



OREGON WATERSHED ENHANCEMENT BOARD

Listening Session Information & Agenda Roadmap to a Long-Term Investment Strategy

Introduction

OWEB's Long-Term Investment Strategy

The Long-Term Investment Strategy will be a multi-year framework for implementing OWEB's Mission and Strategic Plan Goals to achieve priority ecological, community, and economic outcomes. The Long-Term Investment Strategy will identify how the Board desires to structure its investment portfolio to achieve its priorities and identified outcomes to be pursued over time through two-year Spending Plans.

The Long-Term Investment Strategy is not OWEB's Strategic Plan and is not the two-year Spending Plan, but is informed by, and informs, implementation of the Strategic Plan and the Spending Plan.

Purpose

Why is OWEB Developing a Long-Term Investment Strategy?

Before Oregon voters passed Ballot Measure 76 in 2010, dedicated Lottery funds for restoration, enhancement and protection of clean water and native fish and wildlife habitat would have ended in 2014. Measure 76 provides dedicated funds with no end date. This Long-Term funding horizon makes it important for OWEB to consider its Long-Term Investment Strategy. In addition, OWEB values all of the good work and accomplishments of its many partners, but recognizes there is not enough OWEB grant funding to meet all needs. A goal of developing a Long-Term Investment Strategy is increased transparency around OWEB's investment priorities and decision processes so that everyone can understand OWEB's programs and objectives and align their work with them when needed.

Your role

Why is your involvement important?

The Board anticipates adopting the investment strategy by June 2013. OWEB's Board wants to start its work by hearing from our partners and the public about priorities, outcomes, results, tools and programs that are important to them. The spring listening sessions are the beginning of a dialogue. OWEB is planning additional stakeholder involvement as the Roadmap develops.

The Purpose of Today's Listening Session:

- Provide information about OWEB's plans for developing a Long-Term Investment Strategy, and a brief history of OWEB's programs over time;
- Review OWEB's Mission and Strategic Plan Goals; and
- Begin a dialogue with OWEB's partners, grantees and the public about their priorities, to ensure the Board is aware of these priorities and considers them as the Board develops the Long-Term Investment Strategy.

Listening Sessions
May-June 2012

Listening Session Agenda

Investment
Strategy
June 2013



Monday, May 7	Tuesday, May 8	Wednesday, May 9	Thursday, May 10	Thursday, May 31	Monday, June 4
Baker City 3-5 pm AND 6:30-8:30 pm Sunridge Inn Sun/Blue Room 1 Sunridge Ln 97814	John Day 3-5 pm AND 6:30-8:30 pm Grant County Regional Airport 720 Airport Rd 97845	Bend 3-5 pm AND 6:30-8:30 pm Bend Metro Park and Rec. Riverbend Community Room 799 SW Columbia St 97702	Pacific City 3-5 pm AND 6:30-8:30 pm Kiawanda Community Ctr 34600 Cape Kiwanda Dr 97135	Salem* 3-5 pm AND 6:30-8:30 pm Broadway Commons Grant Room 555 Gaines St NE 97301	Grants Pass 3-5 pm AND 6:30-8:30 pm Josephine County Fairgrounds Floral Building 1451 Fairgrounds Rd 97527

***Live webinar option May 31, 6:30-8:30 pm**
Find out more on our website!
www.oregon.gov/OWEB/roadmap_to_investment_strategy.shtml

Welcome and Introductions (~10 minutes)

- Tom Byler, Executive Director
Why developing a Long-Term Investment Strategy is a priority for OWEB and why it's important for OWEB to hear from our partners.
- Session Facilitator: review the 'process roadmap' and role of the listening sessions.

OWEB Board Member: Introduction to OWEB (~5 minutes)

- What are our Mission and Strategic Plan Goals?

Lauri Aunan, Grant Program Manager: Historical View of OWEB's Programs (~15 minutes)

- What has been our focus? How has OWEB grown?

Session Facilitator: How Should OWEB Prioritize?

Interactive session to get input and ideas from our partners, grantees and the public about what OWEB's investment portfolio should look like.

- Priorities Indicator Exercise: What are your priorities? (~5 minutes)
Where do your priorities lie for OWEB's investments? Creating ecological benefits? Creating social/community benefits? Creating economic benefits?
- Individual Reflection (~10 minutes)
Participants will be given time to consider the questions (below) and jot down their answers on their input sheet (will be collected).
- Small Group Discussions and Reports to Full Group (~60 minutes)
Groups will rotate so everyone gets to discuss each of the 4 questions below.
 1. Looking 10 years into the future, what outcomes should OWEB achieve through its investments and how will we know we have achieved them?
 2. Picture your watershed. What tools and programs can OWEB provide in its toolbox to help you achieve your goals for your watershed?
 3. What does OWEB need to do differently to achieve the benefits (ecological, social/community, and/or economic) that are important to you?
 4. If you were in charge of designing OWEB's investment strategy, how would you design it to be specific and focused while allowing opportunities to support new and creative ideas to achieve restoration outcomes?

OWEB Board Member and Director: What Did We Hear From You? (~10 minutes)

Session Facilitator: Next Steps for the Roadmap (~5 minutes)

- Adjourn - Thank you for joining us and sharing your thoughts!!
- Stay involved: www.oregon.gov/OWEB/roadmap_to_investment_strategy.shtml



Planning Impact by Elevation

Levels of Discussion

The purpose of this tool is to help keep our conversations clear and focused and to make sure we all use the same vocabulary. The different elevations illustrate that there are influences outside of the Board's oversight that could impact the strategy; likewise, there are the day-to-day mechanics of grant administration which are too "in the weeds" for this discussion. Recognizing that the different "elevations" affect each other, the Long-Term Investment Strategy will be central to the listening session discussions.

Elevation	Planning Level	
50,000 ft	Oregon Constitution, Legislature, Statutory mandates, Governor's priorities, OWEB budget	Many external drivers influence OWEB's priorities. The Constitution passed by Oregon voters, statutes and budget approved by the Oregon legislature, and priorities established for agencies by the Governor can influence the type and emphasis of OWEB's investments.
40,000 ft	OWEB's Mission OWEB's 2010 Strategic Plan	The 2010 Strategic Plan provides high level guidance and direction for OWEB's programs. The five goals represent priority guidance for our work on behalf of Oregon citizens and to deliver effective and accountable programs.
30,000 ft	OWEB's Long-Term Investment Strategy	The Long-Term Investment Strategy will be a multi-year framework for implementing OWEB's Mission and Strategic Plan Goals to achieve priority ecological, community, and economic outcomes. The Long-Term Investment Strategy will identify how the Board desires to structure its investment portfolio through two-year Spending Plans. <i>The Long-Term Investment Strategy is informed by the Strategic Plan and informs the Spending Plan.</i>
20,000 ft	OWEB's Two-Year Spending Plan	Following the legislature's approval of OWEB's budget, the Board adopts a plan to allocate available funding to specific programs and outcomes. The Spending Plan is the blueprint for how the Long-Term Investment Strategy is implemented. The Board may incrementally implement the Investment Strategy through successive Spending Plans.
10,000 ft	Grants Process, administration	
Ground Level	On-the-ground implementation	



The Spring 2012 Listening Sessions are intended to inform the Board in the design and adoption of this strategy.



OREGON WATERSHED ENHANCEMENT BOARD

Strategic Plan

The Oregon Watershed Enhancement Board (OWEB) operates a grant program that helps Oregonians restore and protect rivers and wetlands – providing clean water and healthy habitat for native fish, wildlife and people. OWEB is led by a 17-member citizen board drawn from the public at large, tribes, and federal and state natural resource agency boards and commissions. OWEB grants are funded with a small portion of Oregon Lottery dollars, federal dollars and salmon license plate revenue. By collaborating with citizens, volunteers and landowners in communities throughout the state, OWEB helps Oregonians care for Oregon’s watersheds.

Mission: To help protect and restore healthy watersheds and natural habitats that support thriving communities and strong economies.

Goals and Strategies

OWEB recently marked ten years as a state agency. The OWEB Board has updated its strategic plan to guide grant investment priorities and deliver effective and accountable programs for our partners and the public. We encourage you to read our latest strategic plan. The five goals and nine strategies that follow represent high priority strategic guidance to continue our work on behalf of Oregon citizens.

Goal 1 *Adaptive Investment*

Restore and sustain resilient ecosystems through investments that enhance watershed functions and support community needs.

Strategy 1.

Maintain and enhance restoration and protection programs that focus on watershed and ecosystem functions and processes, support sustainable working landscapes, and empower community-based conservation to address economic, social and environmental health.

Strategy 2.

Implement monitoring and research programs to build knowledge and strengthen feedback about OWEB investments and critical uncertainties to support adaptive management for outcome improvements.

Goal 2 *Local Infrastructure Development*

Support an enduring, high-capacity local infrastructure for conducting watershed and habitat restoration and conservation.

Strategy 1.

Establish and articulate policies related to the support and development of a diverse local infrastructure for watershed restoration.

Strategy 2.

Evaluate and adjust watershed council support grant review and funding processes to build local capacity, provide base funding, and promote strategic partnerships.

Strategy 3.

Provide technical assistance to build capacity, secure additional funding and increase local organizational resilience.



Goal 3 Public Awareness and Involvement

Provide information to help Oregonians understand the need for and engage in activities that support healthy watersheds.

Strategy 1.

Make Oregonians aware of the importance of healthy watersheds and inform them, in broad strokes, of what has been accomplished on their behalf through the work of OWEB and others.

Strategy 2.

Encourage and facilitate greater exploration and knowledge for those Oregonians who seek greater involvement in watershed and habitat restoration and conservation.

Goal 4 Partnership Development

Build and maintain strong partnerships with local, state, tribal, and federal agencies, nonprofit organizations and private landowners for watershed and habitat restoration and conservation.

Strategy 1.

Identify new and expand existing strategic partnerships that leverage OWEB funds and knowledge to achieve healthy watershed and community outcomes.

Goal 5 Efficient and Accountable Administration

Ensure efficient and accountable administration of all investments.

Strategy 1.

Continue to evaluate, explore and implement grant administrative processes to maintain and enhance efficiencies at all levels.

Historical View of OWEB's Programs

Cumulative Investments since 1999

Regular Grant Program (1999)*

Includes the following grant types statewide, responding to locally identified priorities based on recovery plans, watershed assessments, conservation plans and other federal, state or regional plans.

- **Restoration**

Projects that improve water quality, native fish or wildlife habitat, or watershed or ecosystem function.

- **Technical Assistance**

Projects that produce technical designs, action plans or landowner recruitment needed to develop and implement watershed restoration projects.

- **Monitoring**

Projects that identify watershed conditions, gather baseline data, evaluate effects of management activities, or compare watersheds before and after restoration.

- **Outreach**

Activities that increase awareness and understanding of watershed restoration and protection, and are also related directly to efforts to protect or restore native fish or wildlife habitat or water quality or stream flows.

- **Assessments**

Activities to evaluate how well a watershed is working; the first step in developing local watershed restoration plans.

Partnership Investments

Leverage OWEB grant funds by partnering at a programmatic level.

- **Special Investment Partnerships (SIP) (2007)**

Longer-term, larger-scale investments to address explicit ecological outcomes in specific locations. Current SIPs: Upper Deschutes, Willamette, and Upper Klamath basins.

- **Conservation Reserve Enhancement Program (CREP) (1999)**

CREP is a voluntary, federal-state partnership program for agricultural landowners to establish Long-Term, riparian buffers. OWEB funding pays for 25% of conservation practices and also supports local technical assistance for landowners.

- **Whole Watersheds Restoration Initiative (WWRI) (2006)**

The WWRI is a partnership with EcoTrust, U.S. Forest Service, and National Marine Fisheries Service that focuses on salmon habitat restoration efforts in areas of high ecological importance by targeting priority restoration actions across ownerships in focal watersheds.

Acquisitions grants (1999)

Conserve land or water interests through purchase or lease from willing sellers for conservation of priority habitats and species.

Local capacity grants (1999)

Support the operations of watershed councils and soil and water conservation districts to carry out activities necessary to protect or restore water quality, native fish or wildlife habitats, and watershed natural functions.

Effectiveness monitoring (1999)

Investments to determine whether restoration actions were designed and implemented properly, whether a project meets its ecological objectives, and learn from implemented restoration actions.

Oregon Plan for Salmon and Watershed Products (1999)

Funding for tools that support on-the-ground activities: recovery planning, monitoring, data development, mapping, and technical assistance.

State Weed Board Grants (ODA) (2011)

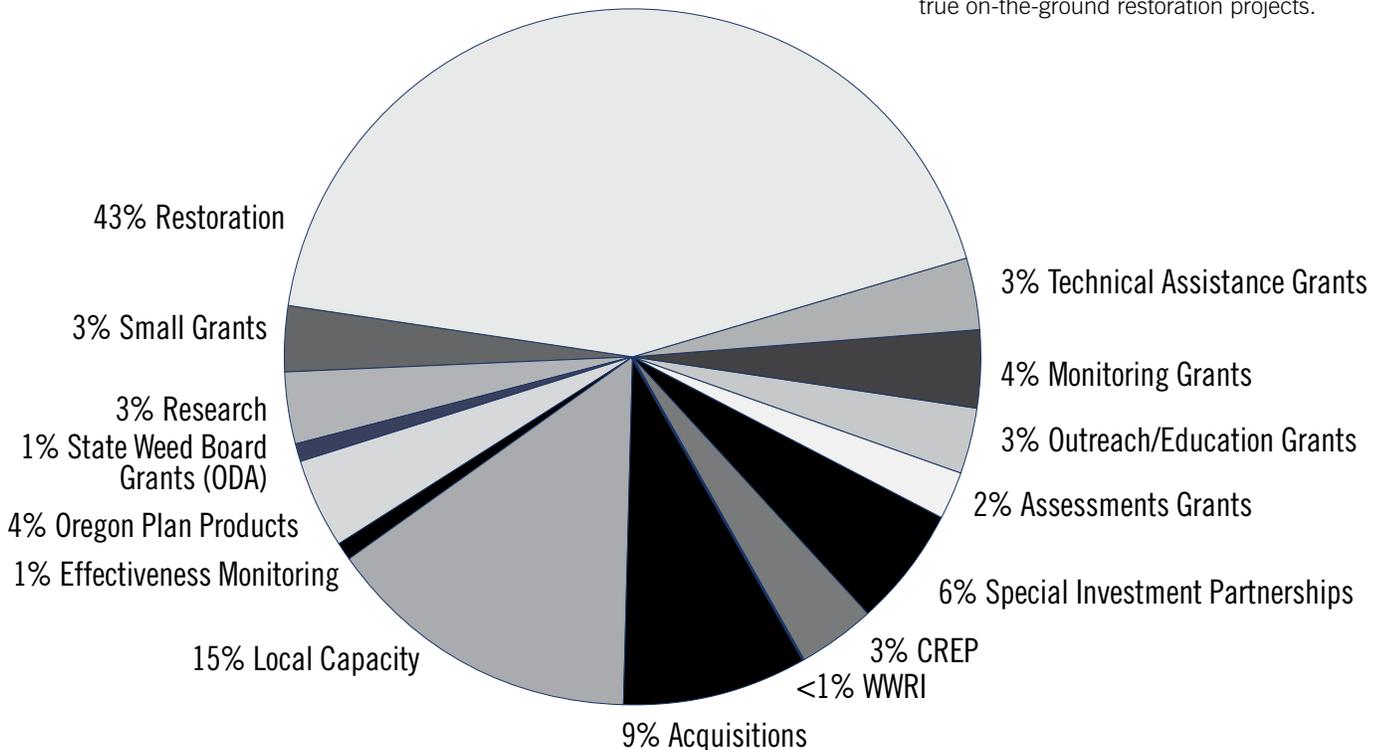
Address noxious weeds in order to protect and enhance Oregon's watersheds and fish and wildlife habitat. Became part of OWEB's grant budget in 2011.

Research (2002)

Funding for applied research that has resulted in data, information, and techniques that inform the restoration and enhancement of Oregon's watersheds.

Small Grants (2002)

Up to \$10,000 for smaller, quicker, tried and true on-the-ground restoration projects.



*Year in parenthesis is the date program was initiated with OWEB



OWEB Ballot Measure 76 and OWEB's Funds

Measure 76 created a long-term funding horizon for OWEB investments. Before Oregon voters passed Ballot Measure 76 in 2010, dedicated Lottery funds for restoration, enhancement and protection of clean water and native fish and wildlife habitat would have ended in 2014. Measure 76 provides dedicated funds with no end date. This long-term funding horizon makes it important for OWEB to consider its Long-Term Investment Strategy.

	Measure 66		Measure 76	
	Passed by voters in 1998 2014 funding sunset		Passed by voters in 2010 Long-term funding horizon	
	35% Non-Capital	65% Capital	35% Operating Fund	65% Grant Fund
Capital grants: restoration and land and water protection		Capital		Grant Fund
Other natural resource agency staff and programs tied directly to restoration		Capital	Operating Fund*	
ODA State Weed Board Grants		Capital		Grant Fund
Non-capital grants: Technical assistance, monitoring, outreach, assessment, research	Non-Capital			Grant Fund
Watershed Council and Soil and Water Conservation District Capacity Grants	Non-Capital			Grant Fund[†]
Interagency Agreements and contracts for Oregon Plan and other products	Non-Capital		Operating Fund	
OWEB Operations	Non-Capital		Operating Fund	

* Legislatively directed through agency budgets

† As implemented by 2011-13 legislative budget decisions