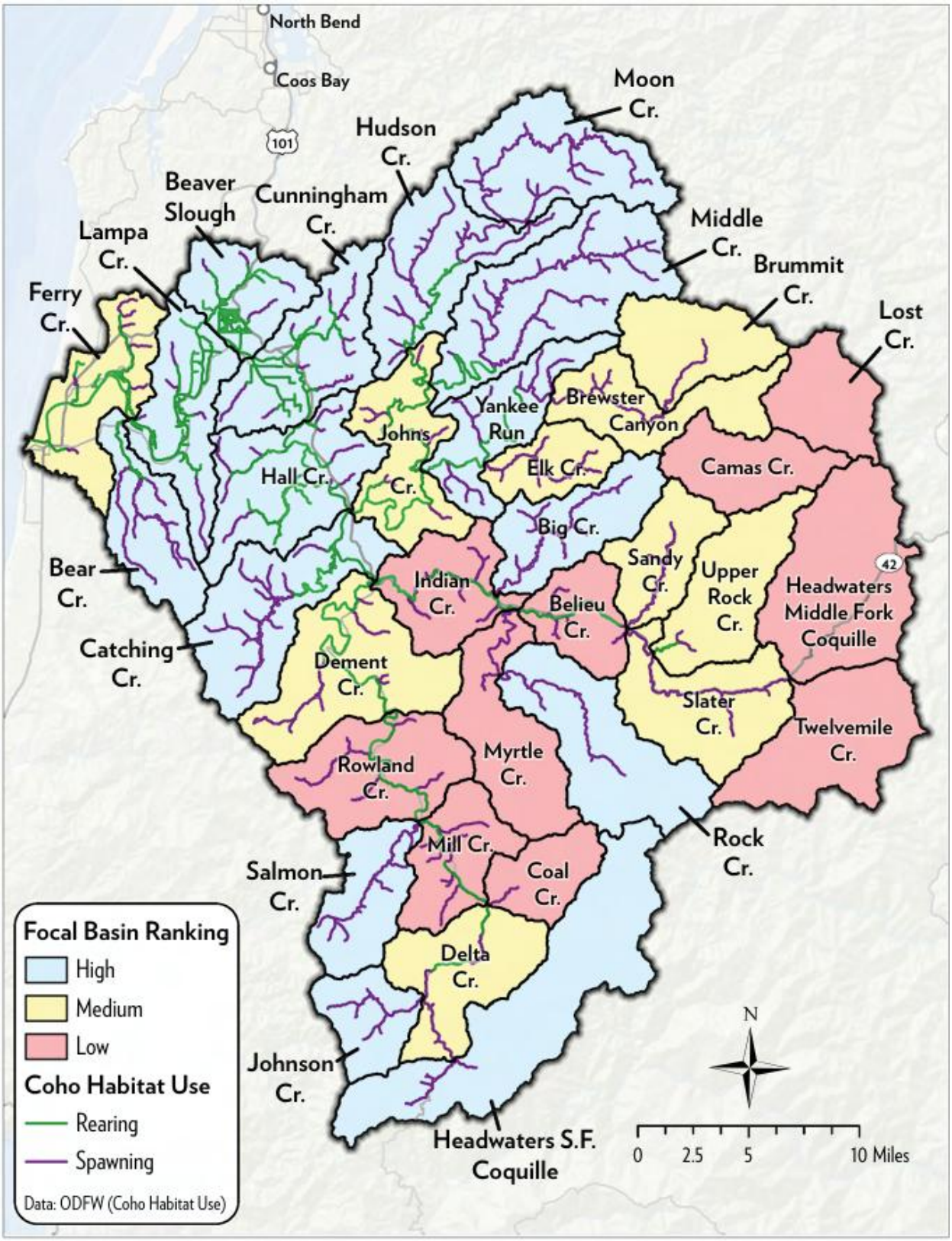
Conservation Actions include: Native Planting, Invasive Vegetation Management, Fencing Setbacks, Conservation Easements and Land Acquisition , and Data Collection and Monitoring, Livestock and agricultural land management improvements, Road Improvements/Decommissioning, Fish Passage Barriers Removed/Upgraded, LWD Structure Placement, Process-Based Restoration/Stream Re-Meander/Floodplain Connectivity, and Outreach.

Partners include BLM- Coos Bay District, Curry SWCD- Coos & Curry CREP, NOAA Restoration Center, NRCS- Coquille Field Office, ODEQ, and ODFW. Coos SWCD, Coquille Watershed Association, Coquille Indian Tribe, and Wild Rivers Land Trust will serve as the core partners.

Attachment A: Initiative Map

Attachment B: Evaluation Criteria Ratings Worksheet

Attachment A: Initiative Map



Attachment B: Evaluation Criteria Ratings Worksheet

REVIEW

The review below is the staff prepared Expert Review Team evaluation of the application based on the evaluation criteria outlined in OAR 695-047-0060 and 695-005-0045.

Expert Review Team Funding Recommendation: Do Not Fund

Expert Review Team Ranking: N/A

EVALUATION CRITERIA

PARTNERSHIP CAPACITY

Evaluation criteria: (1) The extent to which the partnership has the capacity to partner and engage the community within the Initiative geography; (2) The extent to which the partnership demonstrates an established governance structure and a shared history of collaboratively implementing Conservation Actions and adaptively managing to achieve Conservation Outputs; (3) The composition of the partnership is appropriate to achieve Ecological Outcomes within the Initiative and; (4) How engagement with, and input from, local communities disproportionately impacted by climate change has informed or will inform the project.

Strengths

- The partnership has detailed governance that clearly describes partner roles and voting.
- Governance recognizes Tribal sovereignty.
- Outreach and engagement with landowners will inform future work.

Concerns

- The Coquille Watershed Association appears to hold the majority of the project implementation expertise and coordination roles for the proposed initiative. This could create an unbalanced burden on a single partner and make the partnership vulnerable, particularly if there are employee transitions or organizational capacity limitations that could impact the ability to implement a FIP initiative while managing other non-FIP commitments.
- Given that the proposed FIP initiative shares many of the same technical experts as an active FIP initiative, it is unclear whether the partners have the capacity to participate in both FIP initiatives simultaneously.
- It is unclear whether the strict quorum rule and full consensus voting is an effective decision-making approach for a new partnership with little experience making decisions together.
- It is unclear why the Wild Salmon Center does not have a role in this partnership when they participate in other coho-focused FIP initiatives.
- The Coquille Indian Tribe's letter of intent describes Tribal participation differently than is described in the application, leaving the role of the Tribe in the proposed initiative unclear.

TECHNICAL SOUNDNESS

Evaluation criteria: (5) The extent to which the partnership's Theory of Change supports the proposed Initiative and aligns with a Board identified ecological priority; (6) The extent to which the Conservation

Actions and Conservation Outputs described in the proposed Work Plan will make progress toward Ecological Outcomes, (7) Consideration of greenhouse gas emissions or long-term carbon sequestration or storage; and (8) Changing climate conditions are incorporated into the project and the project will contribute to durable adaptation and resilience for ecosystems, including human communities.

Strengths

- The application clearly describes the numerical outputs and deliverables proposed to be implemented through the life of the FIP initiative.
- The application clearly describes a sub-watershed ranking process that includes looking at future water temperature and current coho rearing.
- Many work plan projects have landowner agreements and final designs.
- The proposed initiative is addressing habitat needs for a state and federal priority coho population.

Concerns

- There are projects in the proposed work plan that have received "do not fund" recommendations through OWEB's competitive Open Solicitation grant program, demonstrating that some of the project-level work may not have the technical soundness needed to achieve meaningful outcomes.
- The prioritization and feasibility of projects in consideration of climate change lack detail.
- While the sequencing of acquisition seems appropriate, the application does not describe the focus or prioritization in terms of location and the ecological objective(s) that the acquisition is trying to achieve.
- It is unclear whether partners will have sufficient time to complete acquisitions in the life of the FIP initiative given that landowners and parcels have not yet been identified.
- The Coquille Basin has significant water temperature limitations that will take decades of riparian enhancement to begin to address. The conservation actions in this proposed initiative might be spreading the restoration work across a scale that is too large to make an impact.
- The application does not appear to utilize the best available data and most recent modeling on climate change conditions. Priority areas for cold water refugia could be different under future climate conditions.
- The mapped cold water confluences presented in the application do not connect to the habitat protection and acquisition actions.
- The justification for the spatial and temporal scope and scale of the proposed initiative is not clearly described. A technical assistance grant to further refine and focus the actions could lead to a more meaningful and strategic plan for on-the-ground implementation.

TRACKING & REPORTING

Evaluation criteria: (9) The extent to which the partnership demonstrates a process to track Conservation Outputs that are aligned with Ecological Outcomes.

Strengths

- The application describes the monitoring framework for the proposed initiative that is intended to be built out into a monitoring plan.

Concerns

- The system for tracking project implementation and progress toward meeting ecological outcomes has not yet been established.
- The partnership does not appear to be utilizing existing temperature monitoring and modeling data that may be more sophisticated. Utilizing that data would help to better focus and prioritize riparian work.

FINANCIAL SOUNDNESS

Evaluation criteria: (10) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed Ecological Outcomes and catalyze additional investments.

Strengths

- The allocation of funds is spread across grant types with about two thirds of the funding allocated to restoration.
- Including both a convening and back-up partner in the Partnership Technical Assistance budget provides assurance of continued partnership coordination if the watershed association is no longer able to fill that role.

Concerns

- The majority of assessment work is proposed in the 3rd biennium, which is not a logical progression of work toward on-the-ground implementation and eliminates the opportunity to inform and implement restoration during the FIP initiative.

2027-2029 Grant Offering

Focused Investment Partnership Program

Name of Initiative: Nehalem Basin Partnership – Nehalem Coho Habitat Initiative

Name of Partnership: Nehalem Basin Partnership

Name of Applicant: Upper Nehalem Watershed Council

Initiative addresses the following Board-identified Ecological Priority(ies): Aquatic Habitat for Native Fish Species, Estuaries Habitat

Application Number: 228-0009-25269

Region: 1 **County(ies):** Washington, Columbia, Clatsop, Tillamook

Budget Overview:

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1 (2027 - 2029)	$4,985,086	$2,444,191
Biennium 2 (2029 - 2031)	$4,963,957	$1,953,000
Biennium 3 (2031 - 2033)	$4,941,749	$1,495,000
Total	**$14,890,792**	**$5,892,191**

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

Located on the north coast, the Nehalem River basin is one of Oregon's largest coastal watersheds, significant for its three Conservation Opportunity Areas and populations of Oregon Coast coho and other at-risk aquatic species. The Nehalem Coho Habitat Initiative (NCHI) builds on 30 years of stewardship by diverse partners, whose goal is to increase the pace and scale of aquatic habitat restoration - benefitting coho, other species of concern and local communities of the Nehalem.

Near term Ecological Outcomes address limiting factors and complement successful projects already achieved by the Nehalem Basin Partnership (NBP) in high priority subbasins:
1) improving instream habitat complexity;
2) reducing water temperature;
3) increasing habitat connectivity in freshwater and estuarine habitats.

Long term outcomes will:
1) increase quality and quantity of coho spawning and rearing habitat;
2) improve access and utilization by coho salmon to express full, diverse life history strategies.

Conservation Actions are planned, reviewed and supported by NBP to:
1) Add large wood to anchor habitats and priority reaches;
2) Enhance riparian forests via native plantings and invasive species removal;

3) Install beaver forage and beaver dam analogues and resolving beaver-human conflicts;
4) Remove/replace tide gates and restore tidal wetlands and spruce swamps;
5) Remove/replace undersized and perched culverts, tide gates, and barrier dams.

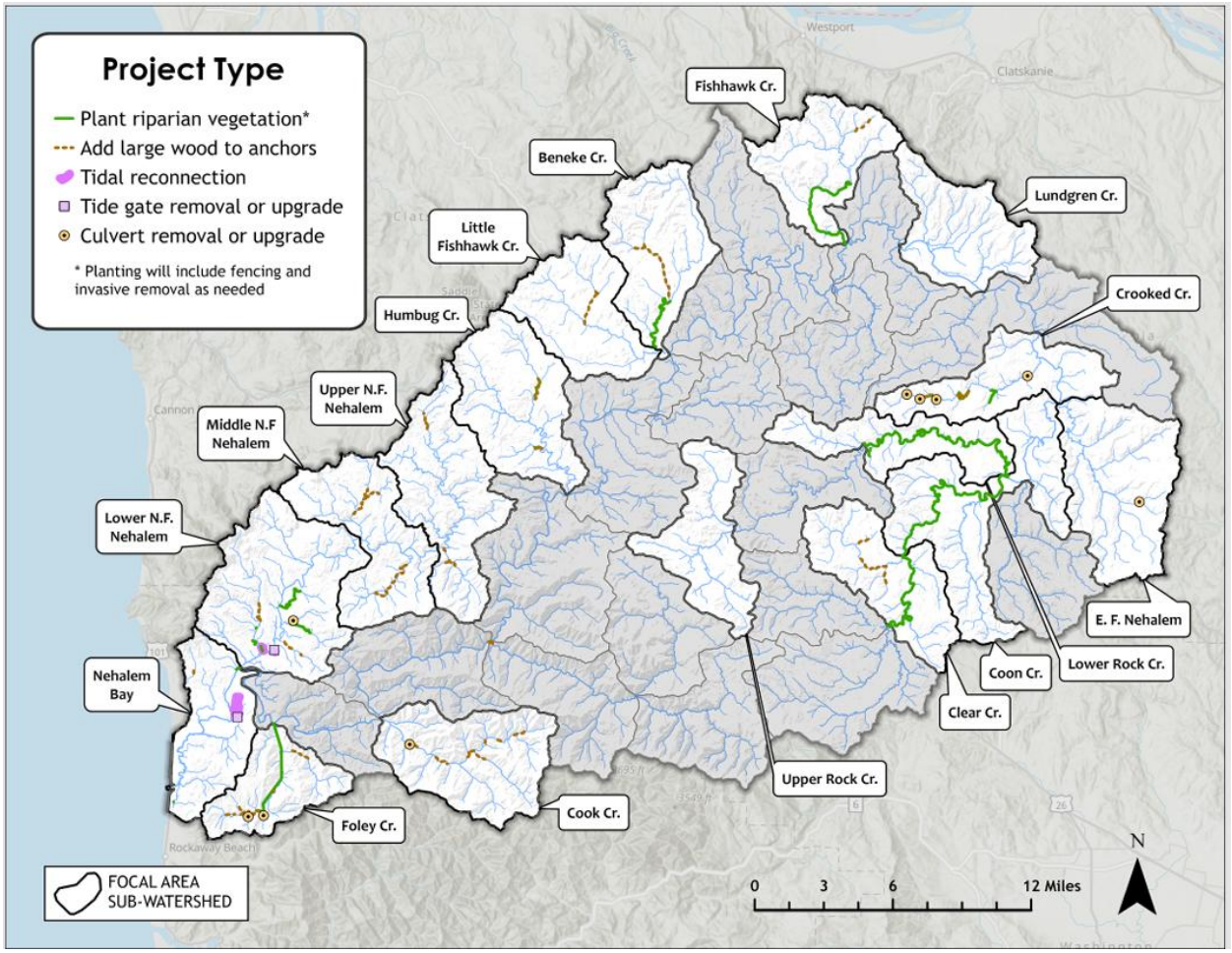
Core NBP members develop, implement and monitor projects: Upper Nehalem and Nehalem Bay Watershed Councils, Tillamook Estuaries Partnership, OR Depts of Fish & Wildlife and Forestry, Columbia SWCD.

Other partners host projects and serve as technical advisors: Clatsop-Nehalem Confederated Tribes, NOAA, NRCS and BLM, OR Dept of State Lands and DEQ, Wild Salmon Center, North Coast Land Conservancy, Lower Nehalem Community Trust, Trout Unlimited, Hyla Woods, Weyerhaeuser Co., Stimpson Lumber and other private landowners.

Attachment A: Initiative Map

Attachment B: Evaluation Criteria Ratings Worksheet

Attachment A: Initiative Map



FIP geography denoted by the white subwatersheds.

Attachment B: Evaluation Criteria Ratings Worksheet

REVIEW

The review below is the staff prepared Expert Review Team evaluation of the application based on the evaluation criteria outlined in OAR 695-047-0060 and 695-005-0045.

Expert Review Team Funding Recommendation: Do Not Fund

Expert Review Team Ranking: N/A

EVALUATION CRITERIA

PARTNERSHIP CAPACITY

Evaluation criteria: (1) The extent to which the partnership has the capacity to partner and engage the community within the Initiative geography; (2) The extent to which the partnership demonstrates an established governance structure and a shared history of collaboratively implementing Conservation Actions and adaptively managing to achieve Conservation Outputs; (3) The composition of the partnership is appropriate to achieve Ecological Outcomes within the Initiative; and (4) How engagement with, and input from, local communities disproportionately impacted by climate change has informed or will inform the project.

Strengths

- The two lead watershed councils have a long history of collaboration.
- The partnership extends an open invitation to local landowners to participate in meetings.
- The application includes a significant list of technical advisors.

Concerns

- The partners described in the application, governance documents, and partnership letter of support are not consistent, which creates ambiguity on their respective roles.
- Two of the critical partnership roles listed in the application are currently assigned to contractors, but the contractor candidates have not been identified.
- The application includes three leadership roles and does not differentiate their partnership roles and responsibilities, particularly who is coordinating the partnership.
- It is unclear from the application whether the listed technical advisors have already signed on to the partnership's proposed FIP initiative or if they are being recruited to participate.
- The application lists five Tribes, but it is unclear what role they fill in the proposed FIP initiative.
- The Columbia SWCD has a small geographic footprint within the proposed initiative area and is participating in the initiative; however, the other districts with the majority of the proposed FIP initiative's acreage — Clatsop and Tillamook — are not listed as participants in any of the partnership documents.
- The application conveys that the partnership wants to scale up their work and requires additional funding to do so; however, the work plan identifies only two primary partners to implement the work and lacks a plan for onboarding new staff and ensuring they are prepared to implement projects at the outset of the FIP initiative.

- The partners' accomplishments are described as a tally of outputs that lack a connection to ecological outcomes, and there is no description of how collaboration helped achieve these outcomes.
- The governance documents describe the partnership's preferred decision-making framework as consensus, but then go on to explain that decisions can be made by voting and that 50% agreement results in an affirmative decision under some circumstances without clarifying what types of decisions this would apply to.

TECHNICAL SOUNDNESS

Evaluation criteria: (5) The extent to which the partnership's Theory of Change supports the proposed Initiative and aligns with a Board identified ecological priority; (6) The extent to which the Conservation Actions and Conservation Outputs described in the proposed Work Plan will make progress toward Ecological Outcomes; and (7) Consideration of greenhouse gas emissions or long-term carbon sequestration or storage; and (8) Changing climate conditions are incorporated into the project and the project will contribute to durable adaptation and resilience for ecosystems, including human communities.

Strengths

- The work plan includes floodplain reconnection as a restoration strategy, an activity that addresses one of the most important limiting factors for coho in this geography.
- The project prioritization incorporates climate change resilience.
- The proposed work plan indicates that the first biennium's riparian projects have secured landowner agreements.

Concerns

- A new opportunistic principle was added to the Strategic Action Plan to encompass where work is "available" for partners to pursue, moving away from the intent of the FIP program to implement projects strategically to achieve the greatest potential ecological benefits.
- The partnership proposes to implement large-scale floodplain restoration, but lacks a work plan project to implement landowner engagement to achieve it.
- Other than riparian projects, work plan projects in biennium 1 are lacking secured landowner agreements, which may lead to longer implementation timeframes.
- The proposed FIP initiative's near-term and long-term outcomes are not well-described.
- The application does not describe how the partnership will use existing fishery monitoring data to inform their work.

TRACKING & REPORTING

Evaluation criteria: (9) The extent to which the partnership demonstrates a process to track Conservation Outputs that are aligned with Ecological Outcomes.

Strengths

- Tillamook Estuary Partnership is providing monitoring support to the partnership and has the monitoring experience and expertise to implement the proposed monitoring projects.

Concerns

- The work plan identifies clear target actions, but lacks a description of the intermediate indicators that demonstrate whether restoration actions are functioning as intended and would be precursors to realizing the anticipated long-term ecological outcomes.
- The narrative Theory of Change is difficult to follow. The application would be strengthened by including a figure or diagram that clearly illustrates the sequence of proposed actions, the expected physical changes, and the monitoring indicators that will be used to track progress toward the anticipated ecological outcomes.

FINANCIAL SOUNDNESS

Evaluation criteria: (10) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed Ecological Outcomes and catalyze additional investments.

Strengths

- The proposed budget dedicates over 80% of the requested OWEB funds to on-the-ground restoration actions, supporting the implementation of projects to achieve the partnership's ecological outputs.

Concerns

- There is no description of a strategy for catalyzing additional investment in the initiative over the life of the FIP.

2027-2029 Grant Offering

Focused Investment Partnership Program

Name of Initiative: South Umpqua Coho Recovery Initiative

Name of Partnership: South Umpqua River Coho Action Team

Name of Applicant: Partnership for the Umpqua Rivers

Initiative addresses the following Board-identified Ecological Priority(ies): Aquatic Habitat for Native Species

Application Number: 228-0010-25270

Region: 2 **County(ies):** Douglas

Budget Overview:

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1 (2027 – 2029)	$4,700,000	$729,000
Biennium 2 (2029 – 2031)	$4,519,580	$936,295
Biennium 3 (2031 – 2033)	$4,427,000	$911,350
Total	**$13,646,580**	**$2,576,645**

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

The South Umpqua River Coho Action Team (SURCAT) seeks Focused Investment Partnership (FIP) funding to implement a coordinated, watershed-scale restoration initiative within the South Umpqua River Subbasin (HUC 17100302) in Douglas County, Oregon. The South Umpqua population of Oregon Coast coho salmon is identified as an essential independent population for recovery of the Oregon Coast Coho Evolutionarily Significant Unit and remains limited by elevated stream temperatures, reduced summer flows, impaired riparian function, habitat simplification, floodplain disconnection, and fish passage barriers. Climate change is expected to further intensify these stressors.

Guided by the South Umpqua Strategic Action Plan, SURCAT will implement restoration, monitoring, and project development actions within priority focal watersheds identified through a basin-wide prioritization process. Proposed work includes fish passage improvements, instream habitat restoration, floodplain and wetland reconnection, riparian restoration and stream shading, flow restoration, protection of cold-water refugia, strategic monitoring, and development of future restoration projects. These actions will restore watershed processes that support high-quality spawning, rearing, migration, and thermal refuge habitats for coho salmon and other native aquatic species.

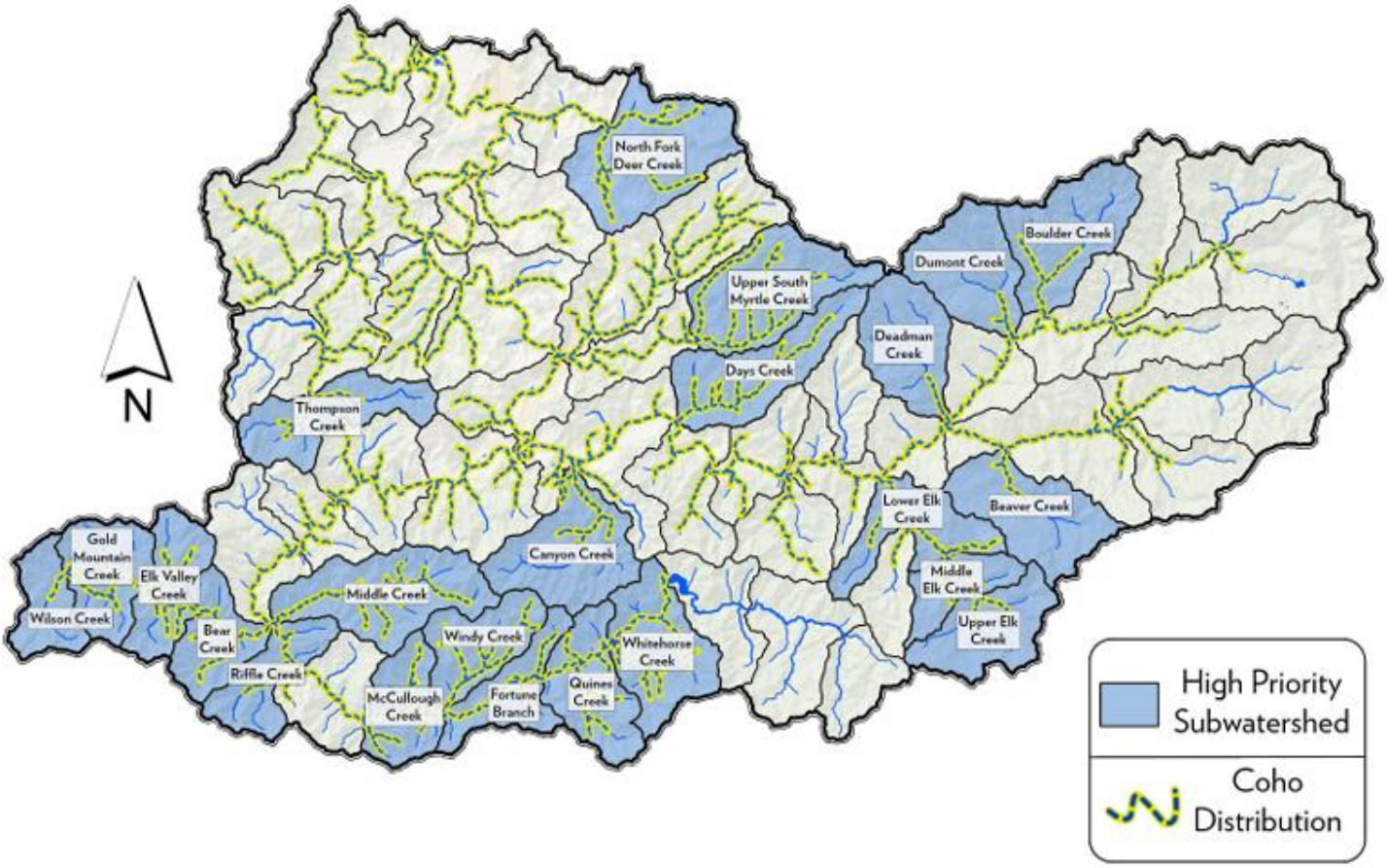
SURCAT is led by the Partnership for the Umpqua Rivers and includes the Cow Creek Band of Umpqua Tribe of Indians, Douglas Soil and Water Conservation District, South Umpqua Rural Community Partnership, Wild Salmon Center, Oregon Department of Fish and Wildlife, National Oceanic and Atmospheric Administration Fisheries, Bureau of Land Management, U.S. Forest Service, Oregon Water

Resources Department and others. Together, these organizations provide the expertise, implementation capacity, and long-term commitment necessary to accelerate restoration, improve watershed resilience, and support recovery of South Umpqua coho salmon.

Attachment A: Initiative Map

Attachment B: Evaluation Criteria Ratings Worksheet

Attachment A: Initiative Map



Attachment B: Evaluation Criteria Ratings Worksheet

REVIEW

The review below is the staff prepared Expert Review Team evaluation of the application based on the evaluation criteria outlined in OAR 695-047-0060 and 695-005-0045.

Expert Review Team Funding Recommendation: Fund

Expert Review Team Ranking: 3 of 8

EVALUATION CRITERIA

PARTNERSHIP CAPACITY

Evaluation criteria: (1) The extent to which the partnership has the capacity to partner and engage the community within the Initiative geography; (2) The extent to which the partnership demonstrates an established governance structure and a shared history of collaboratively implementing Conservation Actions and adaptively managing to achieve Conservation Outputs; (3) The composition of the partnership is appropriate to achieve Ecological Outcomes within the Initiative; and (4) How engagement with, and input from, local communities disproportionately impacted by climate change has informed or will inform the project.

Strengths

- Several projects are currently underway and demonstrate the core partners' experience with project implementation.
- The partnership includes an appropriate mix of state, federal, Tribal, and nonprofit partners.
- The partnership has clear and established leadership in the Partnership for the Umpqua Rivers and partners that have a long track record of successful project implementation.
- The Wild Salmon Center is proposed to facilitate the partnership and brings additional resources and expertise to the initiative.
- The application demonstrates strong Tribal participation and commitment with the Cow Creek Band of Umpqua Tribe of Indians leading many work plan projects.
- The composition of the partnership includes technical expertise and implementation capacity.
- The governance documents and memorandum of understanding clearly describe the roles and responsibilities of partners.
- The Strategic Action Plan was developed through the well-established coho business planning process.
- Douglas SWCD staff have established local landowner trust within the agricultural community that will facilitate the implementation of several of the partnership's identified priority restoration projects.
- Partner roles are aligned with their respective areas of expertise and demonstrate thoughtful planning and participation.
- While a new partnership, there is significant energy and focus from this set of partners as a result of the urgency of threats in this sub-basin and to this coho population.

Concerns

- The partners have worked independently and at different scales, but have not worked as a full collaborative partnership at this scale other than the strategic action planning effort.
- Partnership decision-making has only been tested through strategic action plan development.

TECHNICAL SOUNDNESS

Evaluation criteria: (5) The extent to which the partnership's Theory of Change supports the proposed Initiative and aligns with a Board identified ecological priority; (6) The extent to which the Conservation Actions and Conservation Outputs described in the proposed Work Plan will make progress toward Ecological Outcomes; (7) Consideration of greenhouse gas emissions or long-term carbon sequestration or storage; and (8) Changing climate conditions are incorporated into the project and the project will contribute to durable adaptation and resilience for ecosystems, including human communities.

Strengths

- The project locations identified in the application are technically sound and prioritized based on spawning and rearing habitat, cold water refugia, and climate change parameters.
- Many of the initiative's priority areas are also priority habitat connectivity areas.
- The application clearly describes how climate criteria were taken into consideration in sub-watershed prioritization.
- Supporting and restoring the South Umpqua population of Oregon Coast coho salmon is critically important to achieving Endangered Species Act delisting for coho.
- The partnership expertise, strategies, and actions are appropriate for this geography where water quantity is a limiting factor in the Strategic Action Plan.
- The application describes a sound approach to identifying limiting factors and strategies to address limiting factors.
- Water conservation and water acquisition are appropriate approaches to achieve increased instream flow and address water temperature issues.
- The workload appears well distributed among partners.

Concerns

- The application does not clearly describe the link between conservation actions, outputs, and how the outputs will contribute to ecological outcomes in the Theory of Change.
- The work plan excludes the column listing landowner agreement, making it difficult to evaluate project readiness.
- It is unclear how feasible it is to reduce the basin's smallmouth bass population in a meaningful way, which may limit the effectiveness of the proposed restoration actions due to predation of juvenile salmonids.
- The application does not describe vegetation management and connectivity outside of the stream corridor.
- Fire is an extreme risk in this geography, but fire is not discussed in this application and appears to be a missed limiting factor in consideration of climate change and the impact of increased wildfire risk on aquatic ecosystems.

- It is unclear from the application whether the partnership has an understanding of the landowner readiness to implement water acquisition projects in this geography.

TRACKING & REPORTING

Evaluation criteria: (9) The extent to which the partnership demonstrates a process to track Conservation Outputs that are aligned with Ecological Outcomes.

Strengths

- The Partnership for the Umpqua Rivers has experience monitoring, tracking outcomes, and maintaining data systems.

Concerns

- The proposed timing of quarterly review and reporting could be arduous if no monitoring progress is made in a given quarter (e.g., winter months).
- The monitoring framework identifies specific implementation metrics rather than ecological metrics.

FINANCIAL SOUNDNESS

Evaluation criteria: (10) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed Ecological Outcomes and catalyze additional investments.

Strengths

- The allocation of funds across grant types supports the proposed work and desired ecological outcomes.

Concerns

- None identified.

2027-2029 Grant Offering

Focused Investment Partnership Program

Name of Initiative: Enhancing the Environment for Lampreys in the Willamette

Name of Partnership: Pacific Lamprey Conservation Initiative

Name of Applicant: Columbia River Inter-Tribal Fish Commission (CRITFC)

Initiative addresses the following Board-identified Ecological Priority(ies): Aquatic Habitat for Native Species

Application Number: 228-0011-25271

Region: 3 **County(ies):** Lane, Linn, Marion, and Clackamas

Budget Overview:

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1 (2027 - 2029)	$5,000,000	$428,000
Biennium 2 (2029 – 2031)	$5,000,000	$840,000
Biennium 3 (2031 – 2033)	$5,000,000	$936,000
Total	**$15,000,000**	**$2,204,000**

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

Enhancing the Environment for Lamprey (EEL) is a diverse partnership working to deliver meaningful, measurable ecological outcomes for Pacific Lamprey in five focal areas of the Willamette River Basin: North and South Santiam, McKenzie, Middle Fork, and Upper Willamette/Long Tom. Pacific Lamprey have been harvested by tribes of the Columbia River Basin since time immemorial. Their sharp decline due to habitat and passage threats is the impetus for this high priority initiative. EEL fulfills OWEB's priority, Aquatic Habitat for Native Species, by improving existing and opening historical productive habitats to Pacific Lamprey as well as other native aquatic organisms including Pacific salmon and Steelhead.

Partners will carry out floodplain and riparian restoration to create complex habitat, reconnect floodplains, and boost distribution and abundance. Removing barriers and installing passage structures will open new spawning and rearing areas, improve longitudinal connectivity, and support volitional passage into historical and high production potential habitats. Engaging with the community to integrate lamprey BMPs will improve restoration outcomes.

Long term outcomes include: natural river processes re-established; volitional passage for adults and juveniles; cultural and ecological importance of Pacific Lamprey understood; self-sustaining populations and one million adults at Willamette Falls for tribal harvest.

EEL FIP Partners

Pacific Lamprey Conservation Initiative

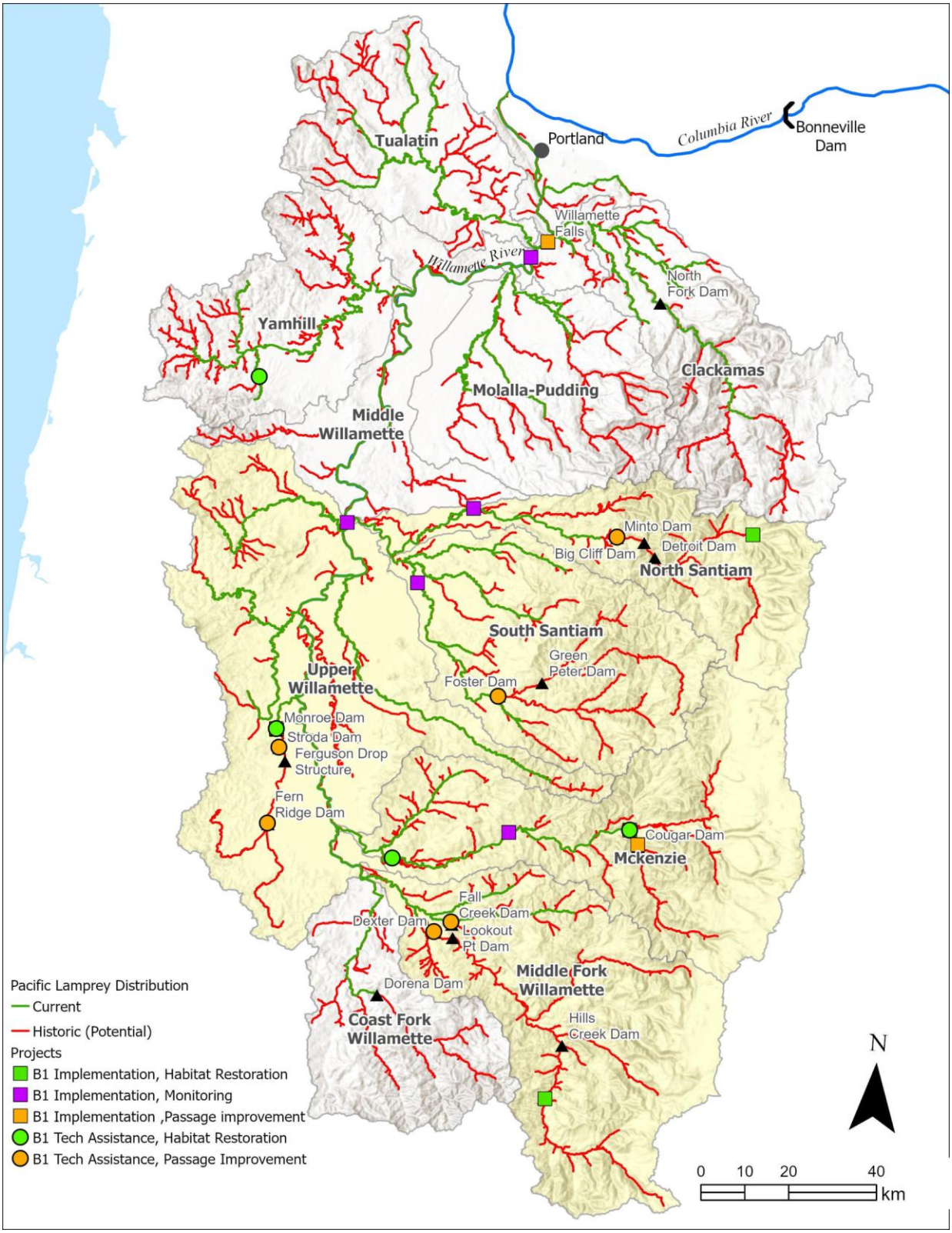
Columbia River Inter-Tribal Fish Comm.

Conf. Tribes of Grand Ronde
Conf. Tribes of Siletz Indians
Conf. Tribes and Bands of the Yakama Nation
Conf. Tribes of the Warm Springs
Conf. Tribes of the Umatilla Indian Reservation
Nez Perce Tribe
Upper Willamette Stewardship Network
Long Tom WC
McKenzie Watershed Alliance
Middle Fork Willamette Watershed
North Santiam WC
South Santiam WC
Oregon Dept. of Fish and Wildlife
US Forest Service
US Fish and Wildlife Service
Benthos Consulting

Attachment A: Initiative Map

Attachment B: Evaluation Criteria Ratings Worksheet

Attachment A: Initiative Map



Attachment B: Evaluation Criteria Ratings Worksheet

REVIEW

The review below is the staff prepared Expert Review Team evaluation of the application based on the evaluation criteria outlined in OAR 695-047-0060 and 695-005-0045.

Expert Review Team Funding Recommendation: Do Not Fund

Expert Review Team Ranking: N/A

EVALUATION CRITERIA

PARTNERSHIP CAPACITY

Evaluation criteria: (1) The extent to which the partnership has the capacity to partner and engage the community within the Initiative geography; (2) The extent to which the partnership demonstrates an established governance structure and a shared history of collaboratively implementing Conservation Actions and adaptively managing to achieve Conservation Outputs; (3) The composition of the partnership is appropriate to achieve Ecological Outcomes within the Initiative and; (4) How engagement with, and input from, local communities disproportionately impacted by climate change has informed or will inform the project.

Strengths

- The partnership includes an extensive list of partners that provide appropriate capacity and expertise for the proposed initiative. The Core Team, Technical Review Team, and implementing partners have roles that are clearly defined.
- Governance documents include nuanced voting requirements with a higher bar for more significant decisions.
- Designating lead partners for each component of the project (implementers, monitoring, technical expertise) is an empowering structure that will help sustain the partnership over the long term.
- The proposed FIP initiative is built on a long history of Tribes working together with Columbia River Inter-Tribal Fish Commission (CRITFC).
- Incorporating watershed councils into the partnership to implement stream restoration is an effective approach to get a diversity of project types implemented across different land ownerships.

Concerns

- Extensive activities, including restoration and translocation, are proposed for stream reaches above US Army Corps of Engineers-owned dams that block lamprey passage; however, the ACOE is not a member of the partnership.
- The Upper Willamette Stewardship Network is designated as the engagement and restoration team coordinator; however, restoration activities are planned to be implemented by watershed councils that are outside of UWSN's geography.

- Some partners have a history of working together, while others signed onto the partnership just prior to submittal of the FIP initiative application.

TECHNICAL SOUNDNESS

Evaluation criteria: (5) The extent to which the partnership's Theory of Change supports the proposed Initiative and aligns with a Board identified ecological priority; (6) The extent to which the Conservation Actions and Conservation Outputs described in the proposed Work Plan will make progress toward Ecological Outcomes; (7) Consideration of greenhouse gas emissions or long-term carbon sequestration or storage; and (8) Changing climate conditions are incorporated into the project and the project will contribute to durable adaptation and resilience for ecosystems, including human communities.

Strengths

- Increasing riparian acres and floodplain reconnection for cold water refugia will help mitigate the effects of climate change on lamprey habitat.
- Where proposed, passage barrier removal will restore lamprey access to upstream habitats.
- Threats to lamprey are well described, and the Theory of Change is well outlined and supports recommended actions.
- The application relies on the recently developed WILLPASS (Willamette Inter-organizational Lamprey Leadership and Passage Assessment Surveys and Syntheses) to prioritize passage barriers. WILLPASS accurately conveys key habitat issues.
- Proposed engagement focuses on landowners and practitioners, which has a closer and more likely tie to restoration than a more general public engagement approach.
- Proposed restoration projects reflect a technically sound approach to restore watershed function and improve habitat.
- The partnership's technical experts are recognized lamprey experts and are leaders in their field.

Concerns

- While the primary habitat restoration partners have the expertise to implement proposed restoration projects, some of the proposed projects appear to be selected due to the partners at the table rather than through a prioritization process.
- The primary geographic focus of translocation and significant restoration actions is above high head dams owned by the ACOE, who is not a partner. It is unclear whether ACOE will be a partner in restoring up or downstream passage around the dams. Since lamprey is not ESA-listed, there is not the same pressure on ACOE to restore passage as there is for salmonids. It is unlikely that ACOE will improve passage in the near-term, indicating that translocated lamprey would be placed in stream reaches that migrating lamprey cannot access. Issues associated with passage at ACOE dams are not discussed in the application. While the best habitat is above these dams, it may be better to focus on west-side streams, which lack severe passage problems, where limited funding is available for anadromous fish habitat restoration, and where there is higher likelihood of project implementation success.
- The application does not mention drawdowns at the ACOE dams and how this will impact the proposed restoration.
- While proposed floodplain restoration projects have many benefits, it is unclear how the specific sites for floodplain restoration were prioritized.

- In the Theory of Change, the first three strategies are interconnected while the 4th strategy (general engagement) is not connected to the other strategies.

TRACKING & REPORTING

Evaluation criteria: (9) The extent to which the partnership demonstrates a process to track Conservation Outputs that are aligned with Ecological Outcomes.

Strengths

- A recognized lamprey expert is engaged in developing monitoring protocols.
- There is a well-defined gap in understanding lamprey habitat restoration needs.

Concerns

- Monitoring proposed in the 1st biennium is designed to detect adults; however, larvae take five or more years to reach adult stage. Funds could be better spent collecting data to inform proposed actions such as status and trend monitoring or effectiveness monitoring to evaluate restoration and acquisition projects and inform future restoration.
- Proposed monitoring is research focused. While more research may be necessary to determine whether proposed actions are likely to be successful, research is not an eligible activity for OWEB's constitutionally dedicated lottery funds.
- Different entities are proposed to lead tracking of different grant types, with data proposed to be stored in different locations. It is unclear whether this system will facilitate or hinder dissemination of monitoring data.

FINANCIAL SOUNDNESS

Evaluation criteria: (10) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed Ecological Outcomes and catalyze additional investments.

Strengths

- The proposed budget for engagement grants is appropriate given the volume of work proposed on private land.
- The sequencing and trajectory of grant types is logical, with TA and engagement having higher levels of investment earlier in the proposed FIP initiative budget.
- Opportunities for leveraging funds are described; however, the application does not describe a process to take advantage of those opportunities.

Concerns

- In the first biennium, the largest expenditure by grant type (about 40%) is for monitoring; it is unclear whether this is the best use of funds. The subsequent biennia allocate about 20% of grant funds for monitoring.
- The application describes the partnership's decision to minimize the OWEB match in order to reduce their reporting burden. This makes it difficult to understand the extent to which the partnership has the ability to catalyze additional funds.

2027-2029 Grant Offering

Focused Investment Partnership Program

Name of Initiative: Umpqua CORE Initiative: Collaborative Oak Restoration & Engagement

Name of Partnership: Umpqua Oak Partnership

Name of Applicant: Douglas Soil and Water Conservation District

Initiative addresses the following Board-identified Ecological Priority(ies): Oak & Prairie Habitat

Application Number: 228-0012-25272

Region: 2 **County(ies):** Douglas

Budget Overview:

Funding Period	OWEB Funding Request	Estimated Match
Biennium 1 (2027 - 2029)	$4,999,876	$1,336,468
Biennium 2 (2029 - 2031)	$4,724,930	$1,178,749
Biennium 3 (2031 - 2033)	$4,766,138	$1,158,749
Total	**$14,490,944**	**$3,673,966**

APPLICATION DESCRIPTION [PROVIDED BY THE APPLICANT]

The Umpqua Oak Partnership (UOP) proposes a six-year Initiative to restore, maintain, and protect oak savanna, woodland, and oak-conifer habitat across Tribal, County, Federal, and private lands in Douglas County, Oregon. Restoration is anchored at North Bank Habitat Management Area (BLM), The Exit 99 Project & other priority Tribal lands (Cow Creek Band of Umpqua Tribe of Indians) and Mildred Kanipe Memorial Park (Douglas County), building connectivity into adjacent private lands.

Need: Oak habitat across the Pacific Northwest has collapsed to just 10% of its historic range—25% across Oregon—a decline that tracks the continent-wide loss of 3 billion birds since 1970. Conifer encroachment, invasive species, and a century of fire exclusion have degraded Douglas County's remnant oak habitat— in a historically underfunded region facing compounding climate-driven drought & wildfire risk imperiling native wildlife, cultural resources, & rural communities.

Proposed Work: The Initiative focuses on five intersecting Core Strategies—Forest Restoration, Ecocultural Stewardship, Understory Restoration, Recruitment and Legacy Oak Protection, and Integrated Watershed Restoration. Synchronized mobilization of three workforce crews increases oak restoration pace and scale, guided by Interdisciplinary Support Teams, Takelma ecocultural stewardship, and engagement to increase landowner readiness. Biennium 1 targets ~2,500 acres in Core Priority Areas, propelling towards a 2050 vision of expanded, fire-resilient oak landscapes.

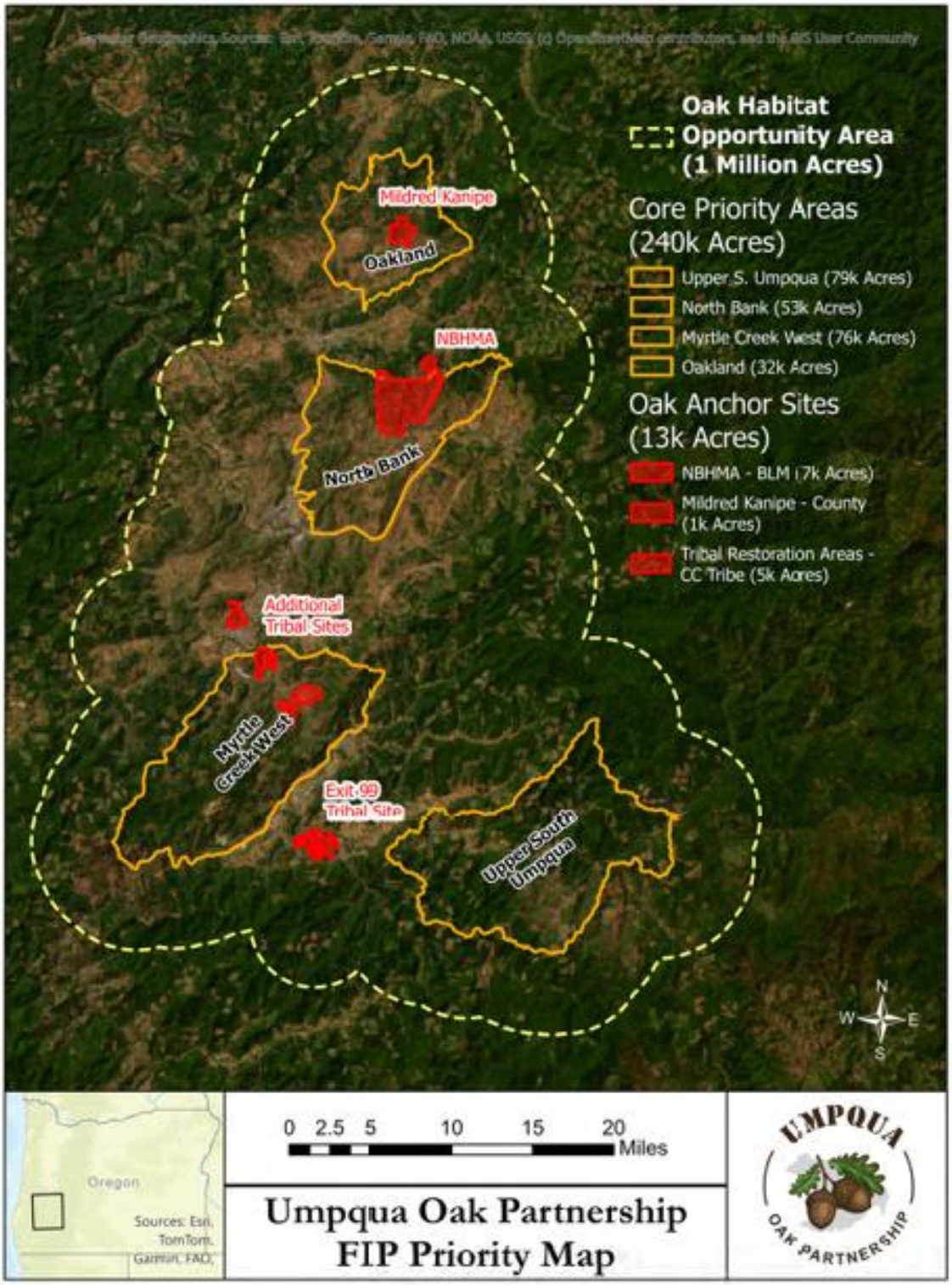
Partners: Douglas Soil & Water Conservation District, Cow Creek Tribal Fire, Douglas Forest Protective Association, Oregon Conservation Corps of the Umpqua Valley, Source One Serenity, BLM, USFS, NRCS, USFWS, USWFS, ODFW, ODF, OSU Extension, PUR, Pacific Birds, Klamath Bird Observatory, Understory

Initiative, National Forest Foundation, Takelma Cultural Center, Alder Creek Community Forest, Yew Creek Land Alliance, South Umpqua Rural Community Partnership.

Attachment A: Initiative Map

Attachment B: Evaluation Criteria Ratings Worksheet

Attachment A: Initiative Map



Attachment B: Evaluation Criteria Ratings Worksheet

REVIEW

The review below is the staff prepared Expert Review Team evaluation of the application based on the evaluation criteria outlined in OAR 695-047-0060 and 695-005-0045.

Expert Review Team Funding Recommendation: Fund

Expert Review Team Ranking: 5 of 8

EVALUATION CRITERIA

PARTNERSHIP CAPACITY

Evaluation criteria: (1) The extent to which the partnership has the capacity to partner and engage the community within the Initiative geography; (2) The extent to which the partnership demonstrates an established governance structure and a shared history of collaboratively implementing Conservation Actions and adaptively managing to achieve Conservation Outputs; (3) The composition of the partnership is appropriate to achieve Ecological Outcomes within the Initiative and; (4) How engagement with, and input from, local communities disproportionately impacted by climate change has informed or will inform the project.

Strengths

- The partnership composition is appropriate in consideration of the work proposed and includes OSU Extension for landowner outreach and engagement. OSU Extension has extensive experience effectively communicating with the partnership's landowner audience on forestry management.
- Over 10 entities signed on to the partnership's governance document that includes defined roles for each partner.
- The Partnership Coordinator has the leadership skills to serve in this role as well as the other roles identified in the work plan.
- The Cow Creek Band of Umpqua Tribe of Indians is a co-lead for implementing the partnership's ecocultural stewardship strategy.
- Inclusion of the Douglas Forest Protection Agency is indicative of likely implementation success for prescribed burning.
- The proposed engagement strategy utilizes the strengths of each partner to reach local audiences most effectively.
- The integration of traditional knowledge and expertise is well described.
- The application describes a unique partnership that brings together entities that have not traditionally collaborated in this geography.
- The partnership has identified three crews to implement on the ground restoration, which is reasonable and appropriate for the scale of the proposed work.

Concerns

- Individual partners and subsets of partners have track records implementing projects; however, the partnership as a whole is relatively new with limited experience collectively implementing projects and would benefit from gaining collaborative experience through OWEB's Open Solicitation grant program.
- Additional staff and capacity will be needed to implement the FIP initiative given the partners' existing commitments. It is unclear how additional capacity will be obtained.

TECHNICAL SOUNDNESS

Evaluation criteria: (5) The extent to which the partnership's Theory of Change supports the proposed Initiative and aligns with a Board identified ecological priority; (6) The extent to which the Conservation Actions and Conservation Outputs described in the proposed Work Plan will make progress toward Ecological Outcomes; (7) Consideration of greenhouse gas emissions or long-term carbon sequestration or storage; and (8) Changing climate conditions are incorporated into the project and the project will contribute to durable adaptation and resilience for ecosystems, including human communities.

Strengths

- The initiative encompasses a large geography, and the partnership has identified key locations for project implementation with helpful maps that identify priority areas.
- The work plan's proposed conservation actions are in core opportunity areas and on anchor sites.
- In biennium 1, more than half the proposed restoration projects have landowner agreements and project designs either final or at 60% design.
- The application includes advancing private land stewardship to ensure there is maintenance of FIP investments over time.
- The application integrates climate adaptation and describes how oak habitats are adapted to survive changing climate conditions which supports the rationale for why these investments will be durable over time.
- The work plan clearly describes the crews that will be implementing restoration projects on the ground.
- The initiative proposes oak habitat restoration in a geography that has been under-invested to address key limiting factors in an area that has lacked implementation leadership for this type of work.
- The work plan demonstrates an understanding of the project pipeline needed to support on-the-ground implementation of oak habitat treatments.
- The proposed initiative builds local capacity to support natural resource management that will contribute to durable climate adaptation and ecosystem resilience where there is a demonstrated need.

Concerns

- The project prioritization process is not well described in the application. This could pose challenges to the partnership if identified projects fall through and there is a need to add projects to the work plan.

- Successful restoration is dependent on long-term maintenance by private landowners. Methods for achieving restoration sustainability are not described in the application.
- The application would benefit from a justification for the partnership's focus areas and rationale to not prioritize connectivity, which would promote wildlife movement and enhance climate change resilience.
- Land conversion is identified as a primary threat, but the application lacks discussion about how to address that threat beyond hosting workshops. Potentially, Oregon Agricultural Trust could be a helpful partner on this issue.
- Prescribed burning in this region faces significant challenges, including limited burn windows, limited staffing, and populated areas within desired burn acreages. The application lacks acknowledgement of these challenges and how the partners would address them.

TRACKING & REPORTING

Evaluation criteria: (9) The extent to which the partnership demonstrates a process to track Conservation Outputs that are aligned with Ecological Outcomes.

Strengths

- The application includes a description of how experienced partners will provide training on field procedures and will include institutionalizing and standardizing field data collection and use of a geodatabase to track project implementation metrics.
- The work plan identifies clear targets and outputs for biennium 1.

Concerns

- The monitoring strategy is unclear. Monitoring is described as voluntary, so it is unclear if monitoring will be conducted.

FINANCIAL SOUNDNESS

Evaluation criteria: (10) The extent to which the allocation of funds across proposed grant types will support the achievement of the proposed Ecological Outcomes and catalyze additional investments.

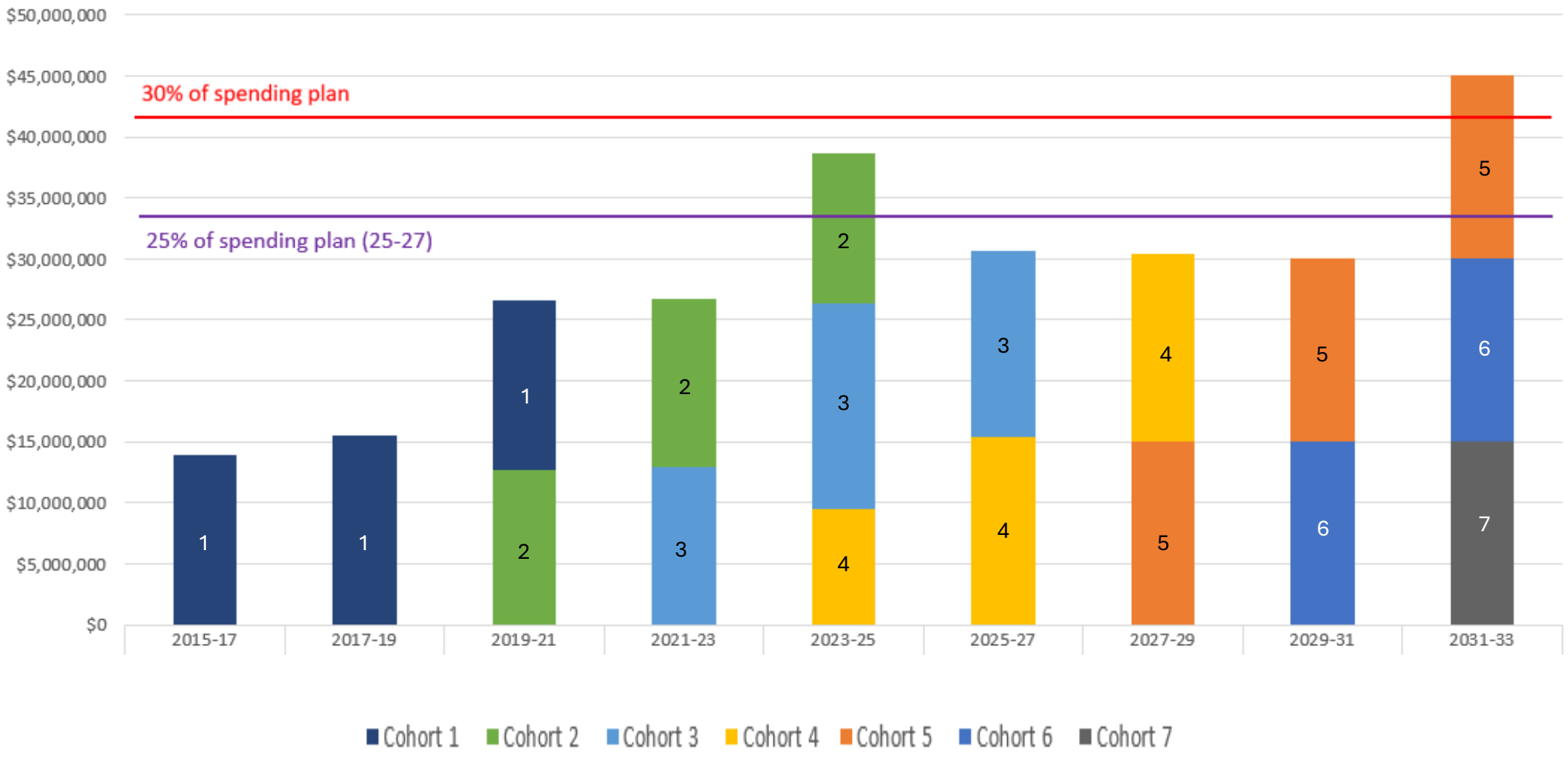
Strengths

- The partnership proposes allocating 85% of the requested OWEB funds to restoration.

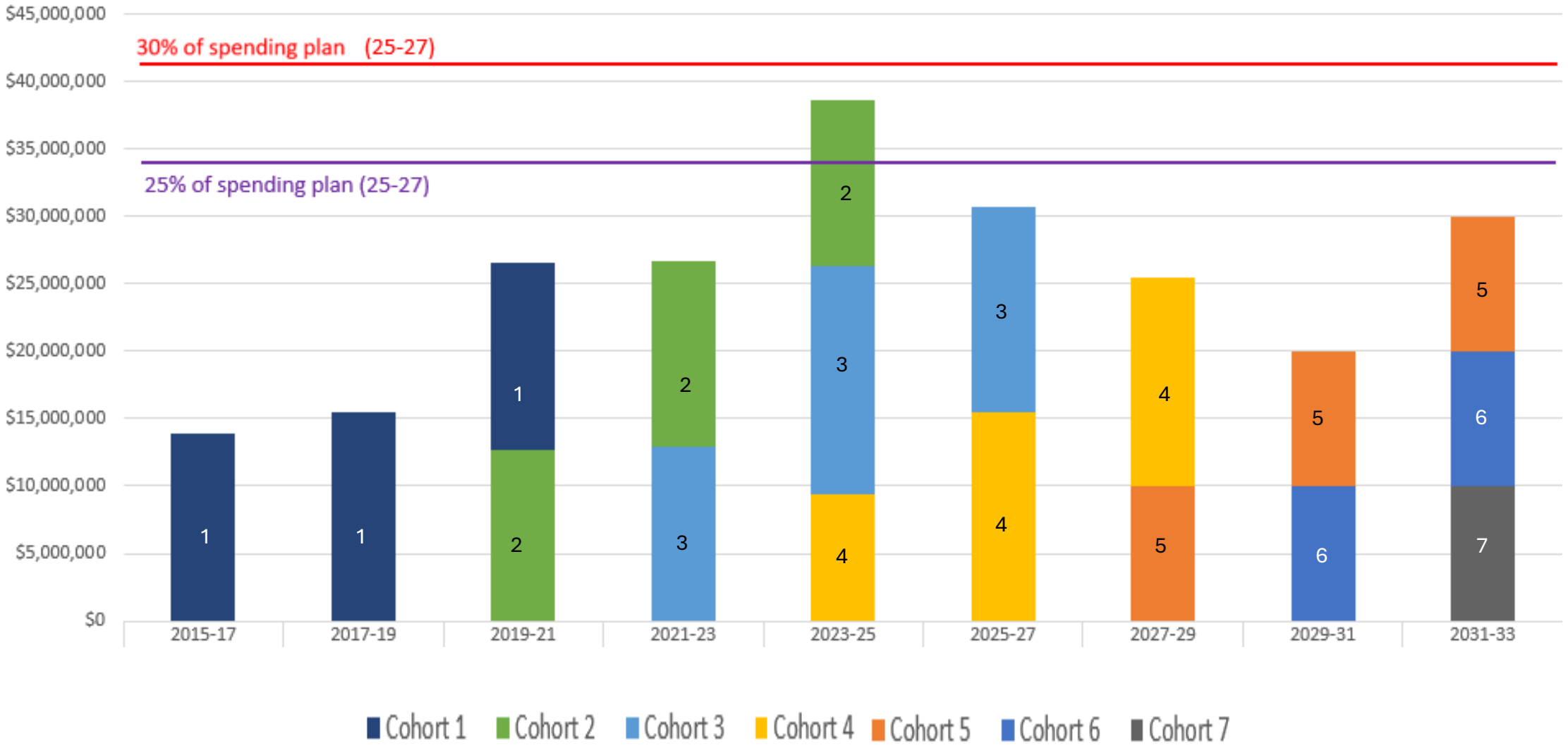
Concerns

- There are two staff positions being created via the proposed FIP initiative; however, that may not provide sufficient capacity to support the proposed engagement activities.
- The future funds to sustain long-term outcomes are not identified, making it unclear how the work will be durable over time.

FIP Spending Bar Graph: Since 2015 with **Three** New Partnerships Awarded at $5 Million Beginning 2027-2029



FIP Spending Bar Graph: Since 2015 with **Two** New Partnerships Awarded at $5 Million Beginning 2027-2029



FIP Spending Bar Graph: Since 2015 with **Three** New Partnerships Awarded at $5 Million Beginning 2027-2029/ **Two** New in 2029/ **Three** New in 2031

