

Oregon Conservation and Recreation Fund (OCRF) Project Scoring Criteria Template  
and Expenditure Framework

Criteria	Score	Scoring Considerations		Notes
<p><b>(1) Clarity of the proposal</b></p> <p><i>(Out of 6 points)</i></p>		<p><b>Well Presented</b></p>	<p><i>Project is written clearly, with concise sentences, and contains few grammatical/spelling errors.</i></p>	
		<p><b>Organized</b></p>	<p><i>Project has a logical flow with relevant information located together (e.g., background, methods, objectives, etc.)</i></p>	
		<p><b>Clear Deliverables</b></p>	<p><i>Project clearly states needs, outcomes, and methods/tools/actions to accomplish the deliverables.</i></p>	
		<p><b>Clear Budget</b></p>	<p><i>Project costs are defined, justified, and are relevant to the project deliverables.</i></p>	
<p><b>(2) Cost efficiency of the proposed actions</b></p> <p><i>(Out of 6 points)</i></p>		<p><b>Projects that maximize the use of funds to achieve the stated outcomes</b></p>	<p><i>Project costs are sufficient to meet project deliverables and proposed methods/equipment/staff time.</i></p>	
		<p><b>Reasonable application of administrative costs</b></p>	<p><i>Administrative costs are justified based on the type, size, and needs of the requesting organization.</i></p>	
<p><b>(3) Timeliness and/or have the necessary approvals in place</b></p> <p><i>(Out of 6 points)</i></p>		<p><b>Projects that will be implemented quickly</b></p>	<p><i>Projects length is designed to be on the timeline of roughly no longer 1-3 years – if longer length is justified</i></p> <p><i>Projects schedules or order of deliverables are logical and sequential for needs.</i></p>	
		<p><b>Projects have necessary approvals in place</b></p>	<p><i>This could include, but are not limited to, collection permits, access permits, transport permits, building permits, land leases, etc.</i></p> <p><i>If no permits are required, applicant needs to clearly state this within their proposal.</i></p>	

Criteria	Score	Scoring Considerations		Notes
<p><b>(4) Outdoor Equity</b></p> <p><i>(Out of 6 points)</i></p>		<p>Projects engages Oregonians in the solution to a key conservation issue or in recreational opportunities</p>		
		<p>Projects reach out to and engage people who have not participated in the past because of language barriers, financial barriers, access barriers, etc.</p>		
		<p>Projects that seek robust engagement with individual youth or underserved individuals, especially projects that are led by traditionally underserved communities and groups.</p>		
		<p>Projects that seek to close gaps in equitable access to education and opportunities.</p>		
<p><b>(5) Impact or scale of the proposed actions</b></p> <p><i>(Out of 6 points)</i></p>		<p>Projects has high impact on participating individuals or the target species or habitat.</p>	<p><i>Community engagement is clearly defined in the proposal, including but not limited to, education, outreach, extension, services, etc.</i></p> <p><i>“Impact” on peoples served is described based on identified needs</i></p> <p><i>Outcomes for target species or habitat are clearly described in the proposal through metric such as number of species, number of individuals, areas of land, etc.</i></p> <p><i>“Impact” on species and habitat is described based on identified needs.</i></p>	
<p><b>(6) Applicant “track record”</b></p> <p><i>(Out of 3 points)</i></p>		<p><i>Applicant has provided examples of past completed work or needed skills that demonstrate the project team can complete currently proposed work.</i></p> <p><i>Applicant is known to their communities of practice or place; this can include but not limited to past work with ODFW, other regional resource managers, regional educational regroups and initiatives, local/regional community outreach programs, etc.</i></p>		

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<p><b>(7) Appropriate / demonstration of partner investment</b></p> <p><i>(Out of 6 points)</i></p>		<p><b>Project engages a variety of partners</b></p>	<p><i>Project partners are clearly described, including their roles, relationships, and impacts within their communities of practice and/or place.</i></p>	
			<p><i>Project partners are appropriate for the deliverables and/or geographic regions where work is proposed.</i></p>	
		<p><b>Engaging in, and providing funding for, joint projects of the department and the State Parks and Recreation Department or other state agencies as recommended by the Oregon Conservation and Recreation Advisory Committee.</b></p>		
		<p><b>Project shows commitment from participants</b></p>	<p><i>Project participants demonstrate commitment through allocation of resources, such as, but not limited to staff time, funding match, additional supplies/resources, etc.</i></p>	
		<p><b>Clear about what each partner has committed to the project</b></p>	<p><i>Project participant roles within the project are clearly defined through participation defining needs, achieving deliverables, and/or evaluating project success.</i></p>	
<p><b>(8) Measurability</b></p> <p><i>(Out of 6 points)</i></p>		<p><b>Project identified the ability to quantify the results of the project</b></p>	<p><i>Evaluation metric are clearly defined, either as quantitative (i.e., numbers) or qualitative (e.g., stories, changes in opinion) and justified by project deliverables.</i></p>	
			<p><i>Resources required for evaluations are described.</i></p>	
			<p><i>Timeline for evaluations are described and justified – this can fall outside the project/grant timeline.</i></p>	
			<p><i>Reporting of evaluations is clearly defined.</i></p>	

Criteria	Score	Scoring Considerations		Notes
<p data-bbox="109 224 344 324"><b>(9) Alignment with OCRF Program Priorities</b></p> <p data-bbox="155 376 365 516"><i>Intersection between Conservation and Recreation</i></p> <p data-bbox="109 626 336 659"><i>(Out of 30 points)</i></p>		<p data-bbox="583 224 823 321"><b>General Alignment – for Conservations OR Recreation</b></p>	<p data-bbox="856 224 1029 246">Conservation:</p> <ul data-bbox="907 256 1604 747" style="list-style-type: none"> <li data-bbox="907 256 1604 500">• Promoting the health of Oregon’s ecosystems and fish and wildlife species by implementing conservation programs and strategies identified in the Oregon Conservation Strategy, including conservation programs and strategies for the nearshore identified in the marine component of the Oregon Conservation Strategy;</li> <li data-bbox="907 506 1604 604">• Habitat restoration and improving habitat connectivity related to implementing the recommendations in the Oregon Conservation Strategy and evolving science.</li> <li data-bbox="907 610 1604 747">• Science, research, and monitoring directly related to implementing the recommendations in the Oregon Conservation Strategy, especially through community science activities.</li> </ul> <p data-bbox="856 795 999 818">Recreation:</p> <ul data-bbox="907 828 1604 1461" style="list-style-type: none"> <li data-bbox="907 828 1604 964">• Improving engagement of the public in wildlife watching, hunting and fishing opportunities and in other outdoor recreation opportunities related to and in support of healthy fish, wildlife and habitats</li> <li data-bbox="907 971 1604 1107">• Improving educational outreach and engagement of the public, including diverse and underserved communities, related to and in support of healthy fish, wildlife and habitats</li> <li data-bbox="907 1114 1604 1250">• Enhancement or restoration of trails and access to waterways in a way that preserves or enhances sensitive habitat or that resolves impacts related to informal or dispersed recreation in sensitive habitat.</li> <li data-bbox="907 1256 1604 1321">• Opportunities to engage and expand the number and diversity of Oregon’s outdoor users.</li> <li data-bbox="907 1328 1604 1393">• Opportunities to introduce Oregonians to wildlife-associated recreation.</li> <li data-bbox="907 1399 1604 1461">• Research, planning, or organizational capacity that supports responsible recreational opportunities.</li> </ul>	

Criteria	Score	Scoring Considerations		Notes
<p><b>(9) Alignment with OCRF Program Priorities</b></p> <p><i>Intersection between Conservation and Recreation</i></p> <p><b><u>(CONTINUED)</u></b></p>		<p><b>“Highest Priority” Areas</b></p>	<ul style="list-style-type: none"> <li>• Habitat restoration and improving habitat connectivity related to implementing the recommendations in the Oregon Conservation Strategy and evolving science.</li> <li>• Actions taken within Conservation Opportunity Areas as defined in the Oregon Conservation Strategy.</li> <li>• Projects related to ODFW’s Wildlife Priority Strategy Species List.</li> <li>• Projects that consider impacts of recreation on fish and wildlife habitat.</li> <li>• Projects that include education for users on the impacts of recreation on fish and wildlife habitat.</li> </ul>	
		<p><b>Intersection of Conservation and Recreation</b></p>	<p><i>Projects consider both conservation and recreation in their project assessment of needs, design/methods implementation, and/or evaluation/measurability.</i></p> <p><i>Projects consider how conservation and recreation can sometimes be at odds and propose project-based solutions alleviate this.</i></p>	
		<p><b>Connection to ODFW needs, missions, and recommendations</b></p>	<p><i>Consideration of ODFW staff reviews and how State and/or ODFW needs/priorities align with project deliverables.</i></p> <p><i>Consideration of ODFW staff review comments and questions relate to possible gaps in project design and/or community needs.</i></p>	

**Black text:** Denotes language and information that came directly from OCRF websites, expenditure frameworks, and other guiding public documents.

**Red text:** Provided by staff to provide additional context and considerations. This text was reviewed by the OCRF Advisory Committee on April 4<sup>th</sup> during the monthly OCRF meeting.

## Framework for Expenditures from the OCRF

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### Vision

The Oregon Conservation & Recreation Advisory Committee envisions an Oregon where native fish and wildlife populations thrive in healthy habitats across the state’s lands and waters and where all Oregonians realize their role in achieving this vision. To do so, the Advisory Committee supports robust conservation projects and projects to get people involved with Oregon’s fish, wildlife, wild places, and recreational opportunities to inspire their personal stewardship.

### Expenditures

The Conservation & Recreation Fund was created to grow the capacity of the Department of Fish and Wildlife to manage all of Oregon’s fish and wildlife species and to implement the Oregon Conservation Strategy and connect Oregonians to the outdoors. The Advisory Committee focuses on granting monies to ODFW, partners, and other organizations that can undertake projects that meet the intent of the Fund. The Advisory Committee solicits projects twice per year through a competitive process which is objectively judged through a set of established criteria.

The Committee offers funding opportunities every six months and may identify detailed and unique priorities for each funding round, but will always be guided by Oregon Revised Statute (ORS 496.273) and Oregon Administrative Law (OAR 635-098-0000 through 635-098-0060).

The Committee may use their discretion to support projects that align with OCRF priorities without a competitive process if the timelines or opportunities don't align with the routine process.

By statute and administrative rule, the activities for which the department may expend monies from the Oregon Conservation and Recreation Fund include, but are not limited to:

- (1) Promoting the health of Oregon's ecosystems and fish and wildlife species by implementing conservation programs and strategies identified in the Oregon Conservation Strategy, including conservation programs and strategies for the nearshore identified in the marine component of the Oregon Conservation Strategy;
- (2) Improving engagement of the public in wildlife watching, hunting and fishing opportunities and in other outdoor recreation opportunities related to and in support of healthy fish, wildlife and habitats;
- (3) Improving educational outreach and engagement of the public, including diverse and underserved communities, related to and in support of healthy fish, wildlife and habitats;
- (4) Engaging in, and providing funding for, joint projects of the department and the State Parks and Recreation Department or other state agencies as recommended by the Oregon Conservation and Recreation Advisory Committee; and
- (5) Other conservation, management, research, habitat improvement, enforcement, outdoor recreation or education activities.

**Other Expenditure Details:**

- There is no legal minimum or maximum limit on financial requests that can be made from the Fund, but the Committee may determine a maximum or minimum in each funding round.
- The Committee may consider accepting restricted donations on a case-by-case basis by evaluating proposals against existing program priorities and criteria. See 'Matching large, restricted donations' below for more details.

A portion of the state funds available in the Conservation & Recreation Fund are currently contingent on matching donations generated through [OregonIsAlive.org](https://oregonisalive.org) and the Department of Fish and Wildlife's Electronic Licensing System.

## Program Priorities for the OCRF

To be considered for funding, the funded elements of a project must be either Conservation and/or Recreation as defined below. Embedded within the mandate for the OCRF is a priority commitment to reach out and engage underserved people and communities who have not traditionally participated in conservation issues or outdoor recreation in the past due to various barriers and perceptions, including but not limited to ethnicity, race, language, gender, gender identity, sexual orientation, disabilities, and/or other cultural, religion and/or economic status, and other considerations as listed in the State of Oregon Equity Framework

[https://www.oregon.gov/gov/policy/Documents/EquityFrameworkCovid19\\_2020.pdf](https://www.oregon.gov/gov/policy/Documents/EquityFrameworkCovid19_2020.pdf).

The definition of Conservation for the purposes of the Oregon Conservation & Recreation Advisory Committee, is: ***Improving the health of Oregon’s ecosystems and populations of fish and wildlife species.***

For conservation projects, The Advisory Committee will prioritize:

- Habitat restoration and improving habitat connectivity related to implementing the recommendations in the Oregon Conservation Strategy and evolving science.
  - Highest priority will be given to actions taken within [Conservation Opportunity Areas](#) as defined in the Oregon Conservation Strategy.
- Science, research, and monitoring directly related to implementing the recommendations in the Oregon Conservation Strategy, especially through community science activities.
  - Highest priority will be given to projects related to [ODFW’s Wildlife Priority Strategy Species List](#)

The definition of Recreation for the purposes of the work of the Oregon Conservation & Recreation Advisory Committee, is: ***Any activity undertaken to enjoy, appreciate, or support fish, wildlife, and their habitats.***

The Advisory Committee encourages applicants to consider how their project aligns with Oregon’s Statewide Comprehensive Outdoor Recreation Plan (<https://www.oregon.gov/oprd/PRP/Pages/PLA-scorp.aspx>).

For recreation projects, The Advisory Committee will prioritize:

- Opportunities to engage and expand the number and diversity of Oregon’s outdoor users.
  - Highest priority will be given to projects that seek robust engagement with individual youth or underserved individuals, especially projects that are led by traditionally underserved communities and groups.
- Opportunities to introduce Oregonians to wildlife-associated recreation.
- Educational materials and opportunities related to responsible recreation, ecology, and wildlife conservation for kids and adults.
  - Highest priority will be given to projects that seek to close gaps in equitable access to education and opportunities.
- Research, planning, or organizational capacity that supports responsible recreational opportunities.
  - Highest priority will be given to projects that consider impacts of recreation on fish and wildlife habitat.
- Enhancement or restoration of trails and access to waterways in a way that preserves or enhances sensitive habitat or that resolves impacts related to informal or dispersed recreation in sensitive habitat.
  - Highest priority will be given to projects that include education for users on the impacts of recreation on fish and wildlife habitat.

The committee welcomes projects that combine conservation and recreation.



## Who Can Apply

Any public or private non-profit organization may request funds. Private non-profit organizations must have tax-exempt status under the IRS Code Section 501(c)(3). Businesses and individuals are not eligible to apply.

## Project Review Criteria

The Advisory Committee will evaluate proposals based on the criteria below.

- **Project outcomes align with OCRF Program Priorities identified in the [Expenditure Framework](#) and are consistent with the [Oregon Conservation Strategy](#)**
- **Clarity of the proposal** – well presented, organized and with clear deliverables. Clear budget.
- **Impact or scale of the proposed actions** – the Committee seeks projects that have high impact on participating individuals or the target species or habitat.
- **Cost efficiency of the proposed actions** – the Committee seeks projects that maximize the use of funds to achieve the stated outcomes and will consider the reasonable application of administrative costs
- **Timeliness and/or have the necessary approvals in place** – the Committee seeks projects that will be implemented quickly
- **Appropriate partnership and demonstration of partner investment** – project engages a variety of partners and shows commitment from participants and is clear about what each partner has committed to the project
- **Measurability** – the applicant has identified the ability to quantify the results of the project
- **Outdoor Equity** - How well projects engage Oregonians in the solution to a key conservation issue or in recreational opportunities that reach out to and engage people who have not participated in the past because of language barriers, financial barriers, access barriers, etc.
- **Addresses the types of diversity identified in the Portfolio Metrics (see below section)**

The Committee will also look favorably on proposals that demonstrate:

- Proven track record of applicant to achieve stated outcomes
- Integration/intersectionality between conservation and recreation

## Expenditure Portfolio Metrics

The Advisory Committee seeks to make multiple, diverse expenditures in each funding round. The below list is an informal characterization of the metrics the Committee will consider to ensure that the suite of projects they select are diverse enough to represent the breadth of work the Committee can support.

### Portfolio Metrics

- Diverse geography (east/west, north/south, urban/rural, [OCS ecoregions](#))
- Diverse taxonomically (fish, reptiles, amphibians, birds, mammals, invertebrates)
- Diverse representation of program priorities (see [Expenditure Framework](#))
- Diverse partners engaged & included in the overall portfolio
- Directly engages Oregonians in the solution to a key conservation issue or in recreational opportunities that reach out to and engage people who have not participated in the past because of language barriers, financial barriers, access barriers, etc.

## Measuring Success

The Committee recognizes the importance of both short- and long-term monitoring to evaluate project outcomes. Beyond the reporting that will be required by our successful applicants, the committee intends to allocate a minimum of 5% of funds to investigating, monitoring, and reporting on the success of our expenditures on a biennial basis. Both evidence-based and values-based metrics may be considered to measure the impact of our projects.

## OCRF Outdoor Equity Subcommittee- Statement of Purpose

The Oregon Conservation and Recreation Fund (OCRF) has a broad mandate to advance conservation issues and recreation projects in support of the Oregon Conservation Strategy for the benefit of all Oregonians. Embedded within the mandate for the OCRF is a priority commitment to reach out and engage underserved people and communities who have not traditionally participated in conservation issues or outdoor recreation in the past due to various barriers and perceptions, including but not limited to ethnicity, race, language, gender, gender identity, sexual orientation, disabilities, and/or other cultural, religion and/or economic status, and other considerations as listed in the State of Oregon Equity Framework

[https://www.oregon.gov/gov/policy/Documents/EquityFrameworkCovid19\\_2020.pdf](https://www.oregon.gov/gov/policy/Documents/EquityFrameworkCovid19_2020.pdf). The Advisory Committee further recognizes that these barriers will not be broken down coincidentally but rather need a focused and pursued endeavor sponsored by the Advisory Committee.

In support of this commitment, the Advisory Committee has established the “Outdoor Equity” subcommittee with the explicit purpose of reaching out and connecting with intentionality to people, communities and organizations that have not traditionally engaged in matters tied to ODFW’s Conservation Strategy. To this end, we are dedicating a significant portion of the available funds to this purpose, and will work with these audiences and stakeholders to identify and fund opportunities and projects that mutually support the interests, the intersection, and engagement of underserved communities in Oregon with the Conservation and Recreation Fund.

## Project Review and Funding Process

The time between the application deadline and when funds are available for approved projects is approximately five months.

## Annual Timeline

The Advisory Committee accepts applications twice per year. The general calendar is as follows:

- December – Application 1 open
- February – Application 1 deadline
- March– Staff review
- April/May – Committee review and recommendations
- June – Commission approval and funds available from Application 1
- July – Application 2 open
- September – Application 2 deadline
- October – Staff review
- November/December - Committee review and recommendations
- January - Commission approval and funds available from Application 2

## Submitting Proposals

OCRF applicants must review the Conservation & Recreation Advisory Committee’s Expenditure Framework. The Committee encourages applicants to pay particular attention to the list of Program Priorities and Committee Review Criteria. The Committee encourages all applicants to review the [Oregon Conservation Strategy](#) and be prepared to describe how your work aligns with the Strategy before completing your application.

Project proposals must be submitted using the digital form available on the [Committee’s website](#). A PDF copy of the form is also available. We encourage you to develop your responses in advance and complete the digital form all at once to avoid any issues with returning to the form once you’ve started. The Committee may request additional information from the applicants throughout the review process.

Questions can be referred to the Department of Fish and Wildlife via email: [odfw.ocrf@odfw.oregon.gov](mailto:odfw.ocrf@odfw.oregon.gov) or by phone: 971-719-1192.

## Matching large, restricted donations

The Oregon Conservation and Recreation Fund (OCRF) has been tasked with raising \$1.545 million dollars of private funds to help implement the Oregon Conservation Strategy and fulfill our broad mandate. Every dollar of non-state money deposited in the OCRF is matched with a dollar from the General Fund.

We have found that the possibility of general fund match for donations resonates well with individual Oregonian’s as well as larger entities and is a big part of our success. Several donations greater than \$10,000 have been received, with those donors being strongly motivated by the match. In discussions with those donors, as well as other potential large donors, it became clear that the OCRF could be even more effective in motivating donors with a modification of how we allocate general fund match. Those donors considering “restricted” donations (that is, donations intended for a specific project) have expressed a strong interest in having a portion of the anticipated future match being allocated back to that specific project. This leverages the donor’s gift not only to help achieve our overall goals but specifically to the project that motivated their restricted donation in the first place. It is clear that such a policy is a strong inducement for large donors to give to the OCRF.

The following is a framework to guide the Advisory Committee in incentivizing donors to give restricted donations greater than \$10,000.

1. At the donor’s request, any OCRF donation greater than or equal to \$10,000 that is restricted to a specific OCRF Project may be matched by the Advisory Committee if and when the state’s General Fund matching commitment is met.
2. The additional apportionment from the OCRF General Funds for an OCRF Project with a qualifying restricted donation will be 30% of the donation amount.
3. The Advisory Committee may accept such donations and make the match commitment for existing, Commission-approved OCRF Projects.
4. The Advisory Committee may also accept such restricted donations and make the match commitment for new OCRF Projects received at the invitation of the Advisory Committee.
  - a. New OCRF Projects will be evaluated by the Advisory Committee for consistency with the Expenditure Framework and existing OCRF Project review criteria.

## Determining eligibility of new projects with eligible match

The preferred approach is for all projects go through the standing project application deadlines, but the Advisory Committee can invite applications for review through the below process if the donor's timeline does not align with the Committee's timeline. This is most likely to happen for projects for which the Committee members believe large donations could be leveraged.

The Strategic Project Subcommittee, made up of four Advisory Committee members, is in place to assist with reviewing new projects. The below process is in place to address these opportunities:

1. Any Advisory Committee member can work with project proponents to surface potential projects.
2. The Advisory Committee member will summarize the project concept for the Strategic Project Subcommittee and the Subcommittee will decide if a full proposal should be solicited. The Subcommittee will consider:
  - a. Consistency with the OCRF program priorities and likelihood that the project will have a high impact on those priorities
  - b. Projects that, due to timing or other factors, are not able to access our usual solicitation process
  - c. Projects where there is considerable opportunity to incentivize large (>\$10,000) donations using general fund match.
3. If the Subcommittee agrees, a full proposal will be solicited from the project proponent.
4. The Subcommittee will score the proposal using the existing project criteria. The Subcommittee will also consider these factors:
  - a. Consistent with expenditure framework (Based on scoresheet)
  - b. Potential to leverage large donations (Subjective determination by the subcommittee)
  - c. Project is viable/well planned (Subjective determination by the subcommittee)
  - d. Consideration of ODFW staff review (informal)
5. The Subcommittee will make a consensus recommendation to the full Advisory Committee
6. The full Advisory Committee will take a yes/no vote based on the recommendation of the Subcommittee
7. If the project is recommended for approval, the Advisory Committee will seek Commission approval to fund the project.