Appendix E: Technical Evaluation Worksheets

PRIVATE FOREST ACCORD

GRANT PROGRAM

Regional Review Team (RRT) Evaluation Questions

All RRTs review submitted proposals and provide comments and feedback in the Areas below:

- **Area 1: Clarity of the Proposal**
  - The project clearly identifies a problem with a clear and appropriate solution.
  - The project clearly states needs, outcomes, and methods/tools/actions to accomplish
  - the deliverables.
  - The project budget is and costs are defined, justified, and relevant to the project.
  - Planning, implementation, reporting and evaluation periods are clearly defined.

- **Area 2: Technical Soundness**
  - The project proposes reasonable and logical science-based solutions.
  - The project has considered, obtained, or plans to obtain any permits or engineering.
    drawing needs.
  - The project can be implemented as designed within the timeframe and budget. proposed.
  - The scope, scale of impact and potential benefit to the covered species(s) is commensurate and favorable to the overall budget and funding request from the PFA Fund.

- **Area 3: Watershed Context**
  - The project addresses watershed function and ecosystem processes.
  - The project addresses limiting factors for the HCP covered species.
  - The project considers its relative context with respect to other restoration efforts or species recovery plans in the watershed such as the Oregon Conservation Plan or other regional guiding document(s).
  - The project demonstrates community support.
  - The project is designed in such a way as to minimize any short and long-term impacts to other native species.
  - The project accounts for general restoration requirements during the proposed work periods (i.e., permit needs, sensitive species needs, in-water work periods, seasonality, etc.).

- **Area 4: Capacity of the Applicant**
  - The applicant provides examples of past work and skills that demonstrate the project team can complete the proposed work.
  - The applicant has the capacity for carrying out the project.

- The applicant described the staff on the project with a short qualification description of each supporting staff.

- **Area 5: Alignment with Private Forest Accord Priorities**
  - The project clearly aligns with the PFA Mitigation Grant Fund priorities.
  - The project demonstrates a conservation benefit to one or more of the HCP Covered Species.
  - Anticipated outcomes for HCP covered species and habitat are clearly identified.
  - The scope, scale of impact, and potential benefit to the covered species(s) are supported.

Private Forest Accord Advisory Committee Scoring Matrix

Criteria Category	Criteria Descriptor	Max Score	Scoring Considerations
Project Match	If match is provided, they receive 1 point	1	Match of any kind provided is eligible and must be awarded 1 point if provided in the application.
Applicant Capacity	Demonstrated capacity	4	Applicant capacity refers to an individual's, organization's, or community's ability/capacity to successfully carry out the proposed activities or responsibilities outlined. A top proposal will include adequate staff assigned and hours predicted, you may also reference the applicant capacity question to learn about project staff and their qualifications. For water projects, consider experience with the Oregon Water Resources Department (OWRD) or other agencies, and ability to manage legal, financial, and reporting requirements. For land transaction conservation easement projects, evaluate the applicant's experience with real estate transactions, land trust accreditation, long term stewardship capacity, and legal defense capabilities.
Clarity of the proposal	Well Presented, Organized, Clear Deliverables and Budget	5	A top proposal would exhibit clarity and organization. Concise sentences and minimal grammatical/spelling errors. It demonstrates a logical flow with relevant information grouped by category (background, methods, objectives, etc.). The proposal effectively articulates the project's needs, desired outcomes, and the specific methods, tools, and actions necessary to achieve its deliverables. Overall, the proposal paints a compelling picture of a well-designed and well-planned project. For water projects, confirm clear description of water right(s), transaction structure, flow benefit, and measurable outcomes. For all projects, a strong proposal will include a well-justified budget and transparent cost estimates.. For land transaction and conservation easement projects, confirm clear description of property boundaries, acreage, easement terms, baseline documentation, transaction structure, and durable conservation outcomes.
Technical Soundness	Feasibility and scientific merit of a proposed project's methodology	5	This category refers to the feasibility and scientific merit of a proposed project's methodology, design, data collection, analysis, and interpretation. A top proposal demonstrates a technically sound well-conceived and feasible plan, based on sound scientific principles and conducted by a qualified team with adequate resources. For water projects, include landowner willingness, due diligence completion, and ability to close within required timelines, escrow, and closing. Has the water project demonstrated completeness of documentation (title reports, OWRD forms, transfer applications) and readiness to meet regulatory standards. For land transaction and conservation easement projects, include landowner willingness, completion of preliminary due diligence (title search, environmental hazard assessment, appraisal), clear timeline for closing, and readiness.
Quantitative Metrics and Measurability	Clear plan for tracking progress and demonstrating impact	5	Strong proposals leverage robust quantitative, or qualitative, metrics, offering data-driven proof of progress and justifying resource allocation while demonstrating impact. For water projects, review clarity of flow monitoring, OWRD compliance, and reporting approach. Did the water project submit a monitoring plan? For land transaction and conservation easement projects, review the draft property management plan, enforcement protocols, baseline data collection, and metrics defining protected habitat acreage or stream miles for HCP covered species.
Cost Effectiveness	Projects that maximize the use of funds to achieve the stated outcomes & reasonable administrative costs	5	A top proposal would be have a budget that demonstrably aligns with the anticipated deliverables. Both the direct costs associated with methods, equipment, and staff time, and the indirect administrative costs, have been carefully determined and are deemed sufficient to support the successful execution of the project. This proposal reflects a demonstrated understanding of the resource requirements specific to the requesting organization's type, size, and unique needs. For water projects, assess the strength of cost justification (comparable, third-party valuations, unit-cost metrics). High scores reflect well-supported, market-consistent valuations and strong justification of public investment. For land transaction and conservation easement projects, assess the strength of cost justification through appraisals, standard land valuation metrics, any stewardship endowment calculations, and reasonable transaction fees.

Alignment with Conservation or Recovery Plans	Alignment with a Recovery Plan or 5-year status review	10	Top proposals demonstrate a direct link or fulfillment of a priority, goal, or limiting factor identified in a state or federal conservation or recovery plan for the targeted PFA covered species. Specific sections of those conservation/recovery plans are referenced in the project proposal, and the project's purpose, activities, and deliverables clearly address the species' and habitat needs or set the stage for further actions that align with conservation/recovery plans. For water projects, prioritize locations in flow-limited priority basins or those addressing limiting factors for covered species. **E**valuate how the proposed water transaction increases instream flow, addresses limiting factors, supports aquatic species life stages, improves water quality, and enhances climate resilience. Does the project align with ODFW Statewide Flow Restoration Prioritization? For land transaction and conservation easement projects, review if the easement is located within priority conservation areas, critical habitat corridors, or regions identified as essential for HCP covered species recovery and climate resilience.
Alignment with PFA Priorities	Aligns with one or more of the PFA major categories of mitigation measures identified in the Grant Guidelines.	10	A top proposal will align with one or more of the PFA major categories of success. These categories being: 1. Restoring degraded habitat to natural condition/function or a condition likely to improve climate resiliency. 2. Habitat enhancement. 3. Reducing or eliminating threats to HPC-covered species. 4. Creating new habitats or new populations. 5. Translocating affected individuals or family groups to establish new or augment existing populations. 6. Translocating species to enhanced or formerly occupied and still suitable habitat.
	Max Points Possible	**45**	