

Request for Project  
Proposals March 8, 2016

2017  
Investment  
Plan

## CONTENTS

<b><u>PROGRAM OVERVIEW.....</u></b>	<b><u>3</u></b>	<b><u>AWARD ADMINISTRATION .....</u></b>	<b><u>16</u></b>
CONTACT INFORMATION .....	3	AWARD AND CONTRACT INFORMATION ....	16
PURPOSE OF THE REQUEST FOR PROPOSALS	3	<b><u>APPENDICES .....</u></b>	<b><u>17</u></b>
SCHEDULE AND IMPORTANT DATES .....	3	APPENDIX A: NEARSHORE PROJECT DATASITE AND HWS INSTRUCTIONS .....	17
ESRP NEARSHORE PROGRAM OBJECTIVES ...	4	APPENDIX B: ACQUISITION AND RESTORATION APPLICATION TEMPLATES ...	20
ESRP PROGRAM GUIDANCE.....	5	APPENDIX C: EVALUATION CRITERIA .....	30
<b><u>FUNDING OPPORTUNITIES .....</u></b>	<b><u>5</u></b>	APPENDIX D: LEARNING OBJECTIVES.....	34
ANTICIPATED FUNDING SOURCES.....	5	APPENDIX E: OTHER RESOURCES .....	36
AWARD AMOUNTS AND AWARD PERIOD ....	6		
PHASED PORTFOLIO FUNDING.....	6		
<b><u>ELIGIBILITY INFORMATION .....</u></b>	<b><u>6</u></b>		
ELIGIBLE APPLICANTS.....	6		
ELIGIBLE GEOGRAPHIES AND SCOPE .....	6		
MATCHING REQUIREMENTS .....	7		
<b><u>ACQUISITION AND RESTORATION</u></b>			
<b><u>PROPOSAL PROCESS.....</u></b>	<b><u>7</u></b>		
<b><u>PRE-PROPOSAL PROCESS.....</u></b>	<b><u>9</u></b>		
DEADLINE AND SUBMITTAL.....	9		
<b><u>FULL PROPOSAL PROCESS.....</u></b>	<b><u>11</u></b>		
DEADLINE AND SUBMITTAL.....	11		
FULL PROPOSAL APPLICATION REQUIREMENTS & FORMAT .....	11		
<b><u>PORTFOLIO PROCESS.....</u></b>	<b><u>15</u></b>		
DEADLINE AND SUBMITTAL.....	15		
PORTFOLIO APPLICATION REQUIREMENTS & FORMAT .....	15		
<b><u>INVESTMENT PLAN DEVELOPMENT .....</u></b>	<b><u>16</u></b>		
INTEGRATING RANKED PROJECT LISTS.....	16		
FINALIZING AN INVESTMENT PLAN.....	16		

## PROGRAM OVERVIEW

## CONTACT INFORMATION

Questions regarding this RFP should be directed towards:

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(360) 902-2969, [mike.ramsey@rco.wa.gov](mailto:mike.ramsey@rco.wa.gov) or

Tish Conway-Cranos, Nearshore Science Manager –Washington Department of Fish and Wildlife  
(360) 902-2603 [Tish.Conway-Cranos@dfw.wa.gov](mailto:Tish.Conway-Cranos@dfw.wa.gov)

## PURPOSE OF THE REQUEST FOR PROPOSALS

**The Estuary and Salmon Restoration Program is seeking project proposals for nearshore protection and restoration projects in Puget Sound.** Proposed project actions will be competitively evaluated based on assessment of completed project costs and benefits. A competitive review of proposals will result in a ranked project list. This ranked list along with funding recommendations will be the basis for ESRP's 2017 Investment Plan. A draft Investment Plan will be presented to the State Legislature in consideration of 2017-19 state appropriations.

## SCHEDULE AND IMPORTANT DATES

### ACQUISITION AND RESTORATION PROJECTS APPLICATION SCHEDULE

TASK	DATE	DESCRIPTION
RFP published	March 8	Request for proposals to ESRP mailing list and posted on website.
Register for Pre-application Site Visit	April 8	Last day to request a pre-application site visit. Contact <a href="mailto:amee.bahr@rco.wa.gov">amee.bahr@rco.wa.gov</a> to schedule your field visit.
Pre-application site visits	April 18- May 5	In-person site visits with members of the ESRP team. Not required but highly recommended.
Pre-proposals due	May 18	2-3 page simple pre-proposals to present the project overview and budget for ESRP team feedback and full proposal invitation.
Full proposals due	July 21, 11:59 PM	See application process steps and criteria. Proposals submitted via HWS/Nearshore Data Site and PRISM.
Presentations	August 22 – 26	Presentations by sponsors to technical evaluation team.
2017 ESRP Preliminary Investment Plan Submitted	September 12	Ranked project list and funding recommendations published and submitted OFM. Ranked list submitted to Governor in December.
Funding notification	TBD	Funding notification dependent upon final 2017-19 state budget. Funds available July 1, 2017

## ESRP NEARSHORE PROGRAM OBJECTIVES

The Estuary and Salmon Restoration Program (ESRP) is housed within the Washington Department of Fish and Wildlife (WDFW) and is jointly administered by the Recreation and Conservation Office (RCO) which functions as ESRP's fiscal agent. The mission of the ESRP is to **restore the natural processes that create and sustain the Puget Sound nearshore ecosystem**. We seek exemplary projects of regional importance that either: 1) provide substantial and cost effective nearshore ecosystem restoration or protection of ecosystem functions, goods, and services, or 2) advance learning about cutting-edge ecosystem restoration tactics and strategies for the purpose of increasing efficiency and effectiveness of future restoration. Our work is centered on the scientific principles and ecosystem restoration strategies developed by the [Puget Sound Nearshore Ecosystem Restoration Project](#) (PSNERP).

### PROTECTING AND RESTORING NEARSHORE ECOSYSTEM PROCESSES

The nearshore ecosystem of Puget Sound is a dynamic environment strongly shaped by physical and ecological processes. PSNERP guidance suggests that projects designed to protect and restore the ecosystem processes that shape and maintain nearshore structure will result in self-sustaining improvements in ecosystem functions, goods, and services, thereby justifying our capital investments in nearshore ecosystem projects. The broad restoration [objectives](#) identified by PSNERP and used by ESRP include:

1. Restore the size and quality of large river delta estuaries and the nearshore processes deltas support.
2. Restore the number and quality of coastal embayments.
3. Restore the size and quality of beaches and bluffs.
4. Increase understanding of natural process restoration in order to improve effectiveness of program actions.

The most competitive ESRP proposals will be those that employ [management measures](#) that can most fully address the source of degradation of these natural processes or that are focused on protection of intact areas.

### LEARNING AND ADAPTIVE MANAGEMENT (RFP released separately in March 2016)

**Regional Feasibility and Predesign Projects** (learning projects) are necessary to support restoration of large and complex ecosystems subject to multiple projects, or to improve effectiveness or efficiency of a class of projects where there is uncertainty about ecological outcomes. This component of ESRP's investment strategy aims to clearly identify the need/problems to be addressed that will influence restoration and protection project development and selection in Puget Sound. ESRP learning projects will provide insight and analysis into the options available to solve complex problems leading to nearshore and salmon recovery in Puget Sound's nearshore. We intend to fund efforts that use scientific methods during the 2017-2019 biennium to increase the efficiency and effectiveness of future ESRP program investments. ESRP's learning project program is required by our authorizing program guidance, developed by the Puget Sound Nearshore and Ecosystem Restoration Project (PSNERP).

Strong learning projects improve our ability to select treatment locations and management measures, and help designers evaluate the consequences of alternative actions. We organize our learning by landform to consider the unique dynamics of delta, beach and embayment ecosystems. Examples of past learning project include development of design goals for delta channel formation and evaluation of how tide gate function affects estuarine fish passage. Projects that require more than a biennium to achieve strong results should be proposed, but must compete with shorter duration efforts based on importance and applicability.

Learning projects have constituted approximately 10% of our biennial ESRP project portfolio. We anticipate that up to \$2,000,000 will be available for learning project investments over the 2017-19 biennium, depending on final appropriations and proposals.

## ESRP PROGRAM GUIDANCE

In addition to the information contained in this RFP, additional program information can be found at the [Estuary and Salmon Restoration Program](#) and [PSNERP](#) web pages. Available materials summarize our current understanding of the important processes and functions of the nearshore ecosystem as well as restoration and protection strategies.

Another relevant source of information is the 2012 ESRP Strategy and Guidance Report ([ESRP Guidance](#)), though this RFP contains the most up to date policy guidance specifically related to grant competition requirements. The Guidance provides additional program context, a thorough description of the ESRP funded project lifecycle, numerous technical resources, contracting information, and references to other online sources of information that can be relevant for proposal development. ESRP Strategy and Guidance Report content particularly relevant to this RFP and development of the 2017 Investment Plan include the following:

- ESRP stewardship and learning strategies
- Strategies for nearshore ecosystem restoration and protection
- PSNERP objectives and target ecological processes
- A definition of what constitutes a ‘project’ and status categories and associated evidence of readiness
- PSNERP Management Measures and shoreline classification

## FUNDING OPPORTUNITIES

### ANTICIPATED FUNDING SOURCES

#### STATE FUNDING

This RFP will be used to develop the 2017 ESRP Investment Plan containing a ranked project list and funding recommendations. This spending plan will be used to direct 2017-19 state capital appropriations to sound conservation investments in Puget Sound. ESRP anticipates a \$20 million request for the biennium.

#### FUNDING PARTNERSHIPS

Establishing Awards for Funding Partnerships - The 2017 Investment Plan process and the resultant ranked project list can be used to identify opportunities with other state and federal partnership funding mechanisms (e.g., NOAA, PSAR, FEMA, and EPA) as part of a coordinated investment strategy. Funding has been distributed in previous years to ESRP projects where other funding programs, core criteria, and project outcomes are in alignment.

#### OTHER 2016 ESRP FUNDING OPPORTUNITIES

The Estuary and Salmon Restoration Program (ESRP) Learning Program will release a call for proposals in March of 2016. This process produces our prioritized investment plan for **Regional Feasibility and Predesign Projects**, and typically accounts for 10% of our biennial appropriation request. ESRP is also currently developing a pilot program for small grant funding, which will have a \$500,000 funding cap for the entire program. WDFW will release that RFP opportunity if and when it becomes available.

## AWARD AMOUNTS AND AWARD PERIOD

There is no maximum or minimum funding limit for proposed projects. Previous awards have ranged from \$25,000 to \$2,600,000, with average requests from \$200,000 - \$400,000. Final award amount and scope may differ from proposed amounts, and will reflect a thorough evaluation of investment plan alternatives, and a project sponsor's readiness to complete work in the award period.

Project awards are for work to be completed between July 1, 2017 and June 30, 2019.

## PHASED PORTFOLIO FUNDING

Contact the [ESRP Program Manager](#) to confirm if your project is part of ESRP's Portfolio Project list.

ESRP provides awards for project activities that can be completed within a 2-year time frame as aligned with our biennial budget cycle. However, we recognize that many projects require years and multiple phases for completion. To support phased funding, ESRP has developed a streamlined application or "portfolio" process for projects that: 1) have completed feasibility tasks AND have won an award in a previous ESRP grant competition, and 2) have not substantively altered project scope. Portfolio projects may apply for supplemental funds without preparing a full competitive application. ***Portfolio project proposals do not have to compete in the full technical review process, but instead are evaluated and ranked by ESRP staff.***

Please [contact the ESRP Manager to determine your eligibility status of your project in our Portfolio process](#). Proposals for portfolio projects must be received by the same application due date as all other project applications (see above schedule and timeline).

## ELIGIBILITY INFORMATION

### ELIGIBLE APPLICANTS

Applicants may be state, federal, local, or tribal agencies, non-governmental or pseudo-governmental organizations, and private or public corporations.

### ELIGIBLE GEOGRAPHIES AND SCOPE

#### BASIC ESRP ELIGIBILITY

1. Within Puget Sound (East of Cape Flattery)
2. The proposed project need must be identified by PSNERP, a salmon recovery Lead Entity or Marine Resource Committee, and listed in a watershed, current salmon recovery, or nearshore habitat restoration or protection plan.
3. The primary purpose of the project must be to restore or protect Puget Sound nearshore ecosystem

processes or functions.

4. Projects with the primary objective of providing recreational access, or remediating chemical contamination are not eligible as stand-alone projects; however these activities may be eligible components of larger efforts.
5. Projects awards will not be provided for work that relieves obligatory compensation or mitigation requirements incurred by the sponsor or a third-party, as determined by the Puget Sound Nearshore Ecosystem Restoration Project or WDFW. Funding, however, may be provided for actions associated with compensation or mitigation, if those elements are above and beyond the mitigation requirements and can be easily isolated from the required mitigation activities.
6. A proposal must have a corresponding record in the [Puget Sound Nearshore Projects Data Site](#) (Nearshore Data Site) or in [Habitat Work Schedule](#) (HWS). Instructions for entering or updating project records in these systems can be found in [Appendix A](#). **It is strongly recommended to create a NDS or a HWS record for your project well before the grant application deadline.**

## MATCHING REQUIREMENTS

ESRP requires that projects provide a match of cash or in-kind services equaling 30% of the total project cost. This match must be incurred according to RCO policies. Some of this match must be non- state funds. Match requirements are typically consistent with RCO-SRFB definitions; however, match eligibility will be determined on a case-by-case basis.

## ACQUISITION AND RESTORATION PROPOSAL PROCESS

Proposals are expected to provide accurate and precise information about predicted project benefits and costs. ESRP uses a competitive peer-reviewed ranking process to compare the costs and benefits of projects. Review procedures are intended to evaluate anticipated whole project value. Applicants are strongly encouraged to present their project as a cohesive and complete restoration or protection action. Evaluation will result in definition of a 'whole project scope' consistent with ESRP project scoping guidelines (see ESRP Guidance), and a proposed funding level and scope of work. *Learning projects will be evaluated using criteria created specifically for this category of projects.*

### Review Opportunity 1. Pre-application site visits

ESRP is offering optional pre-application site visits with ESRP staff. **These will be scheduled between April 18 and May 5<sup>th</sup>, 2016.** Participation is strongly encouraged. Project sponsors are asked to schedule site visits by April 8, 2015 (please email Ameer Bahr [amee.bahr@rcow.wa.gov](mailto:amee.bahr@rcow.wa.gov) to schedule) so that ESRP staff can develop a site visit plan. Any requests received after April 8 will be accommodated on a space-available basis. The site visit schedule will be finalized ASAP so that project sponsors can manage any necessary site visit logistics.

The pre-application site visit is an opportunity for project sponsors to have an early dialogue with ESRP staff and technical advisors about the project that will lead to a more robust grant application package. These site visits will consist of between one and five ESRP staff and representatives and any local representatives the project sponsor chooses. The information collected during the site visit can help with the technical review team's ability to

understand all the components of a project needed for the application review.

The ESRP Implementation Team will use information collected during the optional pre-application site visits (April 18 – May 5) to note highlights about projects for the technical team review. Some common “red flag” notations by the ESRP Implementation Team may include the following:

- *Ideal for ESRP or consider other more appropriate funding source ...*  
encourage funding by ESRP or a more appropriate source, better aligned with project goals
- *Ready to proceed or not ready...*  
if “not ready” comment is noted it is for projects with design or feasibility issues that are anticipated to strongly affect ecosystem benefits or implementation timing that cannot be expediently resolved through contract negotiation.
- *Process based or not process-based ...*  
project is or is not consistent with process-based approach to restoration.

The project sponsors and ESRP implementation team will be able to discuss any important considerations that are revealed during the site visit that can be addressed in the pre-application and final submission of grant application materials. This will provide a more clear and robust proposal.

**Sign up at for pre-application site visits with:** Ameer Bahr [amee.bahr@rcow.wa.gov](mailto:amee.bahr@rcow.wa.gov).

## **Review Opportunity 2. Pre-proposal Materials: Deadline May 18, 2016**

The ESRP team will review and evaluate pre-application materials looking for “red flags” that have not been addressed during the pre-application site visit. Any projects that have not addressed these concerns will not be invited to submit a full proposal. ESRP will also have our WDFW engineering team review any projects that will be considering design or construction funding. The WDFW engineering team will provide project sponsors that receive that evaluation with constructive comments that can be used in the final proposal. **Proposals that have not adequately addressed any “red flag” concerns will not be invited to submit a full proposal.**

## **Review Opportunity 3. Full Application Materials: Deadline July 21, 2016**

Applicants invited to submit a full proposal will be notified after the pre-proposal process. Proposal material will be evaluated by the ESRP technical evaluation team using the relevant ESRP criteria provided in [Appendix B](#). A ranked list will be developed based on reviewer scores. Once the list is developed there will be no changes to the project ranking, although funding award recommendations may differ from requested amounts.

## **Review Opportunity 4. Sponsor Presentations: August 22 – 26, 2016**

Project sponsors will have the opportunity to present their project to our ESRP technical review panel in person or via WebEx (prefer in-person). The technical review team will use this time to gain a better understanding of the proposed project and ask the applicant clarifying questions that may help them in their review and scoring. Final scores will be due from reviewers after all presentations are complete.

## PRE-PROPOSAL PROCESS

**Pre-proposal Due Date:** by midnight May 18, 2016

**Requirements:** All new projects are required to submit pre-proposals. Portfolio projects are not required to submit pre-proposals.

**Submittal Process:** Pre-proposals and any accompanying documents must be submitted into PRISM by creating a project link through Habitat Work Schedule or the Nearshore Data Site (see below). Proposals received after this time or not in the described format may not be considered for competition.

## DEADLINE AND SUBMITTAL

ESRP requires the following minimum level of information entered or attached into PRISM Online for pre-proposal review.

**Once you have received your PRISM number through the Habitat Work Schedule, complete the PRISM application “Project Details,” “Metrics,” and “Costs” screens through the [PRISM Online Application Wizard](#).**

A complete pre-proposal includes a narrative that is **no more than 3 pages** and other supporting maps, budget, and attachments. Additional detail on contents and format for application materials is provided below.

**1. Project Narrative – 3 pages** Please use the following template for the pre-proposal narrative:

- **Project Summary** (1-2 paragraphs). Provide a summary of what you intend to accomplish with your project.
- **Criteria for Ecological Importance and Project Benefits** – Find the PSNERP Process Unit number for your project site ([turn on PSNERP layer](#) and you can find the “site” number navigating to your project location on the map). Using the [PSNERP Strategies Report](#), indicate the actions recommendation for that site, a description of the primary ecological processes your project will address and the extent to which your project will protect or restore processes at the site. The PSNERP site number will provide you with the ability to search the PSNERP Strategies Report (using the “find feature”) for site-level supporting information. Provide supplemental information you have as needed for your project site as it relates to the PSNERP strategy for that process unit.
- **Technical merit and readiness** - Describe the full scope of your project and how your project will be ready to move forward if funded. For construction projects, please itemize (at a high level) the actions or management measures to be completed, including quantitative estimates where possible. Identify how the proposed actions advance and are consistent with regional recovery actions (e.g. PSNERP strategy recommendations, Action Agenda).

**2. Attach a project location or vicinity map.** For acquisitions, the map should depict the project site as well as lands in the vicinity owned publicly or having protection status. Maps should show nearby towns and major roads.

**3. Attach a detailed site or parcel map.**

4. **Attach site or aerial photographs**, if available.
5. **Attach design plans or sketches** that clearly convey the intent of the proposed restoration project. Applicants should provide all available, relevant design information (detailed construction plans, specifications, planting plans, and design reports). Grant applicants with minimal available information should include example photographs, designs, and conceptual sketches to convey their intents.
6. **Attach a draft cost estimate:** Please provide a cost estimate to supplement the general cost information required by PRISM. You may create your own budget format for this proposal stage. Because of the level of detail required in estimates in PRISM Online for acquisition projects, a separate cost estimate is not required.
7. **Initiate consultation with Washington Department of Natural Resources and/or Fish and Wildlife:** Applicants with restoration or design projects that include shoreline, in-water work, over-water work, or public water access should contact the Washington Department of Natural Resources in the draft application process to determine whether their projects are on state-owned aquatic lands, which could affect project scoping.

[See the map](#) to find the contact information for the department's aquatics land manager in your area, or call the department at (360) 902-1100. See [Grant Projects on State Owned Aquatic Lands](#) for more information on managing projects that are on state-owned aquatic lands.

If you are proposing to do work on Washington Department of Fish and Wildlife (WDFW) lands, you are required to initiate a request through WDFW's Restoration Pathways process. Contact your [local WDFW Habitat Biologist](#) or Area Manager for more information.

Additional details and requirements can be found in [Appendix C](#). For a complete set of ESRP's learning objectives see [Appendix D](#).

## FULL PROPOSAL PROCESS

### DEADLINE AND SUBMITTAL

**Proposal Due Date:** Midnight July 21, 2016. Proposals received after this time may not be considered.

**Requirements:** Applicants must submit their proposal through [PRISM Online](#) and also have a record for their project in either the [Nearshore Data Site](#) or Habitat Work Schedule.

**Application Submittal:** Proposals may be submitted beginning March 8, 2016 and must be submitted by July 21, 2016 through the PRISM online application process.

**Nearshore Data Site or Habitat Work Schedule (HWS):** Applicants submitting proposals will be required to also have a project entry in the Nearshore Data Site or HWS and a completed “contract link” to PRISM. We encourage applicants to add or update existing records on those sites as soon as possible using instructions in [Appendix A](#).

**PRISM:** The ESRP grant application process will be managed by [PRISM Online](#). Instructions are provided online via a PRISM “grant application wizard” that will walk applicants through the application process.

#### Questions/Assistance:

- For technical questions of issues with Habitat Work Schedule, contact Meg O’Leary ([meg.oleary@rco.wa.gov](mailto:meg.oleary@rco.wa.gov)) or Kiri Kreamer ([kiri.kreamer@gsro.wa.gov](mailto:kiri.kreamer@gsro.wa.gov))
- For technical questions or issues with PRISM, contact Scott Chapman ([scott.chapman@rco.wa.gov](mailto:scott.chapman@rco.wa.gov)).
- For questions about application requirements, contact Mike Ramsey ([mike.ramsey@rco.wa.gov](mailto:mike.ramsey@rco.wa.gov)) or Jay Krienitz ([jay.krienitz@dfw.wa.gov](mailto:jay.krienitz@dfw.wa.gov)).
- If you need a PRISM User Account or need access to PRISM Online, go to RCO’s web site at: [http://www.rco.wa.gov/prism\\_app/about\\_prism.shtml](http://www.rco.wa.gov/prism_app/about_prism.shtml).

## FULL PROPOSAL APPLICATION REQUIREMENTS & FORMAT

**Items #1-5 will be document attachments submitted through [PRISM Online](#). Templates are provided for each of these on [ESRP’s website](#) and referenced in [Appendix B](#) as part of this RFP.**

### 1) FULL PROPOSAL BUDGET WORKSHEET (Excel file)

Applicants must complete and submit ESRP’s “whole budget worksheet” that presents whole project costs defined by project tasks (e.g., feasibility, design, and construction) and by object class (e.g., salaries, supplies, contract expenses). The worksheet must be supported by the budget narrative and/or other supporting materials that justify task costs. Project funding is typically limited to what sponsors can commit to accomplish within a 2 year award period, with the understanding that the initial award may be amended to include additional tasks. It is understood that the whole project costs are estimates and exact amounts defined at the contract stages. Since this is an Excel-format document, a separate file for you to complete will be included with distribution of the RFP. The following budget categories apply:

- **'Personnel'** refers to wages and salaries for staff engaged in project implementation. Narrative should break down costs by staff type, by rates, and hours. Identify project roles for whom a curriculum vitae or resume has been provided. Only include support staff if their time is not being considered for calculation of an indirect rate.
- **'Fringe Benefits'** are those costs employers incur for providing a package of benefits beyond salary or wages, and can be described as a percentage of wage costs.
- The description of **'Travel'** should include the method used to calculate travel costs. (e.g., mileage rate; estimated miles traveled).
- **'Equipment'** includes items with a value greater than \$5,000, as well as 'inventoriable items' with a value greater than \$300, including: vehicles, engines, licensed equipment, chain saws, space heaters, communications equipment, GPS units, optical devices and cameras, projectors, computers, and audio/video equipment. Please provide an itemized list of equipment.
- **'Supplies'** are material costs that are not equipment. Please describe quantities and unit costs of supplies.
- **'Contractual'** Individual contracts should be itemized with a brief description of scope, the basis for the estimate (i.e. engineers estimate, firm fixed bid, etc.) and the status of the contract (bid documents prepared, RFP released, etc.) Where labor costs are fixed and fully loaded (like a conservation corps crew day) they could be included as contractual costs.
- **'Land'** refers to costs of real property, as based on appraisal or estimated costs of specifically identified parcels.
- **'Other'** costs should be described by the nature of the expense and the method of estimation.
- **'Indirect'** costs are not eligible for funding or as match contribution.

## 2) VISUAL SCOPE OF WORK (Image/JPEG)

The visual scope of work is a map that clearly articulates the present and future vision for the project site. Create the map to the best of your abilities using available resources (e.g., GIS, desktop publishing software, aerial imagery with hand-drawn markups, etc.). Washington Department of Ecology oblique [aerial photos](#) can be useful for this exercise. The visual scope of work does not need to be professional quality, but whatever best creates a visual demonstration of the vision for the project. Do not submit formal design documents unless they are **1-2 pages at most** and fulfill the criteria stated here.

To fulfill state requirements, maps must show the geographic areas where a project may change directly or indirectly the character or use of land. This information is used to assess where a project may affect historic properties or archaeological resources. The map must include a polygon of the entire project area and should show location-identifying features (such as section, township and range). For most projects a topographic or aerial photo base map is most appropriate.

## 3) LANDOWNER ACKNOWLEDGEMENT (Fillable PDF)

Complete the landowner acknowledgement form provided and demonstrate that all affected landowners are aware of the project and supportive of the application (in cases where the landowner is not also the applicant.) If there is landowner conflict or uncertainties to the project proposal, please provide rationale and how project sponsor proposes to manage that circumstance.

**Special Note:** If you are proposing to do work on Washington Department of Fish and Wildlife (WDFW) lands, you are required to initiate a request through WDFW's Restoration Pathways process. Contact your [local WDFW Habitat Biologist](#) or Area Manager for more information.

4) **FULL PROPOSAL NARRATIVE (5,000 words or less)** -See [Appendix B](#) for details (Fillable PDF)

a. **Budget Narrative** (500 words or less)

To evaluate project costs, we require disclosure of whole project cost estimates, recognizing that an ESRP award may only result in phased funding, or may only pay for a portion of whole project costs. Competitive projects define a whole project scope of work, and accompanying whole project cost estimates. Applicants will not be required to meet future cost projections that are outside the proposed phase of work but this information helps us gauge the extent to which ESRP funding will contribute to completion of the whole project.

You may use your own project budget spreadsheets to support the project budget worksheet, but budget narrative materials must allow reviewers to understand the purpose and source of cost estimates. The budget narrative should, at minimum, justify total task cost. The following guidance is provided for what is considered adequate justification. Absence of adequate justification will be inferred as meaning that costs are rough estimates not based on a project specific analysis, thereby reducing confidence in the project status.

b. **Project Narrative** (4,500 words or less) –**This produces the technical ranking and scoring worksheet.**

Applicants should use the proposal template for detailed criteria to create the project narrative (not to exceed 4,500 words). Project narratives will clearly state the project objectives, the site-level problem(s), and the plan for resolving the problem(s).

- How will the project improve or protect ecosystem processes outside of the individual site?
- What are the realistic obstacles to project outcomes and how will those obstacles be addressed?

**Evaluation Criteria Categories**

Ecological Importance	(40 points)
Technical Merit and Readiness	(35 points)
Cost Justification	(15 points)
Public Support and Involvement	(10 points)

**Identify the Shoreline Process Unit (SPU) or Delta Process Unit (DPU)**

As part of your project narrative, proposals must identify the ‘nearshore ecosystem site’ (process unit) in which their project is located. This information is used by ESRP and the technical evaluation team in linking proposed actions to PSNERP strategic recommendations for restoration and protection which are made at the process unit scale.

The [Nearshore Data Site map](#) has a feature that allows users to select an area of interest and view summary data including the process unit number(s) for a site. Once at the site, access the information with these instructions:

- Select "Map Features" near the top left of the screen
- In the pop-up box, Click "+" next to PSNERP
- Check the box next to “Process Units”
- Uncheck other boxes

- Close the “Map Features” by clicking the red “X” at the top right of the pop-up
- Zoom to area of interest (SPU/DPU numbers will show when zoomed to 2000 ft. or closer)

#### 5) **ADDITIONAL SUPPORTING DOCUMENTS** (word, PDF, Image, JPEG, etc.)

The following suggested supporting documents improve the ability of reviewers to evaluate projects based on criteria. Reviewers are instructed to treat absence of information as an indicator of insufficient capacity or resources.

Suggested supporting documents:

- Letters of support
- Feasibility studies and design drawings (if applicable) useful for understanding project scope and configuration.
- Monitoring or stewardship plans if available.

#### 6) **PRISM ONLINE APPLICATION WIZARD /CONTRACT SYSTEM** (Internet)

[PRISM Online](#) will walk grant applicants through an “application wizard” that will ensure a complete application package. PRISM requires applicants to document project information as part of RCO’s grant contracting policies. Some of this information is repetitive from the ESRP grant application materials that are described above (#1-5). Applicants will be required to enter project information during the step-by-step PRISM system, with ESRP grant application attachments (the bulk of your application materials) uploaded in the final step of that process. While some of the information required in PRISM will not directly influence the technical evaluation process, it is required for all projects awarded ESRP funds.

### IN-PERSON PRESENTATIONS

All applicants will be required to give a 20-30 minute presentation to the Technical Review Team. **Presentations will be scheduled between August 22<sup>nd</sup> and August 26<sup>th</sup>, 2016.** The presentations are intended to improve reviewers’ understanding of projects. There is also opportunity for reviewers to ask clarifying questions and provide applicants with direct feedback prior to final ranking of projects. Applicants are strongly encouraged to attend the presentation in person. An option to participate via WebEx will also be made available. Applicants must be able to present on the day they are assigned, so it is highly recommended that applicants keep the entire week free until the presentation schedule is established. Additional information on presentation guidelines and schedule will be made available no later than July 29<sup>th</sup>.

## PORTFOLIO PROCESS

### DEADLINE AND SUBMITTAL

**Portfolio Projects** – Portfolio projects are those that have successfully competed for ESRP funding beyond the feasibility stage and have made good progress on their previous award(s). These projects are not required to go through the full technical review process. If you are not sure whether your project qualifies as a portfolio project please contact the ESRP Manager. Projects that entered ESRP by a legislative proviso are not immediately eligible for inclusion in ESRP's Portfolio process unless they have gone through a subsequent ESRP competition and technical review process.

**Deadline for Submittal:** By 11:59 PM July 21, 2016

**Nearshore Data Site or Habitat Work Schedule (HWS):** Applicants submitting proposals will be required to have a completed record in the [Puget Sound Nearshore Projects Data Site](#) or in [Habitat Work Schedule \(HWS\)](#) and a completed "contract link" to PRISM. Project information contained on these sites should be up to date as it will be a relevant source of information available to the technical evaluation team.

**Submittal Process:** Application material must be submitted by updating your project information in the Nearshore Data Site or Habitat Work Schedule and sending an email with the required documents to: [ESRP@dfw.wa.gov](mailto:ESRP@dfw.wa.gov) with "ESRP Portfolio Proposal" in the subject line. The project name and PRISM Snapshot URL should be provided in the body of the message. Proposal documents should be clearly labeled as such (e.g. Document 1, Document 2).

### PORTFOLIO APPLICATION REQUIREMENTS & FORMAT

#### REQUIRED DOCUMENTS

Required portfolio project application materials will be posted to the [ESRP website](#) ([www.pugetsoundnearshore.org/esrp/application\\_materials.html](http://www.pugetsoundnearshore.org/esrp/application_materials.html)) for applicants to download and use. They include:

**Document 1:** Portfolio status update sheet

**Document 2:** Budget update using whole project worksheet

#### EVALUATION AND REVIEW PROCESS

ESRP's portfolio process is a unique approach to advance high-quality projects with a good track-record as quickly as possible to completion. This is done through a streamlined application process and more frequent opportunities to apply for funding. A project that has completed feasibility has previously competed well for ESRP funding based on the results of that feasibility, and has shown good progress on previous ESRP awards. Portfolio projects do not go through the full technical review, but are evaluated and ranked by ESRP staff resulting in a ranked list of portfolio projects.

#### EVALUATION CRITERIA

Portfolio project requests are evaluated using the ESRP portfolio ranking criteria. The full criteria are provided in [Appendix C](#).

## INVESTMENT PLAN DEVELOPMENT

### INTEGRATING RANKED PROJECT LISTS

The ESRP review process results in four separate projects lists:

1. Ranked new project list
2. Ranked portfolio project list
3. Ranked learning project list
4. Small grants project list (new initiative in development)

The new and portfolio project lists are “zippered” together with the top ranked portfolio project becoming the top ranked ESRP project, followed by the top ranked new project, then 2<sup>ND</sup> ranked portfolio project, and so forth.

Learning and small grants projects will compete against other learning projects/small grants projects for a portion of ESRP’s total appropriation that will be set aside for these opportunities. These projects make up a small portion of the total appropriation request and will be incorporated into the whole ESRP project list according to the running total and the funding set aside for those projects (Learning 10% and small grants maximum of \$500k).

During the review process, ESRP’s technical review team will also look for opportunities contained with the suite of proposals being reviewed that address ESRP’s Adaptive Management objectives or other critical questions or issues that could be resolved with additional funding. In some cases, additional funding may be provided to complete this work. Achievement of these objectives may involve collaboration in monitoring across projects, or increasing or changing the scope of a proposal to increase the effectiveness of monitoring.

### FINALIZING AN INVESTMENT PLAN

A draft investment plan which integrates the three lists and provides funding recommendations is developed by ESRP staff with guidance from PSNERP nearshore teams and project partners. The Draft Investment Plan will include one ranked list that contains the integrated new and portfolio projects, and a separate ranked list of proposed learning investments. The draft plan is then submitted through RCO and WDFW agency budget requests to be presented to the Legislature for funding consideration.

Awards will be available starting July 1, 2017.

## AWARD ADMINISTRATION

### AWARD AND CONTRACT INFORMATION

ESRP awards will be administered through contracts between project sponsors and the Washington State Recreation and Conservation Office (RCO), ESRP’s fiscal partner. All discussion of award funding level, scope, and project implementation schedules are preliminary until publication of the Final Spending Plan and distribution of award notices. The project sponsor assumes full risk for any costs incurred prior to publication of the Final Spending Plan and subsequent award notification.

Contracts will be developed and executed using RCO documents. These materials will be made available upon request. Projects eligible for streamlined review in future grant rounds (via the ESRP Portfolio process) are not assured funding in future spending plans. Project sponsors should not assume that funding of a project phase will result in guaranteed funding of future phases. Projects receiving federal funds must also comply with the relevant federal terms and conditions associated with the funding agency.

## How to start an ESRP Application in Nearshore Data Site (NDS) or Habitat Work Schedule (HWS) – March 2016

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- NDS/HWS user name and password (If you need a username, please contact your Lead Entity Coordinator)
- NDS/HWS project name (50 characters or less)
- NDS/HWS ID number, project summary, application amount, PRISM Project Type (Acquisition, Planning, etc.), Primary Project Sponsor
- PRISM user name and password

**If you have a new sponsor**, contact Scott Chapman [scott.chapman@rco.wa.gov](mailto:scott.chapman@rco.wa.gov) or Ameer Bahr [amee.bahr@rco.wa.gov](mailto:amee.bahr@rco.wa.gov). They will add the new sponsor organization information to PRISM.

**If you need further assistance with this application process**, contact the Paladin Panoramic Support Team [panoramic-support@paladindata.com](mailto:panoramic-support@paladindata.com) or (866) 866-1214, or Meg O’Leary [meg.oleary@rco.wa.gov](mailto:meg.oleary@rco.wa.gov). If you need help after business hours, [CLICK HERE](#) for detailed instructions with screenshots. This process has not changed since the 2014 grant round, though these instructions were updated in 2016.

### Additional Resources

- Sponsor workshop hosted by RCO: <https://youtu.be/7kHvLmaivvw>
- HWS production site: [HWS Log In Page](#)
- HWS training site (anything created here will not impact your real data): [HWS Training Site](#)

**If your project is already in NDS/HWS, skip to the next section and follow instructions under ‘Click by Click submit to PRISM’.** If the project is not yet in NDS/HWS, you will need to enter the following basic data:

- Login to NDS/HWS
- Select your geographic region from the drop down menu on the left side
- Click ‘Projects’ on the left side
- Click ‘Add Project’
- Fill in the following fields
  - Project Name \*
  - Project ID / Number \*
  - Project Category (Acquisition, Restoration, etc.)
  - Primary Status (these projects are usually ‘Proposed’)
  - Start and End Dates
  - Project Cost
  - 1,500 max character summary
- Click ‘Create Project’ at the top left corner

- You are now on the home page of your new project! Continue filling in the required fields (Map, Metrics, etc.). ([CLICK HERE](#) for instructions). If you are entering in your project through the HWS, **Check with your Lead Entity Coordinator about adding fields.**

## **CLICK BY CLICK TO SUBMIT TO PRISM**

These instructions walk you through the creation of a Funding Instrument, the link between your NDS/HWS project and the PRISM project. [CLICK HERE](#) for detailed instructions with screenshots.

1. In the project that you just created, scroll down to 'Funding' and click on 'Manage Funding'. This opens a new page.
2. Click 'Enter Funding' at the top
3. Click 'Add Funder'
4. This opens a drop-down with a list of possible funders
  - Type **ESRP** in the text box, and hit 'Return'
  - Select '**ESRP Estuary and Salmon Restoration Program**'
5. Notice you'll return to the 'Project Funding' page. In the 'Funder' box, use the arrow to select '**ESRP...**'
6. Click 'Add Funding Instrument'. This opens the 'Create Funding Instrument' screen
7. In the box labeled 'Select a template', chose 'Active PRISM Submit'. This ensures that you are applying for the correct funding. If you select another option, your application will not be accepted into PRISM. You will see a note indicating that there will be additional data needed for the template (PRISM Project Type, Primary Sponsor, etc.). Click 'Next'.
8. Notice the screen automatically populates the project information. **If you are resubmitting a project from a previous year, make sure to change the 'Number / Identifier' to distinguish it from the previous year's submittal.** Ignore 'Category'.
9. The summary automatically populates the 1,500 characters from the NDS/HWS project summary.
10. In the 'Funding Amount' box, enter the amount requested from ESRP (screen defaults to funding source and fiscal year). You need this information in order to link your project to PRISM. You do not need to enter anything in the 'Summary' box—leave this blank.
11. Review Funding Instrument information. Click 'Save and Continue' to create the Funding Instrument and proceed to the 'Funding Instrument Template Attributes' screen.
12. On the 'Funding Instrument Template Attributes' screen, choose the appropriate values for the PRISM-specific attributes (e.g., PRISM Project Type, Primary Sponsor, etc.). Next, click 'Save and Connect to PRISM'.
13. You have created a Funding Instrument and entered the information PRISM needs. You are now ready to submit the application to PRISM.
14. On the RCO PRISM Connect screen, you will see two choices, 'Submit Application to PRISM' and 'PRISM Connection Settings'.
  - If you are connecting to an existing PRISM project, click 'PRISM Connection Settings' and enter the PRISM project number you are linking to
  - If you are creating a new project in PRISM, click 'Submit Application to PRISM'
    - i. Enter PRISM Username
    - ii. Enter PRISM Password
  - Click 'Submit'
  - Remember to write down your new PRISM project ID number, e.g., 15-xxxx

**Once you have your PRISM project number,** you can logon to PRISM Online and enter the project number to begin your application. Go to the Project Field, enter the PRISM number and follow the onscreen instructions.

**Questions/Assistance:**

- For technical questions of issues with Habitat Work Schedule, contact Meg O'Leary ([meg.oleary@rco.wa.gov](mailto:meg.oleary@rco.wa.gov)) or Kiri Kreamer ([kiri.kreamer@gsro.wa.gov](mailto:kiri.kreamer@gsro.wa.gov))
- For technical questions or issues with PRISM, contact Scott Chapman ([scott.chapman@rco.wa.gov](mailto:scott.chapman@rco.wa.gov)).
- For questions about application requirements, contact Mike Ramsey ([mike.ramsey@rco.wa.gov](mailto:mike.ramsey@rco.wa.gov)) or Jay Krienitz ([jay.krienitz@dfw.wa.gov](mailto:jay.krienitz@dfw.wa.gov)).
- If you need a PRISM User Account or need access to PRISM Online, go to RCO's web site at: [http://www.rco.wa.gov/prism\\_app/about\\_prism.shtml](http://www.rco.wa.gov/prism_app/about_prism.shtml).



## VISUAL SCOPE OF WORK

Please create a map that clearly articulates the present and future possible vision for the project site. Create the map to the best of your abilities, either utilizing GIS, desktop publishing software, aerial imagery with hand-drawn outlines, or an artistic rendering. Please include Washington Department of Ecology oblique aerial photos if relevant. The visual scope of work does not need to be professional quality, but whatever best creates a visual demonstration of the vision for the project. Do not submit formal design documents unless they are **1-2 pages at most** and fulfill the need stated above.

## EXAMPLE

Below is a very high quality demonstration of a visual scope of work:

### Current conditions



### Expected future condition



## LANDOWNER ACKNOWLEDGEMENT

Provide acknowledgement that all affected landowners are aware of the project and supportive of the application in cases where the landowner is not also the applicant. If there is landowner conflict or uncertainties to the project proposal, please provide rationale and how project sponsor proposes to deal with it. The Landowner acknowledgement form is available as part of the ESRP online application documents. A separate word document version of this form will be included in the RFP communication. Go to the ESRP grants webpage for the form: [www.pugetsoundnearshore.org/esrp/application\\_materials.html](http://www.pugetsoundnearshore.org/esrp/application_materials.html)

**Special Note:** If you are proposing to do work on Washington Department of Fish and Wildlife (WDFW) lands, you are required to initiate a request through WDFW's Restoration Pathways process. Contact your [local WDFW Habitat Biologist](#) or Area Manager for more information.

## EXAMPLE

ESRP Landowner Acknowledgement Form

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# Landowner Acknowledgement Form

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### Landowner Information

Name of Landowner:  
Landowner Contact Information:  
 Mr.  Ms. Title:  
First Name: Last Name:  
Contact Mailing Address:  
Contact E-Mail Address:  
Property Address or Location:

1. (Landowner or Organization) is the legal owner of property described in this grant application.
2. I am aware that the project is being proposed on my property.
3. If the grant is successfully awarded, I will be contacted and asked to engage in negotiations.
4. My signature does not represent authorization of project implementation.

\_\_\_\_\_  
Landowner Signature

\_\_\_\_\_  
Date

### Project Sponsor Information

Project Name:  
Project Applicant Contact Information:  
 Mr.  Ms. Title  
First Name: Last Name:  
Mailing Address:  
E-Mail Address:

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ESRP • July 2014

# NARRATIVE DESCRIPTION

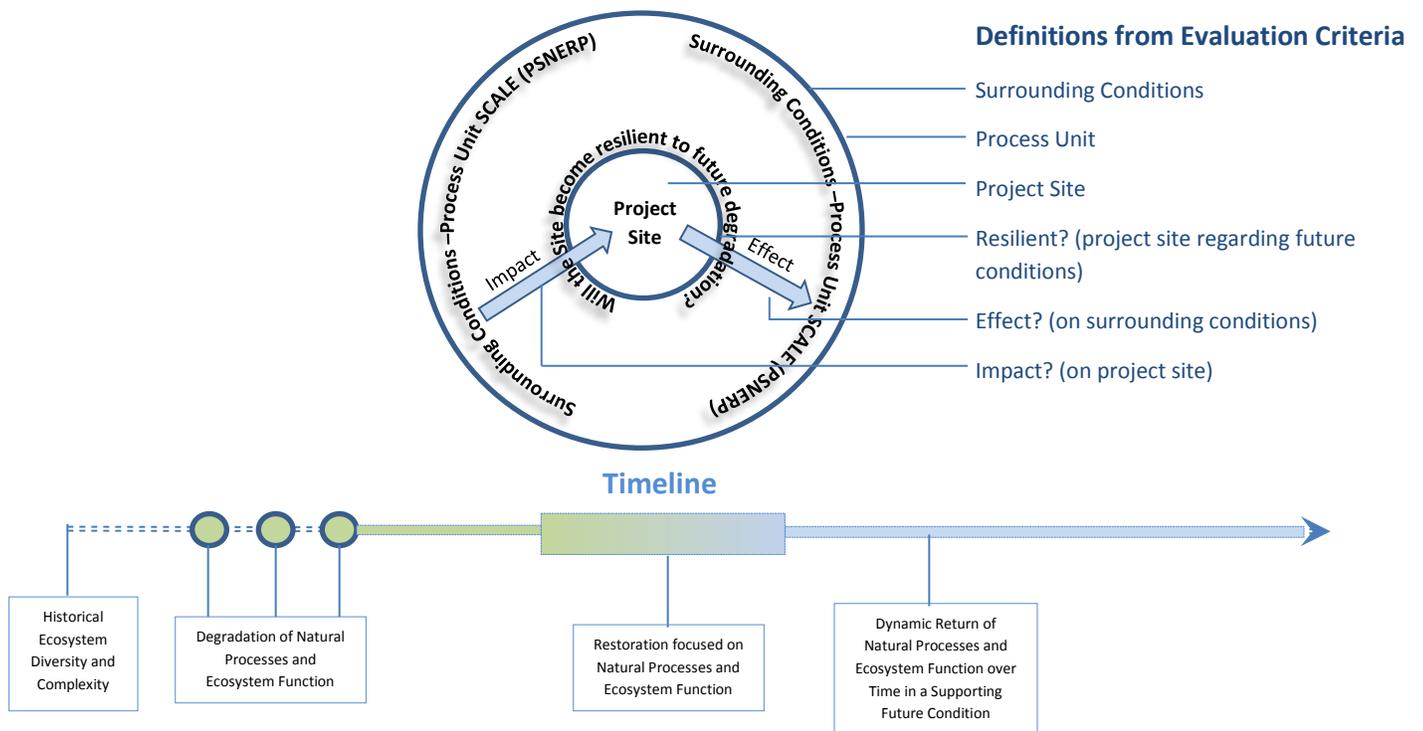
## -Budget Narrative

Complete a “whole project” budget to the best of your ability using ESRP’s definition of “whole project’ found in the [2012 ESRP Guidance](#) section on “Project Scoping Guidelines”. We understand costs are estimates. Describe what funding has been secured already, other pending or planned grant proposals and remaining need. For pending match, describe current status if known. Describe how you will intend to secure the required 30% matching funds for ESRP and remaining funds needed to start implementation. Go to the ESRP grants webpage for the fillable PDF: [www.pugetsoundnearshore.org/esrp/application\\_materials.html](http://www.pugetsoundnearshore.org/esrp/application_materials.html)

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## -Project Narrative and Criteria for Evaluation –This produces the ranking and scoring worksheet

Conceptual Model of ESRP Evaluation of the Project Site as it relates to the surrounding landscape context.



**A) ECOLOGICAL IMPORTANCE (40 pts.)** - An ideal project will restore dynamic natural ecosystem processes, structures and services, within a large complex process unit, resulting in site conditions where the composition and configuration of the landscape reflects historical complexity, and where the site is both resilient to current and future development impacts, and known to provide highly valued habitat services to target species.

- 1. Does it have a large effect on the delta or shoreline process unit?** – The project will maintain existing ecosystem services or provide a large increase in sustainable ecosystem services by protecting in-tact ecosystem processes or restoring the most significant sources of degradation to ecosystem processes.

**Points Possible**  
**0-10 Points**

#### **Evaluation Guidance and Best Practices**

Ideal projects have some or all of the following:

- Restores or protects historical ecosystem processes or services. (define some ecosystem benefits and what might be most important –broad context for ecosystem benefit –diversity web of life, etc)
- Protects intact areas.
- Addresses a high proportion of the restoration or protection needs (i.e. degradation or future risk) within a site.
- Project site is large and complex relative to other similar sites.
- Proposed action(s) **addresses** the PSNERP strategy for that process unit [Cereghino et. al. 2012](#).
- Cumulatively restores critical stressors within a group of smaller and simpler process units.

- 2. Will the site be resilient to future degradation?** – The project results in a highly functioning site that **1)** reflects historical ecosystem dynamics and connectivity, and if not delivered fully by the project action, the proposal describes how incremental work will reach this target condition at the site scale (climate change will be addressed in a later category).

**Points Possible**  
**0-10 Points**

#### **Evaluation Guidance and Best Practices**

Ideal projects have some or all of the following:

- Expected future condition of target ecosystem state is clearly described including predicted changes over time. A full range of ecosystem components (Shipman 2008) or conditions (Cereghino et al 2012) will increasingly provide historical ecosystem services over time.
- Rare shoreform types (e.g. lost barrier estuaries, oligohaline and freshwater tidal marsh), and relatively rare ecosystem components (e.g. stream deltas) are recovered.
- Proposed actions will result in large contiguous patches of habitat that are hydrologically connected in a manner sustainable by natural processes, and open to unconstrained river and/or tidal processes.
- Adjacent areas support the function of the site (e.g. well-vegetated buffers deliver clean, cold water; up-drift bluffs provide sediment etc.).
- If incremental restoration is proposed, future restoration is feasible and designs do not preclude full restoration in the future.

- 3. Do the surrounding conditions support the project?** – The project approach is 1) responsive to potential risks of intense or complex site degradation, and 2) potential future impacts from population growth, and demonstrates a preference for work where historical processes will be restored or protected at the scale of the process unit or ‘nearshore ecosystem site’ (*Note: climate change should be addressed in section titled “Climate Change”*).

**Points Possible**  
**0-10 Points**

#### **Evaluation Guidance and Best Practices**

*Ideal projects have some or all of the following*

- The project will protect or restore an ecosystem component or landform that is critical for increasing the integrity of the region, compared to historical composition.
- Project actions are consistent with the scientific record, respond to risks identified in Cereghino et al. 2012, and utilize local assessments.
- The whole of intact sites are protected, and/or target processes are comprehensively restored. The project addresses multiple stressors and their cumulative impacts.
- Upland and watershed modifications do not substantially limit the ability of the proposed actions to provide intended benefits and/or such modifications are or will be addressed through the project design.
- The potential for future development within and adjacent to the site is explicitly explored. The processes and services of the site will be resilient to anticipated change [Cereghino et. al. 2012](#). Provides a range of risk metrics following [Simenstad et al. \(2011\)](#) and [Bolte & Vache \(2010\)](#).

*Sample questions to consider in this section*

- What are the known or anticipated (current and future) impacts to the project site from the surrounding landscape conditions?
- What are the known or anticipated (current and future) benefits to the project site from the surrounding landscape conditions?
- What are the historical conditions in and around the site? How does the restoration outcome improve upon the degraded conditions?

- 4. Does it provide ecosystem benefits that society places value on?** – The site provides a high level of ecological services compared to other similar landforms, based on an identified and accurately cited assessment.

**Points Possible**  
**0-10 Points**

#### **Evaluation Guidance and Best Practices**

*Ideal projects have some or all of the following:*

- Proposed actions restore or protect ecosystems that have experienced significant loss in size or quantity in Puget Sound or sub-basin, or that contain rare, vulnerable or ecologically important species or resources (e.g. PSP indicators: estuarine wetland, eelgrass meadow, seabirds, unarmored sediment sources, forage fish, and Chinook salmon; state or federal listed species, WDFW’s priority habitats and species).
- Proposed action is logically linked to a change in habitat and other conditions that provide direct benefits for species of concern. The mechanism by which habitat change leads to species benefits is described (e.g. increases in tidal wetland area and re-establishment of channel networks is

anticipated to increase juvenile salmon carrying capacity; predicted change in sediment texture and increase in overhanging shoreline vegetation increases forage fish spawning area).

- Proposed actions are clearly identified in regional or species recovery plans.

**B) TECHNICAL MERIT AND READINESS (35 pts.)** - A strong technical and social review of the project is well documented or proposed for the current phase. Work will be done quickly, and the project is being designed to meet a range of contingencies, advance ecological science, and maximize resilience under climate change.

- 1. Are the techniques reliable?** – 1) The project team includes the range of professional skills and experience suited to the scope of the project, ensuring high confidence the project will result in the predicted benefits, and 2) the project has been improved by critique from an independent and documented interdisciplinary technical review process.

**Points Possible**  
**0-15 Points**

#### **Evaluation Guidance and Best Practices**

Ideal projects have some or all of the following:

- The project team contains the range of expertise needed to complete proposed actions.
- Proposal references or proposes an independent and well documented external review of project strategies and alternatives. Proposal has identified, by name, an interdisciplinary design team that supports the proposed project.
- The project addresses links between ecosystem elements and the processes that maintain them so that the project is likely to have the outcomes described in Ecological Importance (considers ecological context, confidence in predictions, and predictability of the management measures).
- Acquisition
  - Risks to ecological processes at the site can largely be controlled through acquisition. A strong stewardship plan is provided or is proposed as an early project deliverable, to be approved by ESRP, which clarifies how the site will be managed.
- Restoration
  - Sponsor has engaged key stakeholders and technical experts to identify key uncertainties and constraints regarding project performance. Proposed approach is designed to address the uncertainties and constraints to the extent possible and consider alternative scenarios in the design process. For construction projects, the sponsor has a clearly defined contingency plan to address uncertainties.

- 2. Have you identified and resolved uncertainty around technical methods and ecological response to actions?** – 1) The post-construction uncertainties and associated risks have been well defined, 2) a strategy for monitoring and managing uncertainty is defined, and 3) opportunities for learning are fully developed and integrated into the project design.

**Points Possible**  
**0-5 Points**

**ESRP will share project proposals with our science advisory committee in order to recommend opportunities for science and adaptive management enhancements or coordination with your project.**

### Evaluation Guidance and Best Practices

*Ideal projects have some or all of the following:*

- Feasibility and design – proposal explicitly lists factors anticipated that may create uncertainty in project outcomes, including impacts from partial restoration, landscape setting, future threats, ongoing human use, and fundamental assumptions about climate change.
- Acquisition
  - Long-term stewardship and management plan has been (acquisition phase) or will be developed (site identification phase) based on known uncertainties and risks.
- Restoration
  - Projects requesting monitoring funds should have completed a monitoring and adaptive management plan, which will be the basis for evaluating requests for monitoring funding.
  - A management strategy, including an appropriate level of qualitative or quantitative monitoring, has been (or will be) developed to monitor the evolution of natural processes and to observe characteristics of the site during and following implementation that are explicitly linked to outcomes.
- Proposal has identified specific learning objectives, and a systematic approach for achieving new knowledge, through the implementation of robust experimental design. Specific postulates and hypotheses are listed.
- Proposal will identify staff responsible for site management including the skills, knowledge, and experience needed for proposed outcomes.

3. **Does the project help address climate change issues?** – The action increases the resilience of both natural and human systems or fosters adaptation to anticipated sea level rise and local climate change.

**Points Possible**  
**0-5 Points**

### Evaluation Guidance and Best Practices

*Ideal projects have some or all of the following:*

- Proponent demonstrates understanding of how climate change is likely to affect site processes and functions and demonstrates how the information has been considered in the site selection and design process, and monitoring.
- Opportunities to facilitate landward movement of coastal ecosystems subject to dislocation by sea-level rise and other climate change impacts are considered. For example:
  - Beach projects allow for landward migration area of shorelines within the project and sustained sediment supply necessary to adjust beach elevations.
  - Adequate opportunities for landward migration of tidal wetlands are available with the project area
  - The project design and system conditions allows for adequate and timely delivery of sediments to support marsh accretion within the project area and drift cell.
- Proposal identifies and addresses potential impacts of the project to adjacent land uses under climate change scenarios.

4. **Is the project ready to go?** – The proposed schedule is reasonable for project phase and not likely to be significantly delayed by social controversy or uncertainty over landowner willingness.

**Points Possible**  
**0-10 Points**

**Evaluation Guidance and Best Practices**

*Ideal projects have some or all of the following:*

- Proposals will be evaluated for readiness as defined within each of the ESRP status categories.
- Landowner has provided written support for the project.
- Proposed actions are consistent with local land use goals, policies, and regulations.
- There have been documented public communication efforts concerning the project and evidence that the sponsor has taken appropriate steps to prevent or limit controversy that would prevent or substantially delay implementation.
- Budget needs for the proposed phase of project, including matching funds, are secured or pending and likely. A clear strategy is provided for financing necessary additional phases that comprise the whole project.

**C) COST JUSTIFICATION (15 pts.)** - *Ideal projects will have clear budgets that are appropriate for the type of actions proposed in the given location and demonstrate that cost-saving mechanism (design considerations, low-cost partners, diverse funding sources etc.) have been incorporated into the project.*

1. **Are actions cost effective for the site?** – The relationship between expected outcomes and total project cost is appropriate for the project location and landform.

**Points Possible**  
**0-10 Points**

**Evaluation Guidance and Best Practices**

*Ideal projects have some or all of the following:*

- Conceptual design and costs are focused on the most relevant management measure(s). Only a limited proportion of funds are focused on supporting management measures.
- Operations and maintenance costs are minimized and cost-savings mechanisms are used (e.g. low cost partners; volunteers, partnerships etc.).
- Non-state funding sources are leveraged to maximize the ecological protection and restoration benefits.

2. **Is there a clear and understandable budget?** – The budget is complete and provides a fair estimate of all elements required for successful implementation of proposed actions.

**Points Possible**  
**0-5 Points**

**Evaluation Guidance and Best Practices**

*Ideal projects have some or all of the following:*

- The whole project budget is complete, sources of funding are explicit, and their status can be clearly discerned.
- Line item costs are clearly described in a budget narrative so that the nature of the costs and the

estimation method can be easily discerned.

- Budget narrative describes uncertainties considered when developing the budget. Modest but reasonable contingency (based on specific and identified risks) is built into the budget at the task level.
- Funding partners and contributions reflect the diversity of benefits that will be delivered by the project (e.g. projects addressing drainage or flood control have contributions from agricultural groups or dike districts; if public access is improved, matching funds or in-kind from a user-group included; if salmon recovery project, SRFB dollars included).

**D) PUBLIC SUPPORT AND INVOLVEMENT (10 pts.)** - *The project will build community support for protection and restoration, engage the local community and/or encourages valuable partnerships.*

- 1. Are there social benefits?** – The project provides benefits in addition to ecological restoration or protection.

**Points Possible**  
**0-5 Points**

**Evaluation Guidance and Best Practices**

*Ideal projects have some or all of the following:*

- The project references or provides documentation that the project will deliver multiple benefits to local communities including but not limited to public education or engagement, recreational/commercial fisheries, appropriate low-impact public use, flood hazard mitigation, drainage improvements, or infrastructure upgrades.

- 2. Are there many stakeholders and partners involved?** – The project engages many local and regional partners that will collaboratively support education, technology transfer, and stakeholder participation.

**Points Possible**  
**0-5 Points**

**Evaluation Guidance and Best Practices**

*Ideal projects have some or all of the following:*

- Letters of support indicate a broad and diverse base of support.
- Partners have been identified and specific mechanisms developed to support communications and collaboration relevant to successful completion of ESRP tasks and on-going project stewardship.
- Project is in a demonstrably visible location and proponent has a project communications strategy describing how specific groups of stakeholders will be made aware of project activities and related issues.
- Partners or key stakeholders actively involved in feasibility, design and/or implementation.

## APPENDIX C: EVALUATION CRITERIA

### UNDERSTANDING AND APPLYING ESRP'S CRITERIA

ESRP has a unique and rigorous approach to selecting new nearshore investments, providing funding and programmatic support for successful projects that improve ecosystem processes. The criterion ESRP uses to guide and analyze new and ongoing projects is substantial. However, projects that pass through initial stages are entered into ESRP's "portfolio status," offering a streamlined process and providing more reliable long-term support for projects that fall within the approved scope of work. ESRP makes every effort to simplify the application process, while asking for all the information necessary to assure investments for the nearshore and salmon recovery are well spent.

#### ***How to demonstrate evidence in the space provided?***

While ESRP requests a lot of detail and rationale in grant applications, sometimes the details being requested are already articulated in published online materials (PSNERP, PSP, and NOAA resources to name a few). Sometimes, both the project sponsor and the technical reviewer do not need a full re-iteration of a published and well-articulated piece of nearshore research. In order to save narrative space, applicants are encouraged to provide a succinct description about how their project is supported by and/or fulfills the intentions described in published research available online (i.e. previously identified priority areas). Proper citations will include the web address/url, and page number (paragraph number if needed). Only publications available online are allowed to be cited. Please use recommended publications in grant criteria. A successful narrative will succinctly explain why an individual project meets ESRP objectives, while providing the citation for appropriate publications (i.e. PSNERP document, web link, and page #).

It is recommended that you write out your proposal in a separate word document and edit the proposal utilizing the tools of word processing software for spelling, length, etc. This will also allow you to edit and save your work more easily. You can then cut and paste finalized narrative text into the online application text fields.

#### **Defining nearshore ecosystem sites**

Every action occurs within a landscape setting. The PSNERP approach proposes that important physical and ecological processes operate at large scales, drive ecosystem structure, and control the delivery of ecosystem services. Therefore our ability to evaluate the importance and technical merit of a nearshore action depends, in part, on understanding how an action effects and is affected by a larger landscape.

For the purposes of ESRP, the landscape context should be evaluated at the scale of one of three "process domains": shoreline process unit, delta process unit (Simenstad et al. 2011), or coastal inlet site (Cereghino et al. 2012) unless a compelling rationale (e.g. local assessment) demonstrates that a larger or smaller frame of analysis than the process unit is sufficient to insure sustained ecosystem services over time. Projects that fully restore processes within large complex landscapes (i.e. high potential sites in the sense of Cereghino et al 2012) are generally favored over comparable projects at smaller sites.

An application should clearly identify the 'nearshore ecosystem site' in which project actions are proposed. Typically this is a single shoreline process unit (SPU) or delta process unit (DPU), but may include a complex of multiple process units or a separable piece of a process unit such as a coastal inlet if that can be justified. The definition of a 'nearshore ecosystem site' is therefore somewhat subjective, and depends on what the applicant is willing to 'bite off' and what the scale of benefits is in relation to the scope of their proposed work. Larger more complex sites are generally encouraged, but within that site you must account for risks and the degree to which your action addresses the integrity of the system.

## **Recommendations**

Proposals should describe a logic chain that justifies how physical changes being proposed will deliver predicted ecological/ecosystem functions, goods and services (e.g. Restoration Action - Restored Process - Structural Changes - Functional Response).

To adequately address the criteria an application should:

- **Define the ‘nearshore ecosystem site’ in which the action is being proposed.** Unless a compelling justification is provided, this should be the Process Unit or Delta Process Unit as found within the [PSNERP Geodatabase](#) or [Nearshore Data Site](#). Instructions on identifying the process unit in which your project is located earlier in this document under “APPLICATION REQUIREMENTS AND FORMAT”
- **Define the effect of the action** in relation to the change from historical conditions. High ranking projects would substantively address the impacts to a site, rather than proposing superficial treatments that do not address impacts. Proposals should identify the documented (and undocumented) stressors, nearshore and watershed modifications influencing the site, and specifically list those that will be affected by the proposed restoration action.
- **Describe the ‘target state’ of the nearshore ecosystem site**—how will the composition and configuration of the site look when the site has reached a certain level of “restoration maturity?” Partial and incremental actions may be perfectly appropriate. However, if there is no pathway toward substantive restoration of a whole site, that is a concern that may affect prioritization. ESRP strives to fund actions that move us toward some target future condition that is sustainable and has integrity.
- **Describe how the project overcomes risks from degradation**, both from current process degradation, and potential future impacts. Currently Bolte and Vache 2011 data are our only Sound-wide estimates of predicted population changes. However local planning analyses, [PSNERP Change Analysis](#) upland and watershed modifications, zoning and other information can provide another perspective. Projects should address the extent to which existing protection mechanisms and/or land ownership patterns create risk.
- **Link the anticipated outcomes of an action to precise benefits for target species.** The presence of a species in the system does not necessarily indicate there is benefit to the population. If the applicant wishes to claim benefit to a valued species, the mechanisms that result in population benefits should be explicitly stated and supported.
- **Indicate a peer-review mechanisms employed** to insure that design is rigorous and the action maximizes ecological and social benefits. Many projects are developed in isolation. Transparent, independent, interdisciplinary, and well-documented peer review should increasingly become a standard feasibility task for restoration actions.
- **Be focused on primary restorative and prerequisite management measures** (in the sense of Clancy et al. 2009) to ensure the majority of funding is focused on actions that have the ability to protect or restore the target ecological processes at the site. A strong justification should be provided for funding requests that focus on other less significant management measures. Match or partnership funds may be more appropriate for these non-essential management measures.

## **Tailoring Proposal Review to Landform**

Our criteria will be applied based on what we understand about the dynamics of different coastal landforms (following Shipman 2008). Deltas, beaches and their barrier embayments, and coastal inlets each are shaped by a different set of physical processes and provide a unique set of services, that are in turn degraded by distinct patterns of development. The interpretation of ESRP evaluation criteria will be informed by strategic recommendations developed for each landform (Cereghino et al. 2012).

The following describes how ecological *importance* may be differentially evaluated based on landform:

**Deltas - Substantial benefits** are derived for restoring large estuarine areas to both tidal flow and freshwater inputs, through dike and levee setback. **System Integrity** requires consideration of sediment deposition, and representation of diverse wetland types, particularly oligohaline transition and freshwater tidal components, which are delta components which have been disproportionately lost in Puget Sound (Fresh *et al.* 2011; Simenstad *et al.* 2011). **Sustainability** may be compromised in places where accretion rates are insufficient for keeping up with sea level rise, and/or where the potential for landward wetland migration in response to sea level rise is limited. **Highly valued services** include nursery services for estuarine dependent fish like Chinook and chum salmon.

**Beaches – Substantial benefits** are derived by restoring or protecting substantial sources of sediment or removing substantial barriers to sediment transport to large beach systems that support complex depositional features. **System Integrity** requires the presence of a critical mass of sediment supply and transport, nearshore forest, intact groundwater and surface hydrology. **Sustainability** is threatened by residential clearing and shoreline stabilization in combination with sea level rise, and can be overcome through nearshore ecosystem site scaled local management of sediment and coastal forest resources. **Highly valued services** include forage fish spawning.

**Embayments (both barrier embayments and coastal inlets) – Substantial benefits** are derived from reconnecting or reestablishing tidal flow to large historical embayments that have been lost or degraded, or reestablishing large areas of tidal wetlands where they have been lost. **System Integrity** requires management of coastal forest, and maintenance of freshwater quantity and quality through watershed management, and for barrier systems, the integrity and sustainability of the surrounding beach system. **Sustainability** is threatened by watershed development that degrades freshwater inputs, and where barriers sustain embayment structure, the degradation of updrift sediment supply. Sea level rise potentially affects both the sustainability of wetlands (similar to deltas) and increases the importance of sustained sediment supply. **Highly valued services** include nearshore rearing associated with natal salmon streams and rivers, and shellfish production.

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## ACQUISITION AND RESTORATION CRITERIA

Project proposals are reviewed and scored using four primary criteria. Each criterion is broken down into a number of sub-criteria each associated with evidence that sponsors can provide to demonstrate how a project meets criteria and sub-criteria. How well an applicant provides evidence will determine many points they receive for a given sub-criteria. For evaluation, Ecological Importance and Technical Merit are generally evaluated within the context of the “whole project” not just the current phase being proposed. For other criteria, evaluation will focus on the current phase of effort.

**Full criteria details for restoration and protection projects are detailed in Appendix B “[ACQUISITION AND RESTORATION APPLICATION TEMPLATES](#)” under the NARRATIVE DESCRIPTION heading.**

### **Evaluation Criteria Categories**

Ecological Importance	(40 points)
Technical Merit and Readiness	(35 points)
Cost Justification	(15 points)
Public Support and Involvement	(10 points)

## PORTFOLIO PROJECT CRITERIA

Membership in the ESRP Portfolio is not an assurance of funding. While the application process is streamlined, funding is still dependent on competitive evaluation among portfolio projects and across the Investment Plan. Instead of a full proposal, a portfolio project produces a ***Budget and Status Report*** in response to an annual request. These portfolio ranking criteria are intended to support consistent review and ranking of ***funding requests*** provided by partners.

Scoring is conducted by ESRP staff, and reviewed by the Nearshore Partnership Implementation Team. For additional phases of funding, projects must still satisfy eligibility criteria, particularly match requirements. Reviewers look for specific evidence that the proposed project meets the following criteria

Please note, for portfolio projects requesting monitoring implementation funds, their status update sheet should be accompanied by a narrative that addresses the learning criteria.

### Portfolio criteria for restoration and protection projects

Pts.	Criteria	Definition	Rubric
5	<b>Learning</b>	The project is part of an enhanced evaluation or learning strategy.	5 points
15	<b>Technical Ranking</b>	The project performed well within its last strategic competition.	Top 2% = 15 pts.; top 5% = 12 pts.; top 10% = 9 pts.; top 15% = 6 pts.; top 25% = 3 pts.
15	<b>Leverage</b>	The project has secured additional matching resources for subsequent phases of work.	3:1 leverage for next phases = 15 pts. 2:1 leverage for next phases = 10 pts. 1:1 leverage for next phases = 5 pts.
15	<b>Readiness</b>	The project has completed proposed work on time and on budget and has provided evidence of readiness to complete subsequent project phases.	on time under budget = 15 pts. on time and within budget = 10 pts. tasks complete = 5 pts.
10	<b>Urgency</b>	Failure to provide additional funding may jeopardize initial investments or result in substantial cost increases beyond inflation.	Project may terminate without funding = 10 pts. Project may face substantial cost increases without funding = 5 pts.
10	<b>Project type and location</b>	The project type or location has been identified as a high local or regional priority.	local AND regional priority = 10 pts. local OR regional priority = 5 pts.

## APPENDIX D: LEARNING OBJECTIVES

The following seven learning objectives reflect our programs current assessment of what kinds of learning efforts are likely improve our program efficiency and effectiveness. We will accept and review all eligible proposals. Proposals that strongly align with one of these learning objectives may receive up to five additional points (out of a total possible score of 45 points).

### RIVER DELTAS

Delta project work has been focused on the removal or modification of levees and dikes. We anticipate that management of freshwater distributary flows may be critical to future restoration of delta systems. The following learning project topics will receive additional attention in the 2014 learning project review:

- D1. Delta System Scale Analysis of Habitat Function and Resilience** – Some of the effects of restoration, such as hydrodynamics, sediment distribution, and salmon growth and survival, are best observed at the scale of a whole river delta system. A strong system-scale learning project will use analysis of system dynamics to inform the design and configuration of restoration efforts. Strong proposals will 1) identify how results of near term projects may affect decision making around later projects, and 2) develop evidence that can be used to improve restoration decision making in other delta systems. Large scale investigations should 1) integrate and leverage the resources and activities of partners, 2) have specific deliverables that affect decision making, and 3) make good use of the sequence and scope of planned restoration treatments to isolate factors that affect restoration effectiveness. We commonly lack the ability to predict 1) the relative benefit of alternate restored system configurations for salmonid rearing, or 2) the resilience of system restoration strategies to sea level rise.
- D2. Critical Design Decisions Surrounding Levee Removal** – Levee and dike removal is our preferred management measure for delta restoration. There are multiple design decisions that affect project cost, and are based on assumptions about how habitats will evolve following dike removal. We currently lack the ability to predict the importance of surface tillage; drainage ditch modification, excavation of “starter channels”, and the extent of dike removal (see Page 71 in [Clancy et al 2009](#) for a more lengthy discussion of best practices for berm or dike removal or modification). A strong proposal would 1) leverage and synthesize existing regional and national work, 2) result in specific tools or guidance to inform design, and 3) make use of variable or phased restoration treatments or natural experiments to isolate the effects of specific design elements.
- D3. Planning for Multiple Benefits from Delta Restoration** – We lack agreement within agricultural deltas about desired future delta condition. Different stakeholders may have competing interests in flood risk management, development, agricultural viability, or restoration. We are interested in learning projects that 1) create opportunities for delta stakeholders to clarify their objectives, that 2) lead to economic, physical or ecological analyses of delta landscape management alternatives, that 3) result in restoration strategies that integrate restoration, flood management, and the resilience of agricultural economies within river floodplains. A strong effort would result in a set of viable and broadly endorsed restoration projects. A strong proposal will be finite in scope and endorsed by diverse stakeholders.

### BEACHES

A limited but growing number of restoration actions restore beach sediment supply and are funded through the ESRP program. Current records suggest that new armoring construction and maintenance far exceeds restoration. The majority of beach project funding has been used to acquire parcels with feeder bluffs prior to development, at a high cost. The following learning project topics will receive additional attention in the 2014 learning project review:

**B1. Identification of beach system targets** – Initial work led by the Puget Sound Partnership has begun to integrate existing shoreline data to allow for more nimble identification of beach systems most suitable for specific management measures and purposes (see [Nearshore Strategic Data Integration](#)). Further development of this approach will help project sponsors to identify actions, and funders to evaluate projects. We would like to support development of beach prioritization models that consider, 1) the specific tools to be employed, 2) the specific services that we aim to protect and restore, 3) the relative importance of different beach ecosystems for providing these services, and 4) factors that create risk of failure. A strong effort will 1) leverage best available spatial data, 2) result in a Puget Sound-wide strategic overlay comparable to other similar efforts, and will 3) engage a range of stakeholders that are concerned about the beach services in question. An example of this would be to engage with salmon recovery networks to prioritize bulkhead removal, embayment restoration, and reforestation efforts to maximize restoration and long term resilience of juvenile salmonid rearing services on beaches most important for salmonid rearing.

**B2. Development of pilot projects that result in protection of sediment sources using management measures that are more cost effective than parcel by parcel fee-simple acquisition.** Current funding pools are inadequate to acquire all shoreline parcels that provide sediment supply services, and sediment supply degradation continues under existing state and federal laws. A mixture of education, acquisition, and regulatory approaches are ultimately necessary to protect existing sediment supply. Without effective protection strategies, restoration will have very limited success in maintaining current beach ecosystems under sea level rise. A strong proposal will 1) evaluate the cost effectiveness of different approaches that provide perpetual protection of sediment supply using capital projects, while 2) minimizing the cost to the public for those protections, and 3) insuring efficient enforcement.

## EMBAYMENTS

A number of ESRP actions involve the restoration of coastal inlets and barrier embayments. Local assessments provide our primary basis for project selection. We have no tools for tracking our work compared to historical losses, or to estimate the relative value of different actions in the embayment landscape. The following learning project topics will receive additional attention in the 2014 learning project review:

**E1. Inventory and characterization of Puget Sound sub-estuaries for restoration** – Puget Sound has been identified as a single estuary of national significance. Within the Puget Sound are thousands of creek mouths, embayments, and inlets—each of which can be considered a sub-estuary within Puget Sound. Existing data provides the foundation for identifying and characterizing protected coastal wetlands and their associated watersheds. We have not developed a regional inventory of these units for tracking or planning. An inventory of sub-estuaries, and their relationship with adjoining beach systems and watersheds, is a necessary step in developing of sound-wide assessment methods, or for tracking restoration progress and potential. A strong proposal would result in 1) the development of a polygonal representation of Puget Sound sub-estuaries, and 2) relate these units to related beach systems and watersheds, and 3) characterize these units using best available data to support assessment for restoration.

**Prediction of nearshore salmonid rearing services** – Redmond et al. (2005) provides the last systematic sound-wide evaluation of the potential to improve salmonid rearing by restoring embayments. Existing data and web resources could be used to render available empirical evidence into a model to predict relative salmonid use of Puget Sound sub-estuaries (see E1). This evaluation of relative importance combined with PSNERP change analysis data could be used to identify priority restoration and protection sites in coordination with local salmon recovery teams. A strong proposal would consider 1) the potential relationships between beach system conditions (see B1) both as rearing habitat, and as a factor affecting embayment condition (for example, see page 63 of [nearshore strategies](#)), and 2) our developing knowledge spatial variation in salmonid rearing (see [nearshore salmon planning](#)

## APPENDIX E: OTHER RESOURCES

The following websites may provide additional information that supports your application:

ESRP website	<a href="http://www.pugetsoundnearshore.org/esrp.htm">http://www.pugetsoundnearshore.org/esrp.htm</a>
PSNERP Publications	<a href="http://www.pugetsoundnearshore.org/technical_reports.html">http://www.pugetsoundnearshore.org/technical_reports.html</a>
PSNERP: Change Analysis Geodatabases	<a href="http://wagda.lib.washington.edu/data/geography/wa_state/#PSNERP">http://wagda.lib.washington.edu/data/geography/wa_state/#PSNERP</a>
Puget Sound Partnership- Action Agenda	<a href="http://www.psp.wa.gov/action_agenda_center.php">http://www.psp.wa.gov/action_agenda_center.php</a>
Puget Sound Partnership- Salmon Recovery and Watershed Work Plans	<a href="http://www.psp.wa.gov/SR_threeyearworkplan.php">http://www.psp.wa.gov/SR_threeyearworkplan.php</a>
The Nature Conservancy Ecoregional Assessment	<a href="http://waconservation.org/ecoregionalAssessments.shtml">http://waconservation.org/ecoregionalAssessments.shtml</a>
Puget Sound Nearshore Project Data Site	<a href="http://www.psnerp.ekosystem.us/">http://www.psnerp.ekosystem.us/</a>
Habitat Work Schedule	<a href="http://www.ekosystem.us">http://www.ekosystem.us</a>
Ecology Oblique Aerial Photography	<a href="http://apps.ecy.wa.gov/shorephotos/index.html">http://apps.ecy.wa.gov/shorephotos/index.html</a>
WA Dept. of Ecology Coastal Atlas	<a href="https://fortress.wa.gov/ecy/coastalatlas/">https://fortress.wa.gov/ecy/coastalatlas/</a>

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