



# Guidance

# Online Applications

**Oregon Watershed Enhancement Board**

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

**OWEB Online Grant Management System (OGMS):**

<https://apps.wrd.state.or.us/apps/oweb/fiscal/default.aspx>

This document provides guidance in the use of the Oregon Watershed Enhancement Board's Online Application System. The Guidance document and attachments will be periodically updated by OWEB staff as needed.

# TABLE OF CONTENTS

|  |           |
|--|-----------|
| <b>Chapter 1: Introduction &amp; Overview .....</b>              | <b>1</b>  |
| Oregon Watershed Enhancement Board .....                         | 1         |
| Online Application Overview.....                                 | 1         |
| Application Offerings and Deadlines.....                         | 1         |
| Eligible Applicants .....  | 2         |
| How to Apply .....   | 2         |
| Open Solicitation and Focused Investment Partnership Grants..... | 3         |
| How to Define a Project .....                                    | 3         |
| Application Assistance.....                                      | 3         |
| Tips for Filling out an Application.....                         | 4         |
| Formatting an Application.....                                   | 4         |
| <b>Chapter 2: Restoration Applications.....</b>                  | <b>5</b>  |
| Eligible and Ineligible Project Types.....                       | 5         |
| Administrative Information.....                                  | 6         |
| Problem Statement .....  | 9         |
| Proposed Solution .....  | 10        |
| Wrap-Up .....  | 20        |
| Road Activities .....  | 21        |
| Plants .....   | 21        |
| Permits .....  | 21        |
| <b>Chapter 3: Monitoring Applications .....</b>                  | <b>22</b> |
| Eligible and Ineligible Project Types.....                       | 22        |
| Administrative Information.....                                  | 22        |
| Problem Statement .....  | 24        |
| Proposed Solution .....  | 26        |
| Wrap-up.....   | 29        |
| Permits .....  | 31        |
| <b>Chapter 4: Technical Assistance Applications .....</b>        | <b>32</b> |
| Eligible and Ineligible Project Types.....                       | 32        |
| Administrative Information.....                                  | 33        |
| Problem Statement .....  | 35        |
| Proposed Solution .....  | 36        |
| Wrap-Up .....  | 41        |

|   |           |
|---|-----------|
| Permits .....   | 41        |
| <b>Chapter 5: Stakeholder Engagement Applications .....</b> | <b>39</b> |
| Eligible Project Types.....                                 | 39        |
| Administrative Information.....                             | 39        |
| Problem Statement .....                                     | 41        |
| Proposed Solution .....                                     | 43        |
| Wrap-Up.....  | 46        |
| Permits .....   | 46        |
| <b>Chapter 6: Budget.....</b>                               | <b>47</b> |
| Salaries, Wages and Benefits .....                          | 47        |
| Contracted Services.....                                    | 47        |
| Materials and Supplies .....                                | 47        |
| Travel.....   | 47        |
| Equipment .....   | 47        |
| Other .....   | 47        |
| Indirect Costs.....   | 47        |
| Post-Grant .....  | 48        |
| Budget Narrative .....                                      | 48        |
| Funding and Match.....                                      | 49        |
| <b>Chapter 7: Uploads/Attachments.....</b>                  | <b>51</b> |
| Maps * .....  | 51        |
| Project Design *.....                                       | 51        |
| Photos * .....  | 51        |
| Figures and Tables.....                                     | 51        |
| Secured Match Form .....                                    | 51        |
| Support Letters.....  | 51        |
| Contractor Bids.....  | 51        |
| Federally Negotiated Indirect Cost Rate (FNICR) .....       | 52        |
| Risk Assessment .....                                       | 52        |
| Planting Details (Restoration applications only) .....      | 52        |
| <b>Chapter 8: Verify and Submit .....</b>                   | <b>53</b> |

## Chapter 1: Introduction & Overview

### In this chapter

- ✓ The Oregon Watershed Enhancement Board
- ✓ Online application overview
- ✓ Application cycles and deadlines
- ✓ Eligible applicants
- ✓ How to apply
- ✓ How to define a project
- ✓ Application assistance
- ✓ Tips for filling out an application
- ✓ Formatting an application

## 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.

## Online Application Overview

Beginning in July 2016, the following Open Solicitation and Focused Investment Partnership grant types can be applied for online: Restoration, Technical Assistance, Monitoring, and Stakeholder Engagement. Over the next few years, other application types will be added to the online system.

Below is a list of the online application sections. Some sections are the same across all application types while others are specific to the application type.

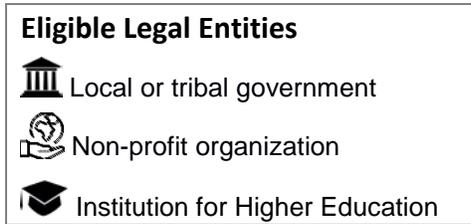
| Section Name               | Application Type Comparison  |
|----------------------------|------------------------------|
| Administration Information | Same for all                 |
| Problem Statement          | Unique for each              |
| Proposed Solution          | Unique for each              |
| Budget                     | Same for all                 |
| Funding and Match          | Same for all                 |
| Wrap-Up                    | Unique for each              |
| Reporting                  | Unique for each              |
| Uploads                    | Same for all                 |
| Road Activities Page       | Specific to Restoration only |
| Optional Monitoring Page   | Specific to Restoration only |
| Plant Page                 | Specific to Restoration only |
| Permits                    | Same for all                 |

## Application Offerings and Deadlines

All deadlines referred to in this Guidance are **5:00 pm Pacific Time for each grant offering**. Deadlines will be **posted on OWEB's website and OGMS** (OWEB Grant Management System), and will be **announced by email in advance**.

## Eligible Applicants

A grant applicant must be one of the **legal entities** identified below and have a Federal Employee Identification Number (**FEIN**). A state or federal agency may apply for funding only as a co-applicant with an eligible entity.

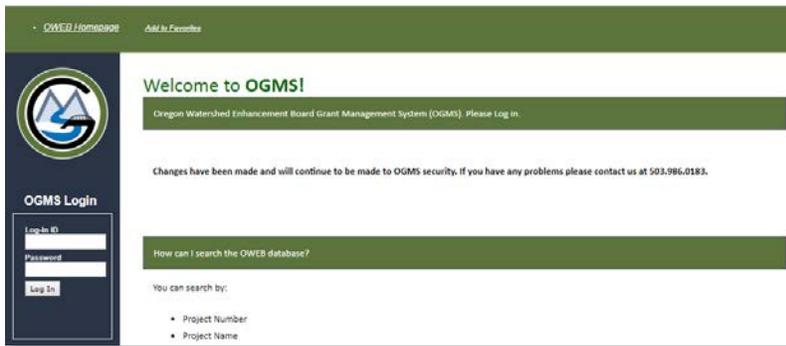


## How to Apply

**OWEB no longer accepts paper applications for any grant offerings** unless otherwise noted in the grant solicitation.

### OWEB Grant Management System (OGMS) login

An OGMS login (username and password) is necessary to access the online grant application. An applicant must use his/her organization's login if one exists, as only one login per organization is allowed. If no login exists, the applicant may request one. OWEB verifies all username and password requests prior to creation.



**Register and get information here:** <https://apps.wrd.state.or.us/apps/oweb/oa/Account/Register>

### Log in:

1. Access the online application directly and use your OGMS login.  
<https://apps.wrd.state.or.us/apps/oweb/oa/Account/Login.aspx>
2. Log in to OGMS, find the appropriate grant offering, and select the link below it.  
<https://apps.wrd.state.or.us/apps/oweb/fiscal/default.aspx>

## Open Solicitation and Focused Investment Partnership Grants

Projects that are found within current OWEB Focused Investment Partnership (FIP) geographies, which are addressing the same ecological outcomes through similar actions, are ineligible for Open Solicitation grants. For more information, applicants are encouraged to review current FIP story maps here: <http://arcg.is/2g6ldYQ>.

## How to Define a Project

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



## Application Assistance

### Regional Program Representatives

#### North Coast Regional Office (Newport)

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#### Partnerships Coordinator (Deschutes, Upper Grande Ronde, Willamette)

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#### Partnerships Coordinator (Ashland Forest, Harney Basin Wetlands, Sage-Grouse)

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### Monitoring

#### Effectiveness Monitoring Coordinator

Ken Fetcho

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## Tips for Filling out an Application

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- After you choose which application to fill out, you can download a template from the application homepage and fill out the template offline. You can then copy and paste narrative sections from the template into the online application. **The application template is only a tool and cannot be submitted in lieu of the online application.**
- The online application functions best with a high-speed internet connection.
- The online application currently supports the following web browsers:
 

 Google Chrome

 Firefox 45

 Microsoft Edge

 Safari
- You will need Adobe PDF Reader installed on your computer in order to view your completed proposal.
- Within the online system, the  icon indicates that additional information is available. Click the icon to view the information.
- Some questions require you to click “Save.” If you navigate away from a page before doing so, the data entered will not be saved and you will have to re-enter the information for that specific question. When you click “save,” the button will change from green to blue indicating that the information has been saved.
- After 2 hours of inactivity, the application will time out and close. You will have to sign in again to return to your application.
- Some answers have character limits. There is a character counter in each text box where this applies. If you copy and paste from a word document/template, the text will be cut off at the character limit.
- Do not copy and paste any figures or tables into the text boxes. Instead, upload them in the “Uploads” section of the application.
- Do not upload large documents (e.g. monitoring plans), in the Uploads section. Instead, provide a link to the document within a relevant section of the application, such as the Problem Statement, Proposed Solution, or Wrap-Up.
- If you are looking for a particular term in the online application, use “Control + F” as a way to search on the page.
- To reduce duplicative reporting of proposed accomplishments, report each action under the most appropriate category based on the primary purpose of the action. Secondary purposes can be described in the Project Overview section, specifically under the Goal, Objectives, and Activities section.
- Do not report the same activity under multiple questions. For example, do not report a rock barb installed to control bank erosion under both instream “bank stabilization” and instream “materials placement.”

## Formatting an Application

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Bold and italics are not supported in the online application. However, you can format your application using bullet points, indentations, and spacing. Be aware that using these tools will contribute to character counts. Also, if you’re copying and pasting, text will automatically cut off at the character

limit so be sure to proofread your answers after pasting any text.

## Chapter 2: Restoration Applications

### In this chapter

- ✓ Eligible and ineligible project types
- ✓ Administrative Information
- ✓ Problem statement
- ✓ Proposed solution
- ✓ Wrap-up
- ✓ Road activities
- ✓ Plants
- ✓ Monitoring
- ✓ Permits

### Eligible and Ineligible Project Types

This is not an exhaustive list of eligible restoration project types. For questions about the eligibility of a proposed project, contact the appropriate Project Manager listed on page 3.

### Eligible Projects by Habitat and Activity

| Habitat   | Eligible Activities  |
|---|--|
| <b>Instream</b>                                 | <ul style="list-style-type: none"> <li>• Bank stabilization</li> <li>• Fish passage improvement</li> <li>• Flow</li> <li>• Habitat restoration</li> <li>• Stockpiling logs</li> </ul>  |
| <b>Riparian, Upland, Wetland, and Estuarine</b> | <ul style="list-style-type: none"> <li>• Road closures/decommissioning</li> <li>• Road drainage improvement</li> <li>• Vegetation establishment or management</li> </ul>   |
| <b>Riparian, Wetland, and Estuarine</b>         | <ul style="list-style-type: none"> <li>• Fencing and other materials for habitat protection</li> </ul>   |
| <b>Riparian and Upland</b>                      | <ul style="list-style-type: none"> <li>• Livestock management</li> </ul>   |
| <b>Riparian</b>                                 | <ul style="list-style-type: none"> <li>• Debris and structure removal</li> </ul>   |
| <b>Wetland and Estuarine</b>                    | <ul style="list-style-type: none"> <li>• Channel modification, including creation</li> <li>• Structure removal/modification/installation</li> <li>• Nonstructural removal and placement protection</li> </ul>                              |
| <b>Upland</b>                                   | <ul style="list-style-type: none"> <li>• Agricultural practices for conservation, including erosion control</li> <li>• Non-agricultural practices for conservation, including erosion control</li> <li>• Urban impact reduction</li> </ul> |

## Ineligible Projects

Projects that are found within current OWEB Focused Investment Partnership (FIP) geographies, which are addressing the same ecological outcomes through similar actions, are ineligible for Open Solicitation grants. For more information, applicants are encouraged to review current FIP story maps here: <http://arcg.is/2g6ldYQ>.

- A watershed improvement project consisting solely of water storage structure construction for an out-of-stream use not related to watershed restoration or protection.
- A fish screening project eligible for funding through the Oregon Department of Fish and Wildlife's fish screening program.
- A watershed improvement project constructed solely to comply with a state or federal agency enforcement order, legal judgment, or mitigation requirement.
- Routine project maintenance costs.
- A water conservation project in which there is no measurable instream flow benefit, groundwater benefit, or water quality improvement.

## Administrative Information

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The information captured in this section will be used to:

- Enter the project into OWEB's database,
- Create a grant agreement if funded,
- Generate a map for purposes of reporting to NOAA and USFWS, and
- Meet State of Oregon legal requirements.

## 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. In crafting your abstract, make an effort to be clear and concise and to keep your description of the proposed activities succinct. Provide an abstract statement for the project in 2,000 characters or less, and take care to address all 4 main parts of the abstract statement.

### Identify the project location.

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

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

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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 guidance documents.

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

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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.

## Contact Information

### Applicant

This should be the individual who receives all correspondence about the project. See page 2 for information on eligible applicants. If this information needs to be updated, please contact OWEB.

**You are now required to provide a DUNS number for your organization. If you are unsure how to acquire a DUNS number, contact OWEB.**

### Payee

This should be the person and/or organization who will be responsible for tracking and accounting for project funds, and compliance with the grant agreement conditions. If this information needs to be updated, please contact OWEB.

### Project Manager

Provide the name of the person who should be contacted on behalf of the applicant about the technical aspects of the project during evaluation and project implementation.

## Location Information

### Mapping project

Map the point that best represents the approximate center of the project area where the most significant portion of the work will take place. Be sure to map the project within the correct OWEB Region (<https://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. For projects that address or include removal of fish barriers, place the map point on the location of the fish barrier to be addressed. For projects that occur over multiple sites, place the point on one of multiple sites where work will be conducted (ideally, a site centrally located in the project area). If no individual sites can be identified (i.e. habitat scoping or monitoring activities that occur over the extent of a watershed), then place the point in the center of the project area.

### 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

See "Permits" at the end of this chapter.

## Racial and Ethnic Statement

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



## Insurance Information

OWEB considers some projects to carry a greater risk to the organization, organization's employees, volunteers, and the community. These projects include working with hazardous materials, earth moving work around the footprint of a drinking water well, transporting individuals on the water, and removal or alteration of structures that hold back water on land or instream (dams, levees, tidegates, etc.). If a project includes any of these activities, the applicant must upload the DAS Risk Assessment found at <https://www.oregon.gov/DAS/Risk/pages/index.aspx>. See policy for additional information at <https://www.oregon.gov/oweb/manage-grant/Pages/payment-budget.aspx>.

If an applicant's staff or volunteers are working with kids related to the project or staff are applying herbicides, additional insurance is required but a DAS risk assessment is not.

## 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 10 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

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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.

## Watershed Problem

Explain the root cause(s) of the problem(s), not the symptoms. A problem can have many perceived causes, but only a few causes underlying all the others. For example, while a cause of instream habitat problems may be a lack of large wood, the root cause is historical land use practices.

## Land Management

Discuss how past or current land management practices at the site and in the surrounding area have contributed to the problem.

## Project 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

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A project that previously received OWEB funding and did not yet result in completion of the restoration goal. Applicants need to explain why continuation is necessary to finish work funded under previous grants.

### Example 1

Previous OWEB Technical Assistance funding resulted in a project design, and now applicant is seeking funding to implement that design.

**Example 2**

New information changed the original project scope, and the applicant is now seeking additional funds to address this new information.

**Resubmittal**

A project proposal that was previously submitted as an OWEB grant application but was not funded.

😊 **HELPFUL HINT:** If resubmitting an application, address previous Review Team comments in the appropriate section(s) (i.e. goal, objectives, activities, design, project schedule).

**Phased Projects**

A phased project is implemented in separate but related stages over time. Provide information on both past and future phases if applicable.

**Example**

Phase 1 = Instream large wood placement.

Phase 2 = Riparian planting along the bank where wood was delivered instream.

**Plans and Salmon**

OWEB requires documentation of relevant local and regional plans and assessments to meet federal and state reporting requirements. Applicants should self-populate names of local plans and assessments, and select relevant regional plans and assessments from the set list if the project benefits salmon or steelhead.

Projects specifically benefitting salmon or steelhead should be located within a salmonid ESU recovery domain and 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 proposed restoration work would address the limiting factors for the selected salmon and steelhead ESU/DPS.

**Proposed Solution**

**Please be aware that if an applicant unchecks a box, all answers will be lost!** For example, if an applicant checks “fish passage improvement” and answers all accompanying questions, but then decides to uncheck the fish passage improvement box, all of the answers provided in the accompanying questions will be erased. An applicant would have to answer all the questions again.

The Proposed Solution section is broken into the following subsections.

| Component               | Must Applicant Answer?                      |
|-------------------------|---|
| <b>Project Overview</b> | Yes   |
| <b>Instream</b>         | Only if proposing work in this habitat type |
| <b>Riparian</b>         | Only if proposing work in this habitat type |
| <b>Upland</b>           | Only if proposing work in this habitat type |
| <b>Wetland</b>          | Only if proposing work in this habitat type |
| <b>Estuarine</b>        | Only if proposing work in this habitat type |

## Project Overview

### Goal, Objectives, and Activities

Applicants are encouraged to build from the problem statement and explain the vision and specific objectives for the proposed restoration project.

#### Goal

Goal statements should articulate desired outcomes (the vision for desired future condition) and the watershed benefit.

#### Example

Restore ecosystem function and processes in remnant Willamette Valley meadow, oak savanna, and oak woodland habitats.

#### Objectives

Objectives support and refine the project goal by breaking it down into smaller steps or project components. Objectives must be worded in a specific, measurable manner demonstrating progress toward achieving the project goal. 😊 **HELPFUL HINT:** Each objective should be **SMART: Specific, Measurable, Achievable, Relevant, and Time-bound.**

#### Example

Objective 1. Restore a total of 38 acres of oak savanna, 12 acres of meadow and 52 acres of oak woodland on one 200-acre property in the One Horse Slough sub-basin.

#### Activities

Activities explain how the objective will be implemented.

#### Example

1) Mechanical & Chemical Site Prep and oak woodland thinning - Conduct 2 years of mechanical and chemical site preparation from 2017 through 2019 on approximately 12 acres of wet meadow, 38 acres of oak savanna and 52 acres of oak woodland habitat. In the summers of 2017 and 2018, oak release work will be conducted by a contractor hired by the landowner on 52 acres of the upland oak woodland habitat by thinning existing White oak trees from 105 to 80 per acre and Douglas fir trees from 89 to 10 trees per acre.

In the summer of 2017, approximately 8 acres of Armenian blackberry was mowed around existing English hawthorn, ash and cherry trees by the USFWS Partners Program across 40 acres of meadow and oak savanna habitat. In the fall of 2017, the landowner will cut and stump spray the medium sized hawthorn (<5" diameter) and chip or lop and scatter the cut stems in a 17 acre area. In the late spring/early summer of 2018, the blackberry regrowth will be broadcast sprayed and the larger hawthorn cut/stump sprayed and piled and covered in the fall of 2018. Hawthorn piles will be burned in fall 2019.

2) Planting - In the fall of 2018, broadcast 210 pounds of grass/forb seed mix on 21 acres of oak woodland thinning area, plant additional native plugs on 8 acres of EQIP oak savanna and continue to treat any invasives. OWEB funds would supplement the EQIP seeding and planting efforts, while also assisting with brush management/plant establishment activities. Also in Fall 2018, seed will be broadcast on any bare soil areas within the non-EQIP oak savanna and meadow that have occurred from hawthorn or blackberry mowing/cut stump treatment. In fall of 2019, seed open ground (~1 acre) that has resulted from the hawthorn burn piles in the

non-EQIP oak savanna and meadow. Plant plugs of deeper tap rooted plants (such as meadow checker mallow, camas bulbs) in oak savanna and areas of the meadow if weed treatment has adequately prepared site. Seed the re-establish 0.5 acre test plot with a no-till seeder.

3) Plant Establishment – Conduct 3 years of plant establishment activity (e.g. spot herbicide application, mowing, etc.) on up to 61 acres of EQIP oak savanna and woodland and 25 acres of meadow and non-EQIP oak savanna to help existing and newly planted native plant species become free-to-grow (2020-2022).

### Project Activities and Schedule

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Identify specific project activities necessary to implement each objective. Describe how and where each activity would occur, and what equipment or methods would be used. Limit on dates is due to online usability and visualization of Gantt chart. If necessary, provide extent of recurring activity in the “description” text box.

### Habitat Type

The application is divided into habitat types (instream, riparian, upland, wetland and estuarine) in which restoration actions will occur. Applicants may select all habitat types in which proposed project actions will occur. Sections below provide information to help determine in which habitat type proposed restoration actions belong. For any questions, contact the appropriate Project Manager listed on page 3 of this guidance.

#### Instream

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Projects below the ordinary high water mark designed to improve instream habitat conditions, including in-channel habitat restoration, bank stabilization, flow, fish screening, and fish passage. Projects that might stockpile logs for future restoration are included in this habitat type. There are 6 categories within the Instream habitat type. Applicants should select all applicable categories.

#### Instream Categories

##### Bank stabilization

Involves projects that reduce streambank erosion through re-sloping and planting, and/or placement of rocks, logs, or other material on the streambank. It can include the placement of materials along the toe of the bank (i.e. “J” hooks or barbs) whose sole purpose is to direct flows from the bank.

Indicate whether the project will treat on one or both sides of the stream. If “both” sides are selected, an applicant will be prompted to report the length of bank treated on each side, and to provide the total stream miles to be treated. The total stream miles to be treated relates to the linear measurement of the stream.

##### Example

A project will install bioengineering to stabilize sections of a 0.3 mile stream reach, placing bioengineering along the entire 0.3 mile reach on the right side and 0.1 miles of the stream reach on the left side. Enter: Left=0.1, Right=0.3, Total stream miles=0.3.

##### Fish passage improvements

These address barriers to fish movement. The category is divided into three actions based on the type of barrier and where the barrier is located.

☺ **HELPFUL HINT:** If the project will provide access to a side channel and the primary objective is passage around a barrier, the project falls under “fish passage improvement” and not “instream habitat restoration.”

- **Barriers at Road Crossings:** Projects that improve fish passage at road crossings. Modification, replacement, or removal of culverts, bridges, and fords. Projects conducting channel work at the site of a road crossing, with a primary purpose of improving fish passage, should be reported here.
- **Non-road-crossing barriers:** Projects that improve fish passage, but are not located at road crossings. Treating passage barriers such as diversion dams, push-up dams, non-diversion dams, weirs, tidegates, natural debris jam barriers, natural boulder/rock barriers, and landslides.
- Fish ladders or engineered bypasses not associated with road crossings.

### **Fish Passage Improvements Totals**

“Total stream miles with improved access” refers to the overall miles of stream with improved access to upstream habitat as a result of ALL the activities reported under fish passage. If applicant selected ‘yes’ to the question on the Proposed Solution page, ‘Will this project benefit salmon or steelhead?’, the measure of stream miles with improved access should represent the miles of anadromous salmonid stream habitat up to the next upstream barrier to anadromous salmonids. For consistency in reporting miles of improved passage, partial barriers should be counted as a barrier when estimating the miles of habitat with improved passage.

“The total number of barriers removed or modified” refers to the actions reported under fish passage.

#### **Example**

A project removes a culvert to improve passage to 1 mile of habitat up to a second barrier. The second barrier is also removed to improve access to another 3 miles of habitat. 4 total stream miles have improved access and 2 barriers were modified/removed.

### **Fish screening**

These projects result in installation or improvement of screening systems that prevent fish from passing into areas that do not support fish survival.

☺ **HELPFUL HINT:** For fish screening projects, applicants must submit documentation with the application that the project is ineligible for the ODFW Fish Screen program. See guidance on in our [Budget Guidance Document](#).

- **Instream flow:** Projects maintain and/or increase instream flow of water. Actions can be either irrigation improvements or irrigation agreements (lease, purchase, or allocation of conserved water).
- **Instream habitat restoration:** Projects occur below the ordinary high water mark and are designed to improve instream habitat conditions with the placement of structures in channel. Actions include channel reconfiguration and reconnection, large wood placement, spawning gravel placement, beaver reintroduction, non-native aquatic plant control, nutrient enrichment, and animal species removal. All large wood projects, even those placing large wood in the floodplain, belong under this section.

- Stockpiling logs: Projects use salvaged and/or purchased material for restoration. For each project, provide details on the location, amount of wood estimated to be required by the project, and briefly describe the work to be completed. Log salvage efforts should have one or more pre-identified staging areas in key locations throughout the watershed.

### **Instream Habitat Totals**

In reporting total stream miles treated, do not double-count actions occurring in the same stretch of the stream.

#### **Example**

A project will place large wood structures in 2 miles of stream and will treat 0.5 miles within the same stretch with bioengineering to stabilize the bank. The total miles proposed for instream habitat treatments is 2.

### **Riparian**

Projects above the ordinary high water mark of the stream, and within the floodplain of the stream, designed to improve habitat conditions. There are 5 categories within the Riparian Habitat type. Applicants should select all applicable categories. Please note that all large wood projects, even those placing large wood in the floodplain, do not belong under this section but rather Instream.

#### **Riparian Categories**

##### **Road activities**

See “Road Activities” at the end of this chapter.

##### **Fencing and other materials for habitat protection**

Projects use fencing or other materials to protect habitat. (This does not include individual plant protection).

##### **Vegetation establishment or management**

Projects involve planting and stewardship of vegetation, including non-native plant control, prescribed burnings, stand thinning, stand conversions, and silviculture treatments.

##### **Livestock management**

Projects manage livestock in order to restore and protect riparian habitats.. Actions include riparian pasture management, cross fencing, and water gap development.

☺ **HELPFUL HINT:** Livestock riparian exclusion fencing should be reported under “fencing and other materials for habitat protection.”

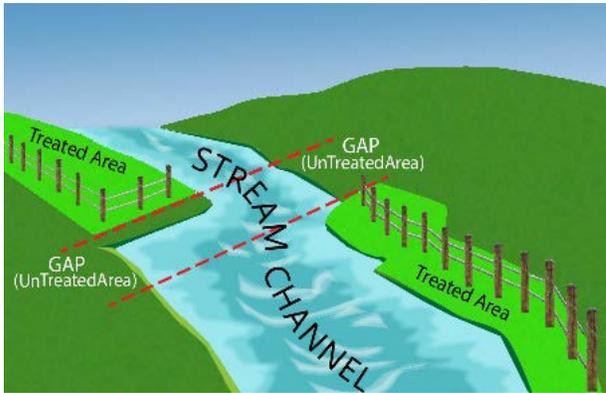
##### **Debris and structure removal**

Projects remove debris (i.e., old tires or appliances) from riparian areas to protect and restore habitat.

☺ **HELPFUL HINT:** Dam removal should be reported under “Instream: Fish passage improvements.”

### **Riparian Habitat Totals**

“Total linear stream miles to be treated” refers to the length of stream to be treated by the riparian actions reported (excluding actions reported under “road activities”). If there is a small gap in the areas to be treated, include that amount in the total miles to be treated.



**Example**

Linear stream miles to be treated = 1.0

Gap miles = 0.02

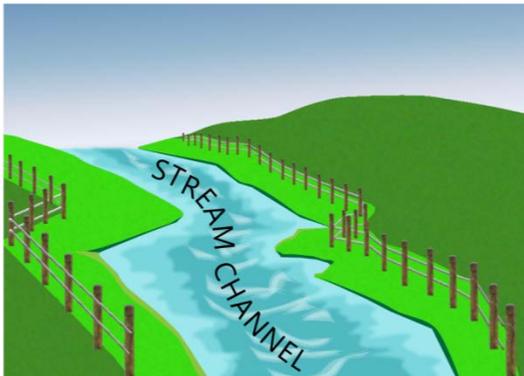
Total linear stream miles to be treated = 1.02

“Total riparian acres to be treated” refers to the overall acres of riparian habitat to be treated by the riparian actions reported.

**Example**

A project will construct a livestock enclosure fence on both sides of a 1-mile stream reach, encompassing 15 acres of riparian habitat. Additionally, 8 acres on one side of the stream will be planted. As a result, 15 total riparian acres are proposed to be treated and 1 linear stream mile will be treated.

If both sides of the stream will be treated by riparian activities, the sum of the miles treated on each side is the total streambank miles. If only one side will be treated, the total streambank miles of the riparian area would equal the linear stream miles treated.

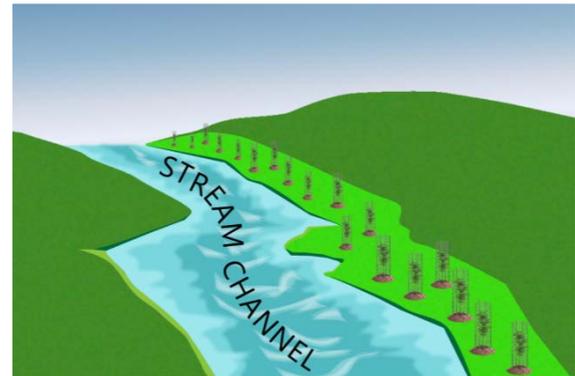


**Example 1**

Linear stream miles = 1.0

Both left and right banks are treated (e.g., fencing, planting)

Streambank miles = 2.0



**Example 2**

Linear stream miles = 1.0

One bank is treated (e.g., fencing, planting)

Streambank miles = 1.0

## Upland

Projects implemented above the floodplain to improve habitat and watershed function. There are 6 categories within the Upland Habitat type. Applicants should select all applicable categories.

### Upland Categories

#### Road Activities

See “Road Activities” at the end of this chapter.

#### Vegetation Establishment and Management

Projects involve planting and vegetation treatment including non-native plant control, prescribed burnings, stand thinning, stand conversions, and silviculture treatments.

#### Livestock Management

Projects manage livestock to restore and protect the landscape. Actions include pasture management, water developments and cross fencing. For water development projects, applicants are asked to include design components which could include the following: trough, solar, cistern, electrical power, source protection fencing, infiltration or easy-drain collector, spring box collector, above ground galvanized pipe, PVC underground pop, armoring or protection of trough and above ground components, frost free hydrant, flow through system, shut off valve, small animal escape, rock, gravel or concrete trough base, and/or escape ramps.

#### Agricultural Practices for Conservation Including Erosion Control

Projects implement best practices for agriculture. Actions can include irrigation improvement for Water Quality, Low/No Till, Filter Strips, Terracing, and Livestock Manure Management.

#### Non-Agricultural Practices for Conservation Including Erosion Control

Projects use best practices to reduce erosion and are not related to agricultural practices. Actions include gully treatment, planting for erosion control, and slope stabilization.

#### Urban Impact Reduction

Projects reduce impacts of stormwater and waste water practices on water quality. Actions include bioswales and rain gardens.

### Upland Habitat Total

Total upland acres to be treated is a measure of the overall acres of upland habitat to be treated by upland actions reported under each category (excluding actions reported under “road activities”). If the only upland activity a project will undertake is livestock water developments, the total upland acres to be treated should be computed by multiplying the number of water developments by 0.1 acres.

#### Example 1

A project will construct pasture fencing to create two pastures and improve livestock distribution over 500 acres, install erosion control structures within one of the pastures, and plant a filter strip encompassing 20 acres located outside of the fenced pastures. The total upland acres to be treated would be 520 acres.

#### Example 2

The only upland activity a project will implement is to develop livestock watering troughs at 7 different sites within a 1500-acre area. The total upland acres to be treated would be 0.7 acres (7 x 0.1 acres).



## Wetland

Projects that occur on land or areas that are covered, often intermittently, with shallow water or have soil saturated with moisture. There are 6 categories within the Wetland Habitat type. Applicants should select all applicable categories. Applicants must also indicate whether work will occur in artificial or historic wetlands.

☺ **HELPFUL HINT:** If the primary objective of improved access is to provide passage around a barrier in the main channel, report under “Instream: Fish passage improvements.”

### Wetland Activities

#### Road Activities

See “Road Activities” at the end of this chapter.

#### Channel Modification Including Creation

Projects re-establish historic stream channels, develop meanders or side channels, and/or relocate channels.

#### Vegetation Establishment or Management

Projects involve planting and stewardship of vegetation including non-native plant control. Does not include individual plant protection.

#### Fencing and Other Materials for Habitat Protection

Projects use fencing or other materials to protect habitat.

#### Structure Removal/Modification/Installation

Projects remove, modify, or install structures (e.g. dikes, levees, berms, tidegates) to protect and restore habitat and/or control water levels.

☺ **HELPFUL HINT:** Dam removal should be reported under “Instream: Fish passage improvements.”

#### Nonstructural Removal and Placement Protection

Projects remove materials to protect and restore habitat. Activities include removal of fill or debris (e.g., trash, appliances, cars), or placement of fill material required for wetland restoration.

### Wetland habitat total

“Total wetland acres to be treated” is a measure of the overall acres of wetland habitat to be treated by the wetland actions reported under each category (excluding actions reported under “road activities”).

#### Example

A project will construct a livestock enclosure fence around a 20-acre wetland and plant 10 acres within the fenced wetland. The total acres treated would be 20 acres.

## Estuarine

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Projects that occur in tidally influenced areas. There are six categories within the Estuary Habitat type. Applicants should select all applicable categories.

### Estuarine Activities

#### Road Activities

See “Road Activities” at the end of this chapter.

#### Channel Modification, Including Creation

Projects re-establish historic stream channels, develop meanders or side channels, and/or relocate channels.

#### Vegetation Establishment or Management

Projects involve planting and stewardship of vegetation including non-native plant control. Does not include individual plant protection.

#### Fencing and Other Materials for Habitat Protection

Projects use fencing or other materials to protect habitat.

#### Structure Removal/Modification/Installation

Projects remove, modify, or install structures to protect and restore habitat. Activities include dikes, levees, berms, tidegates, and structures to control water levels.

#### Nonstructural Removal and Placement Protection

Projects remove materials to protect and restore habitat. Activities include removal or placement of fill material, and removal of debris.

### Estuarine habitat total

The total estuarine acres to be treated is a measure of the overall acres of estuary habitat to be treated by estuary actions reported under each category (excluding actions reported under the “road activities” page since they are reported specifically on that page).

#### Example

A project will plant 10 acres of estuary habitat and, at a separate location, remove a dike to improve 30 acres of estuary habitat. The total estuary acres treated would be reported as 40 acres.

## Wrap-Up

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This section includes Public Awareness, Watershed Benefit, Project Management, and Design

### Watershed Benefit

Explain the watershed benefit here

### Public Awareness

Any associated public awareness activities should be described in this section.

### Project Management

#### Key Individuals

Describe who will be responsible for various aspects of the project. At a minimum, include who is responsible for project management, design, implementation, inspection, and post-implementation status reporting. If a contractor has not yet been hired, provide only the desired qualifications.

### Design

An explanation of design alternatives helps reviewers understand how the project was developed and what range of solutions was considered. No-action alternatives should be described, as well as alternatives with different technical or conceptual approaches. Reviewers need to get a clear understanding of why a specific design was chosen over other options.

| Level of Design                  | Description   |
|----------------------------------|---|
| <b>None</b>                      | No design is required.  |
| <b>10-30% Conceptual Design</b>  | This may include evaluation of alternatives, concept level plans, design criteria for project elements, and/or rough cost estimate.             |
| <b>30-85% Preliminary Design</b> | This may include selection of the preferred alternatives, draft plans, draft design report, and/or preliminary cost estimates.                  |
| <b>85-100% Final Design</b>      | This may include final design report, plans and specifications, contracting and bidding documents, monitoring plan, and/or final cost estimate. |
| <b>Remaining Design</b>          | If work remains on design prior to project implementation, please describe.   |

## Road Activities

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**There is 1 road section for all habitat types. Provide totals from all road actions across all habitat types proposed in the application.**

Projects designed to improve road impacts to watersheds include road closures/decommissioning, obliteration, relocation, drainage system improvement, and surface improvement.

### Example

If the project proposes to decommission a road in a riparian area and an upland area, include the total miles of road decommissioned for both, not just for the riparian section.

## Plants

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**There is 1 plant section for all habitat types. Provide totals from all plant activities across all habitat types proposed in the application.** Applicants must complete the planting section if any part of the proposed project includes planting activities that are integral to the overall success of the project. Answers to these questions help reviewers and OWEB evaluate the likelihood of success of the planting proposal. Each plant activity cost should be placed as a line item under the appropriate Budget Category. Monitoring (Optional)

Applicants may not need to complete this section. **It should be filled out only if monitoring is expected to occur for the Restoration project.** Monitoring actions could target habitat, stream, vegetation, macroinvertebrates, juvenile fish, adult fish, other biologicals, invasive species, soil, water quantity, and water quality.

### Types of Post-Project Monitoring

Indicate whether any type(s) of post-project monitoring will be done at the restoration site during the project period. This could include fish surveys, physical habitat monitoring, water (quantity) flow, and/or water quality monitoring. If no monitoring will occur, check the appropriate box.

### Location of Post-Project Monitoring

Identify the location(s) for the planned monitoring activities relative to the project location (e.g., onsite, downstream, upstream, and/or upslope).

### Effectiveness Monitoring

This can be selected regardless of whether the effectiveness monitoring is funded by OWEB. Explain what activities will be incorporated and any additional sources of funding. However, if the request for effectiveness monitoring funding from OWEB is in excess of \$3,500, the Monitoring application will also need to be completed.

## Permits

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Permit and license information provided in the application will be imported into the final grant agreement for the awarded grant. Applicants are responsible for verifying applicable permits, licenses, and General Authorizations required for the project, and can update information at grant agreement execution.

## Chapter 3: Monitoring Applications

### *In this chapter*

- ✓ Eligible and ineligible project types
- ✓ Administrative Information
- ✓ Problem Statement
- ✓ Proposed Solution
- ✓ Wrap-up
- ✓ Permits

### Eligible and Ineligible Project Types

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Below is a list of **eligible** monitoring project types. For questions about the eligibility of a proposed activity, contact OWEB's Effectiveness Monitoring Specialist listed on page 3.

- Status and Trend
- Effectiveness of a Restoration Project (Project Effectiveness)
- Landscape-Scale Effectiveness (Landscape Effectiveness)
- Rapid Bio-Assessments

Projects that are found within current OWEB Focused Investment Partnership (FIP) geographies, which are addressing the same ecological outcomes through similar actions, are **ineligible** for Open Solicitation grants. For more information, applicants are encouraged to review current FIP story maps here: <http://arcg.is/2g6ldYQ>.

Funded monitoring projects may include: gathering baseline data on current conditions in a watershed; evaluating the specific efforts of management actions; or comparing similar watershed components before and after a project. All monitoring projects must be developed within the context of the entire watershed; follow OWEB approved protocols; and use the information to implement or direct projects to enhance or sustain the health of watersheds. Monitoring applications must describe the specific habitat, stream, vegetation, macroinvertebrates, fish, other animals, invasive species, soil, and/or water quality and quantity variables measured. Applicants must explain the monitoring question and how it fits into the larger watershed context, and provide information about local assessments or plans tied to the project, and/or provide information about complementary monitoring efforts conducted by partners as part of a broader plan.

### Administrative Information

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The information captured in this section will be used to:

- Enter the project into OWEB's database,
- Create a grant agreement if funded,
- Generate a map for purposes of reporting to NOAA and USFWS, and
- Meet State of Oregon legal requirements.

### 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. In crafting your abstract, make an effort to be clear and concise and to keep your

description of the proposed activities succinct. Provide an abstract statement for the project in 2,000 characters or less, and take care to address all 4 main parts of the abstract statement.

#### **Identify the project location.**

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

#### **Briefly state the watershed issue, problem, 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 guidance documents.

#### **Identify and briefly describe the monitoring component(s) to be implemented.**

Briefly list the kind(s) of monitoring actions being proposed (such as habitat surveys, instream surveys, vegetation, juvenile fish, adult fish, invasive species, soil surveys, 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.

## Contact Information

### **Applicant**

This should be the individual who receives all correspondence about the project. See page 2 for information on eligible applicants. If this information needs to be updated, please contact OWEB.

### **Payee**

This should be the person and/or organization who will be responsible for tracking and accounting for project funds, and compliance with the grant agreement conditions. If this information needs to be updated, please contact OWEB.

### **Project Manager**

Provide the name of the person who should be contacted on behalf of the applicant about the technical aspects of the project during evaluation and project implementation.

## Location Information

### **Mapping project**

Map the point that best represents the approximate center of the project area where the most significant portion of the work will take place. Be sure to map the project within the correct OWEB Region ([www.oregon.gov/OWEB/Documents/RPR-Contact-Map.pdf](http://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. For projects that occur over multiple sites, such as technical assistance or monitoring projects, place the point on one of multiple sites where work will be conducted (ideally, a site centrally located in the project area). For example, if a monitoring project will be measuring stream temperatures at several sites, place the point on one of the sites. If no individual sites can be identified (i.e. habitat scoping or monitoring activities that occur over the extent of a watershed), then place the point in the center of the project area.

## Ownership

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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

See “Permits” at the end of this chapter.

## Racial and Ethnic Statement

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

## Insurance Information

OWEB considers some projects to carry a greater risk to the organization, organization's employees, volunteers, and the community. These projects include working with hazardous materials, earth moving work around the footprint of a drinking water well, transporting individuals on the water, and removal or alteration of structures that hold back water on land or instream (dams, levees, tidegates, etc.). If a project includes any of these activities, the applicant must upload the DAS Risk Assessment found at <https://www.oregon.gov/DAS/Risk/pages/index.aspx>. See policy for additional information at <https://www.oregon.gov/OWEB/manage-grant/Pages/payments-budget.aspx>.

If an applicant’s staff or volunteers are working with kids related to the project or staff are applying herbicides, additional insurance is required but a DAS risk assessment is not.

## Additional Information

### Sage-Grouse

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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

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Explain the monitoring/data need 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 needs to be implemented.

## Issue

Provide an overview of the present situation and the key question, specific problem, and/or watershed issue that monitoring is intended to inform. **Do NOT** describe the proposed monitoring project.

## Strategies

Provide information regarding local assessments or plans tied to the project and large-scale or

comprehensive monitoring efforts being conducted by multiple entities (usually under an overarching or guiding plan). Also, provide information on whether there are other collaborating organizations conducting complementary monitoring activities outside of this proposal.

## Project 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

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A project that previously received OWEB funding and did not yet reach the monitoring goal and objectives. Applicants need to explain what was completed - why continuation is necessary to finish work funded under previous grants.

#### Example

The previous project collected continuous water temperature at 10 sites. The current proposal refines the monitoring efforts to measure continuous water temperature AND dissolved oxygen at seven sites.

### Resubmittal

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A project proposal that was previously submitted as an OWEB grant application but was not funded.

### Phased Projects

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A phased project is implemented in separate but related stages over time.

#### Example

The applicant and local partners developed a monitoring plan that will be implemented in three phases.

Phase 1 = Create an integrated database to house historical data, literature, images, and other materials.

Phase 2 = Access, acquire, and upload historic information into the database.

Phase 3 = Initiate monitoring to compliment historic data sets according to the priorities in the monitoring plan and or emerging priorities.

## Plans and Salmon

If the project benefits salmon or steelhead, select relevant regional plans and assessments from the set list. Projects specifically benefitting salmon or steelhead should be located within a salmonid ESU recovery domain and 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 proposed monitoring would address the limiting factors for the selected salmon and steelhead ESU/DPS.

## Proposed Solution

**Please be aware that if an applicant unchecks a box, all answers will be lost!** For example, if an applicant checks “habitat surveys” and answers all accompanying questions, but then decides to uncheck the habitat surveys box, all of the answers provided in the accompanying questions will be erased. An applicant would have to answer all the questions again.

The Proposed Solution section contains the following subsections.

| Component                      | Must Applicant Answer?               |
|--------------------------------|--------------------------------------|
| <b>Project Overview</b>        | Yes                                  |
| <b>Status and Trend</b>        | Only if proposing work for data type |
| <b>Project Effectiveness</b>   | Only if proposing work for data type |
| <b>Landscape Effectiveness</b> | Only if proposing work for data type |
| <b>Rapid Bio-Assessment</b>    | Only if proposing work for data type |

### Project Overview

**IMPORTANT: Applicants must fill out a separate application for each type of monitoring activity.**

#### Status and Trend

Monitoring made at a regular interval to determine long-term patterns of a parameter(s), and to assess conditions relative to specific criteria. A component may involve collecting baseline data, if none exists.

#### Project Effectiveness (Action Effectiveness)

Monitors effectiveness of a restoration project(s) in meeting its biological and ecological objectives. A component may involve collecting baseline data to establish representative conditions before restoration is implemented.

#### Landscape-Scale Effectiveness (Landscape Effectiveness)

Measures environmental parameters to determine the effectiveness of restoration actions in creating desired habitat condition change(s) at a large geographical scale.

#### Rapid Bio-Assessment

The collection, compilation, analysis, and interpretation of biological data to facilitate management decisions and actions for control and/or mitigation of impairment. Assessments are rapid, streamlined, scientifically valid procedures for biological surveys that allow multiple site investigations in a field season, and quick turn-around of results for management decisions.

A rapid bio-assessment (RBA) is different than a Technical Assistance (TA) assessment and survey because it is usually conducted in a particular area, many times, whereas a TA assessment is often a one-time stand-alone activity. In addition, a RBA follows specific protocols and usually involves hiring qualified contractors to complete the survey. RBA projects can be thought of as a “quick and dirty” method of evaluating fish distribution and abundance. The survey method was designed to sub-sample a certain percent of pool habitats (usually 20%) using a technique that covers large distances. RBAs describe the current distribution of fish, as well as collecting pool metrics and variations in habitat complexity. The data collected can be used to prioritize habitat

restoration strategies and measure progress of future restoration activities.

### Goal, Objectives, and Activities

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Applicants are encouraged to build from the Problem Statement, and explain the future vision and specific objectives for the proposed monitoring project.

#### Goal

Goal statements should articulate desired outcomes (the vision for desired future condition) and the watershed benefit.

#### Objectives

Objectives support and refine the project goal by breaking it down into smaller steps or project components. Objectives must be worded in a specific, measurable manner demonstrating progress toward achieving the project goal. 😊 **HELPFUL HINT:** Each objective should be **SMART: Specific, Measurable, Achievable, Relevant, and Time-bound.**

#### Activities

Activities explain how the objective will be implemented.

#### Benefits

Outcomes realized to achieve the stated goal after the monitoring project is complete.

### Project Activities and Schedule

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Identify specific project activities necessary to implement each objective. Describe how and where each activity would occur, and what equipment or methods would be used. Limit on dates is due to online usability and visualization of Gantt chart. If necessary, provide extent of recurring activity in “description” text box.

### Habitat Types

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Applicants may select as many habitat types as needed based on the proposed project actions.

#### Instream monitoring

Occurs below the ordinary high water mark.

#### Riparian monitoring

Occurs above the ordinary high-water mark of the stream and within the floodplain of the stream.

#### Upland monitoring

Occurs above the floodplain.

#### Wetland monitoring

Occurs in land or areas that are covered, often intermittently, with shallow water or have soil saturated with moisture.

#### Estuary monitoring

Occurs in land or areas that are covered, often intermittently, with shallow water or have soil saturated with moisture, and/or monitoring that occurs in tidally influenced areas.

## Monitoring Type

### Status and Trend

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#### Activities

These can include monitoring/surveys targeting habitat, stream, vegetation, macroinvertebrates, juvenile fish, adult fish, other biologicals, invasive species, soil, water quantity, and water quality.

#### Methods and Design

---

Explain the overall approach to monitoring including sampling methods and design.

Describe proposed methods and protocols, and include references. Provide the methods and protocols and include references. Sufficient detail should be provided to demonstrate to reviewers there is a firm understanding how the data will be collected for quality assurance and control. Explain why you have chosen the specific sampling locations, the parameters you are monitoring, and the frequency of data collection. This will help a reviewer understand the specific data to be collected to support on-the-ground decision making and adaptive management.

**Projects related to water-quality or water-quantity with DEQ technical support require an EPA or ODEQ approved Quality Assurance Project Plan (QAP) and/or Sampling Analysis Plan.**

#### Information

Indicate whether the project will gather baseline data. If not, indicate whether there is existing baseline data.

### Project Effectiveness

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#### Activities

These can include habitat surveys, stream surveys, vegetation, macroinvertebrates, juvenile fish, adult fish, other biological monitoring, invasive species, soil surveys, water quantity, and water quality.

#### Methods and Design

---

Explain the overall approach to monitoring including sampling methods and design.

Describe proposed methods and protocols, and include references. Provide the methods and protocols and include references. Sufficient detail should be provided to demonstrate to reviewers there is a firm understanding how the data will be collected for quality assurance and control. Explain why you have chosen the specific sampling locations, the parameters you are monitoring, and the frequency of data collection. This will help a reviewer understand the specific data to be collected to support on-the-ground decision making and adaptive management.

**Projects related to water-quality or water-quantity with DEQ technical support require an EPA or ODEQ approved Quality Assurance Project Plan (QAP) and/or Sampling Analysis Plan.**

#### Information

If the project will gather baseline data, provide a description of the future restoration project(s) to be monitored. If the project will not gather baseline data, indicate whether that information exists in another project/monitoring effort. Also, if the project is monitoring a non-OWEB project, provide the year it was implemented and the main project funder. Explain if this monitoring

activity will gather data about a restoration project proposed this cycle, in progress or previously implemented.

## Landscape Effectiveness

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### Activities

These can include monitoring/surveys targeting habitat, stream, vegetation, macroinvertebrates, juvenile fish, adult fish, other biologicals, invasive species, soil, water quantity, and water quality.

### Methods and Design

---

Explain the overall approach to monitoring including sampling methods and design.

Describe proposed methods and protocols, and include references. Provide the methods and protocols and include references. Sufficient detail should be provided to demonstrate to reviewers there is a firm understanding how the data will be collected for quality assurance and control. Explain why you have chosen the specific sampling locations, the parameters you are monitoring, and the frequency of data collection. This will help a reviewer understand the specific data to be collected to support on-the-ground decision making and adaptive management.

**Projects related to water-quality or water-quantity with DEQ technical support require an EPA or ODEQ approved Quality Assurance Project Plan (QAP) and/or Sampling Analysis Plan.**

### Information

If the project will gather baseline data, provide a description of the future restoration project(s) to be monitored. If the project will not gather baseline data, indicate whether baseline data exists. Also, if the project is monitoring a non-OWEB project, provide the year it was implemented and the main project funder.

Also, describe in detail the type of restoration actions being evaluated, length of time the proposed monitoring will last, the number of monitoring sites, and the geographic scale

## Rapid Bio-Assessment

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### Activities

These can include monitoring/surveys targeting habitat, stream, vegetation, macroinvertebrates, juvenile fish, adult fish, other biologicals, invasive species, soil, water quantity, and water quality.

### Information

Indicate whether the project will gather baseline data. If the project will not gather baseline data, indicate whether baseline data exists. Explain if there will be any complementary monitoring activities now or in the future performed in addition to the RBA survey.

## Wrap-up

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### Outcomes

#### Total stream miles and/or acres

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If monitoring the same location or stream reach multiple times, do not sum the area or length for

each monitoring event.

### **Example**

If the project monitors a 13-mile stream reach twice per year for three years, report the metric as 13 stream miles. If there is more than one type of monitoring and the locations monitored will overlap, report the total miles and/or acres for all types (do not double count areas of overlap).

### **Description of calculations**

Be specific. Consider whether monitoring locations are representative of upstream or surrounding conditions; or if upstream or surrounding conditions are changing, as with tributary influence. If the monitoring site is representative of only a defined location, do not include the entire area or stream miles upstream of the project location.

## **Quality Control/Assurance**

Projects related to water-quality or water-quantity with DEQ technical support require an EPA or ODEQ approved Quality Assurance Project Plan (QAP) and/or Sampling Analysis Plan. Data must be submitted to the agency at the end of the project. For more information on the available ODEQ assistance, please see the fact sheet found at <https://www.oregon.gov/deq/wq/Pages/WQ-Monitoring-Resources.aspx>.

## **Project Management**

### **Key Individuals**

Describe who will be responsible for various aspects of the project, including post-implementation status reporting. At a minimum, include who is responsible for project management, design, implementation, inspection, and post-implementation status reporting. If a contractor has not yet been hired, provide only the desired qualifications.

## **Data**

### **Experience**

The team responsible for the proposed project should be qualified to perform proposed tasks. Please describe who will be working on specific tasks and why they are qualified to do this work. Describe the past experience applying watershed monitoring data. Applying watershed data is defined as follow-up that occurs after data is collected and reported to plan, adapt or take additional actions with relevant audiences or within a given organization based on what was learned

### **Management and Analysis**

Elements of a strong application show the relationship between data collection, data management, analysis and completing the final report. Describe what software will be used to manage, store and analyze the data. Describe how you plan to analyze the different data sets to meet monitoring objectives. Describe what statistical analyses will be performed, if appropriate.

### **Reporting**

The final report should provide a thorough analysis of all data collected and an interpretation of the findings related to the objectives stated earlier in the application. Please explain how that will be done and how it will be shared with interested parties. Describe who the intended audience

is.

### Future Actions

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How will these data be applied to inform future actions? Include immediate next steps and tangible outcomes.

### Permits

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Permit and license information provided in the application will be imported into final grant agreements for awarded grants. Applicants are responsible for verifying applicable permits, licenses, and General Authorizations required for the project, and can update information at grant agreement execution.

## Chapter 4: Technical Assistance Applications

### In this chapter

- ✓ Eligible and ineligible project types
- ✓ Administration Info
- ✓ Problem Statement
- ✓ Proposed Solution
- ✓ Wrap-up
- ✓ Permits

## Eligible and Ineligible Project Types

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### Technical Assistance Grant Types

Technical assistance project types cannot be combined into a single application; a separate grant application must be submitted for each type of project. OWEB offers 2 types of Technical Assistance (TA) grants:

#### TA #1 Technical Design and Engineering (formerly Technical Design)

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Development of a technical design for a restoration project.

#### TA #2 Resource Assessment and Planning (formerly Technical Planning)

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Development of an implementation plan for restoration activities.

### Ineligible TA projects

Projects that are found within current OWEB Focused Investment Partnership (FIP) geographies, which are addressing the same ecological outcomes through similar actions, are **ineligible** for Open Solicitation grants. For more information, applicants are encouraged to review current FIP story maps here: <https://arcg.is/2g6ldYQ>.

Other ineligible projects:

- General training for staff or volunteers
- Website development
- General monitoring
- Farm, ranch, and/or forest plans
- Fish screens (designs are an allowable project type)
- Landscape design
- Support for permit processing alone
- Support for site inspections alone
- OWEB watershed assessments
- Equipment or software for general use
- Projects required as a condition of a local, state, or federal permit, order, or enforcement action (e.g. mitigation projects, management projects required by permit from Oregon Department of Agriculture)

## Administrative Information

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The information captured in this section will be used to:

- Enter the project into OWEB's database,
- Create a grant agreement if funded,
- Generate a map for purposes of reporting to NOAA and USFWS, and
- Meet State of Oregon legal requirements.

### 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. In crafting your abstract, make an effort to be clear and concise and to keep your description of the proposed activities succinct. Provide an abstract statement for the project in 2,000 characters or less, and take care to address all 4 main parts of the abstract statement.

#### Identify the project location.

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

#### Briefly state the watershed issue, problem, 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 guidance 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.

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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.

## Contact Information

### Applicant

---

This should be the individual who receives all correspondence about the project. See page 2 for information on eligible applicants. If this information needs to be updated, please contact OWEB.

### Payee

---

This should be the person and/or organization who will be responsible for tracking and accounting for project funds, and compliance with the grant agreement conditions. If this information needs to be updated, please contact OWEB.

### Project Manager

---

Provide the name of the person who should be contacted on behalf of the applicant about the technical aspects of the project during evaluation and project implementation.

## Location Information

### Mapping project

Map the point that best represents the approximate center of the project area where the most significant portion of the work will take place. Be sure to map the project within the correct OWEB Region (<https://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. For projects that occur over multiple sites, such as technical assistance or monitoring projects, place the point on one of multiple sites where work will be conducted (ideally, a site centrally located in the project area). For example, if a technical assistance project will conduct instream surveys on several reaches, you should place the mapping point at the midpoint of one of the streams to be surveyed. If no individual sites can be identified (i.e. habitat scoping or monitoring activities that occur over the extent of a watershed), then place the point in the center of the project area.

### 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

See "Permits" at the end of this chapter.

## Racial and Ethnic Statement

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

## Insurance Information

OWEB considers some projects to carry a greater risk to the organization, organization's employees, volunteers, and the community. These projects include working with hazardous materials, earth moving work around the footprint of a drinking water well, transporting individuals on the water, and removal or alteration of structures that hold back water on land or instream (dams, levees, tidegates, etc.). If a project includes any of these activities, the applicant must upload the DAS Risk Assessment found at <https://www.oregon.gov/DAS/Risk/pages/index.aspx>. See policy for additional information at <https://www.oregon.gov/OWEB/manage-grant/Pages/payments-budget.aspx>.

If an applicant's staff or volunteers are working with kids related to the project or staff are applying herbicides, additional insurance is required but a DAS risk assessment is not.

## 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

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Explain the background 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 needs to be implemented.

### Watershed Problem

Explain the root cause(s) of the problem(s), not the symptoms. A problem can have many perceived causes, but only a few causes underlying all the others.

### Project 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

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A project that previously received OWEB funding and did not yet result in completion of the TA goal. Applicants need to explain why continuation is necessary to finish work funded under previous grants.

##### Example 1

Previous OWEB Technical Assistance funding resulted in a design project and now applicant is seeking funding to implement that design.

##### Example 2

There was a recent change in design requirements because the original project scope and costs have increased. This project is seeking additional funds to address these new requirements in order to complete final project designs.

#### Resubmittal

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A project proposal that was previously submitted as an OWEB grant application but was not funded.

☺ **HELPFUL HINT:** If resubmitting an application, address previous Review Team comments in the appropriate section(s) (i.e. goal, objectives, activities, design, project schedule, outcomes).

#### Phased Projects

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A phased project is implemented in separate but related stages over time. Note: technical assistance projects are typically not phased.

##### Example

Phase 1 = Assess culverts in Sunny River Basin.

Phase 2 = Complete designs for high priority culverts in Sunny Basin.

### Plans and Salmon

OWEB requires documentation of relevant local and regional plans and assessments to meet federal and state reporting requirements. Applicants should self-populate names of local plans and assessments, and select relevant regional plans and assessments from the set list if the project

benefits salmon or steelhead.

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 proposed TA work would address the limiting factors for the selected salmon and steelhead ESU/DPS.

## Proposed Solution

**Please be aware that if an applicant unchecks a box, all answers will be lost!** For example, if an applicant checks “Assessments and Surveys” and answers all accompanying questions, but then decides to uncheck the assessments and surveys box, all of the answers provided in the accompanying questions will be erased. An applicant would have to answer all the questions again.

The Proposed Solution section contains the following subsections:

| Component                               | Must Applicant Answer?                  |
|---|---|
| <b>Project Overview</b>                 | Yes                                     |
| <b>Technical Design and Engineering</b> | Only if proposing this type of activity |
| <b>Resource Assessment and Planning</b> | Only if proposing this type of activity |

## Project Overview

### Goal, Activities, and Objectives

Applicants are encouraged to build from the Problem Statement and explain the vision and specific objectives for the proposed TA project.

#### Goal

Goal statements should articulate desired outcomes (the vision for desired future condition) and the watershed benefit.

#### Objectives

Objectives support and refine the project goal by breaking it down into smaller steps or project components. Objectives must be worded in a specific, measurable manner demonstrating progress toward achieving the project goal. 😊 **HELPFUL HINT:** Each objective should be **SMART: Specific, Measurable, Achievable, Relevant, and Time-bound.**

#### Activities

Activities explain how the objective will be implemented.

### Project Activities and Schedule

Identify specific project activities necessary to implement each objective. Describe how and where each activity would occur, and what equipment or methods would be used. Limit on dates is due to online usability and visualization of Gantt chart. If necessary, provide extent of recurring activity in “description” text box.

## Technical Assistance Type

Choose whether project is a Technical Design and Engineering (formerly Technical Design) or Resource Assessment and Planning (formerly Technical Planning). **You may select only 1 project type per application.**

### Technical Design and Engineering

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Includes conducting engineering work to develop restoration project designs or other information (e.g., permits) required to implement project. Examples of engineering work include hydrologic analysis, general topographic survey, and hydraulic modeling.

### Plans

Indicate whether the project will address a restoration action identified in a federal recovery or regional plan. If the applicant indicated a benefit to salmonids earlier, the question on 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. If there is no applicable federal recovery plan, choose the relevant sub-basin or regional plan(s) from the list. 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 either the limiting factor addressed and/or the restoration action to be undertaken.

#### Example 1

The SONC Recovery Plan states that remediation of road-stream crossing barriers is one of the highest priority recovery actions for the Strawberry Creek population of SONCC coho (p.22-1). Recovery action SONCC-Str.C.5.1.1.3 identifies providing improved fish passage at the Highway 101 crossing as a specific action. This project will develop a design that would improve coho access on Strawberry Creek at Highway 101 for all life stages to quality habitat upstream of the crossing.

#### Example 2

The Lower Columbia Coho, Chinook, Chum, and Steelhead Recovery Plan lists degraded channel structure and floodplain habitat as primary limiting factors for all Sandy population of ESA-listed salmonids (pp. 4-2, 4-3). Recovery actions to address these factors include restoring off-channel habitats, reducing impacts that alter natural processes, and restoring connectivity (p. 12-2). This project will work to engage landholders in designing projects that seek to effectively restore natural river processes and reconnect side channels in a flood-prone reach of the Sandy River.

## Technical Design and Engineering

This section provides information on the technical assistance product and why it is appropriate for the problem described earlier in the application. Choose the level of design to be achieved, as shown below.

| Level of Design                  | Description   |
|----------------------------------|---|
| <b>10-30% Conceptual Design</b>  | This may include alternative evaluations, concept level plans, design criteria for project elements, and/or rough cost estimate.                |
| <b>30-85% Preliminary Design</b> | This may include selection of the preferred alternatives, draft plans, draft design report, and/or preliminary cost estimates.                  |
| <b>85-100% Final Design</b>      | This may include final design report, plans and specifications, contracting and bidding documents, monitoring plan, and/or final cost estimate. |

## Products

List the products that will result from this proposed technical assistance design and engineering project. Produce examples include a restoration action plan, limiting factors analysis, etc.

## Review

Most designs need a technical review. Provide names of the people or agencies who will review designs, including who must approve the design at the end of the process.

## Technical Design and Engineering Summary Metrics

These metrics detail the amount of land area and/or stream miles encompassed by this technical design.

### Acres affected

If the project will design plans to improve the riparian buffer along both sides of the stream, estimate the total acreage of the riparian buffer from both sides and enter that number as the estimated acres of habitat. If this project is only creating designs for instream work, enter '0' for the estimated acres of habitat.

### Miles affected

This question asks for the miles of stream affected by this design project and not the miles of stream made accessible to fish. If this project includes designs to address fish passage barriers, these need to be calculated as follows to meet federal reporting requirements: Compute the stream miles by multiplying 0.01 miles by each passage barrier addressed by the project; add this to the actual stream miles; enter '0' for the number of stream miles if they are not applicable to this design project.

### Example

The project is designing plans to remove two push-up dams, along 0.5 miles. Compute the stream miles by multiplying the 2 dams x 0.01 miles each (0.02 miles) and enter a total of 0.52 miles as estimated stream miles affected (0.5 miles + 0.02 miles)

## Resource Assessment and Planning

Includes planning activities (conducting habitat restoration/feasibility studies, developing restoration plans) and assessment and surveys (conducting instream or habitat surveys and assessments).

If a significant amount of funds and effort will be spent on evaluating and analyzing existing data, then select Planning Activities and either conducting habitat restoration scoping and/or feasibility studies or developing restoration/action plans.

If the objective is to create a restoration action plan and a small part of the project tasks and proposed budget (less than 25%) is allocated to conduct limited field assessments, then select Planning Activities and developing restoration/action plans.

### Planning Activities

Select all of the technical assistance activities to be completed.

#### 1. Conducting habitat restoration scoping and/or feasibility studies.

Includes analysis and consideration of alternatives for future restoration using existing data. If the applicant previously indicated a benefit to salmon or steelhead, the question on whether the activity addresses a restoration action identified in a federal recovery plan or regional assessment must be marked "Yes." Indicate whether the technical planning project will address a restoration action identified in a federal recovery or regional plan. 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 Rogue Spring Chinook Salmon Conservation Plan indicates a number of key limiting factors and stresses related to degraded riparian areas that affect the entire Interior Rogue River stratum. These include degraded riparian forest conditions, increase water temperature (pp. 10-11, 31-14), land use practices that remove riparian vegetation (pp.32-11, 32-16, 32-20), and significant nonnative riparian vegetation. To restore riparian areas, this project will gather current conditions, perform a region-wide analysis, and identify areas where restoration activities will have the greatest impact toward elimination riparian-related limiting factors/stresses in the region.

#### 2. Developing restoration or action plans.

If the planning project involves a limited amount of data collection/evaluation or project prioritization as a prerequisite to developing a restoration action plan, the project is not considered restoration scoping or assessment. In this case, developing a restoration or action plan is the only planning activity that pertains to this project.

#### 3. Other planning activities.

In a few instances the planning activities described above do not describe the major emphasis of your technical assistance project. If this is the case, enter a description of the planning activity that best describes your project. **Before choosing this activity type, contact the OWEB Federal Reporting Coordinator to ensure the proposed planning activity does not fit better elsewhere in the application.** Appropriate 'other' planning activities include:

- Evaluating existing restoration plans to ensure priority restoration projects are implemented
- Designing/maintaining restoration data systems

If the applicant previously indicated a benefit to salmon or steelhead, the question on whether the activity addresses a restoration action identified in a federal recovery plan or regional assessment must be marked “Yes.” Indicate whether the technical planning project will address a restoration action identified in a federal recovery or regional plan. 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.

If the ‘other’ planning activity will result in the development of a plan, indicate the author, proposed title, and brief description of the plan. The description should include the plan purpose and future use.

### Assessment and Surveys

Projects that collect data to assess the status of a particular restoration issue. These include AHI/AQI Survey/Assessments. The AHI surveys follow the Oregon Department of Fish and Wildlife’s (ODFW) “Aquatic Inventories Project Methods for Stream Habitat Survey Protocol” (Moore 2012). Data and observations are collected along stream reaches and are subjectively defined by observed breaks in topography, land use, stream flow, and other riparian characteristics. The data collected is used to characterize the stream at each reach and includes valley type and width; channel type, slope, width, depth, substrate, and LWD; and bank erosion. Also surveyed are different aspects that identify the riparian environment, such as vegetation composition, age, and percent shade.

☺ **HELPFUL HINT:** Generally, assessment/survey activities involve collecting new data and are often stand-alone projects (i.e., not conducted as a minor part of the technical assistance planning process).

Types of assessments and surveys include:

#### Instream assessments and surveys

Select all of the instream assessment activities to be conducted.

Enter the estimated total miles of stream(s) assessed/surveyed. **Do NOT** double count stream miles. If the only instream assessment you are conducting is a fish passage barrier assessment/inventory, this needs to be calculated as follows to meet federal reporting requirements: Compute the stream miles by multiplying .01 miles by each passage barrier addressed by the project.

#### Habitat assessments/surveys

Select all of the habitat assessment activities to be conducted.

Enter the estimated total acres of habitat to be assessed/surveyed. **Do NOT** double count acreage.

### Data Management

Describe how data will be collected, managed, and analyzed. For example, how will data be stored – in a database, in paper files, and/or online? Over the years, OWEB has seen that effective data management is key to a successful project.

### Complementary Activities

Describe how this proposed project aligns with other planning or restoration activities occurring within the project area, and how this project complements those other activities.

### Technical Resource Assessment and Planning Summary Metrics

These metrics summarize the amount of land area and/or stream miles encompassed by the technical planning project.

**Acres encompassed.** Enter the total acres of all planning activities. If your project only conducted assessments, enter those acres here (in addition to entering this number in the related habitat assessment/survey section).

**Miles encompassed.** Enter the total stream miles of all planning activities. If your project only conducted assessments, enter those stream miles here (in addition to entering this number in the related instream assessment/survey section).

## Wrap-Up

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### Outcomes

Applicants are encouraged to tie TA activities back to the Problem Statement and Goal, Objectives, and Activities. This is the opportunity to “tell the story.”

### Project Management

#### Key Individuals

---

Describe who will be responsible for various aspects of the project, including post-implementation status reporting. At a minimum, include who is responsible for project management and design. If a contractor has not yet been hired, provide only the desired qualifications.

## Permits

---

Permit and license information provided in the application will be imported into final grant agreements for awarded grants. Applicants are responsible for verifying applicable permits, licenses, and General Authorizations required for the project, and can update information at grant agreement execution.

## Chapter 5: Stakeholder Engagement Applications

### In this chapter

- ✓ Eligible project types
- ✓ Administrative Information
- ✓ Problem statement
- ✓ Proposed solution
- ✓ Wrap-up
- ✓ Permits

### Eligible Project Types

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“Stakeholder Engagement Project” means a project whose purpose is to communicate and engage with landowners, organizations, and the community about the need for, feasibility, and benefits of a specific eligible restoration or acquisition project or projects within an identified geography, or an eligible resource assessment or planning project, in order to successfully plan or implement said restoration or acquisition project. Education projects are not eligible.

To determine eligibility, project proponents should consider the outcomes of stakeholder engagement projects. To qualify as necessary for restoration or acquisition, the project must be tied to a specific geography, address clearly articulated habitat or watershed or ecosystem function goal for that geography, and identify a clear path toward achieving the restoration or acquisition measurable outcomes within a reasonable and specific timeframe.

Choose one or more of the eligible project types listed below. Examples are provided in the Proposed Solution section below.

#### Eligible projects include activities that:

- Acquiring, from willing owners, interests in land or water that will protect or restore native fish or wildlife habitats.
- Projects to protect or restore native fish or wildlife habitat.
- Projects to protect or restore natural watershed or ecosystems functions in order to improve water quality or streamflow.
- Projects to engage stakeholders in resource assessment and planning projects that result in an eligible restoration or acquisition project.

#### Ineligible projects:

- Education projects.
- Projects that are found within current OWEB Focused Investment Partnership (FIP) geographies, which are addressing the same ecological outcomes through similar actions, are **ineligible** for Open Solicitation grants. For more information, applicants are encouraged to review current FIP story maps here: <https://arcg.is/2g6ldYQ>.

### Administrative Information

---

The information captured in this section will be used to:

- Enter the project into OWEB’s database,
- Create a grant agreement if funded,
- Generate a map for purposes of reporting to NOAA and USFWS, and
- Meet State of Oregon legal requirements.

## 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 content of the proposed activities. In crafting your abstract, make an effort to be clear and concise and to keep your description of the proposed activities succinct. Provide an abstract statement for the project in 250 words or less, and take care to address all 4 main parts of the abstract statement.

### Identify the project location.

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

### Briefly state the watershed issue, problem, and 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 guidance documents. Your answer may relate to the expected focus of the resulting restoration project that will result from this stakeholder engagement activity.

### Describe proposed Stakeholder Engagement activities.

Briefly list the kind(s) of activities proposed (such as workshops, outreach meetings, publications or other materials produced, etc) and the target audience for your engagement effort. Include information about what scale the activities are proposed (i.e. number of participants, events, materials, etc).

### Identify project partners.

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

## Contact Information

### Applicant

This should be the individual who receives all correspondence about the project. See page 2 for information on eligible applicants. If this information needs to be updated, please contact OWEB.

### Payee

This should be the person and/or organization who will be responsible for tracking and accounting for project funds and compliance with the grant agreement conditions. If this information needs to be updated, please contact OWEB.

### Project Manager

Provide the name of the person who should be contacted on behalf of the applicant about the technical aspects of the project during evaluation and project implementation.

## Location Information

### Mapping project

Map the point that best represents the approximate center of the project area where the most significant portion of the work will take place. Be sure to map the project within the correct OWEB Region (<https://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. For projects that occur over multiple sites, place the point on one of multiple sites where work will be conducted (ideally, a site centrally located in the project area). If no individual sites can be identified (i.e. habitat scoping or monitoring activities that occur over the extent of a watershed, outreach projects that engage students over a wide area), then place the point in the center of the project area.

### 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

See "Permits" at the end of this chapter.

### Racial and Ethnic Statement

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

### Insurance Information

OWEB considers some projects to carry a greater risk to the organization, organization's employees, volunteers, and the community. These projects include working with hazardous materials, earth moving work around the footprint of a drinking water well, transporting individuals on the water, and removal or alteration of structures that hold back water on land or instream (dams, levees, tidegates, etc.). If a project includes any of these activities, the applicant must upload the DAS Risk Assessment found at <https://www.oregon.gov/DAS/Risk/pages/index.aspx>. See policy for additional information at <https://www.oregon.gov/OWEB/manage-grant/Pages/payments-budget.aspx>.

### 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 10 years. This question allows OWEB to track these dollars.

### Problem Statement

---

In the Problem Statement section, focus your answers on explaining the problem behind the proposed project and how it fits into a larger watershed context. Do not explain the project here; instead, tell the background story to help reviewers understand why the project should be implemented.

## Project Description

This question provides important background information to help lay the context for the proposed project (4,000 character limit). There are three major components to this question that should be covered in your description:

- a) Describe in detail the watershed problem that the Stakeholder Engagement project or resulting restoration project will address. Include the specific watershed priority(ies) or limiting factors that will be addressed and the resources that will benefit from the project.
- b) Define the need for the engagement activities within the project area to help address the stated problem or limiting factor. Identify the target audience, describing the number of people hoped to be reached from this effort and the role the target audience has in addressing the watershed problem.
- c) Explain why this opportunity is timely and how the project will result in eligible restoration or acquisition projects. Include information to help clarify for reviewers why this engagement effort is important or urgent in the project area.

### Example

Alder Creek, located in the Sitka River Watershed, has been 303(d) listed for temperature and dissolved oxygen since 2002. The creek is a priority location in which to work to benefit federally listed Oregon coast coho salmon due to the stream's high intrinsic potential, but lack of riparian shade continues to be a problem for the species along the 4 miles of stream characterized by rural residential ownership. Temperature was cited as major limiting factor in the recently completed Sitka River Watershed Limiting Factors Analysis (2015). The Sitka River Watershed Council has been working collaboratively with other partners in the local area to try to implement riparian restoration projects on Alder Creek over the past few years with limited success. The Council and partners lacks the time and capacity necessary to engage the local landowners along the 4 mile reach, many of whom have been resistant to restoration activities in the past. This project will enlist landowner participation in improving the riparian corridor with the goal of reaching all 120 landowners who own creek frontage. While the Council has had difficulty in the past encouraging landowners in the Alder Creek subwatershed to engage in restoration, several recent ownership changes along with a few key recently interested landowners have created a timely opportunity to pursue landscape-scale restoration.

### Example

The Simon Creek Dam in the Willow River watershed completely blocks fish passage to over 5 miles of high quality aquatic habitat for a number of anadromous fish species, including the federally listed Upper Willamette River Steelhead. In 2012, the Willow River Watershed Assessment concluded that fish passage was the primary limiting factor for anadromous fish species in Simon Creek. Landowners in the watershed have long been opposed to removal of the dam due to the potential loss of recreational opportunities on Simon Lake. Recently the dam was damaged during a storm event and the estimated cost of repairs is prohibitive for the surrounding landowners, leading to some discussions with the Council about the possibility for removal. However, some landowners remain unaware of the benefits of removing the dam and are unfamiliar with the restoration potential and benefits within the watershed. There is a great need to conduct outreach to engage the Simon Lake community in evaluating restoration options and building support for a solution that will restore fish passage to the watershed, an effort that has been out of the scope of the Council's current outreach capacity.

## Plans

Explain how the proposed project connects directly to existing federal, state, or local assessments and planning processes. List only relevant local and regional plans where the activities or limiting factors proposed are specifically mentioned or the resulting project is referred to as a priority.

### Example

The Sitka River Watershed Assessment (2002) identified Alder Creek as a priority location in which to work to support the restoration of habitat for Oregon coastal coho salmon. The Sitka River Limiting Factors Analysis (2014) identified temperature as a significant limiting factor in the watershed.

### Example

The Upper Willamette River Steelhead Recovery Plan (2011) identifies fish passage in the Simon Creek watershed as a significant limiting factor to species recovery. The Willow River Watershed Council's Strategic Action Plan (2016) lists outreach to the Simon Lake community as a top priority for Council staff in order to move forward with the restoration of fish passage at the Simon Creek Dam.

## Proposed Solution

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### Project Overview

#### Project Type

Eligible Stakeholder Engagement projects must qualify as being necessary for restoration or acquisition by being tied to a specific geography, address clearly articulated habitat or watershed or ecosystem function goal for that geography, and identify a clear path toward achieving the measurable outcomes within a specific timeframe. Projects may be programmatic in nature, provided that they are tied to a specific geography and are connected to planned restoration or acquisition activities within a specified timeframe.

Examples of eligible projects include:

- A watershed council working towards a dam removal requests Stakeholder Engagement funds to communicate with neighbors and the communities about the effects of the proposed project on upstream and downstream properties and, based on the effects of the proposed project, whether the community supports dam removal at this location.
- A land trust requests Stakeholder Engagement funds to conduct interviews and hold community listening sessions about proposed acquisitions in a high priority conservation area.
- A soil and water conservation district requests Stakeholder Engagement funds to visit 25 landowners to discuss potential restoration and acquisition projects promoting flood irrigation in high priority migratory waterfowl habitat.
- A watershed council builds support for beaver restoration in a watershed lacking sufficient in-stream habitat for ESA-listed species by engaging the community through a series of workshops, visits to successful beaver restoration sites, and development of promotional materials that convey design considerations.

## Goal and Objectives

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### Goal

Goal statements should articulate desired outcomes (the vision for desired future condition) and the watershed benefit.

#### Examples

- To gain affirmative community support to remove the Smith Dam.
- To determine whether the community will support permanent protection of high priority conservation lands in Smith Creek watershed.
- To enlist the landowners of 80% of the riparian corridor on Smith Creek to support, conceptually and financially, implementation of riparian forest restoration on their properties.
- To increase habitat for ESA-listed species in the Smith Creek watershed by cultivating support among the community for beaver restoration projects.

### Direct Correlation

Describe the direct correlation the Stakeholder Engagement effort will have with future restoration or acquisition activities.

#### Examples

- This Stakeholder Engagement project will directly support the reduction of stream temperature along Alder Creek by enlisting landowners in planting efforts along 4 miles of stream. The reduction in stream temperature will directly benefit aquatic species, including Oregon coast coho salmon.
- Engaging the Simon Lake community in evaluating restoration alternatives for the Simon Creek Dam will result in raising awareness and support for restoring fish passage at the site. The Willow River Watershed Council will actively pursue project implementation of the favored alternative after the conclusion of the community engagement efforts.
- The project will develop support for beaver restoration projects in the Smith Creek watershed by aiming to change the community's perception about the species. The council is actively pursuing restoration projects that support beaver habitat in the Smith Creek watershed and plans to implement projects that restore beaver food to the riparian zone and place beaver dam analogs (BDAs) within the highest priority reaches.

### Objectives

Select up to 5 objectives of this Stakeholder Engagement application. For each objective, provide an explanation, list the actions to be taken, and describe the success indicator.

#### Examples

- Enroll at least 30 rural residential landowners with frontage along Alder Creek in the Sitka River Watershed Council's Riparian Planting Program by hosting 5 targeted promotional events over the course of the summer. Success will be indicated by the number of landowners enrolled in the program at the project's conclusion.
- Complete a community wide engagement effort that evaluates restoration alternatives at the Simon Creek Dam. A contracted facilitator will be hired to lead the Simon Lake community through a consensus-building process through a 6 month series of meetings

and workshops. Success will be indicated by a majority (>50%) of the community supportive of the chosen alternative and the identification of a path forward for the Council to proceed with restoration.

- Solicit support for beaver restoration projects by hosting at least 3 workshops within the Smith Creek watershed. Success will be indicated by the number of workshop attendees who express a commitment to working with the council on beaver habitat projects during the implementation phase of the project.

### Target Audience

Describe the target audience, including individuals (and organizations, if appropriate) for the proposed activities, include the number of people to be engaged and any planned publicity about the project.

#### *Example*

The target audience for the Alder Creek Riparian Restoration project consists of the 120 rural-residential landowners with creek frontage along a 4 mile reach of the creek identified in the 2012 Limiting Factors Analysis as having degraded riparian vegetation. The Council hopes to engage the landowners in 5 promotional workshops and events promoting the Riparian Planting Program and raise awareness of the availability of free native plant material from the Native Plant Distribution Program. Publicity will be generated via social media on the community's Facebook page, targeted mailings to inform landowners of the events and details on the Council's programs, and one-by-one outreach to landowners on 20 properties considered high priority by the Council.

### Project History

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#### Continuation

A project that previously received OWEB funding and did not yet result in completion of the project goal. Applicants need to explain why continuation is necessary to finish work funded under previous grants.

#### Resubmittal

A project proposal that was previously submitted as an OWEB grant application but was not funded.

😊 **HELPFUL HINT:** If resubmitting an application, address previous Review Team comments in the appropriate section(s) (i.e. goal, objectives, activities, design, project schedule).

## Wrap-Up

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### Project Management

#### Project Management

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Describe who will be responsible for various aspects of the project. Include project leader(s), their credentials, and related experience. If a contractor has not yet been hired, provide only the desired qualifications.

#### Project Schedule

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Identify specific project elements and the activities necessary to implement each element. Describe how and where each activity would occur, and what equipment or methods would be used.

### Permits

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Permit and license information provided in the application will be imported into final the grant agreement for the awarded grant. Applicants are responsible for verifying applicable permits, licenses, and General Authorizations required for the project, and can update information at grant agreement execution.

## Chapter 6: Budget

Before filling out the application budget, review OWEB's financial guidelines in the *Budget Categories: Definitions and Policy* document. This document changes every two years and can be found on OWEB's website.

### Salaries, Wages and Benefits

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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

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These are services provided by a separate entity under a formal financial agreement or landowners performing work on their own land. Contract costs should be broken out and should match the scope of work described in the application. Materials and supplies purchased and provided by the contractor, as well as contractor travel, should be placed here. **Do NOT lump all contract costs into one row.**

### Materials and Supplies

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Consumable items purchased by the applicant and used up during the course of the project go here. Include small portable electronic equipment costing less than \$2,500.

### Travel

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These are grantee expenses incurred getting to and from the project location, including mileage and per diem rates, and necessary conferences or training workshops related to the project. Current State of Oregon rates must be used.

### Equipment

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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 be retained by Grantee after the grant closes. Grantee may request approval from the OWEB Project Manager to transfer the equipment to another entity.

### Other

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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

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Indirect costs are overhead or administrative costs that cannot be readily identified to a specific project or function, but are actually incurred by an organization. They include expenses like facilities, rent, administrative time, electricity, and telephone. Select one Indirect Cost Rate Type from the options described below. [Click here for video.](#)

## Federally negotiated indirect cost rate (current)

If this method is selected the grantee must submit proof of the approved federally negotiated indirect cost 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.

## Post-Grant

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These costs do not apply to all grant types.

These are costs necessary after the grant has been completed, usually to provide reports (post-implementation status or effectiveness monitoring).

### Status Reporting

Must be \$3,500 or less. You must include the number of reports as well as cost per report.

### Effectiveness Monitoring

If requesting \$3,500 or less in a restoration grant, Effectiveness Monitoring costs go here. If requesting more than \$3,500, the applicant must complete a separate monitoring application.

## Budget Narrative

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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.

**If the budget identifies a contingency amount for specific line item(s)** within the Contracted Services or Materials and Supplies budget categories, explain the specific reasons a contingency is needed for each line item. Contingencies are line-item specific and cannot be used for other costs.

## Funding and Match

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### Outside Funding Sources

😊 **HELPFUL HINT:** This section represents a new approach for OWEB to capture match and leveraged resource information. We recommend reading these instructions while working through the fields online.

😊 **HELPFUL HINT:** An increased amount of leverage/match does not gain a competitive advantage during the application process.

Any additional sources of funding not being sought from OWEB can be categorized as either match or leveraged resources. All OWEB grants have a match requirement. **Match is defined as additional resources expended to further the grant objectives, as required by OAR 695-005-0020(6).** If you have questions about the eligibility of a certain match source, contact your Project Manager.

**IMPORTANT:** Match claimed for one OWEB grant may not be claimed for any other grant (either OWEB or another grantor).

#### Example

Grantee has a \$50,000 grant from U.S. Fish and Wildlife Service. A portion up to \$50,000 may be used as match for a single OWEB grant, or a portion of the \$50,000 may be used as match for one OWEB grant and another portion as match for a second OWEB grant.

Projects that include more than OWEB funds and the required match utilize **leveraged** resources. Leveraged resources further grant objectives and are necessary to achieve the project's proposed outcomes, but are above and beyond what the grantee is claiming for OWEB's required match.

### 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.

## Instructions for adding Funding Sources, Amounts, and Match

### Funding Sources

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Select “Create New Project Funding Source” to add a new organization/entity type. Applicants are required to provide the type and name of the organization/entity. The short description is optional.

### Amounts

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Enter amounts in each funding source row by selecting the appropriate button. Once the applicant selects “Save Changes,” the amount will show up in the Amounts table and, if indicated, the Match table.

### Add Cash

Enter the cash amount, a short description (optional), the contribution status (secured or pending), and select ‘Match’ if some or all of the amount will be used as OWEB match. Select “Save Changes.”

### Add In-Kind

This includes all non-cash services except volunteer hours, which are reported separately. Enter the in-kind amount, in-kind contribution type (labor or materials), a short description (optional), the contribution status (secured or pending), and select ‘Match’ if some or all of the amount will be used as OWEB match. Select “Save Changes.”

### Add Volunteer

This is for donation of an individual’s time. Enter volunteer hours, volunteer rate ([https://www.independentsector.org/volunteer\\_time](https://www.independentsector.org/volunteer_time)), a short description (optional), the contribution status (secured or pending), and select ‘Match’ if some or all of the amount will be used as OWEB match. Select “Save Changes.”

### Match

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If the applicant selected “Attribute some or all of this amount as OWEB match,” then the match information will show up in the match table. The applicant must then edit the “Amount as OWEB Match” column to report the amount of the funding that will be applied toward match for the project.

## Chapter 7: Uploads/Attachments

All uploads/attachments must be in .pdf format. Consider consolidating similar documents into one .pdf, e.g. all support letters. Attach only the documents most relevant to the project. Reviewers have limited time to read large documents, but links may be provided if desired so reviewers can access additional information if they have questions. Required uploads/attachments are denoted with an asterisk (\*).

### Maps \*

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Attach at least one COLOR project location map. Additional detailed maps of the project site showing different project components help reviewers understand the whole project story. [Click here for map creation video.](#)

### Project Design \*

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(Not required for Technical Assistance, Stakeholder Engagement, or Monitoring)

Provide sufficient detail to support a reasonable evaluation of the design solution and its effect on the project site. If the design is standard (e.g., fence, water trough, etc.), cite the design reference (e.g., *NRCS Field Office Technical Guide*). If the design is custom, show sufficient detail to demonstrate how the project will be implemented. Applicants with minimal design information should include example photographs, designs, and conceptual sketches to convey design logic.

### Photos \*

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Provide photographs to support project description. Ideally, upload a single document with a compilation of photos with two photos on each page. Label each photo and note what it illustrates, including a GPS location for each photo if possible. If the project is funded, pre-project photos will be required as part of the Project Completion Report. For more information, refer to OWEB's photopoint guide: <https://www.oregon.gov/oweb/resources/Pages/Field-Tech-Guidance.aspx>.

### Figures and Tables

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Figures and tables may be provided to support further understanding of the Problem Statement and Proposed Solution.

### Secured Match Form

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Applicants can submit a secured match form AND/OR letter(s) of support. Submit the OWEB match form with signed letters or agreements documenting secured match. Signatures must be from an authorized match representative. Letters of support must state the nature of the match (cash or in-kind) and dollar value. Forms can be found on OWEB's website.

### Support Letters

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Provide letters from key partners, participating private landowners, or others. Letters demonstrating private landowner support are important.

### Contractor Bids

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Attach any contractor bid(s) received for the restoration project.

## Federally Negotiated Indirect Cost Rate (FNICR)

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Organizations that have an approved indirect cost rate with a Federal (cognizant) agency must use this rate for their grants. Attach a copy of the applicant's most recent FNICR agreement.

## Risk Assessment

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If a project has been identified as a high-risk activity under the Insurance section of the Administration Information, an applicant must upload the DAS Risk Assessment, <https://www.oregon.gov/DAS/Risk/pages/index.aspx>.

## Planting Details (Restoration applications only)

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If a project includes planting activities, an applicant needs to provide a diagram and/or map of planting design, as well as any other relevant details related to the planting activities.

## Chapter 8: Verify and Submit

An application must be verified before submittal. The verification process will identify application sections that still need to be completed. The applicant can navigate to those incomplete sections by clicking the links provided. Items that still need to be filled out on a page will be presented in big, bold type. **Once all items are resolved, a "submit" button will be presented. However, for Restoration and Technical Assistance applications, applicants will need to allocate project costs before being able to submit.** For each activity type shown, which is compiled based on the activities selected earlier in the application, applicants will need to estimate the percentage of the total cost of the project (OWEB and all other funding sources) that applies to the activity. The sum of all the activity cost percentages should equal 100%. Applicants should distribute all administrative, project management, and other general project costs among the various project activities when estimating percentages.

Upon submittal, a .pdf of the application can be accessed at the online application homepage. **No changes can be made once the online application is submitted. If the applicant wishes to make changes after submittal, the application must be withdrawn and another application filled out online.** An applicant needs to contact their project manager to withdraw an application.

Applicants can clone or copy a submitted application. On the homepage, applicants are presented with a "clone" button under the Submitted Applications section. When an applicant chooses to clone, a pop-up box will appear with the available cycle(s) or an option to "do not do anything." Content can change between cycles so, if an applicant chooses another cycle, there may have been questions added or changed that need to be filled out. If an applicant chooses not to pick a cycle and simply wants to review the application, then the content will stay the same as the cycle applied for.