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OPTU CHAPTER

2016 EVITTS FUND SUBMISSION

GUIDELINES

All applicants must complete and submit the current funding year Old Pueblo Trout Unlimited (OPTU) Chapter Evitts Fund Application; no substitutions are permitted. Please read the following sections carefully prior to completing the Fund application.

I. ELIGIBILITY

The OPTU Fund Program accepts applications submitted by non-profit and for-profit organizations and individuals. The applicant submitting the application must be 18 years of age or older. Applicants younger than 18 years of age must be sponsored by an adult individual who is 18 years or older. The sponsor cannot be a consultant or contractor receiving funds from the Fund award. Note: Applicants should also consider applying for "Embrace a Stream" funds from Trout Unlimited national. Some projects may be eligible for such funding (see www.tu.org for more details).

II. TYPES OF PROJECTS AWARDED FUNDING

The OPTU Evitts Fund Program annually considers funding a variety of projects that demonstrate benefit to Southern Arizona and White Mountain cold water fisheries, including e.g. protection, restoration and conservation projects, feasibility studies, applied research, assessments, conservation planning and education outreach activities. In addition, the OPTU Evitts Fund Program considers funding graduate student stipends and contractor salaries or consultant salaries and design, development or purchase of tools. In each instance, however, applicants must demonstrate that these are substantially required to complete project objectives. A portion of a salary and/or wages for nonprofit employees may be considered for funding by the Fund committee under certain circumstances. Applicants should provide a brief description explaining how payment of any portion of a salary and/or wages is essential to the project and if salary and/or wages are already allocated to the project, to what extent other funding sources exist. The Fund Committee maintains full discretion when determining if a proposed project qualifies for payment of any portion of a salary and/or wages for nonprofit employees. Proposed projects with a funding request equal to or greater than \$1,000 are still required to provide 1:1 matching funds under this exception.

III. REVIEW PROCESS

Applicants are encouraged to review the current OPTU Evitts Fund Calendar below prior to preparing and submitting the Fund Application.

Important Dates:

- First Monday in November: Fund applications due by midnight.
- First Friday in November: Applicants are notified of their initial gate reviews.
- First Wednesday in December: Finalists will present projects.
- January/February: Award notifications are provided.

Before submitting your application, and assuming time permits prior to the submission date, the OPTU Fund Oversight Administrator is available to answer any questions you may have. Once all applications are submitted, the OPTU Fund Committee evaluates first of all if the proposed project is based on sound science or technology and proven practices. This is an initial gate of pass/fail. Once that gate is passed the OPTU Fund committee utilizes scoring criteria to evaluate projects in the following five (5) weighted areas:

- a) Conservation & Education impact.
- b) Strengthening TU impact.
- c) Outreach impact.
- d) Technical merit.
- e) Overall impression & discretionary points

Although a proposal may not address every weighted area completely, it is important to address the strengths of your proposals in each of these areas. The applicant should consider the following when preparing the application:

- I. CONSERVATION & EDUCATION IMPACT (30% OF POINTS):** Address conservation issues that benefit coldwater fisheries in Arizona that may include:
 - a. Improvements for in-stream, riparian restoration, or watershed habitat, fishery health, water quality and flow regimes.
 - b. Filling in critical knowledge gaps in water and stream management, and aquatic scientific discovery.
 - c. Building or strengthening constituency for coldwater conservation.
 - d. Management of water resources.
 - e. Proposing a program that educates the general public about the importance of water quality, conservation, and coldwater fisheries.
- II. STRENGTHENING TROUT UNLIMITED IMPACT (10% OF POINTS):** Provide a description of the ways the project will incorporate measures to increase the strength of the OPTU Chapter (e.g. Opportunities for Trout Unlimited members to participate in the project, marketing, partnering, advocacy, member recruitment, raise awareness of TU goals with the general public, attracting additional funding).
- III. PUBLIC OUTREACH (10% OF POINTS):** Consider increasing the awareness of your project's conservation impact to the broader community by:
 - a. Increasing visibility of conservation to local and regional media (e.g. radio, TV, news, interest magazines).
 - b. Speaking to audiences about how your project benefits coldwater fisheries of Arizona.
 - c. Inviting, when possible, a diverse set of individuals from differing community groups and non-profit and for-profit organizations to participate in your project.
- IV. TECHNICAL MERIT (45% OF POINTS):** Demonstrate the feasibility and quality of your project by:
 - a. Basing the project on good science and acceptable best practices.
 - b. Proposing an appropriate work plan for the size and scope of the project.
 - c. Providing a budget that is reasonable to achieve the project goals.
 - d. Proposing a plan to measure and evaluate project outcomes.
 - e. Listing contributions and support from experts (e.g. teachers, biologist, restoration engineer, watershed planner, policy expert, training coordinator, landowners, and government agency) needed, or have provided contributions, to successfully complete the project.
 - f. Listing and providing stakeholder's (e.g. conservation groups, local business, universities, lenders) efforts and resources needed to complete the project.
 - g. Providing letters of support from experts and stakeholders.
 - h. Defining the roles and responsibilities of the project manager and other individuals participating in the project.
 - i. Listing projects and providing details as to the size and scope of projects that the applicant, sponsor and/or principle participants have previously completed.
- V. OVERALL IMPRESSION (5% OF POINTS):** Each screening committee member has discretionary points for overall impression, importance and professionalism in preparing the application.

The Administrator may contact the Applicant by electronic mail during the review process to clarify issues regarding the Application. Once the OPTU Fund Committee has reviewed and ranked all compliant projects, projects are presented to the general OPTU membership for consideration. Although the OPTU Chapter may not fund all projects submitted within a single funding year, an attempt will be made to fund projects from a diverse set of project types and applicants. If a project is not funded, the applicant may elect to resubmit the project proposal in the next funding year; however, it is the applicant's responsibility to re-submit the project application using the OPTU Fund Application for the respective funding year. Project funding status is provided

by electronic mail and a brief description of funded projects and funding levels are published on the OPTU website at the end of the funding cycle. Proposals selected for funding, require a signed OPTU Fund Contract prior to the release of funds.



2016 Trout Unlimited Old Pueblo Chapter Evitts Fund Program Application

APPLICANT'S CONTACT INFORMATION & SIGNATURE FORM

Contact Name & Title:

(First & Last Name)

(Title)

Qualification(s)

Address:

(Street, City, State, Zip)

Phone / Cell Number:

Email Address:

Applicant's Signature:

(Date)

If Applicant Is Under 18 Years of Age, The Following Section Must Also Be Completed
By an Adult Sponsor

Sponsor's First & Last
Name & Signature*: _

(*Adult Sponsor Must Sign & Date Application.)

(Date)

Sponsor's Address:

(Street, City, State, Zip)

Sponsor's Cell Number:

Email Address:

PROJECT INFORMATION

Project Title:

Project Location:

(e.g. stream, river, lake, watershed, city, state, GPS coordinates)

Requested Amount:

(from attached budget worksheet)

Project Start Date: _____

End Date: _____

Please circle the conservation strategy below that best fits your project:

Protect (*Public lands policy, land trust partnership, Defense from unwise development etc.*)

Reconnect (*Passage barrier removal, In-stream flow enhancement etc.*)

Restore (*Watershed and habitat restoration projects etc.*)

Sustain (*Conservation education, trout in the classroom etc.*)

If your organization has previously received OPTU funding, please complete the section below. (*List the LAST 3 projects funded*). Note: As stipulated in the funding contract, if previously funded, a project progress report for that award must have already been filed with the OPTU Chapter).

Project Title	Year Funded	Amount Funded
1.		
2.		
3.		

PROPOSAL (*Reference and electronically append to the application any additional information, maps, pictures, diagrams, contracts and letters of intent and support. **Contract or expand each section below as needed.***)

I. SUMMARY – (*In 350 words or less, provide a brief and concise summary that includes the name and description of the project, purpose of the project, goals, objectives, proposed actions or methods, anticipated scope of impact, partners, project exceptional merits, matching funds, and amount requested.*)

II. BACKGROUND – (*Describe the issue or opportunity being addressed. If applicable describe the project location, including name of water body and, if appropriate, salmonoid species. State how this issue or opportunity has benefit to Arizona. If this project has received funding previously, provide a brief progress update.*)

III. GOALS AND OBJECTIVES – *(Describe the project purpose, objectives, goals and benefit to Arizona.)*

IV. WORK PLAN – *(Describe in detail the activities and/or technical or scientific methods used to complete the project. Provide a project schedule detailing project activities and milestones - include timeframes for planning, obtaining permits, permission for land access, etc. Describe the role and qualifications of volunteers, consultants and contractors. Describe the role and matching efforts of partners and stakeholders. Include a methodology and indicators to objectively measure project outcomes. Provide a plan to disseminate the benefits of the project to the general public)*

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V. BUDGET- (Using the Sections below, be as specific as possible when describing your project expenses. Include the project total amount and the amount that is being requested from the OPTU Chapter Fund Program. Projects requesting Fund funding for more than \$1000 must be matched with in-kind funding or effort. These include, cash gifts, personnel costs and costs of materials and services. Identify all other contributors and indicate type and amount of matched funding. Please expand or contract each section as needed.)

Description & Use In Project	Rate	Total	Cash Matched	In-Kind Matched	Fund Amount Requested
Section 1 Material & Equipment (Identify and provide justification for specific materials and/or equipment necessary to complete the project. Costs are estimated according to average market value of the equipment. If cost effective, rentals should be considered.)					
Section 2 Volunteer and Professional Labor (Provide a description and role in the project of all sources of volunteer and professional services. The hourly rate for volunteers is \$20.75, the professional hourly rate can be donated at market rates.)					
Section 3 Personnel / Consultant Fees (Provide a detailed description of the work to be performed by personnel/consultants, basis for their fees, time spent on the project and total fees. Salary expenses for non-profit organization staff may be eligible for funding under certain circumstances – see footnote below*).					
Section 4 Contracts (Provide a detailed description of all work to be completed by contract, include selection criteria, type of contract, deliverables, time frame and costs.)					
Section 5 Other Expenses (Provide a detailed description and costs of all other expenses associated with the project.)					
Section 6 Funding (Include totals for total category amounts, cash matched, In-Kind Matched, and Fund Amount Requested)					
Totals					
Total Project Costs =					
Amount Qualified for 1 to 1 Matched Funding =					
Funding Requested =					

*A portion of a salary and/or wages for nonprofit employees may be considered for funding by the Fund committee under certain circumstances. Applicants should provide a brief description explaining how payment of any portion of a salary and/or wages is essential to the project and if salary and/or wages are already allocated to the project, to what extent other funding sources exist. The Fund Committee maintains full discretion when determining if a proposed project qualifies for payment of any portion of a salary and/or wages for nonprofit employees. Proposed projects with a funding request equal to or greater than \$1,000 are still required to provide 1:1 matching funds under this exception.

SUBMITTING APPLICATION

- The applicant should review the Application Checklist (see below) to verify that the Application is complete; all supporting & reference materials attached and original signatures provided.
- This Application and all support materials **MUST** be submitted electronically to the OPTU Chapter Fund Administrator.
- The Contact Information and Signatures Form (first page) can be electronically signed and e-mailed with the application.
- Upon receipt of the Application, applicants will be notified by electronic mail within three (3) days that their Application has been received.

APPLICATION CHECKLIST

- Contact the Fund Oversight Administrator if any additional information is needed.
- Complete the Applicant Contact Information & Signature Form (note: an adult sponsor must sign the application if applicant is under the age of 18 years old).
- Sign & date the Contact Information & Signature Form (this can be an electronic signature).
- Complete each section of the Fund application emphasizing the qualities of your project.
- Complete the Fund budget – provide realistic dollar amounts that represent the size and scope of your project.
- Include all relevant supplemental supporting material in appendices. (e.g. maps, list of names/organizations involved in the project or previously funded OPTU Fund project progress reports)
- Follow the Submitting Application Instructions (above) to submit your application.

The OPTU Chapter of Trout Unlimited appreciates the effort and time it takes to appropriately prepare and submit project applications. Projects like this make a difference both in the world we live in today and also generations to come. We look forward to reviewing your proposal and giving it the highest consideration.