Oregon Solutions
StreamBank Project Team Meeting
2/22/08

<u>DRAFT Notes:</u>

Follow-up items from flip charts:

Short Term:
- ➢ Review the Forest Practices Act exemption for industrial forest landowners and large wood placement in streams for incorporating into the StreamBank software (from Jo Morgan)
- ➢ Further flesh out the prioritization schematics for the pilot projects (landscape/spatial, limiting factors, function, etc.) (from Jeff Oveson and others). Comment also made that funding algorithm is a targeting tool but does not amount to prioritization (does not look @ the project context itself).
- ➢ ODFW can provide a technical review of the applications received for 2008 pilot projects, their merits, and any red flags by the April 4 meeting. (from Joe Sheahan).
- ➢ OWEB can provide a review of their prioritized but unfunded projects in comparison to the applications received for 2008 pilot projects. (from Ken Bierly).
- ➢ Decide whether StreamBank will attempt to include OWEB funding for culvert replacements in the 2008 pilots. Will require coordination of a request to the May 20-21 OWEB meeting in Ontario. (from Ken Bierly).
- ➢ Document the extent to which StreamBank projects change liability for project performance, who is on the hook for liability, and related insurance issues. Mention of a recent lawsuit that undermines State Tort Claims protection. (from Ken Bierly)
- ➢ Consider the "flip side" of funding needs, that is, aligning matching funds with projects already prioritized and partially funded by public entities (from Jo Morgan and others).
- ➢ Need to ensure compatibility between the just-signed NOAA Fisheries Service SLOPES IV Restoration and the new DSL General Authorization and USACE Regional General Permit for large wood, boulder and gravel placement.

On-going:
- ➢ A rigorous review of the public agency funding criteria is needed to identify a path forward for the funding tool associated with StreamBank. Identify public funder constraints on a web-based approach / one-stop-shop. (from Pam Wiley).
- ➢ Deeper discussion and better highlighting of the value-added components of StreamBank for rural landowners is needed, including how the tool can identify the best funding and technical assistance partners for landowners' projects. (How to access the private and Foundation dollars for restoration projects is particularly "mysterious")(from Megan Callahan-Grant). Also need to look at the "value-added" question for local coordinators, funders and agencies.
- ➢ Consider applying for a NOAA partnership grant. The grant application is offered every three years. The next timeframe is Fall 2009 for grants starting in 2010. Grants funds to an entity on for three years, entity awards to projects. Currently Ecotrust is implementing a <u>NOAA Restoration Center Community-based Restoration Program</u> grant for their

[Whole Watershed Restoration Initiative](#) program. Partners include OWEB and USFS. (from Megan Callahan-Grant).

Next meeting dates:
Friday, April 4, in Portland.
Friday, May 2 Portland or Salem. (Note: The Western Division American Fisheries Society Annual Meeting is May 4-8 in Portland.)

I.   Welcome and Introductions

Ken Bailey, Convener
Co-Sponsors: Kevin Moynahan, DSL and Joe Whitworth, Oregon Trout
- Meets DSL strategic goals, protect resource and expedite the process.
- Oregon Trout's impetus for StreamBank is the need for more efficiency in putting restoration projects on the ground at a landscape scale—driven by ecological need to do better than the status quo pace and social need to address local communities / local economies. Develop tools with a focus on the landowner. Committed to making this work for Oregon. This is about the need for collaboration, not taking over someone's turf. Goal for 2008 is $2 Million in fundraising for on-the-ground projects developed and implemented with the StreamBank tool.

Attendees:
Megan Callahan-Grant – NOAA Fisheries
Michael Tehan – NOAA Fisheries, Regional Administrator
Sue Knapp – Governor's Office, Natural Resource Advisor (Salmon)
Joe Sheahan – ODFW Wildlife Division, Willamette, Landowner Incentive Program
Shelly Miller – ODFW Fish Division, conservation and ESA recovery plans
Jo Morgan – Oregon Department of Forestry
Brett Brownscombe – Oregon Trout Conservation Director
Ken Bierly – OWEB, Deputy Director
Jimmy Kagan – Oregon Heritage Program, Oregon Explorer
Sally Puent – DEQ, Water Quality program manager.
Bruce Taylor – Defenders of Wildlife
Jeff Oveson – Grande Ronde Watershed, Network of OR Watershed Councils Board
Ray Jubitz – Jubitz Foundation
Alan Horton – Oregon Trout Managing Director
David Primozich – Willamette Partnership Executive Director
Dave Dishman – State Engineer, USDA Natural Resource Conservation Service
Judy Linton – USACE
Kevin Herkamp – Department of State Lands
Pam Wiley – Meyer Memorial Trust

Some Initial Comments:

Ken Bierly – OWEB is very interested in ways to engage humans in watershed restoration and, on a cautionary note, afraid of overselling and underproducing with any new program. Focus is how to link regulatory system w/ a funding mechanism.

Jimmy Kagan – Noted his work with the Oregon Explorer is to "make it easy for people to find stuff". He is interested in ways to better integrate information using technology, especially when this can lead to making restoration projects happen faster. Don't create 7-8 web tools that do the same thing. Make different projects compatible and coordinated.

Sally Puent – DEQ is involved in restoration permitting. Working closely with USACE, DSL on the permitting to simplify the process for landowners is exciting

Bruce Taylor – Defenders of Wildlife has a longstanding interest in making conservation investments more strategic and effective. He noted that Defenders is producing the Conservation Registry to track conservation activities on the ground. This is an important link for documenting Oregon Trout and DSL expedited restoration projects.

David Primozich – The Willamette Partnership is also interested in delivering projects efficiently, effectively and at scale.

II. The Oregon Solutions collaborative process

Pete Dalke – Oregon Solutions process and Community Governance System overview. At the end of the process we want to get a Declaration of Cooperation with statements of what your organizations can provide to make the project a success. Expertise, technical, financial resources to make the pilot projects a success and then further down the road.

III.   Convener's Role

Ken Bailey – Discussion of ground rules for developing this project team and working together on the objectives. Dalke noted ground rule #3 – let's not talk around the barn. Straight forward discussion is needed to address issues. If you have concerns that are better discussed offline, please call Pete or Ken.

Review the Project Background information (printed on the reverse of the meeting agenda). Discussion of the second paragraph, talking about 2008 pilot testing of StreamBank on + or - 20 projects. Make sure that everyone is comfortable with this paragraph. Ken Bierly lead discussion about what is a fair test? What do we hope to learn? The value is not necessarily the number of projects but the quality and the feedback, lessons learned as the pilot projects selected and implemented through StreamBank are reviewed at this end of this year.

IV.   StreamBank Project Status

Oregon Trout held two StreamBank advisory meetings last fall with some of the people around the table. This meeting today will help bring everyone current, while also engaging

all around the table in advancing stream restoration efficiency objectives. The second team meeting is to have us come back in a month to discuss with where we are with the expedited permit process for large wood, boulder and gravel placement and the pilot project proposals OT has received for 2008. What resources are lined up, what is in the cue to make expedited permitting happen this year? Make this operational. Come back in May to determine the roles.

Ray Jubitz question:
Fixing a whole watershed as the test for StreamBank. Is that still on the table? The pilot will focus on selecting projects around the state to engage a greater number of local coordinators and give a better diversity of feedback about the tool. Brett Brownscombe suggested difficulties exist in "fixing" a watershed or even a sub-part of it within a short timeframe of a pilot project season. It takes time for landowners to pick up on the "contagious" work of their neighbors within a watershed – they may not be on board right away this year. In the end this is just an implementation tool for projects. It could implement all the projects in the watershed but we're not all there yet; it would be forced.

Ken Bierly – This is important question because it goes to the heart of what we are trying to accomplish here.

We need to clarify if we are linking up funding/resources or if we are trying to link up geographic areas. We are linking up the funding process and the regulatory process in the pilots. Maybe we'll learn enough in order to take it to a watershed basis later on.

Ken Bierly raised the concern that if you don't focus on a geographic area, how do you prioritize and select projects? What the mechanism(s) for prioritizing projects will need to be identified. Brett Brownscombe indicated the intent to talk more about this when we get to the conversation on 2008 pilot projects.

Alan Horton gave an overview of the tool. Discussion includes the current status of the tool in 2008. For additional information or more in-depth overview and demonstration, contact Brett Brownscombe at Oregon Trout.

Brett Brownscombe discussed the major changes to the current version of the tool that include:
- Make the web tool more local-coordinator-centric, where they would be the project initiators.
- Other changes in the tool that benefit the local coordinators workload and project development.
- Simplified what projects can go through the tool. (Originally there were 14 different types of projects.
- Oregon Trout is also building a "partially funded" function to add to the tool, allowing it to work as a "gap" funder as well as funder of important project components that typically go un- or under-funded (i.e., monitoring and maintenance).

Oregon Trout recently put out an RFP for pilot projects. Brett passed around a handout of the project applications received to date. OT is also hiring a project manager to move projects

through in 2008. The 2008 StreamBank Pilot Project RFP is available from Oregon Trout and is also posted on-line at the Oregon Solutions StreamBank webpage.

Oregon Trout recently completed a case study of the three pilot projects completed in 2007 using StreamBank. To view the case study, visit: http://www.ortrout.org/streamBank.html Oregon Trout has raised $450,000 so far for the 2008 pilot projects and want to match it 1 to 1 with public funds (or vice versa).

It was noted that this private funding allows getting some projects done, but without public funding can we get to 20 pilot projects desired for 2008? The timeline is important because if you start late it is tough for a local entity to hire contractors and get the work done. The entities that have submitted projects feel certain that they can get their projects done this year. Oregon Trout expressed their desire for people to feel comfortable with the objectives of the StreamBank and expedited restoration permitting project so that 1) they agree with the tool and 2) they can invest.

V.   Framing the Next Steps

Opportunity with OWEB's to explore using the StreamBank tool for culvert replacement projects (funded with license plate funds). The criteria are contextual for fish passage in that all barriers downstream of a proposed project need to have been previously, or concurrently, addressed. Getting data on barriers is important (*Note: ODFW has not been able to secure the needed funding to complete converting disparate fish passage barrier datasets to a standard framework for a comprehensive, consistent dataset*). Ken Bierly's recommendation is to use StreamBank to develop culvert projects in a specific geographic area that has a consistent, comprehensive dataset (e.g. Umpqua or Siuslaw basins, Scappoose Bay) and therefore provide a better contextual basis for the trial. The OWEB Board would have to be comfortable with funding these areas but this is a possibility to work with OWEB. OWEB Board meets in May.

Jimmy Kagan – Oregon Explorer can assist with available data and getting information/data sets from ODFW. ODFW is required to report data on fish passage barriers.

Michael Tehan (OWEB Board member) discussed OWEB's ability to "write checks." The agency is limited by the legal requirements and systems in place. For this year's pilots it is difficult to fund.   StreamBank needs to go through the formal process.

Much discussion focused on the fact there are a finite number, but different, state and federal agency revenue streams for restoration projects in Oregon, each with different legislative roots, restrictions, applications deadlines, etc. How can the requirements and systems developed for each be plugged into the "fund of funds" system proposed with StreamBank? This is the very heart of the issue with this aspect of the StreamBank tool.

For this Oregon Solutions project, the focus of this team is to get to a place where we can select 20 projects by April in order to accomplish (fund and implement) these projects in 2008. This presents another opportunity to consider: Are there projects that have been funded by an agency (e.g. ODFW, OWEB, DEQ 319, NOAA, USFW) but do not have a local match? Maybe this is the right way to approach it. Especially with a short time frame.

StreamBank may be able to provide match with a requirement that the project sponsor use the StreamBank tool and provide feedback. Longer term: There is a value of StreamBank being a gap funder but that doesn't necessarily help the grant writer. The vision for StreamBank is to provide a broader systems' advantage through one-step data entry for funding applications, budgeting, permit application, project RFP, and reporting.

ODFW, OWEB offered to give feedback on the projects received from the RFP and also look at the flip side at gap funding projects. NOAA will look at the list too. They will lobby for salmon recovery projects. Then we can come back at the April 4 meeting with possibly 20 projects that will help further develop the tool.

Pam Wiley - Meyer Memorial Trust is considering how to structure and better coordinate restoration in the Willamette. They will be in a position to roll out plan in June. Partner with OWEB on a Strategic Investment Partnership (SIP). This Oregon Solutions process needs to identify the real issues and restraints with public funding to find a long term path forward together.

Megan Callahan–Grant – There needs to be value added focus. Regulatory streamlining is beneficial. The private/philanthropic world is mysterious to most folks. To provide some organized way to help identify the foundations that are interested in funding this type of restoration work, and how best to partner, would be beneficial. Attempts to funnel the requirements of a national program into a locally responsive program – there are some issues here. The NOAA Partnership with Ecotrust that is just starting. They will select specific projects. Applications for the Partnership program will open again in the fall of '09. StreamBank may want to apply.

Jeff Oveson – Noted disagreement with NOAA about the ESA priorities and getting good restoration projects on the ground, nature of the process for consultations. Regarding StreamBank, he supports getting to one shared format for grant funding proposals to cover "everyone's needs". Same for reporting. There should be one application and reporting form that can work for all entities.

Ken Bierly voiced support and felt that this can be done, particularly for OWEB, ODFW Restoration and Enhancement and DEQ 319 applications. Oregon Trout noted that this is StreamBank's intent, and is constructing the web tool with this approach in mind.

VI. <u>Permitting and Process Improvement</u>

The Oregon Solutions project objectives for 2008 are outlined in the StreamBank Objectives (February 2008 draft) handed out at the meeting. Section B. Advance Expedited Permitting lists the desire to have the 2008 pilot project move through an expedited permitting process. This is an opportunity for permitters to work through a pilot approach as to how expediting would be done for other simple or common restoration activities that were not covered by the new GA and RGP for large wood / boulder placement projects.

DSL is aligning its electronic permitting initiative with StreamBank for expediting permits for restoration. Kevin Herkamp is the lead on this effort. Efforts are starting with the low

hanging fruit to benefit restoration projects yet they are intended to provide benefit for other types of restoration projects also. Working with the USACE to find complimentary efforts to expedite restoration project permits.

DSL will make available their Strategy for E-permitting and Process Improvements. They have identified the development of a mapping tool that provides information and maps to the landowner up front as a key product. This will help identify potential hurdles to overcome for a landowner's permit applications and improve application quality and agency review. DSL is also tracking the need for assistance with Cultural Resources reviews. Discussions are taking place with the State Historic Preservation Office. They have also identified working with OWEB on a common reporting form for permitted restoration projects as an important step to reduce duplication.

Kevin Herkamp noted he is working on EPA funds and at this point the funds extend his work until around July 2009. He hopes to make important steps now and but it's not certain what will happen after that. The DSL 2007-09 recommended budget included a request for funds for e permitting work. The request was not approved by the Legislature.