Guidance

Partnership Technical Assistance Application

Oregon Watershed Enhancement Board
775 Summer Street NE, Suite 360
Salem OR 97301-1290
503-986-0178
www.oregon.gov/OWEB

Partnership Technical Assistance application forms and other items referred to in this document are available via OWEB's website, unless otherwise indicated.

This document provides guidance for completion of the Oregon Watershed Enhancement Board's Partnership Technical Assistance Grant Application. The Guidance document and any attachments will be periodically updated by OWEB staff as needed.

January 2024

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Oregon Watershed Enhancement Board

The Oregon Watershed Enhancement Board (OWEB) is a state agency that provides grants to help Oregonians take care of local streams, rivers, wetlands, and natural areas. OWEB grants are funded from the Oregon Lottery, federal dollars, and salmon license plate revenue. OWEB offers a variety of grant types and programs.

Overview

The Partnership Technical Assistance (TA) grant offering supports the operations of existing partnerships, or collaborating groups of organizations, to enhance partnership capacity, develop a strategic action plan, conduct stakeholder engagement related to strategic action plan development, and coordinate strategic action plan implementation. Applicants can request a maximum of $150,000. Grants can last up to 3 years.

NOTE: Partnership TA proposals are not required to address a Focused Investment Partnership (FIP) OWEB board-identified ecological priority of significance to the State (found at www.oregon.gov/oweb/grants/Pages/fips.aspx).

==Partnership TA grants are required to lead to implementation of conservation actions.==
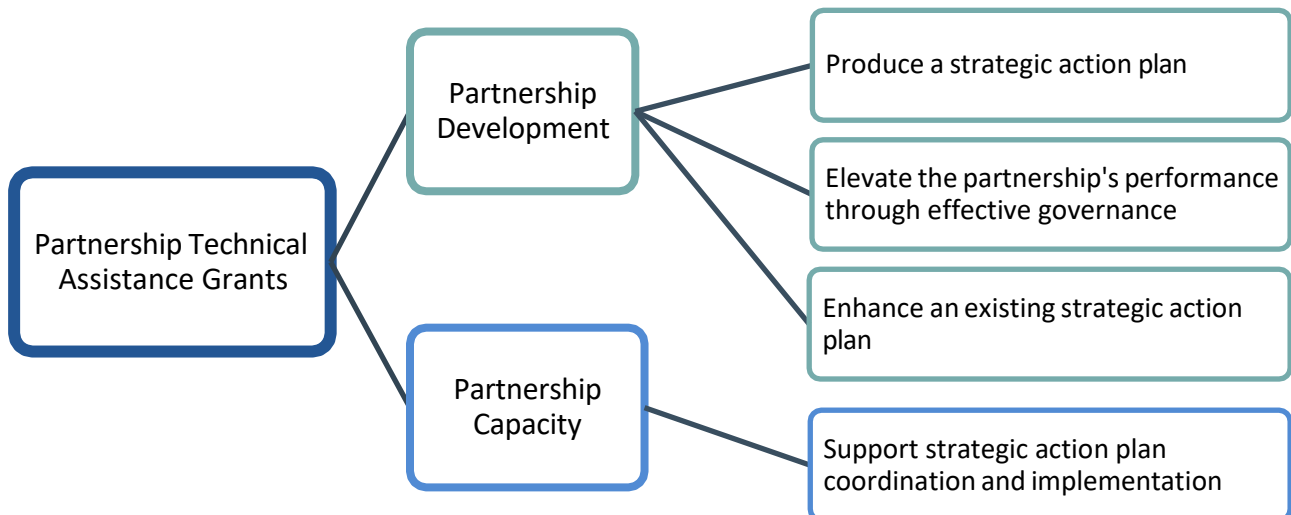
Definitions

Partnership Development

Technical assistance for existing partnerships to develop or enhance a strategic action plan and partnership governance.

Partnership Capacity

Technical assistance for existing partnerships with a strategic action plan to support strategic action plan coordination and implementation. Funds may be used to add Theory of Change and/or Progress Monitoring Framework sections of OWEB's Strategic Action Plan guidance document to the partnership's existing strategic action plan (www.oregon.gov/oweb/Documents/FIP-SAP-Guidance.pdf).

Types of Partnership Technical Assistance and Related Activities

OWEB's Definition of a Project

OWEB defines a project as all related and relevant activities necessary for achieving the project's full ecological objectives, whether funded by OWEB or other sources. You should not separate out OWEB and non-OWEB funded activities. Answer all application questions to reflect all proposed project activities, regardless of funding source. The Budget and Match sections of the application provide space for you to designate funding sources for each activity.

OWEB Requested Funding **+** OWEB Required Match **+** Leveraged Funds **=** Project

Eligible and Ineligible Project Activities

Eligible Project Activities (including but not limited to…)

Partnership Development

- Support for a Partnership Coordinator or Chairperson
- Staff time to assist with partnership administrative duties
- Partnership meetings (costs to participate, room/food, materials, etc.)
- Facilitation (staff or contracted time)
- Staff or contracted time developing a strategic action plan
- Staff or contracted time developing partnership governance documents (e.g. MOU, Operations Manual, Fundraising Plan, Outreach/Communication Plan, etc.)
- Stakeholder engagement in support of developing a strategic action plan
- Project planning, mapping, and/or prioritization software

Partnership Capacity

- Support for a Partnership Coordinator or Chairperson
- Staff time to assist with partnership administrative duties
- Partnership meetings (costs to participate, room/food, materials, etc.)
- Facilitation (staff or contracted time)
- Maintenance of partnership documents (e.g. strategic action plan, governance documents, Fundraising Plan, Outreach/Communication Plan, etc.)
- Project planning, mapping, and/or prioritization software
- Completing the Theory of Change and/or Progress Monitoring Framework sections of OWEB's Strategic Action Plan guidance document: (www.oregon.gov/oweb/Documents/FIP-SAP-Guidance.pdf).

  Other sections are required to be included in the partnership's strategic action plan before applying for this grant type.

Eligible Applicants

Partnerships may be comprised of a diverse set of stakeholders, including but not limited to: local, state, and federal agencies; tribes; not-for-profit conservation organizations; Oregon institutions of higher education; or independent not-for-profit institutions of higher education. The composition of the partnership is determined by the partners.

In applying for program funding, the partnership will select one partner to be point of contact as applicant. A grant applicant must be one of the **legal entities** identified below and have a Federal Employer Identification Number (FEIN). A state or federal agency is not eligible to be applicant.

Eligible Legal Entities

Local or tribal government

Non-profit organization

Institution for Higher Education
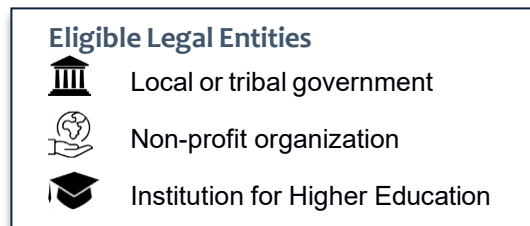
Documents and Guidance

Partnership TA forms and other items referred to in this document are available at www.oregon.gov/OWEB/pages/index.aspx, unless otherwise indicated.

OWEB's online applications, including the Partnership TA application, are available at https://apps.wrd.state.or.us/apps/oweb/oa/.

Evaluation of Applications

OWEB intends to fund Partnership TA grants that have a high probability of supporting partnerships in implementing conservation work as guided by the partnership's strategic action plan. It is important to demonstrate that the proposed Partnership TA activities will position the partnership to generate positive impacts on the landscape and in the community of the partnership's focal geography. Applicants should ensure that proposed activities align with the purpose and eligibility of the Partnership TA grant offering.

Partnership TA grant applications are evaluated by a Partnership TA review team, which consists of personnel with statewide knowledge and interdisciplinary expertise drawn from agencies represented on the OWEB Board and other entities, as appropriate.

The review team will consider the following criteria (OAR 695-030-0045 (3)): (a) The degree to which the application demonstrates support and engagement from the appropriate stakeholders; (b) The likely effectiveness of communication among the applicant and partners; (c) The extent to which the application describes partner roles and responsibilities; (d) The performance history and composition of the partnership; (e) How the proposed costs are aligned with the work necessary to accomplish the objectives described in the application; (f) The qualifications of the technical staff of the applicant, or consultants to be retained, to accomplish the activities described in the application; (g) The extent to which the application describes why the opportunity for partnership technical assistance is timely; (h) The extent to which the application identifies a common vision of success and potential barriers to success of the project; (i) The likelihood of success of the partnership technical assistance project,

including if the project will lead to future eligible restoration or acquisition projects; and (j) The organizational capacity of the applicant.

The review team will evaluate each application and provide funding recommendations to OWEB staff. OWEB staff will review the expert review team recommendations and make a funding recommendation to the Board. The results of the expert review process, including evaluations, shall be provided to applicants and the OWEB Board.

How to Apply

Partnership TA applications are available via OWEB's online application website: https://apps.wrd.state.or.us/apps/oweb/oa/.

An OWEB Online Grant Management System (OGMS) login is required to access the online grant application. Only one login per organization is allowed. If no login exists for the applicant's organization, please email Leilani Sullivan at leilani.sullivan@oweb.oregon.gov to request one. Include the following in your email:

- Organization name and address.
- Grantee Contact information: name, title, email address, and phone number for the person who will receive all communication from OWEB and sign any grant agreements.
- Payee Contact Information: name, email address, and phone number for the person who keeps financial records and submits payment requests and documentation.
- FEIN (Federal Employer Identification Number). OWEB may only enter into agreements with legally established entities.
- Per federal guidance, all OWEB grantees must be registered at the System for Award Management (SAM) before receiving a grant agreement. Entities will receive a non-proprietary identifier (called the Unique Entity Identifier (UEI).) This identifier is assigned by SAM (sam.gov is a free service) and entities must update their registration annually.

Application Cycles and Deadlines

All deadlines referred to in this Guidance are **5:00 pm Pacific Time for each grant cycle**. Deadlines will be posted on OWEB's website and will be announced by email in advance.

Filling out the Application

This section outlines instructions for the Partnership TA online application. Instructions may not be included for sections of the application that are self-explanatory.
The application must be completed regardless of whether there are applicable instructions below.

Administrative Information

The information in this section of the application form will be used to:
1) Enter the project in OWEB's database;
2) Create a grant agreement if the project is funded; and
3) Meet State of Oregon legal requirements.

Application Name

Provide a name that can be used for the project on all related correspondence and agreements. Giving the project a name helps to define it. Try to keep the project name to seven words or fewer.

Applicant Contact Information

Provide the name of the organization submitting the application and to whom the grant agreement will be addressed.

Payee Contact Information

Provide the name of the organization and organization's staff person who will be responsible for tracking and accounting for project funds.

Project Manager Contact Information

Provide the name of the organization and organization's staff person who will receive all correspondence about the project, including technical aspects of the project during evaluation and project implementation.

Abstract

The abstract statement provides important reference information for the project and will be the first place OWEB staff and technical reviewers look to understand the location and components of the proposed activities. The abstract should be clear and concise. Provide an abstract statement for the project in 2,000 characters or less that includes the following four elements:

Identify the project location.

Include the names of streams, rivers, or watershed(s) impacted by the project; the proximity of the nearest town(s); and the county(ies) in which the project is located.

Briefly state the watershed issue, problem, and/or limiting factor(s) to be addressed.

List the watershed issues/problems the project addresses, such as fish and wildlife species, habitat access, fish passage, altered habitat, water quality/quantity, invasive species or other concerns associated with addressing ESA-listed species, TMDL's or other issues identified in planning documents.

Identify and briefly describe the restoration component(s) to be implemented.

Briefly list the kind(s) of restoration actions being proposed (such as planting, tree thinning, weed removal, fencing, culvert replacement, habitat structure placement, irrigation piping, etc.) and at what scale (number of miles, acres, culverts, etc.).

Identify project partners.

List partners directly involved in the project. For example, partner involvement could be by contributing technical advice, materials, labor or cash match. Using acronyms is acceptable.

Location Information

Mapping project

Map the point that best represents the approximate center of the partnership's focal geography. Be sure to map the project within the correct OWEB Region (www.oregon.gov/OWEB/Documents/RPR-Contact-Map.pdf). If the project includes a sensitive location, such as sage-grouse habitat, use the applicant's address as the map point. It is possible that a partnership's geography spans multiple regions. In that case, select the region that encompasses the majority of the partnership's geography.

Ownership

Check the boxes that apply to the project and provide the information requested. OAR 695-005-0030(4) states that "All applications that involve physical changes or monitoring on private land must include certification from the applicant that the applicant has informed all landowners involved of the existence of the application and has also advised all landowners that all monitoring information obtained on their property is public record. If contact with all landowners was not possible at the time of application, explain why."

Permits

Permit and license information provided in the application will be imported into the final grant agreement for an awarded grant. You are responsible for verifying applicable permits, licenses, and General Authorizations required for the project at the time of execution of the grant agreement and on an ongoing basis. You may update this information before the grant agreement is executed.

Racial and Ethnic Impact Statement

Chapter 600 of the 2013 Oregon Laws requires applicants to include a Racial and Ethnic Impact Statement with each grant application.

Insurance

OWEB's insurance requirements for grantees include standard insurance types and coverage, as well as specialized insurance coverage for higher-risk projects. If OWEB grants funds for your project, your organization will be required to document certain insurance at the time of executing a grant agreement. Refer to OWEB's guidance regarding insurance requirements, available in Chapter 8 of OWEB's GoBig Guidance on Budgeting and Grants.

Additional Information

Sage-Grouse

At its April 2015 meeting, the OWEB Board adopted a policy to support projects benefitting sage-grouse habitat in Oregon's sage-steppe ecosystem. The policy makes available at least $10 million in grants over ten years. This question allows OWEB to track these dollars. If the project includes a sensitive Sage-grouse location, use the applicant's address as the map point.

Problem Statement

Problem Statement

Explain the problem behind the proposed project and how it fits into the larger watershed context. **Do NOT** explain the project here; instead, tell the background story to help reviewers understand why the project should be implemented.

Choose one or more of the eligible project types listed. **Partnership TA grants are required to lead to implementation of conservation actions.**

History

During application review, review team members appreciate having historical context for proposed projects as well as information on future phases. OWEB staff also provide previous project summaries and evaluations to reviewers based on the application numbers provided by applicants.

"Continuation" is defined as a project that previously received OWEB funding and did not yet result in completion of the TA goal. Applicants need to provide OWEB grant numbers of previous grants, describe the work completed under the previous OWEB grant(s), and explain why continuation is

necessary to finish work funded under previous grants.

Plans and Salmon

Salmon

If your project will specifically benefit salmon or steelhead, indicate which salmon ESUs (Evolutionary Significant Unit) or steelhead DPSs (Distinct Population Segment) will benefit. Projects specifically benefitting salmon or steelhead should be located within a salmonid ESU recovery domain and should intend to affect streams and/or estuaries with current salmonid ESU species use or where there is likelihood of future species use. In explaining the benefits to salmon or steelhead or their habitat, indicate how the technical assistance work will address the limiting factors for the selected salmon or steelhead ESU/DPS.

Plans

Indicate whether your project will address a restoration action identified in a federal recovery or regional plan. If you indicated a benefit to salmonids earlier, the question of whether the activity addresses a restoration action identified in a federal recovery plan or regional assessment must be marked 'Yes.' Then choose the federal recovery plan(s) under which this project is being implemented. For each recovery or restoration plan chosen, describe how the project is consistent with the cited plan. Wherever possible, refer to specific sections or pages of the recovery/restoration plan that indicates the limiting factor addressed and/or the restoration action to be undertaken.

> *Example*:
> The Proposed Federal Recovery Plan for Oregon Coast Coho states that removing wetland dikes and tide gates is one of the highest priority recovery actions for the West River estuary (p.22). Recovery action C.5.1.1.3 identifies removing dikes at the West River wetlands site as a specific action. This project will model hydraulic changes that will occur if dikes are removed at the West River wetlands site.

Proposed Solution Background

Partnership Structure

Describe the partnership's current structure, including frequency of meetings, communication, and decision-making processes. Be specific and use examples as appropriate. Reference the required partnership documents that are uploaded to the application (see Uploads section below).

Describe the capacity of the partnership to collaborate throughout the process. Describe the level of commitment of each partner and their unique roles, expertise, etc. that each brings to this Partnership TA grant. Explain how the partnership operates and why the partnership is well-suited to complete the activities proposed in this grant application.

Partnership Technical Assistance Type

Select the appropriate type of Partnership technical assistance for your proposal and address the associated questions in the next section.

"Partnership Development" is defined as: Technical assistance for existing partnerships to develop or enhance a strategic action plan and partnership governance.

"Partnership Capacity" is defined as: Technical assistance for existing partnerships with a strategic action plan to support strategic action plan coordination and implementation. Funds may be used to add Theory of Change and/or Progress Monitoring Framework sections of OWEB's Strategic

Action Plan guidance document to the partnership's existing strategic action plan (www.oregon.gov/oweb/Documents/FIP-SAP-Guidance.pdf).

It is important to demonstrate that the proposed Partnership TA activities will position the partnership to generate positive impacts on the landscape and in the community of the partnership's focal geography. Applicants should ensure that proposed activities align with the purpose and eligibility of the Partnership TA grant offering.

Partnership Development

Indicate whether the partnership has a strategic action plan. If yes, answer the subsequent questions. There is not an expectation that every partnership has a strategic action plan at the time of application. Some partnerships may be applying for Partnership TA funding in order to create a new strategic action plan.

Develop a Strategic Action Plan

Describe the partnership's vision and purpose for developing a strategic action plan. Be specific and use examples as appropriate.

Describe existing data that the partnership will use to assess baseline conditions. Describe existing data gaps and how those gaps will be addressed. Partnership TA funding is not eligible to be used for new data collection, although it can be used for data analysis in the strategic planning process.

Elevate the partnership's current level of performance

Explain how the partnership will build capacity and elevate its performance. Be specific and use examples as appropriate. Describe how the partnership's increased capacity and elevated performance will translate into more effective implementation and coordination of the strategic action plan and conservation actions on-the-ground.

Develop other partnership documents

List and describe the deliverables that this grant will generate. Products include, but are not limited to: financial, communication/outreach, and/or monitoring plans; partnership outreach materials; a partnership website; etc.

Be specific and use examples as appropriate to describe how these documents will be created and used for future conservation actions.

Engagement for SAP Development or Enhancement

Be specific and use examples as appropriate to describe the stakeholders in the community with whom the partnership will engage and how the partnership will engage those stakeholders in developing or enhancing the strategic action plan. Explain why the proposed level of engagement is necessary and sufficient to implement future conservation actions under the strategic action plan.

Partnership Capacity

Indicate whether the partnership has a strategic action plan. If yes, answer the subsequent questions.

If the partnership does not have a strategic action plan, then you should apply for Partnership Development. Partnership Capacity funding is intended for existing partnerships with a strategic action plan to support strategic action plan coordination and implementation.

Funds may be used to add Theory of Change and/or Progress Framework sections of OWEB's Strategic Action Plan guidance document to the partnership's existing strategic action plan.

Partnership Support

Describe those aspects of the strategic action plan that the partnership will focus on implementing during the period in which this capacity funding will be active. Be specific and use examples as appropriate.

Explain how this funding will allow the partnership to be more strategic and effective in implementing on-the-ground conservation actions in pursuit of its strategic action plan and achieve desired ecological outcomes on the landscape.

Develop Theory of Change and/or Progress Monitoring Framework sections of a strategic action plan

Partnership TA funds may be used to add Theory of Change and/or Progress Framework sections of OWEB's Strategic Action Plan guidance document to the partnership's existing strategic action plan. Answer the associated questions and be specific and use examples as appropriate.

Products

List the deliverables that this grant will generate. Products include, but are not limited to: a new or enhanced strategic action plan; financial, communication/outreach, and/or monitoring plans; partnership outreach materials; a partnership website; etc.

Wrap-Up

Describe how the implementation of conservation actions in the partnership's geography will be different after the completion of the activities proposed in this application. Explain how strategic planning, building or maintaining partnership support and coordination, and other efforts associated with this Partnership TA grant will lead to more effective implementation of conservation and restoration actions on-the-ground.

Schedule

Identify specific project elements and the activity necessary to implement each element. Explain how the partnership will adapt to challenges that may impact the proposed schedule in order to complete the scope of work outlined in this grant application.

Project Management

Describe who will be responsible for project implementation. If contractors will be used but have not yet been hired, provide only the desired qualifications. If this is a continuation of previous partnership capacity funding, describe any changes in leadership within the partnership, including how the new leadership was selected and the capacity of the new leadership to fulfill that role.

Metrics

Provide a summary, to the best of your knowledge, of the acres of habitat and stream miles that will be encompassed by this Partnership TA grant.

Climate Considerations

Refer to Technical Resources now available on this webpage, if additional background references or online planning tools would help inform your response:

Budget

Partnership Technical Assistance grant applications may request up to **$150,000** in OWEB funds for up to three years.

Application Budget Form

Before filling out the application budget, review chapter 4 of OWEB's [GoBig Guidance on Budgeting and Grants.](#)

Salaries, Wages, and Benefits

For in-house staff only, show each position title, estimated number of hours, and the cost per hour (including gross wages, payroll taxes, health insurance, retirement benefits, accrued leave liability, and workers compensation insurance).

Contracted Services

This budget category is for labor, supplies and materials, and travel associated with hiring consultants, construction firms, or other outside firms. Landowners performing work for the grant are to be paid from this category. All costs must follow state rates and policies. Do not lump all contract costs into one row, except when a contractor bids a lump-sum amount for a discrete deliverable. Contract costs should match the scope of work described in the application.

Materials and Supplies

Materials and supplies are consumable items you will purchase and use up during the course of the project. Include small portable electronic equipment costing less than $2,500.

Travel

These are expenses you will incur getting to and from the project location, including mileage and per diem rates. You must use current State of Oregon rates.

Equipment and Software

This category includes portable, nonexpendable items with a useful life of two or more years, and a per-unit cost of $2,500 or more. Equipment purchased with OWEB funds must reside with the grantee or another approved entity.

Other

This refers to items that do not fit in the other budget categories, including meeting costs, permit fees, and project-specific printing. OWEB will not reimburse any costs associated with an individual's license or permit.

Indirect Costs

Indirect costs are overhead or administrative costs that cannot be readily attributed to a specific project or function, but are actually incurred by the grantee organization. They include expenses like facilities, rent, administrative time, electricity, and telephone. Select one Indirect Cost Rate Type from the options described below.

Federally negotiated indirect cost rate (current)

If this method is selected the grantee must submit proof of the approved federally negotiated indirect rate prior to the release of the grant agreement. The applicant may opt to use some

or all of its federally negotiated indirect cost rate as match.

10% de minimis rates

Grantees can select this option if they have NEVER received a federally negotiated indirect cost rate. Grantees that select this method are not required to submit receipts for indirect costs. Grantees need to provide the rate they are charging to OWEB. If you are charging 10%, then you should select the 10% de minimis button and leave the override amount blank. If you are charging less than 10%, select the OWEB negotiated indirect cost rate button and fill in the correct percentage. Match for administration costs should be provided in the 'other' budget category.

OWEB negotiated indirect cost rate up to 15%

This rate will be negotiated for each grant and will be based on actual costs submitted either on a receipt basis or on a cost allocation basis. The applicant may opt to use some or all of its OWEB negotiated indirect cost rate as match. If this option is chosen, the grant applicant must indicate which one of the following billing methods will be used:

Receipt Billing

Grantees would select this billing method when their indirect costs are charged to projects on an item-by-item basis. These Grantees must submit receipts for items $250 and over. All receipts must be kept and provided to OWEB on request.

Cost Allocation

Grantees that select this billing method must have accounting practices in place that support charging costs to a cost allocation pool and must submit cost allocation supporting documentation for allocations $250 and over.

Budget Narrative

OWEB staff and application review teams carefully review application budgets and may question how costs were developed. Use this section of the application to explain how project costs were estimated. Contract costs should be broken out and should match the scope of work described in the application. If the budget includes unusually high costs and/or rates, provide justification for those costs and/or rates.

Funding and Match

Outside Funding Sources

Any additional sources of funding not being sought from OWEB can be categorized as either match or leveraged resources. Match is defined as additional resources expended to further the grant objectives, as required by OAR 695-005-0060(3). Match for this grant offering is $1.00. Prior to any payment of grant funds, you must provide proof that match has been secured. More information about match is contained in chapter 4 of OWEB's GoBig Guidance on Budgeting and Grants.

Funding Sources

Report the organizations/entities providing additional project funds. Once an organization/entity has been added, this information will be populated in the accompanying tables below (Amounts and Match) where applicants will have the ability to provide additional details.

Amounts

Report the type (cash, in-kind, volunteer) and amount of funding each organization/entity is providing for this project. If one organization/entity is providing multiple types of support, such as cash and in kind services, each type must be reported separately.

The "Contribution Total" equals the total of all the funding sources from the amounts column in the Amounts table.

The "Non-OWEB Budget Total" equals the total of the "Cash Match Amount" and "In-Kind Match Amount" columns from the Budget page.

Match

Report the amount of funding that will be used as OWEB match for the project.

The "Match Total" totals all of the columns listed under "Amount as OWEB Match".

The "Percentage of OWEB Budget Amount" calculates the percentage match based on the sum of the "Amount as OWEB Match" column and the OWEB funding request from the Budget page.

Uploads

All application attachments must be in PDF format and included with the application in a single PDF that does not exceed 20 MB in size. Oversized maps, designs, or drawings should be reduced to a size that is appropriate for inclusion in your PDF. Include only attachments that are highly relevant to the project. Reviewers have limited time to read large documents, but links may be provided if desired, so that reviewers can access additional information if they have questions. **Application attachments that are required are denoted below with an asterisk (*). Other listed items may be required later if your project is funded.**

Maps *

Attach at least one COLOR project location map, showing watershed context and proximity to the nearest town.

Federally Negotiated Indirect Cost Rate (FNICR)*

Organizations that have previously negotiated or currently have an approved indirect cost rate with a Federal (cognizant) agency must use the approved rate for their grants. Attach a copy of your organization's most recent FNICR agreement, if applicable.

Partnership Letter of Participation *

The Partnership Letter of Participation on the applicant's letterhead must include the authorized signature(s) from each core partner affirming their commitment to participate throughout the proposed grant period.

Other

You may attach other documents to support further the explanation and understanding of the Problem Statement and Proposed Solution, provided your application does not exceed the size limit of 20 MB. Examples include, but are not limited to: partnership governance documents, partnership outreach/communications plan, partnership financial plan, partnership monitoring plan, partnership outreach materials, etc.

Secured Match Forms

If you have secured match for the project, you may attach the match funding form, which is available online with the land acquisition technical assistance application materials. You may

accompany the match funding form with signed letters or agreements documenting secured match. The letters should state the nature of the match (cash or in-kind) and the dollar value. The letters must be signed by authorized representatives of the organizations contributing the match. Although the match funding form is not required when you submit the grant application, OWEB will not make any payment for the project until you provide the match funding form, indicating that $1.00 match has been secured.

Strategic Plan
Upload the partnership's strategic action plan as applicable.

Help with Your Application

For assistance with your application, please contact:.

Denise Hoffert, Partnerships Coordinator, 971-701-3206 or denise.hoffert@oweb.oregon.gov