



Oregon Watershed Enhancement Board

Meeting Materials

for

**June 27, 2018
Board Meeting**

Cascade Locks, Oregon



OWEB Strategic Direction and Principles

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

Goals

Goals from OWEB's 2010 Strategic Plan

In 2010, the OWEB Board approved a strategic plan with five goals. With the passage of Constitutional Measure 76 and permanent Lottery funding, the Board continues to operate under the strategy.

Goal 1: Adaptive Investment

Restore and sustain resilient ecosystems through program and project investments that enhance watershed and ecosystem functions and processes and support community needs.

Goal 2: Local Infrastructure Development

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

Goal 3: Public Awareness and Involvement

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

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.

Goal 5: Efficient and Accountable Administration

Ensure efficient and accountable administration of all investments.

Long-Term Investment Strategy

OWEB's Framework for Grant Investments

In 2013, the Board adopted a Long-Term Investment Strategy that guides its investments of Lottery, federal and salmon plate funding. All of OWEB's investments in ecological outcomes also help build communities and support the local economy. The Board also approved a direction for the investments outlined below. They will continue operating capacity and open solicitation grants and continue focused investments with a gradual increase over time.

Operating Capacity

Operating Capacity Investments support the operating costs of effective watershed councils and soil and water conservation districts. Councils and districts are specifically identified in OWEB's statutes.

Open Solicitation

OWEB offers responsive grants across the state for competitive proposals based on local ecological priorities.

Focused Investments

OWEB helps landscape-scale collaborative partnerships achieve collaboratively prioritized ecological outcomes.

Effectiveness Monitoring

OWEB evaluates and reports on the progress and outcomes of watershed work it supports.



OWEB

Guiding Principles

Guiding Principles

As the Board developed the Investment Strategy, they did so under established principles for how any changes in OWEB's programs would operate.

Build on accomplishments. The commitment and work of our local partners have resulted in a nationally and internationally recognized approach with unmatched environmental accomplishments. OWEB will build on this foundation.

Effective communication. OWEB is committed to active, two-way communication of ideas, priorities, and results with its staff, partners, potential partners, and the public as a means for developing and maintaining a strong investment strategy and successful cooperative conservation.

Transparency. OWEB values transparency and develops its Long-Term Investment Strategy through an open, transparent process that involves input and dialogue with stakeholders and staff.

Maximize service, minimize disruption. The Board considers how OWEB's grant portfolio impacts partner organizations and staff resources to maximize effectiveness without adversely affecting service delivery.

Responsive. The Long-Term Investment Strategy will adjust to changes in revenue and be responsive to changes in ecological priorities from the Governor, Legislature, the Board, and local partners.

Adapt based on monitoring and evaluation. OWEB's staff and Board monitor and evaluate the effectiveness and implementation of the Long-Term Investment Strategy. The Board shall adapt and modify the strategy as needed to meet its desired goals and outcomes and to improve overall investment success.

Phase-in Change. OWEB's Long-Term Investment Strategy will guide future efforts, is designed to accommodate changes and adjustments made by stakeholders and OWEB staff, and will be periodically revisited.

Operating Principles

Operating Principles to Enhance OWEB Team Work

We will do all we can, individually and as a group, to:

- **Use Good communication--at all levels and in all directions;**
- **Operate with a Team approach;**
- **Follow through on conversations in order to build and maintain needed trust;**
- **Empower staff wherever it is appropriate to do so; and**
- **Have fun while doing important work!**

Joint SRFB & OWEB Meeting Agenda

June 25-26, 2018

Skamania Lodge & Tour
1131 SW Skamania Lodge Way, Stevenson, WA 98648



WASHINGTON STATE
RECREATION AND CONSERVATION OFFICE
Salmon Recovery
Funding Board



Time

Opening sessions will begin as shown; all other times are approximate.

Public Comment

To comment at the meeting, please fill out a comment card and provide it to staff. Please be sure to note on the card if you are speaking about a particular agenda topic. The chair will call you to the front at the appropriate time. Public comment will be limited to 3 minutes per person.

Meeting Accommodations

Persons with disabilities needing an accommodation to participate in RCO public meetings are invited to contact us via the following options: 1) Leslie Frank by phone (360) 902-0220 or e-mail leslie.frank@rco.wa.gov. Accommodation requests should be received at least three business days prior to the meeting to ensure availability. Please provide 2 weeks' notice for requests to receive information in an alternative format and for ASL/ESL interpretation requests.

MONDAY, JUNE 25

DINNER: Salmon Recovery Funding Board (SRFB) & Oregon Watershed Enhancement Board (OWEB)

6:00 p.m.	Joint Board Gathering, Introductions and Dinner – Skamania Lodge, Adams Room	David Troutt, Chair SRFB Randy Labbe, Co-Chair OWEB Will Neuhauser, Co-Chair OWEB
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8:00 p.m. Recess

TUESDAY, JUNE 26

MEETING: Salmon Recovery Funding Board (SRFB) & Oregon Watershed Enhancement Board (OWEB)

7:00 a.m. Breakfast – Skamania Lodge, Jefferson Room

8:00 a.m. Opening Remarks, Adams Room

David Troutt, Chair SRFB
Randy Labbe, Co-Chair
OWEB

Kaleen Cottingham, RCO
Meta Loftsgaarden, OWEB

8:10 a.m. Discussion with NOAA Regional Administrator Barry Thom

Barry Thom, Regional
Administrator, NOAA
Fisheries, West Coast Region

8:50 a.m. Salmon Recovery – Overview of Oregon's and Washington's Organizations and salmon recovery structures, including capacity and project funding.

Tara Galuska, RCO
Liz Redon, OWEB
20 minutes each
20 minutes Q&A

9:50 a.m. Sharing best practices and lessons learned on focused investment strategies

Andrew Dutterer, OWEB
Eric Hartstein, OWEB

10:20 a.m. BREAK

10:35 a.m. Shared Monitoring Needs and Addressing Predation (Northern Pike, Sea Lions and Terns)

Steve Martin, GSRO
Keith Dublanica, GSRO
Justin Bush, WISC

11:20 a.m.	Communication and Outreach strategies	Steve Martin, GSRO, RCO Courtney Shaff, OWEB 15 minutes each
11:50 p.m.	Public Comment	
12:15 p.m.	Grab Lunch and DEPART ON TOUR	

AFTERNOON TOUR

12:30 p.m.	DEPARTURE – Meet at Bus	
1:00 p.m.	Hemlock Dam Site (Washington)	Josh Lambert, RCO Steve Manlow, Lower Columbia Fish Recovery Board
2:00 p.m.	TRAVEL	
3:00 p.m.	East Fork Hood River Site (Oregon)	Greg Ciannella, OWEB Cindy Thieman, Hood River Watershed Group Chris Brun, Confederated Tribes of Warm Springs John Buckley, East Fork Irrigation District
4:00 p.m.	TRAVEL	
4:45 p.m.	SRFB & OWEB Informal Reception - Marine Park Pavilion, Cascade Locks (Oregon) <ul style="list-style-type: none"> Hosts: Columbia Land Trust, Friends of Columbia Gorge Underwood Conservation District, Mid-Columbia Regional Fisheries Enhancement, Hood River Soil and Water Conservation District 	Randy Labbe, Co-Chair OWEB Will Neuhauser, Co- Chair OWEB
5:45 p.m.	TOUR CONCLUDES – Travel to Skamania Lodge	
6:30 p.m.	Joint Board Dinner and Tribal Presentation - Skamania Lodge, Adams Room	Will Neuhauser, Co-Chair OWEB Eric Quaempts, Interim Executive Director, Confederated Tribes of the Umatilla Indian Reservation
8:00 p.m.	JOINT MEETING CONCLUDES	

Acronyms

OWEB – Oregon Watershed Enhancement Board, Oregon
SRFB – Salmon Recovery Funding Board, Washington
RCO – Recreation and Conservation Office, Washington
GSRO – Governor’s Salmon Recovery Office, Washington
WISC – Washington Invasive Species Council, Washington



Oregon

Kate Brown, Governor

Oregon Watershed Enhancement Board

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www.oregon.gov/OWEB



MEMORANDUM

TO: Oregon Watershed Enhancement Board
FROM: Liz Redon, Willamette Regional Program Representative
SUBJECT: Overview of OWEB Grant-making
June 26, 2018 SRFB/OWEB Meeting

I. Introduction

The Oregon Watershed Enhancement Board (OWEB) is a state agency that provides grants to help Oregonians take care of Oregon's watersheds. Grants are funded mostly from the Oregon Lottery, federal dollars, and salmon license plate revenue. Since 1997, the Oregon Plan for Salmon and Watersheds, or 'Oregon Plan,' has guided these efforts. Attachment A provides the executive summary of OWEB's 2015-2017 biennial report for the Oregon Plan.

II. OWEB Grant Offerings

Grants offerings began in 1999 with an Open Solicitation approach that included grants for restoration, assessment, monitoring, education, and council support. Since then, offerings have evolved and diversified to adaptively respond to the changing needs for an effective statewide watershed health restoration strategy. Today, OWEB's grant portfolio offers a variety of pathways and grant types that are found in Attachment B.

III. Grant Application, Technical Review Process, and Agreements

Applications are required for every grant offering. Each application is subject to a review by technical experts familiar with the subject matter and geography of the project. These review teams typically include staff from federal and state agencies, tribes, and non-profit organizations. For restoration and acquisition projects, reviewers are encouraged to participate in site visits coordinated by OWEB staff. At review team meetings, OWEB staff facilitates a discussion to identify the strengths and concerns of the project with respect to the applicable evaluation criteria. Based on this discussion, review teams provide a recommendation to staff for each project. OWEB staff synthesizes review team comments and recommendations into a project evaluation and funding recommendation to the OWEB Board or Director. The OWEB Board awards the grants based on this staff report, or gives authority to the Director to award grants for certain offerings. Grant agreements are developed to establish expectations of the grant

award, and include reporting requirements and any unique conditions for the project that is determined necessary to ensure likelihood for success.

IV. OWEB Grantees

OWEB grantees include organizations of all sizes and roles within the voluntary watershed restoration approach of the Oregon Plan. Grantees include watershed councils and other nongovernmental entities, soil and water conservation districts, and other special districts, tribes, land trusts, and local governments. These groups often form partnerships that broaden the network of entities contributing to Oregon's cooperative conservation approach to watershed health. Together they provide significant watershed, economic, and community benefits.

V. Lessons Learned

Recently, OWEB staff interviewed grantees implementing cooperative conservation to reflect on the impacts of watershed investments in Oregon (see Attachment C).

Attachments

- A. 2015-2017 Biennial Report
- B. Summary of grant programs
- C. Summary of Lessons Learned- Key Findings



2015-2017 BIENNIAL REPORT EXECUTIVE SUMMARY

The *Oregon Plan* for Salmon and Watersheds

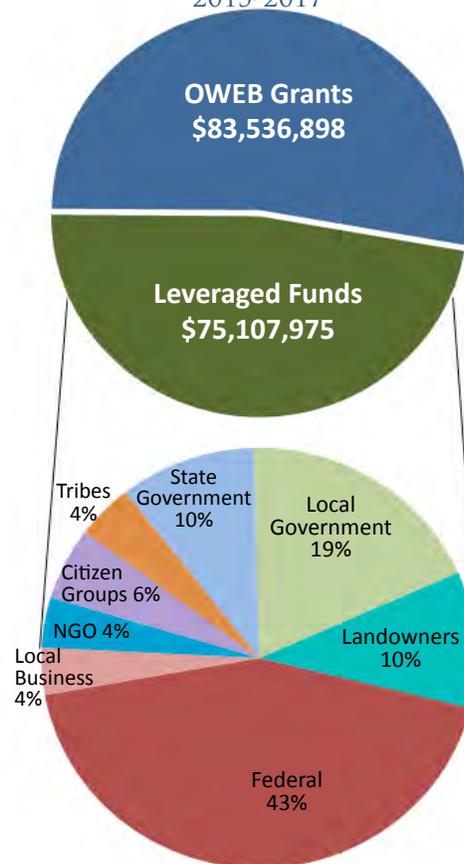
From rural landowners to urban residents, Oregonians value watersheds as a key to our quality of life in Oregon. This care and commitment helps drive on-the-ground projects that aim to improve water quality and restore habitat for native fish and wildlife. Since 1997, the Oregon Plan for Salmon and Watersheds (or 'the Oregon Plan') has guided these efforts. The Oregon Plan provides a statewide framework for restoration and conservation of the state's watersheds and fish and wildlife habitats, while at the same time supporting local economies and enriching Oregon's communities through local, voluntary restoration. Pursuant to Oregon Revised Statute 541.972, the Oregon Plan Biennial Report describes activities implemented under the plan for the 2015-2017 biennium. This Executive Summary of the biennial report highlights key investments and accomplishments over the past two years; coordinated actions among Oregon Plan partners and agencies; and recommendations from the Oregon Watershed Enhancement Board (OWEB) about future work. The full report can be found on the [Oregon Plan for Salmon and Watersheds website](#) and includes information about each region of the state, as well as additional details about the activities and accomplishments summarized below.

2015-2017 INVESTMENTS AND ACCOMPLISHMENTS

Total funding for watershed enhancement projects in Oregon was over \$158 million during the 2015-2017 Biennium. This total includes funding provided by OWEB from the Oregon Lottery, the Pacific Coastal Salmon Recovery Fund (PCSRF), salmon license plate revenues, and other sources. PCSRF, funded by NOAA Fisheries, remained an important contributor to Oregon's restoration efforts. Significant funding to match these dollars is provided by other funders, agencies, and partner organizations, increasing the impact of OWEB funding throughout the state.

Partners under the Oregon Plan are as important and diverse as the actions they undertake to benefit salmon and watersheds. These partners include landowners, non-profit organizations, tribes, local businesses, individuals, and all levels of government, each contributing to collaborative investments designed to support priority actions across the state.

OWEB AWARDED GRANTS 2015-2017



Grants awarded by OWEB from 7/1/15 to 6/30/17, the amount of leveraged funds contributed by grant participants, and the percentage of leveraged funds contributed by different categories of participants.

Watershed Metric	OWRI	BLM	USFS	Total
Riparian Miles (e.g., streamside plantings)	245.6	128.8	187	561.4
Instream Habitat Miles (e.g., wood placement)	153.6	-	-	153.6
Miles of Fish Habitat Made Accessible	142.0	16.6	182.0	340.6
Stream Crossings Improved for Fish Passage	91	8	64	163
Push-up Dams Retired to Improve Fish Passage	14	-	-	14
Fish Screens Installed on Water Diversions	31	-	-	31
Upland Acres (e.g., juniper thinning, seeding)	68,141.4	-	-	68,141.4
Wetland Acres (e.g., wetland habitat created)	2,128.2	-	-	2,128.2
Miles of Road Closures	21.0	1.5	274.0	296.5
Miles of Road Improvements (e.g., erosion control)	53.0	111.5	125.0	289.5
Miles of Riparian Invasive Treatments	508.0	-	-	508.0

Watershed restoration activities completed from 1/1/15 to 12/31/16 as reported to the Oregon Watershed Restoration Inventory (OWRI), U.S. Bureau of Land Management (BLM), and U.S. Forest Service (USFS). Restoration metrics are collected after projects are completed and reported to OWEB. Therefore, there is a lag between the current biennium and the time period for which metrics are available.

COORDINATED AGENCY ACTIONS

Oregon Plan agencies recognize the value of shared approaches. Collaboration across state natural resources agencies continued throughout the 2015-2017 biennium on several key interagency initiatives, including (but are not limited to):

- The Sage-Grouse Conservation Partnership ([SageCon](#)), which brings together landowners, agencies, and interest groups to identify and address threats to sagebrush habitats and the species that rely on them, implementing the [Oregon Greater Sage-Grouse Action Plan](#) (2015);
- The Conservation Effectiveness Partnership, a collaborative effort among multiple state and federal agencies that aims to describe the effectiveness of cumulative conservation and restoration actions in achieving natural resource outcomes through collaborative monitoring, evaluation, and reporting;
- Agricultural landowners engaging in innovative

and results-oriented water quality improvements with assistance from Oregon Department of Agriculture's (ODA's) Coordinated Streamside Management and Strategic Implementation Areas initiative;

- Ongoing implementation of Oregon's Integrated Water Resources Strategy (led by the Oregon Water Resources Department) and the state's Federal Forest Health Program (led by the Oregon Department of Forestry);
- The first update to the [Oregon Conservation Strategy](#) in 2016; and
- Initial implementation of Oregon Department of Fish and Wildlife's [Multi-Species Coastal Management Plan](#) for salmon and other native fish.

Additional information about coordinated actions around the state focused on monitoring water quality and quantity, fish populations, and habitat, are described in the [Biennial Report](#), along with details about other Oregon Plan agency programs.

FROM THE OWEB BOARD



In the past two biennia, the OWEB Board has made recommendations in four significant investment areas: Operating Capacity, Open Solicitation, Focused Investments, and Monitoring. During the 2015-2017 biennium, OWEB invested significant effort in turning these recommendations into reality, awarding over \$13 million in Operating Capacity grants; over \$45 million in Open Solicitation grants; nearly \$14 million in Focused Investment Partnerships; launching a new online grant application system; and continuing to support monitoring and reporting on all aspects of the Oregon Plan.

The OWEB Board has nearly completed an update to its 2010 Strategic Plan, which provides an opportunity for the agency to strategically look at its programs and granting decisions, and consider how best to address new challenges and seize upon new opportunities over the long term.

As we look toward the future, the Board recommends support of several investment areas and partnerships.

- Continuing to invest in local organizational capacity via OWEB's Operating Capacity grant-making and locally driven, high-priority projects—including working lands approaches on both forestry and agricultural lands around the state—through Open Solicitation grants, along with effectiveness monitoring of these investments.
- Making programmatic investments that contribute to the conservation and recovery of native fish and

wildlife and their habitats through coordinated, large-scale programs. Examples include:

- Investing in future Focused Investment Partnerships and associated monitoring and tracking of progress by these partnerships.
- Continuing OWEB's commitment to greater sage-grouse habitat restoration by investing at least \$10 million in funds between 2015 and 2025.
- Assisting with implementation of the federal recovery plan for Oregon Coast coho salmon by supporting development of strategic action plans in support of coho restoration work.
- Developing partnerships with other state and federal agencies to improve the use of water-quality data to inform conservation and restoration investments and develop tools to improve water quality and streamside health on agricultural lands. One example is Coordinated Streamside Management, initiated by ODA and OWEB to improve water quality, initially focused on agricultural lands.
- Supporting Oregon's forest health by administering grants to forest health collaboratives in partnership with Oregon Department of Forestry.
- Supporting Oregon's working farms and ranches in coordination with agriculture and conservation organizations to identify approaches to keep working lands in agriculture while supporting fish, wildlife and other natural resource values. Find more information on the [Oregon Agricultural Heritage Program webpage](#).

OWEB Grant Offerings

Pathways	Types
<p>Open Solicitation</p>	<ul style="list-style-type: none"> a. Restoration grants are OWEB’s primary method of delivering support for projects that restore watershed function. Typical restoration grants include riparian and upland habitat restoration, fish passage projects, and in-stream habitat restoration. b. Technical Assistance grants are for resource assessment, project planning and design. The grants also include technical assistance activities important for implementing the Conservation Reserve Enhancement Program, including planning, training, and landowner engagement. c. Stakeholder Engagement grants are intended for landowner and community engagement necessary for developing restoration or acquisition projects. d. Monitoring grants are used for assessing project effectiveness, identifying causes for changes in trajectory in habitat, fish and wildlife populations, and water quality, and developing plans to guide monitoring efforts. e. Programmatic Effectiveness Monitoring grants evaluate specific types of restoration actions at a larger geographic and temporal scale than project-level monitoring. These initiatives consist of evaluating the effectiveness of OWEB-funded restoration projects and programs. f. Land and Water Acquisitions grants involve the acquisition of interests inland and water from willing sellers for the purpose of maintaining or restoring watersheds and habitat for native fish or wildlife. The offering also includes technical assistance for work necessary for complex tidally influenced projects. In addition, OWEB works closely with local conservation and restoration partners for applications to US Fish and Wildlife for long-term coastal wetland ecosystems conservation. g. Oregon State Weed Board grants protect watershed health from the negative impacts of State Listed noxious weeds. h. Small Grants for small, straightforward restoration projects. The projects cannot exceed \$15,000, and are often the first experience a landowner has with OWEB.
<p>Focused Investments</p>	<ul style="list-style-type: none"> a. Implementation Focused Investment Partnerships grants address board-identified priorities of significance to the state; achieves clear and measurable ecological outcomes; use results-orientated approaches identified in strategic action plans; and are implemented by high-performing partnerships over a six-year timeframe. b. Development Focused Investment Partnerships grants support existing partnerships to build their capacity to partner at a high-performing level, generate a new strategic action plan, and/or to enhance an existing plan within a board-identified priority of significance to the state.

	<p>c. Focused Investment Effectiveness Monitoring grants evaluate the dedication of funding to specific actions in a particular geographic area. The approach employed by Focused Investment Partnerships provides an opportunity to learn about the progress and outcomes possible under six-year investments. Information emerging from these investments will be used by the board and stakeholders to adaptively manage partnership investments in the future.</p>
<p>Operating Capacity</p>	<p>a. Capacity (Watershed Council & Soil and Water Conservation District) grants support the operations of effective watershed councils and soil and water conservation districts to engage people in their communities to participate in collaborative, voluntary restoration of watersheds that conserve natural resources and address priority agricultural water quality concerns.</p> <p>b. Statewide Organization Partnership Support grants support the Network of Oregon Watershed Councils, Oregon Association of Conservation Districts, Coalition of Oregon Land Trusts, and Oregon Conservation Education & Assistance Network. These separate groups collaborate to deliver technical support, member services, program development, training, and outreach to their stakeholders.</p> <p>c. Organization Collaboration grants are available to groups of collaborating organizations seeking to improve organizational effectiveness to support actions that are necessary for carrying out eligible conservation actions or programs that lead to development of eligible projects.</p>
<p>Other</p>	<p>a. Oregon CREP is a cooperative venture between the State of Oregon and Farm Services Agency, with technical support from the Natural Resources Conservation Service and local partners. The purpose of this long-standing program is to restore, maintain, and enhance streamside areas along agricultural lands to benefit fish, wildlife, and water quality. Landowners enrolled in CREP receive annual rental payments and state and federal cost-share incentives to install approved conservation measures such as planting trees and shrubs, and installing fencing and livestock watering facilities.</p> <p>b. Strategic Implementation Areas grants are offered in partnership with Oregon Department of Agriculture in select areas around the state to receive focused landowner engagement to address priority water quality concerns.</p> <p>c. Governor’s Priorities grants address landscape-scale or emerging issues related to restoration needs of importance as identified by the Governor’s Office. Grant investments are targeted and catalyze broad-scale, multi-organizational work.</p>

Summary of Lessons Learned-Key Findings

The following resulted from a qualitative analysis of grantee interviews designed to understand the impact of watershed investments in Oregon:

A. Partnerships Increase Opportunities and Impact

Partnerships create strengths that reach beyond an individual organization's existing capacity. Creating a network of collaborative relationships among partners with different expertise, skills, and resources enables organizations to implement landscape-scale watershed projects. This builds motivation and optimism among partners as they see how their role benefits projects and communities. OWEB investments can grow partnerships, which has a synergistic effect that increases scope, scale, efficiency, and impacts of cooperative conservation.

B. Cornerstone Funder as Bedrock

Permanently dedicated lottery funding distributed by OWEB enables grantees to propose large, complex projects that have the greatest potential for improving watershed health. These funds are crucial for grantees to leverage other funding sources and expand their impact. OWEB's funding portfolio reflects on-the-ground needs and the evolving recognition of what it takes—both ecologically and organizationally—to carry out meaningful watershed enhancement. This awareness in OWEB's grant-making helps organizations complete the work that is most needed in their communities. OWEB is viewed not only as a funder, but as a partner.

C. The Road to Impact is Lined with Capacity

OWEB grantees define capacity as (1) funding to achieve their organizations' missions, (2) staff and board expertise, and (3) the level of engagement of their boards and members. Interviewees stated that their organizations believe long-term stable funding is the key to capacity, which leads to successfully engaging communities and expanding impact.

D. Relationships Matter

OWEB grantees serve as critical relationship builders in their communities. They are in a unique position to initiate conversations within communities that allow diverse interests to be communicated. These discussions move beyond a "one-size fits all" approach by providing the space for community members to discuss their interests and concerns. A history of collaboration and two-way knowledge exchange, especially when guided by respected community members, helps develop locally-driven projects and build a foundation of legitimacy and trust in communities.

E. From Ridge Top to River Valley: Diverse Strategies for Watershed Engagement Needed

The path to maintaining gains in watershed health and continuing to recruit voluntary action in cooperative conservation requires long-term and diverse approaches. Telling the watershed story can build community and individual aspirations for healthy watersheds; and ongoing engagement invites participation in conservation-focused organizations and projects. This storytelling is necessary to communicate the value of voluntary restoration to a community, and can create opportunities for watershed projects, as well as generate financial support.

F. We're on the Road to Somewhere: Planning Provides the Road Map, Evaluation Measures the Impact

Long-term vision for conservation work is important to proceed methodically and maximize impact. Planning helps to uncover not only the symptoms of impairments to watershed health, but the root causes. There is also broad interest among partners to evaluate conservation projects so grantees can describe outcomes of investments to a diverse audience, including landowners, funders, and the broader community. Showing the effects of conservation builds trust and creates opportunities for engaging more Oregonians in the work.

G. Diversity: An Opportunity for Growth

The Oregon Plan focused on a voluntary approach among landowners, communities and agencies; and the role of diversity, equity and inclusion was not yet evident in this blueprint for watersheds. There is now a belief that more can be achieved by engaging entire communities and focusing on including the underrepresented that typically have not participated in cooperative conservation efforts.

H. It Works Because We See Results

The cooperative conservation process provides an opportunity for stakeholders to overcome legacies of distrust and see that conservation can be compatible with economic development, working lands, and cultural resources. People begin to see that this approach can diversify opportunities through the stewardship economy that has emerged. Cooperative conservation results in "win-wins" for economies, communities, and the environment. Success stories are increasing confidence in and commitment to cooperative conservation as a solution for improving watershed health.

I. Scaling Up Impact

Landscape scale restoration is needed to have a significant impact on watershed health. To successfully scale up impact, organizations are identifying that they need to approach their work differently. Necessary elements include: (1) Expanded organizational capacity, (2) Increased collaboration among partners, (3) Looking beyond boundaries, (4) Access to foundational funding from OWEB and other funders, (5) Developing and implementing robust plans, and (6) Increasing evaluation to tell the story of the impact.



Salmon Recovery Funding Board Briefing Memo

APPROVED BY RCO DIRECTOR KALEEN COTTINGHAM

Meeting Date: June 26, 2018

Title: Salmon Recovery Overview – Washington State

Prepared By: Tara Galuska, Salmon Section Manager, Recreation and Conservation Office

Summary

This memo summarizes the structure of *Salmon Recovery In Washington State*

Board Action Requested

This item will be a:

<input type="checkbox"/>	Request for Decision
<input type="checkbox"/>	Request for Direction
<input checked="" type="checkbox"/>	Briefing

Background

Salmon Recovery in Washington state involves a large network of people dedicated to bringing salmon populations back from the brink of extinction. Salmon were first listed as threatened or endangered under the Endangered Species Act in Washington in the 1990s. We currently have 15 listed species of salmonids with over 145 populations throughout the state. The legislature responded to the listings by enacting the Salmon Recovery Act in 1999, setting up the unique bottom-up approach to recovery. Funding to enact the legislation comes from the state legislature's approval of the state capital and operating budgets and from the federal Pacific Coastal Salmon Recovery fund, administered by National Oceanic and Atmospheric Administration (NOAA).

The Salmon Recovery Act created the Salmon Recovery Funding Board (board), the Governor's Salmon Recovery Office (GSRO), and the regional organization and lead entity structure to write and implement recovery plans in the state. The GSRO, and the Natural Resource Cabinet, authored the foundational strategy document for recovery titled, [Extinction is Not an Option](#). It was updated in 2006, and renamed to "[The Washington Way](#)." Efforts are afoot right now to plan for a 2019 review and update to the strategy.

Although the Endangered Species Act requires the federal government to develop recovery plans for salmon species at risk of extinction, the State of Washington decided to take on the development of these plans through the regional organizations. State law directed development of a statewide strategy to recover salmon on an evolutionarily significant basis. The Governor's Salmon Recovery Office, together with other state and federal agencies, defined eight geographical salmon recovery regions.



Salmon Recovery Funding Board Briefing Memo

To coordinate the work of recovery planning and implementation, seven regional organizations formed within the regional recovery areas. Recovery plans were developed and approved by NOAA for all listed species, with the exception of Puget Sound Steelhead which is currently being developed with federal, state, tribal, local and private partners. NOAA Fisheries listed Puget Sound steelhead as a threatened species under the Endangered Species Act in 2007. A draft plan will be available for public review in 2018, with a final plan completed in 2019. In addition, a plan for the coast region was developed to address species that were not listed in the effort to have healthy, diverse and self-sustaining populations of salmon, maintained by healthy habitats and ecosystems, which also support the ecological, cultural, social, and economic needs of human communities. The board's primary role is to administer state and federal funding and to assist with a broad range of salmon-related activities. The primary goal is to recover salmonids (salmon, trout, and steelhead) by providing grants to local organizations. The Board funds projects consistent with the priorities identified in regional recovery plans that have been vetted by scientists, community members, and regional recovery organizations.

The board is composed of five voting members appointed by the governor and five non-voting state agency directors (or their designees). The board believes that science-driven, technically smart projects supported by local elected officials and citizens is essential to its strong grant program. Projects must demonstrate, through an evaluation and a monitoring process, that effective implementation will provide sustained benefit to fish.

The board funds riparian, freshwater, estuarine, nearshore, saltwater, and upland projects that protect existing, high quality habitats for salmon. It also funds projects to restore degraded habitat in order to increase overall habitat health and biological productivity of the fish. Projects may include the actual habitat used by salmon and the land and water that support ecosystem functions and processes important to salmon.

In September 2001, the board funded six regional groups to develop recovery plans. Each group developed a recovery plan that expanded on previous planning efforts and helped connect local, social, cultural, and economic needs and desires with science and the Endangered Species Act goals. The six organizations developed a series of actions necessary to recover salmon and gained regional consensus on measurable fish recovery results. Each of these regional recovery plans was reviewed and approved by NOAA. Today, the regional organizations implement these recovery plans and update them as necessary. A seventh regional organization, for the coastal area, which had no listed species at the time of formation, completed the *Washington Coastal Sustainability Plan*. The hallmark of this plan is that it protects the region's salmon habitats by bringing together partnerships aimed at safeguarding and enhancing the natural function of the regional ecosystems on which salmon depend. Currently, efforts are underway to develop a plan for Puget Sound Steelhead, which were listed in 2007. Additionally, the US Fish and Wildlife



Salmon Recovery Funding Board Briefing Memo

retained authority for developing a recovery plan for listed bulltrout. We use state funds to support projects in northeast Washington for bull trout recovery.

Recovery plans, or in their absence, lead entity strategies, form the basis for the Salmon Recovery grant program. Grant applicants must demonstrate how projects address the actions defined in the regional recovery plans or lead entity strategies.

By applying for a grant from the board, applicants become part of the salmon recovery network. That network includes larger watershed groups, regional organizations, non-profit organizations, state and federal agencies, local and tribal governments, as well as the Legislature, Governor, and Congress. This network supports salmon recovery, starting on the local level, which starts with people developing plans and projects.

The work of the board and the Governor's Salmon Recovery Office is supported by the Recreation and Conservation Office (RCO), which is a state agency whose director is appointed by the Governor. The RCO has 62 FTEs. The RCO administers many grant programs, in addition to those flowing through the Salmon Recovery Funding Board. Currently the RCO administers 17 distinct grant programs which funnel approximately \$534 million dollars in new and re-appropriated funds into projects that relate to salmon recovery, wildlife conservation, recreation, farmland and forest land preservation, and invasive species. The funding comes from federal funds, state general obligation bond funds, general tax funds, and dedicated funds (i.e. gas taxes and permit fees).

Links

- A. [Recreation and Conservation Office Salmon Recovery Page](#)
- B. [State of the Salmon in Watersheds Report](#)
- C. [Manual 18 2018, Salmon Recovery Grants Manual](#)



Oregon

Kate Brown, Governor

Oregon Watershed Enhancement Board

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MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Andrew Dutterer, Partnerships Coordinator
Eric Hartstein, Senior Policy Coordinator

SUBJECT: Sharing Best Practices and Lessons Learned on Focused Investment Strategies
June 26, 2018 SRFB/OWEB Meeting

I. Introduction

This report provides an overview of OWEB's Focused Investment Partnership (FIP) program, which includes both "Development" and "Implementation" grant offerings.

II. Background

In June 2013, the OWEB Board approved its Long-Term Investment Strategy Framework with four major areas of investment: Operating Capacity, Open Solicitation, Focused Investments, and Effectiveness Monitoring. Following an extensive public process, the OWEB Board established the following statewide priority areas for focused investments at its April 2015 meeting:

- 1) Sagebrush/Sage-Steppe Habitat
- 2) Oregon Closed Lake Basin Wetland Habitat
- 3) Dry-type Forest Habitat
- 4) Oak Woodland and Prairie Habitat
- 5) Coho Habitat and Populations along the Oregon Coast
- 6) Aquatic Habitat for Native Fish Species
- 7) Coastal Estuaries

III. FIP Grant Program

The FIP grant program supports high-performing partnerships that utilize strategic action plans to implement conservation work with clear and measurable outcomes in the established priority areas.

The Development FIP grant program considers initiatives with an existing partnership that are pursuing enhancement of that partnership, development of a strategic action plan, and community engagement in support of the strategic action plan. Funding for Development FIP grants is for up to three years and \$150,000. Beginning in the 2015-2017 biennium, the OWEB Board has made available approximately \$1 million for the

Development FIP grant program per biennium. Current Development FIP initiatives are described in Attachment A.

The Implementation FIP grant program considers initiatives with an existing strategic action plan that are ready for implementation by a high performing partnership for a period of up to six years, seeking an average of \$2 million/biennium. In the 2015-2017 biennium. The OWEB Board awarded over \$14 million to six Implementation FIP initiatives (Attachment A) for conservation work beginning in that biennium. In the current biennium, the OWEB Board has awarded over \$15.5 million for the existing Implementation FIP initiatives.

IV. Implementation FIP Progress Monitoring Framework

OWEB has provided a grant to Bonneville Environmental Foundation (BEF) to develop a progress monitoring framework for Implementation FIP partnerships. The key elements of the framework are a results chain and a theory of change narrative. Results chains are graphical representations of the partnership's theory of change for how strategies are expected to produce long-term ecological impacts. These tools offer a mechanism for adaptive management within an initiative, and provide a mechanism for the partnerships and OWEB Board to track progress towards meeting desired ecological outcomes.

V. Partnership Learning Project

In addition, OWEB's board awarded funds to BEF for FIP effectiveness monitoring, including the "Partnership Learning Project." The purpose of the Partnership Learning Project is to better understand what partnerships need to be resilient and maintain a high level of performance, and how OWEB can improve the FIP program to support these partnerships to achieve desired ecological outcomes.

VI. Lessons Learned

As the FIP grant program is relatively new, it has been important for OWEB to allow for flexibility in both Development and Implementation FIP initiatives. OWEB recognizes that each partnership is unique, and strives to manage the program in a manner that respects the distinct ecological and social challenges that partnerships face. Through the work of BEF and their project partner, Reciprocity Consulting, OWEB has also engaged in a "Partnership Learning Project" with each FIP initiative in which critical questions about the challenges partnerships face, the resilience of partnerships through time, and how the FIP program may be improved are being asked. The findings that are generated through this process are expected to help guide the FIP program into the future. Attachment B is the Executive Summary of Phase I of the Partnership Learning Project.

VII. Recommendation

This report is for informational purposes only.

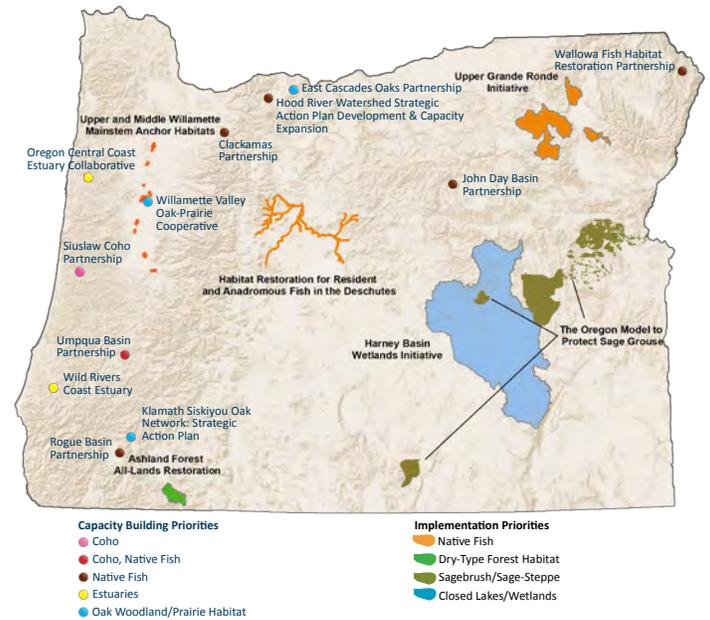
Attachments

- A. Development and Implementation FIP Initiatives
- B. Partnership Learning Project, Phase I Executive Summary

Focused Investment Partnerships

Landscape-Scale Conservation

A Focused Investment Partnership is an OWEB investment that addresses a board-identified priority of significance to the state, achieves clear and measurable ecological outcomes, uses integrated and results-oriented approaches as identified through a strategic action plan, and is implemented by a high-performing partnership. Through the Implementation program (see below), OWEB has awarded the first four years of planned 6-year investments for 6 partnerships, whose actions are designed to achieve measurable progress toward ecological outcomes. Through the Development program (see reverse), OWEB has awarded grants to partnerships seeking to strengthen their collaborative work and develop strategic action plans.



Implementation Partnerships

Upper and Middle Willamette Mainstem Anchor Habitats

- Willamette Mainstem Anchor Habitats Working Group was awarded \$2,445,000 by OWEB to rehabilitate the floodplain and riparian forests, reconnect the river to its historical floodplain, and increase channel complexity.
- The total cost of the initiative is \$4,430,000.*

Upper Grande Ronde Initiative

- Grande Ronde Restoration Partnership will improve and increase habitat quantity, quality, and diversity for all life stages of spring Chinook, summer steelhead, and other native species in Catherine Creek and the Upper Grande Ronde. OWEB will invest \$2,417,000 in the \$18,263,620* initiative.

Harney Basin Wetlands Initiative

- Harney Basin Wetlands Initiative Partners will develop a model for complex problem resolution for controlling carp and improving aquatic health in Harney Basin wetlands. OWEB will invest \$1,970,000 in the \$3,110,000* initiative.

Habitat Restoration for Resident and Anadromous Fish in the Deschutes

- The Deschutes Partnership will restore the physical and biological conditions necessary for successful reintroduction of salmon and steelhead into 226 miles of historic habitat in Whychus Creek, Metolius River, and Crooked River. OWEB will fund \$4,000,000 of the \$6,960,000* initiative.

Ashland Forest All-Lands Restoration

- Ashland Forest All-Lands Restoration Partnership will create a balance of open- and closed-canopy habitat conditions approaching the Natural Range of Variability. Their work will also provide landscape resilience to mitigate the threat of severe wildfire to water quality, dependent wildlife, late-successional habitat, oak habitat, aquatic habitats for native fish, and surrounding human communities. OWEB will fund \$2,340,000 of the \$4,090,000* initiative.

Oregon Model to Protect Sage-Grouse, All Counties

- Greater sage-grouse populations have declined in Oregon and throughout the West. Oregon All Counties Candidate Conservation Agreement with Assurances (CCAA) Steering Committee was awarded \$2,355,000 by OWEB to develop and implement CCAAs with private landowners for the seasonal or year-round protection of sage-grouse habitat. The total cost of the initiative is \$2,997,750.*

* Initiative costs are approximate for the 2017-2019 biennium.

Focused Investment Partnerships



Development Partnerships

Coho Habitat and Populations along the Coast

Siuslaw Coho Partnership

Support of the Siuslaw, Siltcoos, and Tahkenitch coho populations with increased quantity and quality of instream complexity and rearing and spawning habitats, increased stream connectivity to floodplains, improved riparian habitat, and improvement in water quality.

Coho Habitat and Populations along the Coast, Aquatic Habitat for Native Fish Species

Umpqua Basin Partnership

Prioritization of restoration efforts throughout the entire basin, taking into account the long-term ecological recovery of the system for native species.

Coho Habitat and Populations along the Coast, Coastal Estuaries

Wild Rivers Coast Estuaries

Restoration of estuarine processes and functions in 10 South Coast estuaries over a 10-year timeframe.

Coastal Estuaries

Oregon Central Coast Estuary Collaborative

Protection and restoration of ecologically functional estuaries on the central Oregon Coast to improve their health and resilience.

Oak Woodland and Prairie

Willamette Valley Oak-Prairie Cooperative

Protection, restoration, and maintenance of a functional, resilient network of oak and prairie habitats in the Willamette Valley.

Klamath Siskiyou Oak Network

Establishment of short-, medium-, and long-term goals for oak habitat restoration actions to achieve ecological outcomes critical to reversing declining trends of oak-associated plants and wildlife over the entire southern Oregon landscape.

East Cascades Oaks Partnership

Development of an adaptive, strategic, collaborative, multi-scale approach to conservation that will improve the pace, scale, and effectiveness of oak conservation efforts in the East Cascades Ecoregion.

Aquatic Habitat for Native Fish Species

John Day Basin Partnership

Acceleration of the pace, scale, and impact of watershed restoration across the basin with increased cold water and summer base flows in the system, and fully-functioning ecosystem processes that support a long-term trend of increasing populations of wild summer steelhead, spring chinook, bull trout, and other important native fish.

Rogue Basin Partnership

Preservation and improvement of conditions to support native fish with clean water at sufficient volumes throughout the year to maintain healthy, interconnected, native riparian/floodplain forests and grassland and upland forest habitats dominated by native species.

Clackamas Partnership

Prioritization of actions for the recovery of listed species and to benefit Clackamas native fish populations informed by the Lower Columbia River Conservation & Recovery Plan.

Wallowa Fish Habitat Restoration Partnership

Prioritization and implementation of habitat restoration projects designed to maximize biological benefits in the Wallowa and Imnaha River subbasins to native aquatic species, with emphasis on Chinook salmon, steelhead, and bull trout in the Wallowa and Imnaha subbasins.

Hood River Partnership

Restoration of priority streams in the Hood River Watershed, including improved streamflows and instream habitat to support the recovery of threatened populations of Lower Columbia River steelhead, spring Chinook, and coho.



Executive Summary

OWEB's Focused Investment Partnership (FIP) Program was initiated in the 2015-2016 biennium to make multi-year investments in partnerships, which demonstrated strong potential to accelerate the restoration of priority species and habitats. In January 2016, the OWEB Board awarded \$13.7 million to fourteen partnerships – eight received two-year Capacity Building FIP grants to support the continued growth and development of their partnerships and six received six-year Implementation FIP grants to support large-scale on-the-ground restoration.

By encouraging reflection among grantees, this Partnership Learning Project aims to better understand:

- 1) What do partnerships need to be resilient and maintain a high level of performance? and**
- 2) How can OWEB improve and innovate the Focused Investment Partnership (FIP) program to support high performing, resilient partnerships that can make progress toward desired ecological outcomes?**

This report presents findings from the eight partnerships that received Capacity Building grants – **Clackamas Basin Partnership, John Day Basin Partnership, Oregon Central Coast Estuaries, Rogue Basin Partnership, Siuslaw Coho Partnership, Umpqua Basin Partnership, Wallowa Habitat Restoration Partnership**, and the **Wild Rivers Estuary Partnership**. These findings were produced from attending meetings of all eight Capacity Building partnerships from October 2016 to April 2017, in-depth interviews with 17 partners, and online survey responses from 80 partners across the partnerships.

Starting in Fall 2017, the same methods will be used to encourage reflection among the six partnerships that received Implementation FIP grants. Those findings will be presented in a separate report anticipated in Spring 2018.

Understanding the Value Proposition of a Partnership

Drawing from the public administration literature, it is helpful to think about partnerships on a continuum from **more autonomous partnerships**, where partners are loosely linked and periodically come together for information sharing or project-based collaboration, to **more collaborative partnerships**, where partners are committed to collective goals, complementary roles, and an integrated work plan.



Continuum of Partnerships



More collaborative partnerships require greater investments in planning, governance, conflict management, and communications, but the promise is that this increased investment will strategically leverage the strengths of diverse partners to tackle more complex restoration goals more effectively (Arnold and Bartels 2014, Warren, Reeve and Arnold 2016). When organizations align and focus their efforts, they also tend to be more attractive to funders, which has been prominent in partners' motivation for participating in the Capacity Building FIP grant.

“A big part of the motivation was working together in a more strategic way so that we could attract larger funding into the basin. The message was loud and clear that funders didn't want to fund single entities focused on single actions. If we wanted to get the work done that we wanted, then we had to work in a different way.”

What do partnerships need to be resilient, high performers?

Most partnerships in this study have been collaborating on specific projects for many years. Through OWEB's Capacity Building FIP grant, they have had the opportunity to build on that foundation through the development of 1) a strategic action plan that includes a prioritization framework for restoration activities, 2) governance documents that describe how partners will work together, and 3) an outreach plan that describes coordinated outreach to new partners and external stakeholders.

Reflecting on their history and how far they have come, many partners realized that one to three years of relationship building and internal organizational development were needed to solidify commitment to a collaborative effort before technical planning even began. Those groups that began strategic planning before talking about how partners would work together seemed to experience more internal skepticism and challenging group dynamics.

Throughout this early phase and even beyond, most partnerships experienced a cyclical process of addressing doubts and fears and reassuring partners of the value of working

together. Leaders who practiced good listening skills, diplomacy, and patience were able to effectively address doubts and keep the partnership unified. Partners felt stretched both within their own organization and by the partnership itself to understand how their internal goals aligned (or not) with the emerging focus, goals, geography, and funding opportunities of the larger partnership. Organizations that had recently gone through strategic planning found it easier to demonstrate overlapping interests and alignment with the broader partnership and justify their participation, for some a leadership role.

Tribal Engagement

Tribes played an important role in most partnerships – taking on various roles from leaders to core partners to promising new partners. Non-tribal partners described the learning curve of understanding the complexities of tribal interests, geography, internal organization, etc. Although non-tribal partners often assumed tribes had substantial capacity to participate, the geographic scale and breadth of tribal interests were significantly greater than most partners. With a little extra support, tribes with limited capacity could more fully participate, for example commenting on planning documents, participating in joint fundraising, or getting technical training to more fully participate in project implementation. Also, the complexities of intertribal relations were difficult for non-tribal partners to understand. Developing governance documents, such as an MOU, was seen as a valuable opportunity to respectfully learn about and address partner needs, including tribal perspectives.

Capacity to Partner

A common theme among small groups, such as watershed councils, soil and water conservation districts, land owner associations, and in some cases tribes, was limited capacity to participate. These groups expressed sincere appreciation for the capacity support provided by OWEB, while acknowledging that the collaborative work has taken more time than anticipated. If more capacity support were available, these small groups could more fully engage in the partnership's work.

Stakeholder Engagement

In general, it was difficult for partnerships to involve land owners, agricultural interests, and industrial forest interests at least during development of the strategic action plan. In a few cases, this was possible where well-organized land owner associations existed or where ranchers or farmers participated directly, for example as soil and water conservation district board members. In other cases, core partners worked diligently to reach out through personal networks to get some level of input from these interest groups. Most partnerships anticipated more success with engaging these interest groups once the plan was completed and the work shifted toward implementation.



Centralized Resources

GIS and IT are critical technical resources, most importantly for data analysis and planning, for example to integrate climate scenarios into prioritization frameworks, but also creating maps for outreach. GIS services are difficult for small organizations and even some partnerships to provide, and consultants are expensive. Some partnerships have had success with fee-for-service agreements, where the services of a GIS specialist could be shared among partners. Others relied on federal agency partners to provide GIS services. A few partners suggested that it would be extremely valuable if OWEB could provide GIS services at a regional level that could be broadly accessed.

Transitioning from Planning to Implementation

As partnerships anticipated the transition from planning to implementation, partners described feeling nervous, awkward, and excited. A common sentiment was expressed that if planning moves too slowly or if implementation funding lags too much after the plan is complete, partners may stop showing up, and the collective effort may lose momentum. Part of the awkwardness of transitioning to implementation is that partners are expected to “put their project ideas in the hopper” and accept that the list of prioritized projects may not include their own at the top of the list.

“Once we start having implementation money and ranking projects, it will take a different tone for the partnership. That will be challenging as the partnership changes.”

Many people felt this shift toward broad-scale collaboration wouldn't have been possible without funding for facilitators who can encourage a diversity of partners to feel comfortable participating, especially smaller organizations and younger professionals who at times have felt overpowered by well-funded organizations and senior professionals. Some partnerships selected internal facilitators, while others hired external facilitators – benefits and risks to both approaches were discussed.

Partners also found themselves caught in the transition between planning and implementation and faced with new decisions that represented uncharted territory, for example hiring a partnership coordinator or launching a partnership website before long-term funding was secured. A modest funding commitment could go far to bridge the gap between an intensive planning effort that creates the scaffolding for collaboration and the ability to attract long-term implementation funding to build out the partnership in earnest.

Diversified Fundraising

Diversifying fundraising strategies was highlighted as a critical path to get more capacity for continued partnership coordination and also larger grants to more effectively advance restoration at a large scale. Strategies to diversify funding were discussed by some



partnerships, but many smaller organizations haven't had the capacity to explore other options or invest in fundraising beyond what they already do. The promise of a collaborative model of watershed restoration is that there would be centralized leadership and resources to do fundraising on behalf of the whole to distribute to partners. However, partners expressed uncertainties, concerns, and fears about how this would affect individual fundraising and how funds might be distributed. Concerns were also expressed that there are only so many potential funding opportunities for this type of work, and over time, more funding may be concentrated in partnerships and high capacity organizations.

How can OWEB improve and innovate the Focused Investment Partnership (FIP) program to support high performing, resilient partnerships?

Funders have played a prominent role in how these partnerships have come together, including the focus and scope of the partnership. In many cases, partners cited the Capacity Building FIP grants, which supported facilitators, staff capacity, and consultants, as the tipping point that made the shift toward collaboration possible. In other cases, partners leveraged funding from other “anchor funders” and were able to deliver a “higher quality, seamless product” because of the Capacity Building FIP grants. Partners expressed universal appreciation for OWEB's flexibility allowing modifications to the timeline, scope, and strategic action plan template relative to partner needs.

“So far this grant has worked very well. I think the secret to this success is flexibility at OWEB. Had OWEB led these grants with hard and fast prescriptions, I think success would be much lower.”

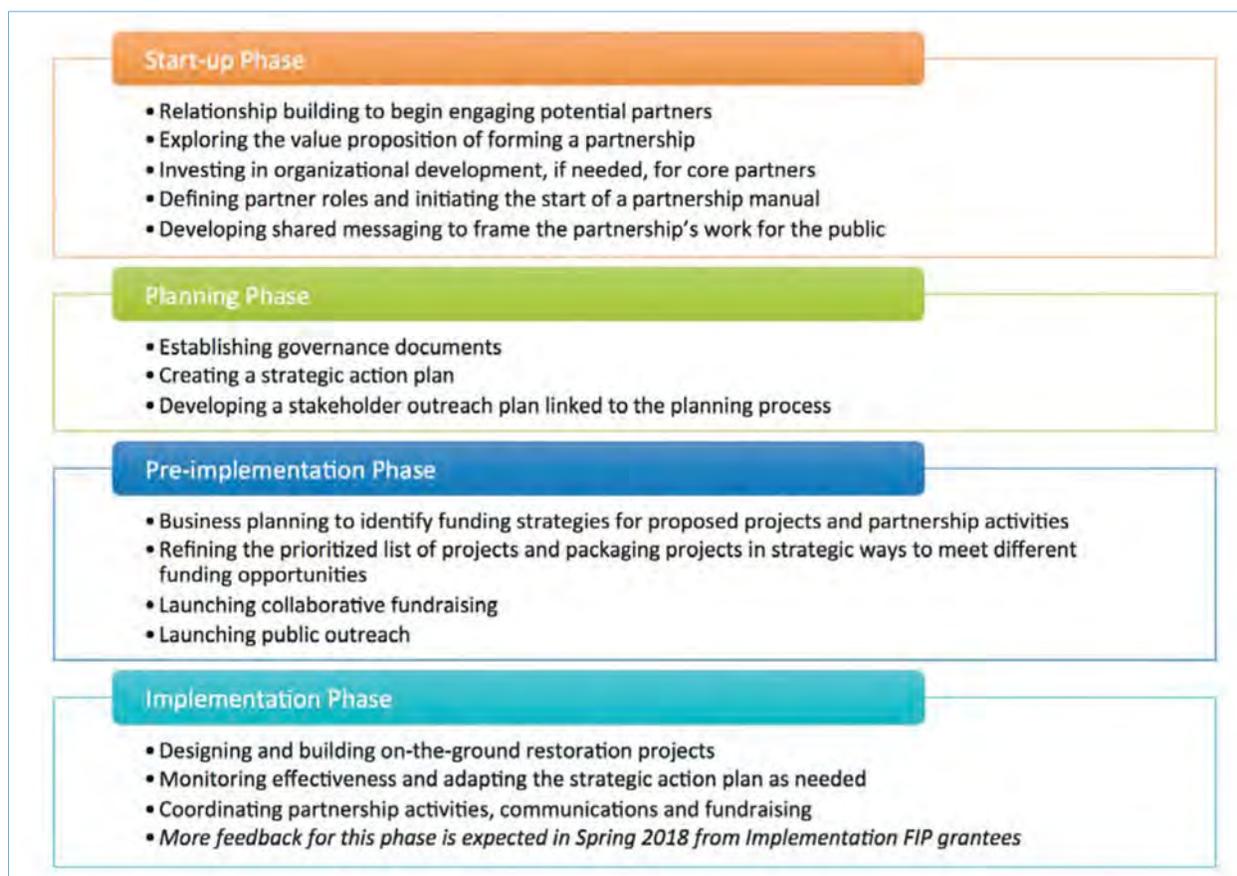
Suggested Four Phases of Partnership Support

As partners reflected on their progress with planning and looked ahead to their goals for implementation, several interesting suggestions surfaced across the partnerships that together paint the picture of how the FIP program could better support resilient partnerships through four phases of partnership support. Specifically, suggestions emphasized the need for more relationship building and organizational development upfront before technical planning began and more capacity to refine the prioritized project list and diversify fundraising strategies to more fully prepare for implementation.

“FIP or no FIP we're going to use our plan to leverage more money. The leverage is the plan. The better the plan the better the leverage. We don't have our plan fleshed out to the level that I would like. I would like to say, ‘We have these anchor habitats. Here's what your money will buy you, and this is what we can do. Here is why it matters, and here are the projects you can be involved in.’”



Suggested Four Phases of Partnership Support



The pre-implementation phase in particular seems to be a missing link in the current structure of the Focused Investment Partnership Program. Once the partnerships complete the Capacity Building FIP grants, they are eager to find substantial enough implementation funding to justify continued investment of time and effort in the partnership. Most partnerships are strategically focused on developing a competitive Implementation FIP proposal, despite the reality that the Implementation FIP grant is highly competitive and open to all partnerships in the state.

“We would definitely continue on and look for other funding if we didn’t get an Implementation FIP grant. But it would definitely help! Since we are investing a lot of our time and effort in defining what our FIP proposal would look like, it would be a shame if we didn’t get that funding source.”

Most partnerships will not be able to get an Implementation FIP grant because of the small number of grants open to all partnerships in the state, and so a key step in supporting the resiliency of these partnerships is to provide support for them to develop a business plan that would identify a mix of potential private and public funding sources. This would allow

a partnership to layout their work plans along different timelines and pace themselves according to the potential sources of available funds.

A question that requires more discussion is whether these newly strengthened collaborative partnerships will attract new investment for restoration in the state – potentially yes especially if restoration goals are linked more broadly with economic development – or whether this approach will simply concentrate existing investments in more focused geographies and activities. If there is a chance that funding in the state will stay the same or decrease, a measure of caution is wise to avoid encouraging the growth of too many collaborative partnerships if implementation funds are not likely.

Communications and Outreach Investments Linked to Strategic Action Planning

Several partners acknowledged the limitations of a highly technical strategic action plan relative to their goals for stakeholder outreach and the community support needed for project implementation. Suggestions for future investments in communications and outreach linked to the strategic action plan included: **studies on the economic value of restoration and why it should matter to people, clear messaging from these studies to launch a state-wide campaign** that could be tailored at the local level, and **general capacity for relationship building**, particularly local leaders and influencers with a history of skepticism toward government.

More Than One Way to Be Strategic in “Moving the Needle” for Restoration

OWEB’s two restoration funding programs – the Focused Investment Partnership (FIP) program and the open solicitation program – can be used strategically to respond to different types of opportunities. They have the potential to be complementary if they are appropriately linked and the details are clearly explained to potential grantees.

Similarly, within partnerships, there are different views about what’s most strategic to “move the needle” for watershed restoration. Partners that push for the biggest environmental win tend to rely on a purely scientific approach to prioritization that makes a clear case for specific geographies and restoration activities, which is a good match for the FIP program. Partners that operate with a “restoration through relationships” approach, which some refer to as opportunistic, tend to fit well with the open solicitation program. The latter approach may have more modest environmental wins initially, but this can build trust among potentially skeptical land owners. Through a “neighbor-to-neighbor approach,” one private land owner may turn from a restoration skeptic to a champion, and as a result, an initially modest environmental win can create positive waves of opportunity throughout a basin that can lead to increasingly strategic environmental wins over the long-term.



More discussion is needed to understand how best to link the Implementation FIP and open solicitation programs – or not – to support different paths to long-term restoration. Also, more support within the partnerships to navigate these differences could facilitate the development of prioritization frameworks that better reflect the diverse partners and constituencies represented by the strategic action plans. The value of respecting these differences and working to find common ground for long-term restoration cannot be underestimated.

Appreciation for Learning

From across the partnerships, people expressed appreciation for OWEB’s investment in this Partnership Learning Project to invite early feedback from grantees with a willingness to apply learning to the next evolution of the Focused Investment Partnership Program. Most partnerships also expressed an interest in repeating the survey, interviews, and observations at some point in the future to highlight their progress and any additional feedback that might emerge after more experience as a partnership. They also expressed an interest in future opportunities for peer-to-peer sharing across partnerships.





Salmon Recovery Funding Board Briefing Memo

APPROVED BY RCO DIRECTOR KALEEN COTTINGHAM

Meeting Date: June 26, 2018
Title: Shared Monitoring Needs and Addressing Predation
Prepared By: Steve Martin, Keith Dublanica and Justin Bush

Summary

This memo summarizes the salmon recovery monitoring programs supported by the Washington Salmon Recovery Funding Board (SRFB), provides an overview of predation as a key threat to salmon recovery, and notes a new invasive species lurking just upstream with devastating potential impact to salmon recovery in the Columbia River system.

Board Action Requested

This item will be a:

<input type="checkbox"/>	Request for Decision
<input type="checkbox"/>	Request for Direction
<input checked="" type="checkbox"/>	Briefing

Salmon Recovery Monitoring Programs as funded through 10% of PCSRF Award Overview

Background

As with every recipient of federal Pacific Coastal Salmon Recovery Funds (PCSRF), Washington dedicates at least 10% of its grant award (approximately \$2 million per year) to monitoring. The approach to monitoring has evolved over the past twenty years to an approach that supports three primary monitoring efforts: 1) status and trends monitoring (also known as Fish in/Fish out monitoring); 2) intensively monitored watersheds (IMWs); and 3) reach-scale project effectiveness monitoring.

Status and Trends (Fish in – Fish out) Monitoring

The Washington Department of Fish and Wildlife (WDFW) monitors specific index streams statewide. The SRFB provides funding to support approximately 6% of the overall budget for statewide status and trends monitoring. The principal investigators for this monitoring utilize a robust sampling regime and framework where juvenile salmon out migrants and returning adult spawning salmon are tracked. The subsequent data analysis contributes to extrapolations of fish distribution and abundance to other tributaries. The Department of Fish and Wildlife provides annual reporting to the SRFB's Monitoring Panel, which then reviews the monitoring process and results. The successful consistency and continuity of this program is due to the diligent expertise of the program principal investigators and their utilization of quality assurance and quality control protocols and methodology.

The principal investigators provide comprehensive detail and rationale in their supporting presentations and documentation that includes peer-reviewed journals produced from the decade-plus of monitoring. They are encouraged to offer suggestions of how to better enhance the program and to increase communicating the results.

Intensively Monitored Watersheds (IMWs)

IMWs involve monitoring an entire watershed, along with a “paired” control or reference watershed, to see if the watershed-wide investments in restoration projects are having an impact. This allows comparisons of responses to specific habitat treatments that include monitoring of water quality, riparian cover, substrate, fish presence, distribution, abundance and productivity. The watersheds were selected over a decade ago for their particular and unique geomorphologic traits. They are frequently referred to as an experimental design, or Before-After / Control Impact (BACI) study. One site is left alone while an adjacent has received treatment. The changes in time to the habitat are monitored. There are three IMWs in the Puget Sound Region, one in the Lower Columbia Region, and one in the Snake River Region.

Reach –Scale Project Effectiveness (PE)

Reach –scale project effectiveness monitors nine categories of project effectiveness over more than a decade of sampling. The categories of projects monitored include: instream structures, riparian cover, floodplain/off channel, diversion screening, livestock exclusion and fish passage, among others.

Both SRFB and OWEB entered an interstate agreement for one component of project effectiveness monitoring, specifically the livestock exclusion category, with the Oregon sites being included in the Washington process in order to enjoy economies of scale and to maintain consistency in the sampling protocol.

Project effectiveness sampling, currently conducted by Cramer Fish Sciences, is scheduled to end this year, with a synthesis document of the previous ten years of the program due at the end of this calendar year by the contractor. The SRFB (with advice from the monitoring panel) will decide if it will continue with a subsequent phase and scope of effectiveness monitoring (including what categories should be included).

A workshop is scheduled for later this summer to address potential modifications to the program, including options for economies of scale, remote sensing and stakeholder interest. Another collaborative effort with OWEB, similar to that performed last year for the livestock exclusion category, would be a good topic for discussion.

SRFB Monitoring Panel

The SRFB Monitoring Panel was established in 2013 and has been charged with providing an expert panel for objective review of the SRFB-funded monitoring investments. The panel meets on a regular basis specific to the major monitoring categories, providing desk-top reviews and site visits with principal investigators when essential to the process. The panel informs the SRFB with recommendations to improve the monitoring program.

Predation – a Threat to Salmon, Orcas and Fishers

Predation in an Altered Ecosystem

Salmon and predators evolved together for eons in their natural habitat. Unfortunately the natural habitat has been altered with physical, chemical and biological factors that threaten salmon and give predators a competitive edge. This has a huge potential to compromise salmon recovery investments. Emerging data, due largely to recent technology, is revealing alarmingly high and increasing rates of predation on salmon by predatory fish, birds, and marine mammals. Floats, buoys, bulkheads, docks, bridges, culverts, dams, artificial islands, dikes, and the list goes on, are offering predators a competitive advantage because they: (1) funnel large numbers of salmon into narrow areas; (2) provide ambush cover for predators; (3) provide

haul out/resting/breeding sites for predators; and (4) reduce the abundance of alternative prey for the predators. Climate change is certain to make things worse. Near term management of predators while we work to address these factors will be critical to our efforts to recover salmon and the Southern Resident Killer Whales that depend upon them.

Northern Pike – An Invasive Species at the Door Step

Washington State agencies and Native American Tribes are working together to combat an increasing and alarming problem that threatens twenty years of state investment in salmon recovery--totaling over \$700 million in Washington alone. The invasive northern pike (*Esox Lucius*) is an apex predatory fish, preying on any finfish that will fit in their mouths. Since the early 2000s, northern pike have been spreading from Montana and Idaho rivers downstream through the Columbia River System's non-anadromous waters above Grand Coulee Dam. Alarmingly, they have reached Grand Coulee Dam and threaten anadromous waters downstream. While much is being done to prevent further spread within Washington, there is an urgent need for a cooperative effort at multiple scales between Oregon and Washington to address this issue. There is a unique opportunity to fully prevent the spread and damages to the shared resources and investments of Oregon and Washington. The Executive Coordinator of the Washington Invasive Species Council, will provide an overview of the problem and opportunities to work together with the Washington and Oregon Invasive Species Councils.

More information:

- *The website below has additional information and all of the summary reports for Northern Pike suppression: https://wdfw.wa.gov/ais/esox_lucius/*
- *King 5 News feature briefing on the situation at Lake Roosevelt: <https://youtu.be/co2xlVzAtLE>.*
- *Learn more about the Oregon Invasive Species Council by visiting: <https://www.oregoninvasivespeciescouncil.org/>.*
- *Learn more about the Washington Invasive Species Council by visiting: <https://invasivespecies.wa.gov/>*



Oregon

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www.oregon.gov/OWEB



MEMORANDUM

TO: Oregon Watershed Enhancement Board
FROM: Courtney Shaff, Capacity Programs Coordinator
SUBJECT: OWEB's 20th Anniversary Celebration and Broad Awareness Campaign
June 26, 2018 Joint OWEB/SRFB Board Meeting

I. Introduction

This report provides an overview of OWEB's 20th Anniversary Celebration and broad awareness campaign.

II. Background

In 1998, Ballot Measure 66 was passed by nearly 70% of Oregon voters. The measure dedicated the 15% of lottery revenues to support parks, and salmon and watersheds, with 7.5% going to State Parks and 7.5% supporting work to improve native fish and wildlife habitat and water quality. In 1999 OWEB was created to manage the 7.5% of the Lottery revenues dedicated to restoring watershed health.

In 2019, OWEB will celebrate 20 years of providing grants to help Oregonians take care of local streams, rivers, wetlands, and natural areas. This campaign ties directly to the first priority in OWEB's draft strategic plan – broad awareness of the relationship between people and watersheds. As a part of that priority, OWEB, working with Oregon Lottery, watershed councils, SWCDs, land trusts, and others, will tell the stories of the people, places, and partnerships that make Oregon's Conservation ethic unique.

III. Broad Awareness Campaign

OWEB serves as an information source for partners as they carry messages to their stakeholders about the importance of healthy watersheds to all Oregonians. As a part of this campaign, OWEB and its partners are developing resources for local stakeholders to help them highlight both conservation actions and the people impacted by those actions. Oregon Lottery has led training for local stakeholders to help them better work with media and use social media more effectively, as well as coordinating press releases to share the stories of our local partners.

Beginning this fall and continuing through 2019, OWEB and partners will tell the stories of the people and places that make Oregon's conservation ethic unique, while showing gratitude to all Oregonians, who have supported this work since OWEB's inception.

IV. Recommendation

This report is for informational purposes only.



Salmon Recovery Funding Board Briefing Memo

APPROVED BY RCO DIRECTOR KALEEN COTTINGHAM

Meeting Date: June 26, 2018
Title: Communication and Outreach Strategies
Prepared By: Steve Martin, Executive Coordinator, Governor's Salmon Recovery Office

Summary

This memo summarizes Washington's communication and outreach strategies about salmon recovery.

Board Action Requested

This item will be a:

<input type="checkbox"/>	Request for Decision
<input type="checkbox"/>	Request for Direction
<input checked="" type="checkbox"/>	Briefing

Background and context

Agency-wide Communications Plan

The Recreation and Conservation Office (RCO) developed a 5-year, agency-wide, multi-board communications plan, which began in 2013. The plan has three main goals, the first of which is relevant to this memo:

1. Build support for RCO's missions of salmon recovery, land conservation, recreation, and invasive species management.

To focus on the mission of salmon recovery, the Governor's Salmon Recovery Office (GSRO), which is a program within the Recreation and Conservation Office, in conjunction with the Salmon Recovery Funding Board (Board) commissioned the development of a stakeholder-engaged communications and fundraising plan.

Salmon Recovery Communications Plan

The Board and GSRO hired a consultant to develop a communications plan in 2014 and update it in 2016. The consultant developed a plan, informed by our stakeholders, which identified several key messages with four priority actions to help get those messages communicated to the public, elected officials, and federal agencies.

Key Messages

- Salmon bind us to this region and to one another.
- Investments in salmon recovery provide multiple benefits.
- We are shaping our own futures: salmon recovery is locally designed and led.
- Salmon are in trouble.

- Restoring salmon is working, but there is much more to do.
- Time to step up and make good on our investments.
- Salmon are ours to save.

Priority Actions

The four priority actions are as follows:

- Improve internal network communications
- Strengthen the capacity of the regions to lead
- Build relationships that extend our reach
- Create and use effective messages and tools

The first goal of improving our internal network communications focuses on creating a forum for all the salmon recovery partners to identify and communicate shared statewide priorities. The idea is that if all the partners are speaking with the same voice, our salmon recovery message will be amplified to the public and to the funders. The Salmon Recovery Network (SRNet) was created a few years ago to fill this purpose. It meets regularly.

The second goal of “strengthening the capacity of the regions to lead” recognizes that regional organizations are essential resources and conveners for our partners in recovery. The work under this goal is about helping regions, lead entities, and others synchronize their priorities and customize local message. To that end, the Board has provided funding to each region to develop and customize communications plans.

The third goal is about building relationships to sustain the long-term commitment required for salmon recovery. Part of the work in this goal is to build social media, online, and earned media forums where salmon recovery partners can share their stories of success. RCO has just hired a part-time communications specialist, who will begin to tackle this work.

The final goal of creating effective messages and tools is about creating info graphics, online stories, briefing papers, videos, etc. and unifying those through a common look and feel. The idea is to have tools that can be used easily by all the partners so we speak with one voice, amplifying the salmon recovery message.

Salmon Recovery Network (SRNet)

All across Washington there is a network of salmon recovery partners who are working to implement the recovery plans. Regional Fisheries Enhancement Groups (RFEG's), Lead Entities, Conservation Districts, Tribes, state agencies, and nonprofit organizations, just to mention a few, are hard at work developing proposals for high priority projects identified in the recovery plans. This network is known as the Salmon Recovery Network, or SRNet. SRNet is a forum where members can work together to build understanding and identify shared priorities for action. Members are able to speak to others with a unified and mutually-supported voice and collaborate at each organizational level (watershed, Lead Entity, region, statewide, etc). The Network develops and supports long term funding strategies for salmon recovery implementation to ensure sufficient funding for the human and organizational capacity to effectively implement salmon recovery. They review and discuss policies and programs related to salmon recovery and often provide their perspectives and recommendations as a unified voice.



Oregon Watershed Enhancement Board

Meeting Agenda

June 27

Wednesday, June 27, 2018

Port of Cascade Locks
Marine Park Pavilion
395 SW Portage Rd.
Cascade Locks, OR 97014
Directions: <https://goo.gl/maps/XH76P94vc4M2>

Business Meeting – 8:00 a.m.

For each agenda item, the time listed is approximate. The board may also elect to take an item out of order in certain circumstances. During the public comment periods (Agenda Items D and L), anyone wishing to speak to the board on specific agenda items is asked to fill out a comment request sheet (available at the information table). This helps the board know how many individuals would like to speak and to schedule accordingly. At the discretion of the board co-chairs, public comment for agenda items on which the board is taking action may be invited during that agenda item. ***The board encourages persons to limit comments to 3 to 5 minutes.*** Written comments will also be accepted on any item before the board. Written comments should be sent to Eric Hartstein at Eric.Hartstein@oregon.gov. Please note that written comments received after June 20, 2018 will not be provided to the board in advance of the meeting.

A. Board Member Comments (8:05 a.m.)

Board representatives from state and federal agencies will provide an update on issues related to the natural resource agency they represent. This is also an opportunity for public and tribal board members to report on their recent activities and share information and comments on a variety of watershed enhancement and community conservation-related topics. *Information item.*

B. Review and Approval of Minutes (8:45 a.m.)

The minutes of the April 24-25, 2018 meeting in Frenchglen will be presented for approval. *Action item.*

C. Board Subcommittee Updates (8:50 a.m.)

Representatives from board subcommittees will provide updates on subcommittee topics to the full board. *Information item.*

D. Public Comment (9:10 a.m.)

This time is reserved for general public comment, and public comment associated with the OWEB Strategic Plan, as well as other matters before the board.

E. OWEB Strategic Plan –Adoption and Implementation Grants (9:30 a.m.)

Executive Director Meta Loftsgaarden will join Principal Consultant Steve Patty and Associate Consultant Jessamyn Luiz with Dialogues in Action to seek board approval on OWEB's new strategic plan. Following board action on the strategic plan, Director Loftsgaarden will request the board include a new line in its spending plan to implement components of the strategic plan. *Action item.*

F. Technical Assistance Grants- Administrative Rules (11:00 a.m.)

Grant Program Manager Eric Williams and Senior Policy Coordinator Eric Hartstein will present administrative rules for the technical assistance grants for board consideration and approval. Public comment associated with this item may be heard as part of general public comment. However, because this item has already been the subject of a formal public hearing and a comment period, further public testimony may only be taken upon changes made to the item since the original public comment period, or upon the direct request of the board members in order to obtain additional information. *Action item.*

G. Executive Director's Update (11:50 a.m.)

Executive Director Meta Loftsgaarden will update the board on agency business and late-breaking issues. *Information item.*

H. 2017-2019 Spending Plan Additions (1:00 p.m.)

Executive Director Meta Loftsgaarden, Partnerships Coordinator Jillian McCarthy, and Effectiveness Monitoring Coordinator Ken Fetcho will request the board approve receipt of funds from the:

- National Oceanic and Atmospheric Administration Fisheries' Pacific Coastal Salmon Recovery Fund,
- U.S. Fish and Wildlife Service's National Coastal Wetlands Conservation Grant Program,
- Natural Resources Conservation Service and Oregon Department of Forestry for the Conservation Reserve Enhancement Program, and
- Pacific States Marine Fisheries Commission funding for monitoring efforts in the Upper Middle Fork John Day River Intensively Monitored Watershed.

Action item.

I. 2017-2019 Council Capacity Awards- Lower Columbia Watershed Council (1:30 p.m.)

Capacity Programs Coordinator Courtney Shaff will request board action on the second year of funding for the Lower Columbia Watershed Council's 2017-2019 Council Capacity grant. *Action item.*

J. Focused Investment Partnership (FIP) – Upper Grande Ronde Request (1:50 p.m.)

Grant Program Manager Eric Williams and Partnerships Coordinator Andrew Dutterer will request the board carry-forward funds associated with the Upper Grande Ronde Restoration Partnership's 2015-2017 Implementation FIP award. *Action item.*

K. Land Acquisition Grant Program – 2017 Portfolio Monitoring and Rulemaking (2:10 p.m.)

Grant Program Manager Eric Williams and Acquisitions Coordinator Miriam Hulst will present to the board a summary of 2017 Land Acquisition portfolio monitoring, and request the board authorize rulemaking for Land Acquisition grants. *Action item.*

L. Public Comment (2:50 p.m.)

This time is reserved for general public comment, as well as other matters before the board.

M. OWEB Agency Request Budget (3:05 p.m.)

Executive Director Meta Loftsgaarden will request the board's approval of budget proposals that will be included in OWEB's Agency Request Budget to the Governor for the 2019-2021 biennium. *Action item.*

N. FIP Update – Partnership Learning Project Phase II (3:35 p.m.)

Capacity Programs Coordinator Courtney Shaff and Jennifer Arnold of Reciprocity Consulting will provide an update on the Partnership Learning Project that is being led by the Bonneville Environmental Foundation. The update will focus on the lessons learned from evaluation of the six Implementation FIPs. *Information item.*

O. Other Business (4:35 p.m.)

This item is reserved for other matters that may come before the board.

Meeting Rules and Procedures

Meeting Procedures

Generally, agenda items will be taken in the order shown. However, in certain circumstances, the board may elect to take an item out of order. To accommodate the scheduling needs of interested parties and the public, the board may also designate a specific time at which an item will be heard. Any such times are indicated on the agenda.

Please be aware that topics not listed on the agenda may be introduced during the Board Comment period, the Executive Director's Update, the Public Comment period, under Other Business, or at other times during the meeting.

Oregon's Public Meetings Law requires disclosure that board members may meet for meals on Monday, Tuesday, and Wednesday.

Voting Rules

The OWEB Board has 18 members. Of these, 11 are voting members and seven are ex-officio. For purposes of conducting business, OWEB's voting requirements are divided into two categories – general business and action on grant awards.

General Business

A general business quorum is **6 voting members**. General business requires a majority of **all** voting members to pass a resolution (not just those present), so general business resolutions require affirmative votes of **at least 6 voting members**. Typical resolutions include adopting, amending, or appealing a rule, providing staff direction, etc. These resolutions cannot include a funding decision.

Action on Grant Awards

Per ORS 541.360(4), special requirements apply when OWEB considers action on grant awards. This includes a special **quorum of at least 8 voting members** present to take action on grant awards, and affirmative votes of at least six voting members. In addition, regardless of the number of members present, **if 3 or more voting members** object to an award of funds, the proposal will be rejected.

Public Testimony

The board encourages public comment on any agenda item.

General public comment periods will be held on *Wednesday, April at approximately 9:10 a.m. and 2:50 p.m.* for any matter before the board. Comments relating to a specific agenda item may be heard by the board as each agenda item is considered. People wishing to speak to the board are asked to fill out a comment request sheet (available at the information table). *The board encourages persons to limit comments to 3 to 5 minutes.* Written comments will also be accepted on any item before the board. Written comments should be sent to Eric Hartstein at Eric.Hartstein@oregon.gov. Please note that written comments received after *June 20, 2018* will not be provided to the board in advance of the meeting.

Tour

The board may tour local watershed restoration project sites. The public is invited to attend, however transportation may be limited to board members and OWEB staff. Any person wishing to join the tour should have their own transportation.

Executive Session

The board may also convene in a confidential executive session where, by law, only press members and OWEB staff may attend. Others will be asked to leave the room during these discussions, which usually deal with current or potential litigation. Before convening such a session, the presiding board member will make a public announcement and explain necessary procedures.

More Information

If you have any questions about this agenda or the Board's procedures, please call Darika Barnes, OWEB Board Assistant, at 503-986-0181 or send an e-mail to darika.barnes@oregon.gov. If special physical, language, or other accommodations are needed for this meeting, please advise Darika Barnes as soon as possible, and at least 48 hours in advance of the meeting.

Oregon Watershed Enhancement Board Membership

Voting Members

Laura Masterson, *Board of Agriculture*
Vacant, *Environmental Quality Commission*
Bruce Buckmaster, *Fish and Wildlife Commission member*
Vacant, *Board of Forestry*
Meg Reeves, *Water Resources Commission*
Jason Robison, *Public (tribal)*
Gary Marshall, *Public*
Will Neuhauser, *Board Co-Chair, Public*
Randy Labbe, *Board Co-Chair, Public*
Jan Lee, *Public*
Liza Jane McAlister, *Public*

Non-voting Members

Rosemary Furfey, *National Marine Fisheries Service*
Stephen Brandt, *Oregon State University Extension Service*
Debbie Hollen, *U.S. Forest Service*
Kathy Stangl, *U.S. Bureau of Land Management*
Ron Alvarado, *U.S. National Resource Conservation Service*
Alan Henning, *U.S. Environmental Protection Agency*
Paul Henson, *U.S. Fish and Wildlife Service*

Contact Information

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OWEB Executive Director – Meta Loftsgaarden

meta.loftsgaarden@oregon.gov

OWEB Assistant to Executive Director and Board – Darika Barnes

darika.barnes@oregon.gov

503-986-0181

2018 Board Meeting Schedule

January 30-31, in Florence
April 24-25, in Frenchglen
June 26-27, Stevenson, WA and Cascade Locks
October 16-17, Gold Beach

2019 Board Meeting Schedule

January 15-16, North Coast TBD
April 16-17, in TBD
July 16-17, in Klamath Falls
October 15-16, TBD

For online access to staff reports and other OWEB publications, visit our web site:

www.oregon.gov/OWEB.

MINUTES ARE NOT FINAL UNTIL APPROVED BY THE BOARD

Oregon Watershed Enhancement Board (OWEB)

April 24, 2018 OWEB Board Meeting

Frenchglen School Gymnasium

39235 OR Highway 205

Frenchglen, OR 97736

MINUTES Some agenda items are discussed out of order.

(Audio time stamps reference recording at: <https://www.youtube.com/watch?v=dFTU1--G4k>).

OWEB Members Present

Brandt, Stephen
Buckmaster, Bruce
Furfey, Rosemary
Henning, Alan
Henson, Paul
Labbe, Randy
Lee, Jan
Marshall, Gary
Masterson, Laura
McAlister, Liza Jane
Neuhauser, Will
Reeves, Meg
Robison, Jason

ABSENT:

Alvarado, Ron
Hollen, Debbie
Stangl, Kathy

VACANT:

Environmental Quality Commission
Board of Forestry

OWEB Staff Present

Barnes, Darika
Ciannella, Greg
Davis, Renee
Dutterer, Andrew
Duzik, Katie
Greer, Sue
Grenbemer, Mark
Hartstein, Eric
Hatch, Audrey
Leierendecker, Karen
Loftsgaarden, Meta
McCarthy, Jillian
Redon, Liz
Shaff, Courtney
Williams, Eric

Others Present

Beamer, Kelley
Bulay, Jason
Coordes, Regan
Houston, Ryan
Keith, John
Martino, Amanda
McMahon, Crystal
Morford, Shawn
Morris, Christo
Suter-Goold, Marty

The meeting was called to order at 8:00 a.m. by Co-Chair Randy Labbe.

A. Board Member Comments (Audio = 0:01:10)

Board members provided updates on issues and activities related to their respective geographic regions and/or from the state and federal natural resource agencies they represent.

B. Review and Approval of Minutes (Audio = 0:37:00)

Minutes of the January 30-31, 2018 board meeting in Florence were presented to the board for approval.

Gary Marshall moved the board approve the minutes from the January 30-31, 2018 meeting in Frenchglen. The motion was seconded by Jan Lee. The motion passed unanimously. (Audio = 0:37:35)

C. Co-Chair Election (Audio = 0:37:53)

Co-Chair Will Neuhauser reminded the board of its established practice of having a co-chairs leadership model with staggered annual elections. He informed the board that Randy Labbe's seat was open for consideration and that Labbe was interested in continuing to serve as co-chair for a two-year term. He asked for other interest and nominations. Liza Jane McAlister nominated Randy Labbe. There were no other nominations.

Liza Jane McAlister moved the board elect Randy Labbe to serve as OWEB Board Co-Chair for a two-year term. The motion was seconded by Jason Robison. The motion passed unanimously. (Audio = 0:38:55)

D. Board Subcommittee Updates (Audio = 0:39:40)

Rosemary Furfey provided an update on the meetings and activities of the Monitoring subcommittee. Other subcommittees did not have anything to report since the last board meeting.

E. Public Comment (Audio = 0:41:40)

The board was addressed by Jason Bulay and Amanda Martino from the Blue Mountain Land Trust from Walla Walla, WA to provide an overview of their involvement with Oregon partners in the John Day Basin.

Crystal McMahon from the Klamath Lake Land Trust addressed the board with two of her colleagues to thank the board for consideration of their grant applications and to provide a broad overview of their organization's history and activities.

Shawn Morford from the Network of Oregon Watershed Councils, Kelly Beamer from the Coalition of Oregon Land Trusts, and John Keith from the Oregon Association of Conservation Districts came before the board representing the Oregon Conservation Partnership to discuss the activities of their individual organizations and their joint activities, including the CONNECT Conference and a meeting of each of their boards and the Oregon Conservation Education and Assistance Network.

Marty Suter-Goold from the Harney Soil and Water Conservation District addressed the board to welcome everyone to their county and to thank the board and staff for their efforts in the community there.

F. Small Grant Program (Audio = 0:59:55:)

Senior Policy Coordinator Eric Hartstein requested board approval on proposed administrative rule amendments to OWEB's Small Grant Program. In addition to raising the cap, per the board vote at the July 2017 meeting, Hartstein explained that staff identified other areas in the administrative rules that were being recommended for amendment.

Co-Chair Will Neuhauser moved the board approve the Small Grant Program administrative rules as amended in Attachment B in the Small Grant Program Administrative Rule Amendments staff report. The motion was seconded by Jason Robison. The motion passed unanimously. (Audio = 1:18:10)

G. Fall 2017 Open Solicitation Grant Offering (Audio = 1:19:14)

G-1. Request for Increased Spending Plan Funding (Audio = 1:19:27)

Executive Director Meta Loftsgaarden and Grant Program Manager Eric Williams advised the board that, during the 2018 Legislative Session, Lottery revenues had increased to a level that resulted in OWEB receiving an additional \$5 million in expenditure limitation for Measure 76 Lottery funding. They proposed options to the board for investing a portion of those funds in the current spending plan, including an increase to the Conservation Reserve Enhancement Program (CREP) line item, and reserving a portion of revenues for the next biennium. Also proposed was the addition of a new 'Strategic Plan Implementation Grant' category to the spending plan, which will be brought before the board in June.

Co-Chair Randy Labbe moved the board increase the open solicitation monitoring line item by \$350,000 and the acquisitions line item by \$2 million, in the 2017-2019 spending plan. The motion was seconded by Jason Robison. The motion passed unanimously. (Audio = 1:34:25)

Co-Chair Randy Labbe moved the board increase the CREP line item of the 2017-2019 spending plan by \$150,000 and delegate to the Executive Director the authority to distribute the funds through appropriate agreements with an award date of July 1, 2017. The motion was seconded by Gary Marshall. The motion passed unanimously. (Audio = 1:35:07)

G-2. Fall 2017 Open Solicitation Grant Funding Recommendations (Audio = 1:37:01)

Grant Program Manager Eric Williams and OWEB Regional Program Representatives came before the board to make a presentation on the Fall 2017 Open Solicitation grant offering, and asked the board to consider grant applications submitted for restoration, technical assistance, monitoring, and stakeholder engagement projects.

Williams provided background information on the grant offering and explained the review team process, noting how project evaluation criteria under five main categories (proposal clarity, technical soundness, watershed context, capacity of applicant, and cost effectiveness) factor into the regional review team process for recommending projects. OWEB's regional program representatives provided presentations on projects within their geographic areas, five of which highlighted one of the evaluation criteria categories with the sixth describing the ranking process.

Region 1: Katie Duzik, Regional Program Representative for the North Coast, presented projects from Region 1 with a focus on proposal clarity. (Audio = 1:48:40)

Region 6: Sue Greer, Regional Program Representative for the Mid-Columbia Basin, presented projects from Region 6 with a focus on technical soundness. (Audio = 2:01:40)

Region 5: Karen Leiendecker, Regional Program Representative for Eastern Oregon, presented projects from Region 5 with a focus on cost effectiveness. (Audio = 2:09:40)

Region 2: Mark Grenbemer, Regional Program Representative for Southwest Oregon, presented projects from Region 2 with a focus on watershed context. (Audio = 2:28:45)

Region 4: Greg Ciannella, Regional Program Representative for Central Oregon, presented projects from Region 4 projects a focus on capacity of applicant. (Audio = 2:51:20)

Region 3: Liz Redon, Regional Program Representative for the Willamette Basin, presented projects from Region 3 with a focus on how regional review teams arrive at a ranked list of projects for staff to propose to the board for funding. (Audio = 3:02:00)

PUBLIC COMMENT: (Audio = 3:12:25)

Christo Morris from the Powder Basin Watershed Council came before the board to appeal that the recommended project application 218-5055, which fell below the recommended funding line, be considered for funding.

Co-Chair Randy Labbe moved the board approve the staff funding recommendations as described in Attachment C to the Fall 2017 Open Solicitation Grant Offering staff report with the following corrections: award \$137,339 for grant application #218-3026; and award \$66,458 for grant application #218-6046. The motion was seconded by Meg Reeves. The motion passed unanimously. (Audio = 3:34:15)

Meg Reeves moved the board approve funding for grant application #218-5055 in Attachment C to the Fall 2017 Open Solicitation Grant Offering staff report with these conditions: "In coordination with DEQ, the applicant will shift sites lower in the basin on private ground to better understand management activities; and clarify methods to operate continuous water temperature loggers, conduct quality assurance and quality control for data, and appropriate management of data over three years." The motion was seconded by Laura Masterson. The motion passed unanimously. (Audio = 3:35:50)

H. Land Acquisition Grant Awards (Audio = 3:43:00)

Grant Program Manager Eric Williams discussed with the board a new team-approach by OWEB staff to land acquisition application review and project management. He then requested board action on land acquisition grant applications that were received during the Fall 2017 grant offering.

PUBLIC COMMENT: (Audio = 4:11:48)

Kelley Beamer from the Coalition of Oregon Land Trusts (COLT) came before the board to talk about the role of voluntary land protection in terms of meeting COLT's goals for the long-term protection and restoration of native fish and wildlife habitat, securing public benefits on private lands, and serving local needs.

Co-Chair Will Neuhauser moved the board award funding for land acquisition grants as specified in Attachment A to the Land Acquisition staff report, with the project-specific conditions detailed in Attachment C to the Land Acquisition Grant Awards staff report. The motion was seconded by Jan Lee. The motion passed unanimously. (Audio = 4:19:11)

I. Water Acquisition Grant Awards (Audio = 4:20:15)

Partnerships Coordinator Jillian McCarthy came before the board to request board action for water acquisition grant applications that were received during the Fall 2017 grant offering.

Co-Chair Randy Labbe moved the board award funding for water acquisition grants as specified in Table 1 of the Water Acquisition Grant Awards staff report. The motion was seconded by Meg Reeves. The motion passed unanimously. (Audio = 4:36:25)

L. Programmatic Effectiveness Monitoring (EM) Funding Requests (Audio = 4:37:00)

L-1: Focused Investment Partnership Programmatic EM (4:37:50)

Deputy Director Renee Davis came before the board to request funding to support programmatic effectiveness monitoring work for Focused Investment Partnerships (FIP), as well as funding to support Bonneville Environmental Foundation's ongoing work related to FIP effectiveness monitoring.

Co-Chair Will Neuhauser moved the board award \$623,750 from the Focused Investment Effectiveness Monitoring line item in the 2017-19 spending plan to support grants to fill priority gaps for Implementation FIPs, and delegate to the Executive Director the authority to distribute the funds through appropriate agreements with an award date of April 25, 2018. The motion was seconded by Gary Marshall. The motion passed unanimously. (Audio = 5:06:30)

Co-Chair Will Neuhauser moved the board award \$126,250 from the Focused Investment Effectiveness Monitoring line item in the 2017-19 spending plan to continue Bonneville Environmental Foundation's work with OWEB on FIP monitoring by increasing grant 216-8390-12951, as described in Section II of the FIP Programmatic Effectiveness Monitoring Funding Request staff report. The motion was seconded by Jason Robison. (Audio = 5:07:20)

L-2: Open Solicitation Effectiveness Monitoring (5:08:15)

Conservation Outcomes Coordinator Audrey Hatch requested the board approve funding to support open solicitation programmatic effectiveness monitoring to help OWEB and grantees combine quantitative data with restoration examples around the state to better 'tell the restoration story.'

Co-Chair Will Neuhauser moved the board award \$200,000 from the Open Solicitation Programmatic Effectiveness Monitoring line item in the 2017-19 spending plan to support grants for an initial slate of retrospective analyses to tell the restoration story, and delegate to the Executive Director the authority to distribute the funds through appropriate agreements with an award date of April 25, 2018. The motion was seconded by Gary Marshall. The motion passed unanimously. (Audio = 5:26:20)

L-3: Conservation Effectiveness Partnership Programmatic EM (5:27:20)

Deputy Director Renee Davis came before the board to request funding to support programmatic effectiveness monitoring for the Conservation Effectiveness Partnership associated with new work in the Fifteenmile Creek case study.

Co-Chair Will Neuhauser moved the board award \$15,725 from the Open Solicitation Programmatic Effectiveness Monitoring line item in the 2017-19 spending plan to complete data analyses and update the Fifteenmile Creek case study for the Conservation Effectiveness Partnership, and delegate to the Executive Director the authority to distribute the funds through appropriate agreements with an award date of April 25, 2018. The motion was seconded by Meg Reeves. The motion passed unanimously. (Audio = 5:33:50)

M. Organization Collaboration Grant Awards (Audio = 5:35:15)

Capacity Programs Coordinator Courtney Shaff requested the board approve funding of an Organization Collaboration grant application from Rickreall and Glenn Gibson watershed councils.

Co-Chair Randy Labbe moved the board award the Organization Collaboration grant as described in Attachment A in the Organization Collaboration Grant Awards staff report. The motion was seconded by Jason Robison. The motion passed unanimously.

(Audio = 5:44:50)

Q. Other Business – Coastal Wetlands Grant (Audio = 5:45:35)

Partnerships Coordinator Jillian McCarthy came before the board to request approval for OWEB to receive one grant award from the U.S. Fish and Wildlife Service's 2018 National Coastal Wetlands Conservation Grant Program for the Winter Lake Restoration and Planting Project.

Co-Chair Randy Labbe moved the board approve receipt of funding in the amount of \$1,000,000 from U.S. Fish and Wildlife Service under the 2018 National Coastal Wetlands Conservation Grant Program and delegate authority to the Executive Director to distribute funds through the appropriate agreements with an award date of April 25, 2018 in support of the Winter Lake Restoration and Planting Project. The motion was seconded by Meg Reeves. The motion passed unanimously. (Audio = 5:51:30)

The meeting was adjourned at 3:00 p.m. by Co-Chair Will Neuhauser. (Audio = 5:54:30)

MINUTES ARE NOT FINAL UNTIL APPROVED BY THE BOARD

Oregon Watershed Enhancement Board (OWEB)

April 25, 2018 OWEB Board Meeting

Frenchglen School Gymnasium

39235 OR Highway 205

Frenchglen, OR 97736

MINUTES Some agenda items are discussed out of order.

(Audio time stamps reference recording at: <https://www.youtube.com/watch?v=MfyKE1DYLgc>).

OWEB Members Present

Brandt, Stephen
Buckmaster, Bruce
Furfey, Rosemary
Henning, Alan
Henson, Paul
Labbe, Randy
Lee, Jan
Marshall, Gary
Masterson, Laura
McAlister, Liza Jane
Neuhauser, Will
Reeves, Meg

ABSENT:

Alvarado, Ron
Hollen, Debbie
Robison, Jason
Stangl, Kathy

VACANT:

Environmental Quality Commission
Board of Forestry

OWEB Staff Present

Barnes, Darika
Ciannella, Greg
Davis, Renee
Dutterer, Andrew
Duzik, Katie
Hartstein, Eric
Hatch, Audrey
Leiendecker, Karen
Loftsgaarden, Meta
McCarthy, Jillian
Redon, Liz
Shaff, Courtney
Williams, Eric

Others Present

Beamer, Kelley
Coordes, Regan
Houston, Ryan
Keith, John
Maltz, Erica
Morford, Shawn
Patty, Steve
Taylor, Barbara

The meeting was called to reconvene at 8:30 a.m. by Co-Chair Randy Labbe.

J. Oregon Agricultural Heritage Program Update (Audio =0:00:45)

Executive Director Meta Loftsgaarden and Grant Program Manager Eric Williams updated the board on the first series of Oregon Agricultural Heritage Commission (OAHC) meetings in Prineville for program rulemaking. In addition, the commission has discussed succession planning grants rules, and rules for conservation management plans, covenants, and easements. Also discussed was the potential for board members and commission members to meet informally on the Monday prior to the June OWEB Board meeting in Cascade Locks.

K. Initial 2019-2021 Agency Request Budget Presentation (Audio =0:16:45)

Deputy Director Renee Davis updated the board about budget preparation for the 2019 Legislative Session, including submission by OWEB of the final application to NOAA Fisheries on behalf of the State of Oregon for funding under the Pacific Coastal Salmon Recovery Fund. Davis indicated that staff will bring an updated list of packages for inclusion in the 2019-2021 Agency Request Budget for the board's consideration and approval at the June 2018 meeting.

N. Public Comment (Audio =0:49:27)

Erica Maltz, Natural Resources Director for the Burns Paiute Tribe, came before the board to introduce herself, to welcome the board to the Tribe's aboriginal territory, to provide a technical point of contact for the Tribe, and to thank the board for its investment in relationships with Tribal governments and continued partnership on priority projects for the Tribes. At the request of Rosemary Furfey, Maltz provided the board with highlights of current projects that her department is currently spearheading.

O. Strategic Plan (Audio = 53:20)

Dr. Steve Patty from Dialogues in Action joined Executive Director Meta Loftsgaarden to seek the board's feedback on the revised strategies and proposed actions in developing OWEB's new strategic plan. Patty reviewed what has been accomplished and the steps taken to arrive at the current set of strategies and actions. Loftsgaarden then reviewed with the board changes made by staff to the prior version, and the board provided additional input.

Loftsgaarden also introduced the concept of the use of grants to partners to assist in the implementation of the strategic plan. She indicated staff would like the board to consider adding a spending plan line item in June 2018 that would allow for investment in this work.

Patty concluded the agenda item by providing next steps and what the board can expect at the June meeting.

PUBLIC COMMENT (Audio = 2:41:00)

Shawn Morford addressed the board to provide her perspective on OWEB's approach to communicating, convening, and implementing parts of the strategic plan. She urged the board to communicate early and often with statewide partners, and provide leadership among foundations involved in voluntary conservation.

P. Executive Director's Update (2:45:05)

P-1: Lower Columbia Watershed Council Update (2:45:30)

Capacity Programs Coordinator Courtney Shaff and Region 1 Program Representative Katie Duzik provided an update on the Lower Columbia River Watershed Council's progress towards meeting OWEB's funding requirements associated with the 2017-2019 Council Capacity grant award. Duzik stated the council has already met several of the objectives and have developed a memorandum of understanding. She said they have also met their first funding requirements. Shaff explained the next steps, including an upcoming interview at OWEB with staff and a technical review team, which will lead to a funding recommendation to bring before the board at the June meeting.

P-2: FIP Gathering Update (2:49:17)

Capacity Programs Coordinator Courtney Shaff provided an update on the FIP Gathering, held March 13-14, at Menucha Retreat Center, which brought together 42 partners from 17 of the 18 FIPs from around the state for two half-days of sharing, learning, and relationship building.

P-3: Technical Assistance Rulemaking Update (2:50:55)

Senior Policy Coordinator Eric Hartstein updated the board on technical assistance grant rulemaking. Hartstein explained the progress of the Rules Advisory Committee and the next steps, including presenting a final draft of the rules to the board to consider for adoption at the June 2018 meeting.

P-4: Livestock Exclusion Study Update (2:54:20)

Executive Director Meta Loftsgaarden noted that a copy of the Livestock Exclusion Study was provided to the board as an information item and directed board questions to Effectiveness Monitoring Coordinator Ken Fetcho.

The meeting was adjourned at 11:43 p.m. by Co-Chair Randy Labbe. (Audio = 2:56:27)

June 27, 2018 OWEB Board Meeting Monitoring Subcommittee Update

Subcommittee Members

Current Chair Alan Henning, Past-Chair Rosemary Furfey, Stephen Brandt, Debbie Hollen, and Jason Robison

Background

The Monitoring Subcommittee is overseeing new work associated with both open solicitation programmatic effectiveness monitoring (EM) and Focused Investment Partnership (FIP) monitoring. They also are advising staff as improvements are made to monitoring grant-making processes.

Summary of Monitoring Subcommittee Work this Quarter

The subcommittee met on May 15, 2018, and discussed the following topics:

- Debrief from the April board meeting – The group discussed next steps from the monitoring-related board actions, including soliciting priority monitoring and/or reporting needs from the Implementation FIPs as follow-up to the FIP progress monitoring framework with Bonneville Environmental Foundation, and identifying the first set of retrospective analyses to begin ‘telling the story’ of OWEB’s restoration investments. The group briefly discussed the coordinated monitoring work anticipated from the strategic plan update.
- Open Solicitation monitoring guidance update process – Staff described how feedback received during the process is being used to make near-term refinements to the monitoring application, the associated guidance to applicants and technical resources to provide to applicants. Over the longer term, additional potential improvements to OWEB’s monitoring grant-making process that were identified through the guidance update process will be cross-walked to strategic plan priorities.
- Monitoring related agenda items for the June 2018 board meeting – Staff briefed the subcommittee about the general structure of the meeting (including the joint day-long session with the State of Washington Salmon Recovery Funding Board) and two requests to approve receipt of funding from 1) Pacific States Marine Fisheries Commission in support of the Upper Middle Fork John Day Intensively Monitored Watershed, and 2) Oregon Department of Forestry in support of performance tracking of actions under the Conservation Reserve Enhancement Program. Subcommittee members discussed the requests and concluded these are consistent with OWEB’s mission and programs.
- Upcoming discussion topics – Staff noted that discussion topics for upcoming subcommittee meetings will include follow-up on recommendations that were included in literature review regarding tidegate removal and replacement projects that was recently completed by Oregon State University, and framing up the approach OWEB will use to begin monitoring capacity investments, as outlined in the strategic plan.

The subcommittee will meet again on July 24, 2018.

To Be Presented at the June 2018 Board Meeting by:

Rosemary Furfey, Past Subcommittee Chair

Staff Contact

Renee Davis, Deputy Director
renee.davis@oregon.gov or 503-986-0203

June 27, 2018 OWEB Board Meeting Open Solicitation Subcommittee Update

Subcommittee Members

Chair Meg Reeves, Kathy Stangl, Stephen Brandt, Rosemary Furfey

Background

The Open Solicitation subcommittee focuses on issues related to restoration, technical assistance, and stakeholder engagement grants offered through regular solicitations and the small grant program.

Summary of Open Solicitation Subcommittee Work this Quarter

The subcommittee met on June 6 to discuss issues associated with funded irrigation efficiency projects and the potential for protecting water in-stream, following up on the board discussion at the April meeting. The subcommittee invited guests from Oregon Water Resources Department, including Ivan Gall, Field Services Division Administrator, and Becky Williams, Grant Program Coordinator, who provided background on relevant OWRD programs. The subcommittee discussed the following:

- The Water Resources Commission adopted a water measurement strategy in 2000 that determined high priority basins for measuring water use. Within these basins, 2400 significant points of diversion were identified; of the 1800 still in use, about 1100 have measuring devices. It is unclear how many water users are measuring. There is required water use reporting from public entities and private entities with permit conditions, resulting in about 14,000 users submitting data (out of a universe of 80,000 users). OWRD is considering a system to track water use measurement.
- The Allocation of Conserved Water (AOCW) statute, which requires a minimum of 25% of conserved water to be allocated for in-stream use, is the only option available to water users that allows for expanded water use on new land. Potential barriers to using the AOCW program include application fees, processing time, and availability of other options, such as leases, transfers, and programs like FAST that entail commitments not to irrigate during critical low-flow periods.
- Leasing may result in irrigators giving up irrigated acreage because their ability to withdraw water is reduced.

The subcommittee would like to invite OWRD to a future board meeting to further discuss these issues and answer the board's questions.

The subcommittee will meet again on September 27, 2018.

To Be Presented at the June 2018 Board Meeting by:

Meg Reeves, Subcommittee Chair

Staff Contact

Eric Williams, Grant Program Manager
eric.williams@oregon.gov or 503-986-0047

June 27, 2018 OWEB Board Meeting Focused Investment Subcommittee Update

Subcommittee Members

Jason Robison, Chair, Ron Alvarado, Bruce Buckmaster, Alan Henning, Paul Henson, Gary Marshall

Background

The Focused Investment Subcommittee focuses on issues related to the Focused Investment Program (FIP), including Development and Implementation FIPs, and the effectiveness of these programs.

Summary of Focused Investment Subcommittee Work this Quarter

The subcommittee met on June 8 and discussed the following topics:

- Partnership Learning Project - Jennifer Arnold from Reciprocity Consulting, provided an update on the Partnership Learning Project, which launched in Fall 2016, completed Part One analyzing Development FIPs, and is now finalizing Part Two on Implementation FIPs. Jennifer will be presenting the Implementation FIP report at the June board meeting. After interviewing and surveying FIP partners, and meeting with each of the six Implementation FIP partnerships, Jennifer presented these findings:
 1. Partnerships are dynamic;
 2. Partnerships are driven by funding and external events;
 3. Efficiency is critical; and
 4. Large, inclusive partnerships are needed for landscape-scale change.
- 2019-2021 Implementation FIP Solicitation Schedule - Staff described the evaluation process for Implementation FIP applications, which are due June 29. Expert review teams for capacity and each of the board-established ecological priorities will provide reviews and ratings for each application; staff will compile the reviews and present them to the FIP Subcommittee and the applicants; the subcommittee will have a call November 2 to ask clarifying questions on the application reviews; and the subcommittee will meet in public session November 7-8 to interview applicants and rank the applications for board consideration in January.
- Status of Current Implementation FIPs - Staff provided status updates on each of the six Implementation FIPs. The subcommittee discussed the need to continue assessing whether the FIPs are achieving ecological shifts and stressed the importance of effective partnerships in achieving ecological goals.
- The subcommittee will meet again on September 14, 2018.

To Be Presented at the June 2018 Board Meeting by:

Jason Robison, Subcommittee Chair

Staff Contact

Eric Williams, Grant Program Manager
eric.williams@oregon.gov or 503-986-0047

June 27, 2018 OWEB Board Meeting Operating Capacity Subcommittee Update

Subcommittee Members

Chair Debbie Hollen, Jan Lee, Laura Masterson, and Liza Jane McAlister

Background

The Operating Capacity subcommittee focuses on issues related to watershed council and soil and water conservation district operating capacity grants, monitoring of capacity investments, support for the statewide partnership organizations and organizational collaboration grants.

Summary of Monitoring Subcommittee Work this Quarter

The subcommittee met on May 21, and discussed the following topics:

- Review purpose – This was the first meeting of the reorganized Operating Capacity Subcommittee. We reviewed the purpose of the committee and discussed the future meeting schedule and topics.
- Discuss the Lower Columbia River WC – The group discussed the board’s July 2017 funding decision for the Lower Columbia River WC and staff’s work with the council over the last year. Staff then described the evaluation process and reasoning behind the staff funding recommendation. The group also discussed opportunities to capture lessons learned from staff working with the Lower Columbia River WC through this process over the last year. In addition, the subcommittee discussed how to capture lessons learned from the council as it uses a unique staffing structure to fulfill its staffing needs: two contractors working together to help the council implement projects and continue working on organizational development.
- Upcoming discussion topics – Staff noted that discussion topics for upcoming subcommittee meetings will frame up the approach OWEB will use to begin monitoring capacity investments, as outlined in the strategic plan.

The subcommittee will meet again on September 18, 2018, in a joint meeting with the Monitoring Subcommittee.

To Be Presented at the June 2018 Board Meeting by:

Debbie Hollen, Subcommittee Chair

Staff Contact

Courtney Shaff, Capacity Programs Coordinator
courtney.shaff@oregon.gov or 503-986-0046



Oregon

Kate Brown, Governor

Oregon Watershed Enhancement Board

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MEMORANDUM

TO: Oregon Watershed Enhancement Board
FROM: Meta Loftsgaarden, Executive Director
SUBJECT: Agenda Item E-1 – Strategic Plan
June 27, 2018 Board Meeting

I. Introduction

Following an 18-month process including extensive public engagement, OWEB staff and Dialogues in Action (DIA) will present the final strategic plan for board approval. In addition, staff will initiate conversations with the board around outcome and output measures, strategic plan engagement strategies, and alignment between OWEB's grant offerings and the newly adopted strategic plan.

II. Background

OWEB approved its last strategic plan in 2010 during a time when the agency and its associated funding were expected to sunset in 2015. Soon after, Constitutional Ballot Measure 76 passed in Oregon, making OWEB's funding permanent.

As a result of the shift to permanent funding, the board then undertook an effort in 2012-13 to develop a Long-Term Investment Strategy for granting. The strategy was approved by the board in 2013 and has become the framework by which the board develops and approves its two-year spending plan in support of the strategic plan.

It has been more than eight years since the board approved its last strategic plan, and five years since board approval of the investment strategy.

III. Strategic Plan Process Steps to Date

Who We Are: In January 2017, the board formally initiated its strategic planning process. At this time, both the board and all OWEB staff began developing the "Who We Are" portion of the strategic plan.

Interviews: Also in January, board members and the newly established staff process team members interviewed a range of OWEB stakeholders about their experiences and work with OWEB, each interviewing at least one stakeholder.

Listening Sessions: In March 2017, OWEB staff traveled with Steve Patty from DIA to six locations across Oregon to hold strategic planning listening sessions. In addition, OWEB held one virtual listening session webinar. In total, approximately 80 individuals attended, including grantees, regional review team members, agency partners, and others.

Stakeholder Surveys: In April 2017, surveys were sent broadly to stakeholders and partners to identify what is working well in their interactions with OWEB, and areas for improvement. That information was provided to the board at their June 2017 meeting.

External Advisory Group: In May and June 2017, the board's established External Advisory Group synthesized and expanded on information from interviews, listening sessions, and stakeholder surveys. In October, the group provided their input to the strategy development and they helped to prioritize strategies in January 2018.

Board Strategic Plan Discussions: In January, April, June, July, and October 2017, as well as January 2018 and April 2018, the board met to vet the ideas proposed through the many processes identified above, which has resulted in the final strategic plan for the board's approval (Attachment A).

IV. April Board Meeting Discussion

Strategic Plan Approval: In April 2018, the board provided a series of recommendations for final edits to priorities, strategies, and actions for the plan. Those recommendations have been incorporated, and the board will review and approve the final plan.

Indicators of Progress: OWEB staff, with assistance from DIA, have identified a set of outcome measures tied to priorities and output measures tied to strategies. At the meeting, staff and DIA will review these measures with the board and discuss how future measures will be developed and reported as the plan unfolds (Attachment B).

Engagement Strategy: A new strategic plan provides an opportunity to increase an organization's visibility. DIA and OWEB staff will initiate conversations with the board regarding audiences for the strategic plan, and effective ways to inform those audiences about the plan's implications and opportunities. In addition, many individuals were involved in the plan's development. Staff will share thoughts about how to re-engage those individuals in understanding and helping to communicate the plan's results.

OWEB Granting Portfolio: Over the last eight years, OWEB's granting portfolio has shifted to match board priorities. Staff will introduce information to assist the board in future meetings as they consider how the agency's grant-making can evolve to match the new strategic plan. Attachment C takes two snapshots of OWEB's individual grant programs, at different times. The graphs highlight changes in flexibility, scale of impact, and application process complexity. The charts are not designed to identify one right or wrong approach. A range of grant-making approaches can help OWEB balance its organizational risk across grant types.

V. Recommendation

Staff recommend the board approve the 2018 OWEB Strategic Plan.

Attachments

- A. OWEB Strategic Plan and Summary
- B. Indicators of Progress
- C. Grant Portfolio Chart



Mission

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

About OWEB

OWEB has funded more than 8,700 grants since 1999, with which Oregonians have restored more than 5,100 miles of streams and have made more than 6,100 miles of habitat accessible for fish. The grants have helped landowners improve more than 1,135,000 upland habitat acres and restore, improve, or create more than 51,000 wetland or estuarine habitat acres. The majority of the funds invested go directly to on-the-ground improvements of land and water such as native plantings, dam removals, irrigation efficiencies, streams and rivers made accessible to fish, and land protected for future generations.

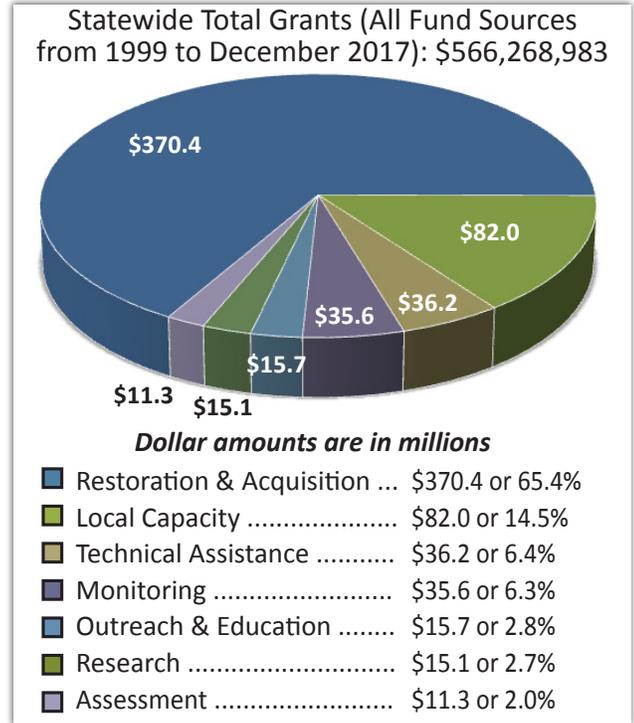
On behalf of the board members and staff of the Oregon Watershed Enhancement Board (OWEB), we invite you to review our 2018-2028 strategic plan. Based on a year and a half of conversations with partners and grantees, this plan celebrates all we have accomplished together over the last twenty years and sets a course for the next ten.

OWEB, our partners, and our grantees have much to celebrate. With over \$550 million in investments from Lottery, Salmon License Plates, federal and other funds, our grantees have restored 5,100 miles of streams, and improved habitat on over 1.1 million acres in the watersheds above those streams. Coupled with the restoration or creation of 51,000 acres of wetlands and estuaries, these gains support clean water and habitat for Oregonians and the fish and wildlife species that call this state home.

Our current investment portfolio – ranging from our flagship Open Solicitation grants to our newly established Organizational Collaboration grants – provides the foundation to improve the health of our watersheds by investing in people in our local communities. OWEB grants support local community partners to work with farmers, ranchers, forestland owners, and local contractors to provide clean water for Oregonians and healthy habitat for our fish and wildlife.

Our new plan builds on that strong granting foundation. As we look forward to the next ten years, we will focus our efforts, and current and future grant offerings to address the strategic priorities on the following page.

Over the past year of conversations, we have learned many of you share these same priorities, and we hope you will join us in implementing them. As we identify specific actions and measures to track our plan, we will share our progress with you. We look forward to working with you to improve the health of Oregon’s watersheds, and the opportunity to celebrate our successes over the next ten years.



Priorities & Strategies

With extensive input from our stakeholders, OWEB has designed a strategic plan to provide direction for the agency and its investments over the next 10 years.

Priority 1

Broad awareness of the relationship between people and watersheds

Strategies

- Develop and implement broad awareness campaigns and highlight personal stories to tell the economic, restoration and community successes of watershed investments
- Increase involvement of non-traditional partners in strategic watershed approaches

Priority 2

Leaders at all levels of watershed work reflect the diversity of Oregonians

Strategies

- Listen, Learn and Gather Information about diverse populations
- Create new opportunities to expand the conservation table
- Develop funding strategies with a lens toward diversity, equity, and inclusion

Priority 3

Community capacity and strategic partnerships achieve healthy watersheds

Strategies

- Evaluate and identify lessons learned from OWEB's past capacity funding
- Champion best approaches to build organizational, community, and partnership capacity
- Continue to catalyze and increase state/federal agency participation in strategic partnerships

Priority 4

Watershed organizations have access to a diverse and stable funding portfolio

Strategies

- Increase coordination of public restoration investments and develop funding vision
- Seek alignment of common investment areas with private foundations
- Explore creative funding opportunities/partnerships with the private sector
- Partner to design strategies for complex conservation issues that can only be solved by seeking new and creative funding sources

Priority 5

The value of working lands is fully integrated into watershed health

Strategies

- Implement the Oregon Agricultural Heritage Program
- Strengthen engagement with a broad base of landowners
- Enhance the work of partners to increase working lands projects on farm, ranch and forestlands
- Support technical assistance to work with owners/managers of working lands
- Develop engagement strategies for owners/managers of working lands who may not currently work with local organizations

Priority 6

Coordinated monitoring and shared learning to advance watershed restoration effectiveness

Strategies

- Broadly communicate restoration outcomes and impacts
- Invest in monitoring over the long term
- Develop guidance and technical support for monitoring
- Increase communication between and among scientists and practitioners
- Define monitoring priorities
- Develop and promote a monitoring framework

Priority 7

Bold and innovative actions to achieve health in Oregon's watersheds

Strategies

- Invest in landscape restoration over the long-term
- Develop investment approaches in conservation that support healthy communities and strong economies
- Traditional conservation incentives may hinder participation; while at the same time, new, untested incentives may be developed to increase conservation work across Oregon. In addition, effectively conserving and restoring watersheds requires a thorough understanding of how economics and restoration/conservation actions intersect.
- Foster experimentation that aligns with OWEB's mission



OREGON Watershed Enhancement Board



2018 Strategic Plan



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

June 25, 2018

On behalf of the board members and staff of the Oregon Watershed Enhancement Board (OWEB), we invite you to review our 2018-2028 strategic plan. Based on a year and a half of conversations with partners and grantees, this plan celebrates all we have accomplished together over the last twenty years and sets a course for the next ten.

OWEB, our partners, and our grantees have much to celebrate. With over \$550 million in investments from Lottery, Salmon License Plates, federal and other funds, our grantees have restored 5,100 miles of streams, and improved habitat on over 1.1 million acres in the watersheds above those streams. Coupled with the restoration or creation of 51,000 acres of wetlands and estuaries, these gains support clean water and habitat for Oregonians and the fish and wildlife species that call this state home.

Our current investment portfolio – ranging from our flagship Open Solicitation grants to our newly established Organizational Collaboration grants – provides the foundation to improve the health of our watersheds by investing in people in our local communities. OWEB grants support local community partners to work with farmers, ranchers, forestland owners, and local contractors to provide clean water for Oregonians and healthy habitat for our fish and wildlife.

Our new plan builds on that strong granting foundation. As we look forward to the next ten years, we will focus our efforts, and current and future grant offerings, to address these strategic priorities:

- Working with partners, we will help Oregonians better **understand the relationship between people and watersheds**, and provide opportunities for them to improve the health of their own watershed. At the same time, we will ensure that **leaders at all levels of watershed work reflect the diversity of Oregonians**.
- Our board and staff recognize that healthy watersheds are supported by the people who care for them. As we look to the future, OWEB will use its current grant offerings and consider new offerings that **support community capacity and strategic partnerships to achieve healthy watersheds**.
- While OWEB is a major investor in healthy watersheds, there are many others with a vested interest in this work. In partnership with agencies, foundations, and the business community, we will help **watershed organizations have access to a diverse and stable funding portfolio**.
- Since our inception, much of the work of our local partners has taken place on private farms, ranches and forestlands. Over the next ten years, we will find ways to improve the landowner access to funding and technical support for conservation on their lands, ensuring that **the value of working lands is fully integrated into watershed health**.
- We will **invest in coordinated monitoring and shared learning to advance watershed restoration effectiveness** and increase the capacity to track and communicate the impact of OWEB's grant-making. Oregon has long been recognized as a leader in its care for the watersheds we call home. Oregonians have chosen to permanently invest in healthy watersheds, which allows local partners the space to test **bold and innovative actions to achieve health in Oregon's watersheds**.

Over the past year of conversations, we have learned many of you share these same priorities, and we hope you will join us in implementing them. As we identify specific actions and measures to track our plan, we will share our progress with you. We look forward to working with you to improve the health of Oregon's watersheds, and the opportunity to celebrate our successes over the next ten years.

Sincerely,

Randy Labbe and Will Neuhauser
OWEB Co-Chairs

Preamble



The Oregon Watershed Enhancement Board cares about and invests state funding in the health of the land in Oregon's watersheds and the water that flows through it.

Everyone in the world lives in a watershed. Watersheds encompass every square inch of land on the planet, starting at the very top of the highest ridge. They include every place from which water flows as it enters creeks, then streams, then rivers, then the ocean and lakes. A watershed is as much about the land across and through which water flows as it is about the water itself. Urban, rural, desert, rainforest – every part of the landscape is in a watershed, and every part of the landscape matters when we talk about watershed health.

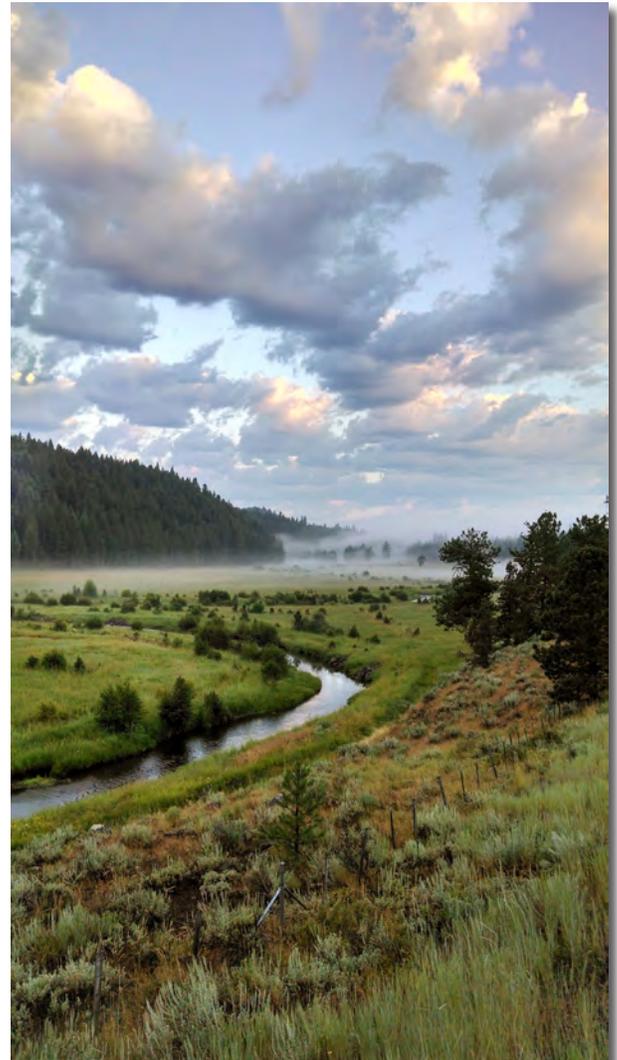
Healthy watersheds work hard. They move sediment from the mountains to their ultimate destination, beaches and bays, sorting it along the way to create diverse landscapes and habitats. They cycle nutrients and convert them into forms that living organisms can use. They purify and store water, and then meter its release into streams to reduce flooding and damaging erosion in the winter and to sustain flows and cool temperatures during the dry season. Watersheds even improve air quality by absorbing pollutants and greenhouse gases.¹

In addition to environmental benefits, healthy watersheds matter for our state's economy and communities. A watershed that is healthy can grow big trees. When managed with care, those trees support a sustainable timber harvest. At the same time, they provide homes for owls and support habitat for salmon in the streams. A healthy watershed

grows sagebrush where birds nurture and protect their young, and a place for ranchers to raise cattle that thrive. Water that runs through lands that are cared for and managed is cleaner, requiring less treatment for a family's drinking water. Clean water and healthy forests and deserts create spaces for those families to swim, camp, hike, fish, and hunt.

We care about watersheds – those lands and water that sustain us. A healthy watershed provides enough food, water, and shelter for the people, plants, fish and wildlife that inhabit it – not just for Oregonians now, but for future generations as well. In return, healthy watersheds are supported by people who reflect the diversity of their communities. OWEB will seek out and develop leaders that reflect the diversity of Oregon to engage them in the rewarding work of watershed restoration.

When the watershed and its water are vibrant and healthy, we are too.



K. Handley

1 Marin County Department of Public Works (2014)

Who We Are

We are committed to exemplifying the values we hold to be important in this work. These ideas are about our conscience, our convictions, and the commitments about our ethos and ethic.

In all things, we will...

Be bold

We believe in pursuing the greatest potential, not the easiest path. To be bold means to go be unafraid to listen to and explore new ideas even if they run counter to established processes. It means that we will focus on opportunities and strive to overcome the barriers we face. Practicing boldness pushes us to think in new ways and try new and innovative strategies.

Be open and transparent

Being open and transparent means being committed to active, two-way communication internally and externally as a means for developing and maintaining strong partnerships. We will ensure that all decisions are transparently made and their reasoning is clearly communicated. We will consistently check in with partners to make sure they understand what we've communicated.

Consider future Oregonians

Everything we do now will impact the Oregonians of the future. We will be thoughtful about helping stakeholders develop sustainable watersheds. We will be informed by Oregon's legacy of watershed restoration and cooperative conservation while developing a vision for cooperative conservation in the future that is equitable and inclusive.

Be curious

Being curious means not just accepting the status quo but asking "why," "how," and "what if?" We will approach all situations with curiosity, encouraging staff and stakeholders to ask questions as they think about our watersheds and our practices. When we are curious, we are more apt to be responsive and flexible, adapting to the opportunities and challenges around us. We will seek to listen, learn, and think about watershed health and cooperative conservation in new ways and through fresh perspectives.



What We Believe In



We hold fast to a set of ideas that provide a fundamental and underlying rationale for our work. These are our foundational perspectives. They keep us oriented. These are the core ideas that guide us.

Dedicated to the idea that...

- ◆ Healthy watersheds sustain healthy communities now and in the future.
Oregon's watersheds are intertwined with its people – the land is a part of our culture, our food and water, our work and our recreation. As a result, the well-being of all Oregonians depends on the health of our watersheds. Current and future generations need access to whole and healthy watersheds. People and communities are an integral part of their watershed, just like fish and wildlife. A community's economic and social health comes from the health of the lands that surround them and the ability to draw enjoyment from clean water, open spaces, and natural habitats.
- ◆ Every Oregonian plays a role in the health of our watersheds.
We are committed to being profoundly inclusive because we believe every person of every background – whether urban or rural, rich or poor; regardless of age, ethnicity, education, beliefs, or politics – has something valuable to contribute to a healthy watershed. When people connect with their watershed, they will care for their watershed. The roles in each watershed are many and overlapping: planner, funder, doer, enjoyer, and communicator, among others. We encourage every citizen, staff, and stakeholder to find their niche and to help others find theirs.
- ◆ It takes broad partnership to support resilient watersheds.
The Oregon way is unique. In Oregon, no individual landowner or community needs to grapple with watershed challenges alone. Cooperative conservation is built from broad, diverse partnerships that collaborate to develop and implement enduring watershed solutions. It is the Oregon way to invest in restoring and sustaining healthy, resilient watersheds. Public investment in watersheds is a value and commitment of Oregonians.
- ◆ The work to improve our watersheds requires we take the long view.
Healthy watersheds require the stewardship of generations. With permanent funding, we have the opportunity to test approaches that get to root causes. The challenges we must address came from generations of impacts, and will require we and our partners take the long view in determining the best approaches to address them. We are engaging in work we might not see the end of; it requires patience, persistence, discipline, and a vision for the future that embraces the long view.



The Impact We Want to Achieve



Our ideas of intended impact are the areas of the change we would like to see in Oregon as a result of our work. These ideas describe how Oregon will be different as a result of all that we and our partners accomplish. Everything we do is designed to achieve results in the following areas of impact.

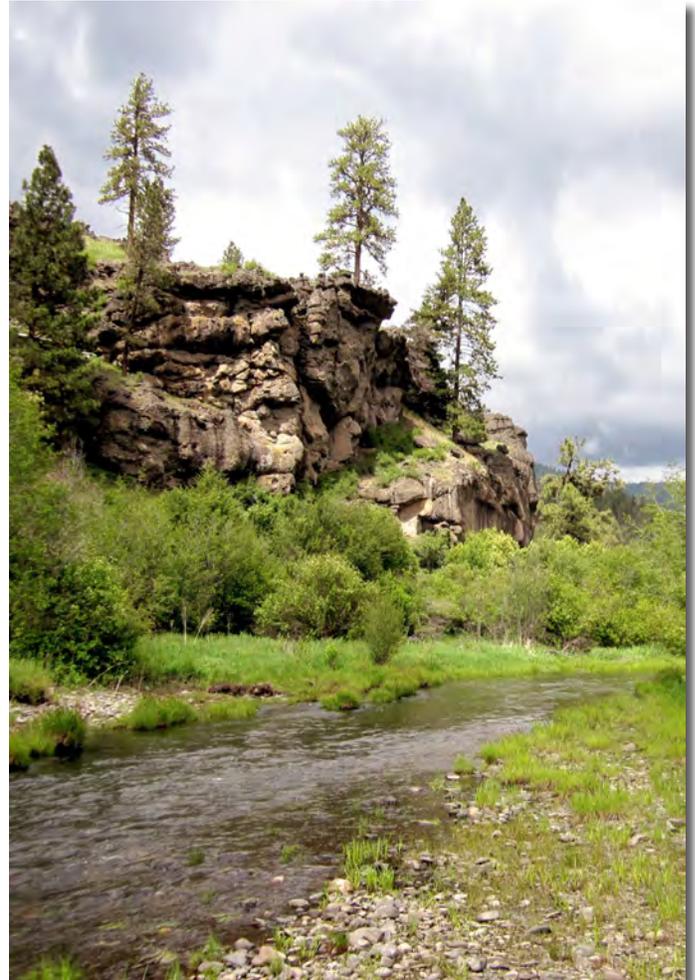
Our work is in service to...

Healthy, resilient watersheds (Ecological)

What we mean: A healthy, resilient watershed provides clean water and a vibrant place to live for people, fish, and wildlife - now and in the future. OWEB's investments will address the root causes of watershed problems. These investments will result in measurable improvements that lead to healthier streams and healthier upland habitat, while ensuring that the work of our grantees is resilient to long-term impacts to the environment.

Broad care and stewardship of watersheds by Oregonians (Social)

What we mean: Broad care and stewardship of Oregon's natural places can come about only by greater understanding, awareness, and appreciation by each Oregonian of the impact of their everyday actions on the health of their watersheds. Working with partners, OWEB will make special effort to meaningfully engage each Oregonian, including underserved and under-represented populations. This engagement will recognize each Oregonian's unique connection with the land – whether cultural, spiritual, economic, or recreational. OWEB will encourage stewardship as a path toward vibrancy, health and abundance in Oregon's watersheds, and promote engagement of current and future generations.



K. Handley

Adaptive capacity of communities to support their watersheds (Community)

What we mean: OWEB seeks to ensure all communities empower diverse stakeholders to design, implement, and evaluate collaborative conservation actions. Engaged community members are better able to adapt to new ideas, address new challenges and design new approaches to improve their watershed. When landowners, land managers and local citizens are actively involved in shared learning and leadership within local organizations, the capacity of communities to improve the health of their watersheds is expanded.

Strengthened economies emerging from healthy watersheds (Economic)

What we mean: Oregon’s natural resource industries – agriculture, forestry, fishing, recreation – are dependent on healthy watersheds to be sustainable. The work of restoring natural areas creates jobs in communities, and the impact of a healthy watershed extends to all segments of Oregon’s economy and is essential for the economic vitality of the State. When communities understand the link between healthy watersheds and a strong economy, they are more likely to invest in improving both.

OWEB will support the capacity of local organizations to engage their community in cooperative conservation while benefiting Oregon’s diverse economies.

Strong and diverse partnerships that promote and sustain healthy watersheds (Sectoral)

What we mean: Strong and diverse partnerships include the meaningful involvement of local, regional, and statewide organizations, public and private investors, government partners and experts from across Oregon. By understanding the needs of the watershed and community, OWEB is uniquely positioned to help to connect resources with communities. Collaboration allows the opportunity for cross-pollination of ideas, cross-boundary work, adaptive learning, and heightened fidelity to science. OWEB will encourage partners to develop a common vision and objectives to improve their watershed.



The Approach We Take



We believe that every endeavor is guided by a set of commitments not just about the “why” and the “what,” but also the “how.” These are the ways we are committed to engaging in our work. This is our approach. These principles modify everything we do.

Our work is characterized by...

● Involving stakeholders broadly and in partnership

- Involving the community members at all levels
- Promoting community ownership of watershed health
- Collaborating and authentically communicating
- Bringing together diverse interests
- Building and mobilizing partnerships



● Using best available science supported by local knowledge

- Basing approaches on the best available science
- Advancing efficient, science driven operations
- Addressing root sources and causes
- Incorporating local knowledge, experience, and culture
- Catalyzing local energy and investment



● Investing with long-term outcomes in mind

- Maintaining progress into the future
- Stewarding for the long term
- Taking the long view on projects and interventions

● Demonstrating impact through meaningful monitoring and evaluation

- Providing evidence of watershed change
- Measuring and communicating community impact
- Increasing appropriate accountability
- Incorporating flexibility, adaptive management – when we see something that’s not working, we do something about it

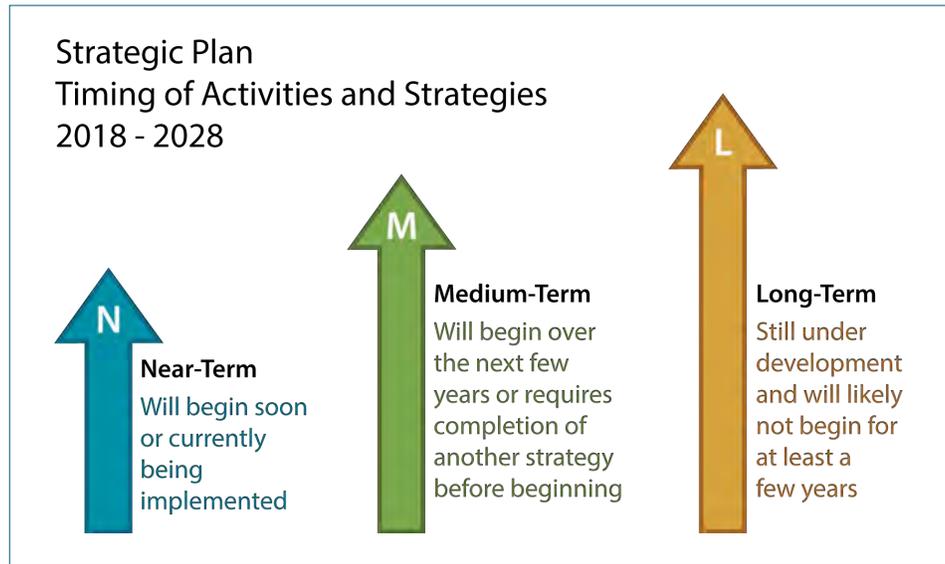


● Reaching and involving underrepresented populations

- Seeking to include the voice and perspectives that are not typically at the table
- Specific, targeted engagement
- Ensuring information is available and accessible to diverse audiences

Priorities, Strategies, and Action Examples

With extensive input from our stakeholders, OWEB has designed a strategic plan to provide direction for the agency and its investments over the next 10 years. With that in mind, the strategies within each priority are staged. In some cases, one strategy may need to be completed before another begins. In other cases, based on capacity, some strategies are prioritized for implementation in the near term, while others may not be implemented until later. The arrows below are indicated next to each strategy to highlight when strategies are expected to be implemented.



In addition, some strategies are focused on work with our partners and stakeholders, while others may result in a policy or funding shift for the OWEB Board. Strategies, objectives, or activities that may result in a policy or funding shift by the board are represented by the yellow icon with 3 arrows.





Priority 1

Broad awareness of the relationship between people and watersheds

What we mean

OWEB serves as an information source and catalyst for partners as they carry messages to their stakeholders about the importance of watersheds to the health and vitality of all Oregonians. This will include the development of story-telling and community engagement with dual goals. First, to help Oregonians take an active role in the health of their watershed and second, to increase awareness of the role watersheds play in improving the well-being of the people who reside in them. This will result in a growing care and stewardship of local watersheds and a deeper commitment to watershed work throughout the state.

Strategies

1. Develop and implement broad awareness campaigns and highlight personal stories to tell the economic, restoration and community successes of watershed investments.
2. Increase involvement of non-traditional partners in strategic watershed approaches.

Outcomes

- Non-traditional partners are involved and engaged in strategic watershed approaches.
- Successes are celebrated at the local and state level through use of appropriate tools.
- More Oregonians:
 - are aware of the impacts of their investment in their watershed.
 - understand why healthy watersheds matter to their family and community.
 - understand their role in keeping their watershed healthy.





Intent

Broad care and stewardship of Oregon's natural places can come about only by greater understanding, awareness, and appreciation by each Oregonian of the impact of their everyday actions on the health of their watersheds. Working with Oregon Lottery, watershed councils, soil and water conservation districts (SWCDs), land trusts and others, OWEB will tell the stories of the people, places, and partnerships that make Oregon's conservation ethic unique. This will include celebrating accomplishments and saying "Thank You" to all Oregonians who support this work.

Objectives

- In partnership with Oregon Lottery, the Oregon Conservation Partnership, and other conservation partners, develop tools and resources for local stakeholders to help them highlight conservation actions and the people and places impacted by those actions.
- Develop and share consistent messages across all OWEB's partners and stakeholders regarding the importance of watersheds to the health and vitality of all Oregonians.
- Train and educate local communicators to tell the story.

Activity Examples

Short Term (1-3 years)

- Coordinate with Lottery, SWCDs, watershed councils, and land trusts on 20th Anniversary campaign, including training for local organizations to help tell the story.

Medium-Long Term (3-6 years)

- Develop a continuous feed of stories (people and actions) to provide for Lottery to highlight ongoing conservation actions.





Intent

New, non-traditional partners (corporations, recreation and healthcare industries, etc.) can help improve watershed health. This will require new and different approaches to reach out to partners and engage them in ways that benefit their organization. Outreach is one critical component of establishing and maintaining partnerships. Strong and diverse partnerships include the meaningful involvement of local, regional, and statewide organizations; public and private investors; government partners; and experts from across Oregon. By understanding the needs of the watershed and community, OWEB is uniquely positioned to help to connect resources with communities. Collaboration allows the opportunity for cross-pollination of ideas, cross-boundary work, adaptive learning, and heightened fidelity to science. OWEB will encourage partners to develop a common vision and objectives to improve their watershed.

Objectives

- Identify potential non-traditional partners that are important to improving watershed health.
- Develop outreach and engagement strategies to increase engagement with non-traditional partners.
- Identify and learn from our stakeholders who are already engaging with non-traditional partners.

Activity Examples

Medium-Long Term (3-6 years)

- Identify the needs, opportunities, and gaps that non-traditional partners can fill.
- Work with the Oregon Conservation Partnership to engage with non-traditional partners toward a common goal, including organizations that may have different, but overlapping missions.
- Support stakeholders as they work to engage more diverse partners.





Priority 2

Leaders at all levels of watershed work reflect the diversity of Oregonians

What we mean

OWEB's board and staff will engage with partners and grantees to develop models and approaches that actively involve all Oregonians in improving the health of our watersheds. In its own practice, OWEB will seek out and develop leaders that reflect the diversity of Oregon to engage them in the rewarding work of improving the health of their watersheds. OWEB will adopt practices that support diversity in our own work and encourage equity in our grant-making through training, peer-to-peer learning, and other awareness-increasing approaches. This will shape the culture of the watershed work over time, developing a restoration system that is diverse and inclusive.

Strategies

1. Listen, learn and gather Information about diverse populations.
2. Create new opportunities to expand the conservation table.
3. Develop funding strategies with a lens toward diversity, equity, and inclusion (DEI). 🌱

Outcomes

- New and varied populations are engaged in watershed restoration.
- Grantees and partners actively use DEI tools and resources to recruit a greater diversity of staff, board members and volunteers.
- Increased engagement of under-represented communities in OWEB grant programs and programs of our stakeholders.
- OWEB, state agencies, and other funders consider opportunities to fund natural resource projects with a DEI lens.





Intent

OWEB's board and staff will engage with partners and grantees to develop models and approaches that actively involve all Oregonians, particularly the historically marginalized, to improve the health of our watersheds. OWEB will take the time to listen to and learn from our partners, stakeholders, and others working with the broad diversity of Oregonians.

Objectives

- Engage with current and potential future grant applicants from a diversity of backgrounds to determine the accessibility of our grant programs and if we are meeting their needs.
- Listen to stakeholders about barriers/concerns related to program types and accessibility.
- Increase understanding among staff, board, and stakeholders what DEI work entails.
- Increase understanding of current and potential partners who can help OWEB improve DEI in our board, staff, and grant-making.
- Create a plan to adapt services to accommodate gaps and barriers wherever possible. 🙌

Activity Examples

Short Term (1-3 years)

- With partners, survey our grantees to learn about the demographics of their stakeholders.
- Meet with other state and federal partners who are already doing DEI work to learn, understand available resources, and find ways to partner.
- Hold trainings for staff and board regarding both DEI and the state's unique relationship with tribes.



Intent

OWEB's board and staff will engage with partners and grantees to develop models and approaches that actively involve all Oregonians in improving the health of our watersheds.

Objectives

- In coordination with Oregon Conservation Partnership, develop strategies to help stakeholders recruit and engage under-represented communities based on training and feedback from Strategy 2.1.
- Seek new partnerships to recruit and maintain high-quality, diverse board and staff.
- Implement a continuous feedback loop to evaluate strategies again after completion of Strategy 2.1.

Activity Examples

Medium term (3-6 years)

- Following implementation of Strategy 2.1, develop work plan to expand DEI through OWEB's programs, staff, and board.
- Build DEI conversations and training into staff and board onboarding processes.



Intent

OWEB's board and staff will engage with partners and grantees to develop models and approaches that actively involve all Oregonians in improving the health of our watersheds. Through this process, OWEB will take the time to listen to and learn from our partners, stakeholders, and others working with the broad diversity of Oregonians.

Objectives

- Develop funding models to represent DEI principles. 
- Engage under-represented communities as funding recipients.
- Mobilize under-represented communities as partners in watershed conservation efforts.

Activity Examples

Medium Term (3-6 years)

- Activities will be built out after OWEB's initial listening and learning in years 1-3 of the strategic plan.





Priority 3

Community capacity and strategic partnerships achieve healthy watersheds

What We Mean

Diverse organizations and agencies provide capacity in many forms. OWEB will work with partners of all sizes and at all organizational levels to design resources and deploy tools to enhance the capacity of communities and strategic partnerships to participate in cooperative conservation. Partnerships will have the support they need to develop and implement strategic, science-based approaches to improve watershed health. OWEB will support watershed organizations and associated watershed work at all levels in pursuit of a statewide restoration network that is resilient and sustainable, and capable of achieving ecological outcomes. OWEB will be a statewide champion for partnerships in watershed health, supporting the environment that allows strong and effective partnerships of all sizes and at all levels to grow and flourish. Partnerships that engage a broad range of stakeholders are more inclusive, equitable, effective, consistent, reliable, purposeful, and innovative. This inclusion will amplify the impact of watershed work and develop resilience and capacity in the organizations seeking to improve and sustain healthy watersheds.

Outcomes

- Partners access best community capacity and strategic practices and approaches.
- OWEB can clearly tell the story of the value of capacity investments.
- Funders are aware of the importance of funding capacity.
- Lessons learned from past capacity investments inform funding decisions.
- Restoration projects involving multiple agencies are implemented more efficiently and effectively
- State-federal agencies increase participation in strategic partnerships.



**Intent**

By evaluating one of OWEB's longest-running programs and developing lessons learned, we are encouraging staff and stakeholders to ask questions as they think about how capacity investments are used. When we are curious, we are more apt to be responsive and flexible, adapting to the opportunities and challenges around us. We will seek to listen, learn, and think about cooperative conservation in new ways and through fresh perspectives.

Objectives

- Evaluate existing SWCD and watershed council capacity investments.
- Establish process to monitor, evaluate, and develop opportunities to improve investments in capacity to meet community needs.
- Design strategies that improve capacity programs and build on lessons learned. 

Activity Examples**Short Term (1-3 years)**

- Exchange information with other funders to learn how they invest in organizational capacity.
- Complete a qualitative and quantitative evaluation of past watershed council and SWCD capacity investments.
- Quantitative: Understand what our capacity dollars are already funding and the local accomplishments that are the result of these investments.
- Qualitative: Interview current and previous SWCD/WC staff and board members.

Medium Term (3-6 years)

- Identify lessons learned. Share with partners (funders, state and federal agencies).
- Use lessons learned to continue to adaptively manage capacity funding going forward. 

**Intent**

The Oregon way is unique. In Oregon, no individual landowner or community needs to grapple with watershed challenges alone. Cooperative conservation is built from broad, diverse partnerships that collaborate to develop and implement enduring watershed solutions. We seek to evaluate and learn to continue providing operating capacity funds for local organizations to advance conservation missions. We understand that capacity funding enables local partners to engage their communities in cooperative conservation while benefiting Oregon's diverse economies.

Objectives

- Evaluate the current state of capacity investments, including opportunities and gaps.
- Increase understanding of the connection between capacity investments and conservation actions.
- Identify ingredients of successful partnerships and develop tools for partnership self-evaluation.
- Using lessons learned, provide a range of resources including funding, technical tools, and learning opportunities that serve the needs of existing, new, and emerging partnerships, and local capacity. 


Continued

Activity Examples

Short term (1-3 years)

- Analyze other capacity funding models, including diverse, non-traditional approaches.
- Explore and share information and best practices on high-performing partnerships.
- Explore geographic/regional capacity funding to fill core capacity functions, incorporating results from the retrospective evaluation.
- Provide funding and support for regional shared services. 

Medium Term (3-6 years)

- Considering the life cycle of a partnership, community opportunities, and gaps, identify resources needed to improve stability for organizations, partnerships, and the restoration community.
- Based on research, implement a pilot to test new ways for supporting organizational, community and/or partnership capacity. 
- Use results of research to evaluate OWEB's spending plan and fund allocation for operating capacity.
- Assess needs for providing information to help foster a statewide network of high-performing partners.

Long Term (6-10 years)

- Review results of pilot and make any adjustments to OWEB's operating capacity funding. 

Strategy 3.3 Accelerate state/federal agency participation in partnerships

Intent

Natural resource agencies have complementary missions in support of watershed health. OWEB can support existing and new models that increase engagement of state/federal agencies in strategic partnerships. Strong and diverse partnerships include the meaningful involvement of local, regional, and statewide organizations, public and private investors, government partners and experts from across Oregon. By understanding the needs of the watershed and community, OWEB is uniquely positioned to help to connect resources with communities. Collaboration allows the opportunity for cross-pollination of ideas, cross-boundary work, adaptive learning, and heightened fidelity to science.

Objectives

- Develop approaches to help local organizations improve partnerships with state/federal agencies.
- Increase engagement of and coordination among state/federal agencies.
- Develop new models of efficient and effective coordination that make restoration easier. 

Activity Examples

Short term (1-3 years)

- Coordinate with federal and state agency OWEB Board members to highlight the importance of agency collaboration.
- Work with federal and state agency OWEB Board members to continue to elevate the need for conservation and restoration coordination among agencies.
- Continue to support existing effective state/federal agency partnerships, including providing updates at Board meetings and Natural Resources Cabinet.
- Coordinate with state and federal agencies to identify pilot areas that can be models for efficient and effective restoration project implementation.



Priority 4

Watershed organizations have access to a diverse and stable funding portfolio

What We Mean

OWEB will work with traditional and non-traditional funders to support the work that watershed organizations accomplish in communities. At the same time, OWEB and partners will work with these same organizations to strengthen their ability to seek and secure more diverse funding sources for watershed work. This two-pronged approach will provide communities the resources to move forward strategically and boldly in addressing watershed restoration needs.

Outcomes

- Agencies have a shared vision about how to invest strategically in restoration.
- Oregon has a comprehensive analysis of the state's natural and built infrastructure to direct future investments.
- Foundations and corporations are partners in watershed funding efforts.
- Foundations and corporations increase their investment in restoration.
- Natural resources companies are implementing watershed health work that is also environmentally sustainable.



Greenbelt Land Trust



Intent

There are a number of public agencies who provide funding related to watershed health, water quality and habitat. OWEB can support the development of statewide coordination of investments including grants, mitigation, and other funding mechanisms. Strong and diverse partnerships include the meaningful involvement of local, regional, and statewide organizations, public and private investors, government partners and experts from across Oregon. By understanding the needs of the watershed and community, OWEB is uniquely positioned to help to connect resources with communities.

Objectives

- Coordinate development of a state conservation investment vision to create clarity from the highest levels of the executive branch to local landowners. 
- Better coordinate mitigation and restoration funding to leverage conservation efforts. 
- Evaluate OWEB's role in, and capacity to, coordinate funding across agencies. 
- Develop cross-agency approaches to coordinate investments at the state level. 

Activity Examples

Short Term (1-3 years)

- Map the landscape of natural resource funding around the state and identify areas for potential alignment.
- Update OWEB mitigation policy to increase clarity around OWEB investments and how they work with mitigation funding.

Medium Term (3-6 years)

- Research approaches to increase state-level granting across agencies.
- Identify opportunities to leverage mitigation and restoration investments across state agencies.
- Work with state agencies to develop state investment vision.
- Identify innovative public agency investment strategies to better align with other funders.





Intent

Foundations may or may not know about the important restoration work occurring in Oregon. While restoration may not be a priority for foundations, the additional benefits of restoration projects may be. Jobs, community capacity, health, and community resiliency are just a few additional benefits that come from restoration projects, which may be of interest to private foundations. Strong and diverse partnerships include the meaningful involvement of local, regional, and statewide organizations, public and private investors, government partners and experts from across Oregon. By understanding the needs of the watershed and community, OWEB is uniquely positioned to help to connect resources with communities.

Objectives

- Develop funder-focused messaging around the multiple benefits of restoration investments.
- Work with other funders to better reflect environmental, community and economic values in in conservation granting.
- Partner with foundations to invest in strategic partnerships around conservation and restoration. 
- Reduce the risk of projects from a private foundation's perspective to encourage project investment. 
- Seek ways to increase connections with tribal foundations.

Activity Examples

Short -Term (1-3 years)

- Map the landscape of natural resource funding around the state and identify areas for potential alignment.
- Utilize existing convenings to highlight OWEB successes and open a dialogue with funders about co-investment.

Medium Term (3-6 years)

- Use existing networks to meet with funders as the opportunities arise.
- Explore opportunities for expanding conversations with foundations.
- Share OWEB's innovations with private foundations to encourage their investment in conservation.
- Identify new and innovative foundation investment strategies to better align with other funders. 



Intent

Corporations in Oregon have a vested interest in clean water and healthy watersheds. OWEB will work with partners to identify ways to help corporations invest strategically in the health of their local watershed. Strong and diverse partnerships, include the meaningful involvement of local, regional, and statewide organizations, public and private investors, government partners, and experts from across Oregon. By understanding the needs of the watershed and community, OWEB is uniquely positioned to help to connect corporate resources with communities.



Continued

Objectives

- Identify companies who have an inherent interest in natural resources, water, and watersheds.
- Work with companies to identify sponsorship models that work for them.
- Work with statewide conservation organizations to expand grantee capability to seek corporation investments in local projects.
- Reduce the risk of projects from the funder's perspective to encourage project investment. 🌱

Activity Examples

Short-term (1-3 years)

- Map the landscape of natural resource funding around the state and identify areas for potential alignment.

Medium term (3-6 years)

- Partner with foundations to develop messages around the economic, environmental, and community values of conservation investments for corporations.

Long term (6-10 years)

- Identify new and innovative corporate investment strategies to better align with other funders.

Strategy 4.4



Partner to design strategies for complex conservation issues that can only be solved by seeking new and creative funding sources

Intent

Oregon needs to increase its investment for increasingly complex conservation and restoration needs. This will require creative thinking around funding opportunities that match the size and scale of Oregon's vision for healthy watersheds. It is likely the investment need will be far beyond OWEB and its current partners' ability to fund with existing dollars. Strong and diverse partnerships include the meaningful involvement of local, regional, and statewide organizations, public and private investors, government partners and experts from across Oregon.

Objectives

In collaboration with the Governor's office, state agencies and other partners:

- Identify areas ripe for large-scale investments.
- Clearly identify the size of the challenge and the time scale to address it with or without additional funding.
- Develop analysis approaches to prioritize investment needs at the regional and state scale. 🌱

Activity Examples

Short Term (1-3 years)

- Identify areas of alignment between state climate change initiatives and OWEB funding.
- Partner to develop inventory, assessment, and prioritization approaches to identify water and other associated infrastructure needs.

Medium-Long Term (3-10 years)

- Identify additional areas of alignment for new and creative investment. 🌱



Priority 5

The value of working lands is fully integrated into watershed health

What we mean

Oregon's natural resource industries - agriculture, forestry, fishing, recreation – are dependent on healthy watersheds for their sustainability, including on private lands. OWEB will develop strategies to help local partners engage broader participation among those who own and manage working lands. This includes working broadly with partners who own or manage working lands and conservation communities to develop intentional approaches that fully embrace the value of well-managed working lands to habitat, water quality, and local economies.

NOTE: "Working land" means land that is actively used by an agricultural or forest land owner or operator for an agricultural or forestland operation that includes, but need not be *limited* to, active engagement in farming, ranching or timber management.

Outcomes

- Generations of landowners continue to integrate conservation on their working lands while maintaining economic sustainability.
- Fully functioning working landscapes remain resilient into the future.
- Across the state, local partners have the resources necessary to better facilitate why and where restoration opportunities exist on working lands.
- Sustained vitality of Oregon's natural resources industries.



**Intent**

Working with partners and the Oregon Agricultural Heritage Commission, finalize rules, solicit for applications, and determine appropriate funding sources for working lands easements, management plans, and succession planning for agricultural landowners. Oregon's watersheds are intertwined with its people – the land is a part of our culture, our food and water, our work and our recreation. As a result, the well-being of all Oregonians depends on the health of our watersheds. Current and future generations need access to healthy watersheds. People and communities are an integral part of their watershed, just like fish and wildlife. A community's economic and social health comes from the health of the lands that surround them and the ability to draw enjoyment from clean water, open spaces, and natural habitats.

Objectives

- Establish a fully functioning Oregon Agricultural Heritage Commission.
- Adopt rules governing grant programs for succession planning, covenants, easements, and technical assistance. 🌱
- Determine funding needs for the Oregon Agricultural Heritage Program. Full implementation is funding-dependent. 🌱

Activity Examples*Short Term (1-3 years)*

- Provide leadership for the Oregon Agricultural Heritage Commission.
- Facilitate the Commission's development of program rules.
- Implement surveys and otherwise solicit the level of interest in the granting programs under the Commission's purview to determine funding needs.
- Support existing and new land trusts, soil and water conservation districts and other working land easement partners as they work with landowners interested in the program.

**Intent**

The agency will start by learning from others with more experience and knowledge. This includes a commitment to continuous learning by understanding who our current grantees, partners and stakeholders are and clearly identifying the gaps in these areas and how they are represented. This is important to fully incorporate strong working lands approaches into OWEB's mission. Oregon's natural resource industries – agriculture, forestry, fishing, recreation – are dependent on healthy watersheds to be sustainable. The work of restoring natural areas creates jobs in communities, and the impact of a healthy watershed extends to all segments of Oregon's economy and is essential for the economic vitality of the state. When communities understand the link between healthy watersheds and a strong economy, they are more likely to invest in improving both.

Objectives

- Map the working lands community, defining landowner barriers to and motivations for implementing conservation.
- Develop a pathway to work with partners to increase working lands projects, and support technical assistance for owners and managers of working lands.
- Evaluate opportunities for incentives to increase landowner participation.


Continued

Activity Examples

Short-term (1-3 years)

- Invest with grantees and working lands advocates to survey landowners to better understand their motivation and barriers to implementing conservation.
- Develop and design training and information sharing approaches.

Medium Term (3-6 years)

- Work with partners to develop a pathway to increase working lands projects.
- Work with partners to identify and support technical assistance opportunities for owners and managers of working lands.



Strategy 5.3



Enhance the work of partners to increase working lands projects on farm, ranch and forestlands

Intent

There are many areas in the state where working lands strategies and habitat/water quality priorities intersect. A number of statewide agencies and organizations have strong connections with farmers, ranchers and forest land owners. OWEB will partner with those organizations (formally and informally) to increase landowner involvement in conservation – whether through a program or on their own. OWEB can continue to work with partners at the state and local level to identify strategic areas where the agency can focus its investments on that intersection, highlighting the compatibility of working lands conservation strategies.

Objectives

- Engage multi-agency resources to help target and develop assistance for landowners.
- Capitalize on opportunities to complement Oregon's land use program with conservation investments.
- Increase partnerships with those who are implementing successful working land approaches.
- Create opportunities to increase incentives for landowner participation in working lands conservation based on learning from strategy 5.2.

Activity Examples

Medium Term (3-6 years)

- Train review teams about the value of working lands for conservation.
- Based on lessons learned from strategy 5.2, identify funding and funding gaps for working lands conservation projects.
- Convene resource specialists to help identify species, habitat and water quality needs/opportunities and where they intersect with working lands; share this information broadly.
- Establish and facilitate a state technical group to identify and recommend approaches to invest in technical support tools for local partners.



Intent

While local organizations are very effective at working with farm, ranch and forest landowners, there are some landowners/managers who have not yet been engaged in conservation for a variety of reasons. OWEB can coordinate with other partners to help local organizations effectively engage new landowners in their community.

Objectives

- Increase available technical resources for landowners and managers of working lands.
- Develop funding mechanisms for long-term stewardship of working lands. 
- Support stakeholder engagement to better address the changing demographics of owners and managers of working lands in rural Oregon.

Activity Examples

Medium term (3-6 years)

- Facilitate assessment of technical assistance needs.
- Increase investment in technical assistance to grantees and working lands advocates.
- Design monitoring and evaluation strategies for working lands restoration. 

Long term (6-10 years)

- Develop technical assessment materials to meet the needs of specific audiences.



Intent

Landowner engagement is an important component to increase working lands projects to build understanding and support for the work as well as identify opportunities to work with interested land owners.

Objectives

- Engage community leaders to help build support and understanding for working lands conservation.
- Expand awareness or understanding of working lands conservation programs to owners and managers of working lands not currently engaged.
- Broadly communicate economic and conservation values of working lands conservation, emphasizing the balance of habitat, water quality, and landowner needs.
- Build and encourage a culture of conservation on working lands.
- Ensure consistent working lands conservation opportunities across the state. 

Activity Examples

- Additional activities will be developed based on lessons learned from strategy 5.2.



Priority 6

Coordinated monitoring and shared learning to advance watershed restoration effectiveness

What we mean

OWEB will develop greater capacity throughout the system of watershed stakeholders to monitor progress, learn from projects, track effectiveness, gather data, respond to data, and advance the cause of healthy, resilient watersheds through monitoring and evaluation. OWEB will work with partners to ensure frameworks to receive and share information exist. These frameworks will take advantage of the best scientific thinking and latest methods and technology in and outside the restoration community. OWEB and partners will develop monitoring ‘networks’ to which organizations in all parts of the state can contribute.

Outcomes

- Decision-making at all levels is driven by insights derived from data and results.
- Limited monitoring resources are focused on appropriate, high-quality, prioritized monitoring being conducted by state/federal agencies and local organizations.
- Local organizations integrate monitoring goals into strategic planning.
- Evaluation of impact, not just effort, is practiced broadly.
- Impacts on ecological, economic and social factors are considered as a part of successful monitoring efforts.
- Partners are using results-based restoration ‘stories’ to share conservation successes and lessons learned.
- Monitoring frameworks are developed and shared.
- Monitoring results that can be visualized across time and space are available at local, watershed and regional scales.





Intent

OWEB seeks to ensure all communities empower diverse stakeholders to design, implement, and evaluate collaborative conservation actions. Engaged community members are better able to adapt to new ideas, address new challenges and design new approaches to improve their watershed. When landowners, land managers and local citizens are actively involved in shared learning and leadership within local organizations, the capacity of communities to improve the health of their watersheds is expanded.

Objectives

- Coordinate with partners to tell the story of watershed work, progress, and impact.
- Improve understanding and awareness about how restoration benefits people.
- Identify clear and understandable restoration outcomes, including measures of both ecological and social/economic outcomes that describe the relevance of OWEB's investments to the public.

Activity Examples

Short term (1-3 years)

- Assess what information is readily available for tracking restoration results, outcomes, and impacts, and improve the quality and relevance of data collected as appropriate.
- Work with grantees and other local partners to identify the best ways to communicate outcomes.
- Build on existing processes for 'telling the story' to effectively interpret scientific information and communicate results in ways that are meaningful to diverse audiences. 📄

Medium-Long Term (3-10 years)

- Link refinements to OWEB's monitoring grant-making to OWEB's approach to 'telling the story of restoration' and adaptively manage this work.
- Continue to explore new and diverse ways to use online and social media.
- Continue to build on successful awareness and communication efforts, expanding OWEB's ability to reach new or under-represented sectors or demographic groups.



Strategy 6.2 Invest in monitoring over the long term

Intent

For effectiveness monitoring to be successful, there needs to be long-term sustained effort – or, at the very least, an ability to sample or measure indicators at appropriate time scales. OWEB seeks to ensure all communities empower diverse stakeholders to design, implement, and evaluate collaborative conservation actions. Engaged community members are better able to adapt to new ideas, address new challenges and design new approaches to improve their watershed. When landowners, land managers and local citizens are actively involved in shared learning and leadership within local organizations, the capacity of communities to improve the health of their watersheds is expanded.

Objectives

- Help grantees develop realistic approaches for what to monitor, purpose, and timeframe.
- Explore coordinated monitoring approaches that provide monitoring capacity and technical support at appropriate and realistic scales of both geography and time.
- Consider how theory of change approaches can inform both restoration planning and strategies to track the effectiveness of restoration over the long term.
- Develop the ability to communicate the structure of a monitoring framework over the long term and its relevance to restoration practitioners, managers, and funders who are interested in better understanding status and trends and the effectiveness of restoration.

Activity Examples

Short-Medium term (2-4 years)

- Assess existing coordinated monitoring efforts and/or teams to understand how they have functioned.
- Evaluate past OWEB investments in paired restoration and large-scale monitoring, FIP monitoring, and long standing monitoring projects/programs. 

Long Term (5-10 years)

- Develop recommendations for the board about long-term investments in monitoring, and criteria for applicants to address the board priorities for long-term investments in monitoring. 

Strategy 6.3 Develop guidance and technical support for monitoring

Intent

Develop monitoring and adaptive management guidance to provide technical support.

Objectives

- Understand specific barriers and challenges to implementing successful monitoring efforts.
- Improve monitoring grant applications to meet local and state needs.
- Distill technical monitoring data into useable information for adaptive management.

Activity Examples

Short-Medium Term (1-5 years)

- Prioritize findings of OWEB's monitoring application guidance development process, develop a work plan for refining the agency's monitoring grant-making, and begin implementation of the plan. Example activities include:
- Compile and communicate lessons learned from past monitoring investments.
- Develop guidance documents for restoration and monitoring practitioners. 



Intent

Develop communication strategies to share results, incorporate scientific and technical information, including climate science information, into restoration planning, and support adaptive management by helping bridge the gap between research/monitoring and on-the-ground work.

Objectives

- Accelerate science/practitioner communication.
- Explore the value of the regional forums and/or networks to coordinate monitoring and encourage efficient and effective use of available resources for monitoring.
- Make scientific data and tools available to restoration practitioners.

Activity Examples

Medium-Term (3-5 years)

- Explore and support existing information-sharing venues to share results of research and monitoring, including workshops, symposia, regional monitoring gatherings, and peer exchanges.
- Share information about resources and tools available through existing regional networks.
- Continue to coordinate with other states on opportunities for action-specific monitoring partnerships.

Long-Term (5-10 years)

- Explore the value of helping to organize informal networks that include scientists/researchers, technical/monitoring experts, and restoration practitioners.



Intent

Assess what OWEB wants to achieve through monitoring and then create the resources and tools necessary. Define appropriate monitoring scopes or scales. Consider the operational contexts to determine what is appropriate for any given partnership or organization.

Objectives

- Define appropriate scopes and/or scales for monitoring. 
- Integrate monitoring with other OWEB investments to ensure ecological outcomes can be quantified.
- Promote monitoring as a critical component of restoration work and identify other funding partners for this work.

Activity Examples

Medium-Term (3-5 years)

- Assess and define what OWEB wants to achieve through monitoring. 
- Review the findings from other strategies under the Coordinated Monitoring priority.

Long-Term (5-10 years)

- Draft monitoring priorities for consideration by the board.
- Use funding conversations with foundations and state agencies under Priority 4 to explore areas of common interest in funding monitoring, including assessment of other interested and willing funders.

Intent

Encourage state and federal agency partners to develop consistent approaches, clear goals, shared scope and scale for their watershed monitoring.

Objectives

- Partner with state and federal agency partners to develop consistent approaches, clear goals, shared scope, and scale for monitoring watershed restoration outcomes and impacts. 
- Partner with state agencies to increase interagency collaboration and develop a common vision for monitoring at a larger scale.
- Complement larger-scale monitoring planning with embedded approaches to help local partners identify lessons learned at a local scale and with relevance to localized decision-making.
- Strengthen integration of data collection across state and federal agencies.

Activity Examples

Medium-Term (3-5 years)

- Continue implementation of current monitoring efforts and evaluate the use of approaches that bridge larger-to-smaller scales.
- Evaluate existing monitoring strategies and consider their appropriateness as a foundation for developing a monitoring framework. 
- Share information with restoration and monitoring practitioners about existing and emerging data integration and visualization tools.

Long-Term (5-10 years)

- Develop tools and resources to encourage use of a consistent monitoring framework, methodologies, and tools by integrating these into OWEB's grant-making processes.
- Continue to support use and build-out of existing and emerging tools for: integrating data collection efforts; visualizing monitoring results at larger scales; and evaluating potential for more efficient monitoring on the ground.





Priority 7

Bold and innovative actions to achieve health in Oregon's watersheds

What we mean

OWEB will catalyze, support, and encourage the design and implementation of watershed health innovations by grant applicants. These innovations can reach beyond project implementation to touch all areas of OWEB's granting that support healthy watersheds – from capacity and partnership development to technical assistance, implementation, and monitoring. OWEB will continually weigh the agency's investment risk to encourage design and experimentation in watershed work while ensuring the public benefits from our investments.

Outcomes

- Multi-phased, high-complexity, and large geographic footprint restoration projects are underway.
- OWEB's investment approaches recognize the dual conservation and economic drivers and benefits of watershed actions, where appropriate.
- Diverse, non-traditional projects and activities that contribute to watershed health are now funded that weren't previously.
- Conservation communities value an experimental approach to learning and innovation.
- Conservation communities become comfortable with properties and projects that show potential, even if the work is not demonstrated based on proven past performance.
- OWEB becomes better able to evaluate risk.
- OWEB encourages a culture of innovation.



Philip Bayles



Intent

Expand funding opportunities for large-scale conservation efforts over multiple years, sharing risk amongst diverse partners.

Objectives

- Provide funding for landscape-scale restoration over the long term.
- Provide funding to support partnerships implementing landscape-scale restoration or identify other sources of capacity funding for partnerships.
- Share results of long-term efforts and lessons learned with the broader conservation community.
- Invest in capacity to develop projects that can be successfully implemented at the landscape scale.

Activity Examples

Short term (1-3 years)

- Continue to fund long-term activities that lead to landscape scale restoration.
- Develop evaluation processes for individual restoration grants that reward projects that may entail risk, but offer big potential upsides.

Medium term (3-6 years)

- Evaluate if other OWEB grant programs may be necessary to successfully invest in landscape scale restoration.



Intent

Develop appropriate investment approaches that recognize the dual conservation and economic drivers of watershed actions.

Objectives

- Identify new economic approaches that incentivize conservation.
- Clearly communicate to the public the economic benefits of restoration, while including the ecological benefits realized from well-managed working lands.

Activity Examples

Medium to long-term (4-10 years)

- Research cutting edge science that involves working lands and conservation outcomes.
- Identify economic impacts of healthy fish runs, water quality, and healthy watersheds.
- Develop resources that can help our partners in conservation communicate the economic benefits of restoration.



Intent

We will stimulate innovations and experimentations to adopt promising new practices throughout the conservation system. Once discoveries are made, we will provide insights from the learning to the conservation community for adoption and further experimentation.

Objectives

- Deliberately and nimbly invest in both programs/projects that are traditional (with predictable outcomes) and innovative (where more risk exists), sharing risk amongst diverse partners. 🚧
- Convene partners to develop, then provide incentives for innovative ideas.
- Evaluate ways to allocate funding specifically for innovation. 🚧
- Formally recognize that lessons learned are a part of a project's success.

Activity Examples

Short term (1-3 years)

- Capture lessons learned from restoration and partnership investments and share with restoration practitioners to identify areas for innovation and increased risk-taking.
- Develop approaches that allow grantees the space to clearly articulate risks and benefits of new and innovative approaches.
- Develop board and staff capacity to evaluate risk and to be able to weigh risk of innovation against proposed benefits.



The Freshwater Trust

OWEB Board and Staff

The ideas and efforts represented by this strategic plan are built upon the work of current and past OWEB members and partners and will be continued and further developed by those who have yet to join the team. Those listed below are board and staff members at the time of publication of this document.

Board

Randy Labbe, Co-Chair, Public at Large, Portland
Will Neuhauser, Co-Chair, Public at Large, Yamhill
Alan Henning, US Environmental Protection Agency, Eugene
Bruce Buckmaster, Fish & Wildlife Commission, Astoria
Debbie Hollen, US Forest Service, Portland
Gary Marshall, Public at Large, Hines
Jan Lee, Public at Large, Sandy
Jason Robison, Cow Creek Band of Umpqua Tribe of Indians, Roseburg
Kathy Stangl, US Bureau of Land Management, Portland
Laura Masterson, Board of Agriculture, Portland
Liza Jane McAlister, Public at Large, Enterprise
Meg Reeves, Water Resources Commission, Corvallis
Paul Henson, US Fish & Wildlife Service, Portland
Ron Alvarado, Natural Resources Conservation Service, Portland
Rosemary Furfey, National Oceanic & Atmospheric Administration Fisheries, Portland
Stephen Brandt, OSU Extension Administration, Corvallis

Staff

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Renee Davis, Deputy Director
Andrew Dutterer, Partnerships Coordinator
Audrey Hatch, Conservation Outcomes Coordinator
Bobbi Riggers, OWRI Data Coordinator
Cammi Hungate, Grant Support Specialist
Cindy Silbernagel, Manager
Courtney Shaff, Capacity Programs Coordinator
Cyrus Curry, Business Application Specialist
Darika Barnes, Executive Assistant
Eric Hartstein, Senior Policy Coordinator
Eric Williams, Manager
Ginger Lofftus, PCSRF Reporting Assistant
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Gretchen Kirchner, Technical Support Specialist
Jillian McCarthy, Partnerships Coordinator
Karen Leiendecker, Region 5 Program Representative
Kathy Leopold, Small Grant Coordinator
Katie Duzik, Region 1 Program Representative
Katy Gunville, Administrative Manager
Ken Fetcho, Effectiveness Monitoring Coordinator
Kristi Primley, Administrative Support
Leilani Sullivan, Grant Payment Specialist
Liz Redon, Region 3 Program Representative
Mark Grenbemer, Region 2 Program Representative
Miriam Hulst, Acquisitions Coordinator
Nellie McAdams, Oregon Agricultural Heritage Program
Paula Wills, GIS & Technology Specialist
Reed Warner, Information Management Analyst
Sue Greer, Region 6 Program Representative
Tara Choate, Grant Payment Coordinator



OWEB Strategic Plan Draft Outcome and Output Indicators of Progress

Priority 1 - Broad awareness of the relationship between people and watersheds					
Strategies	1. Develop and implement broad awareness campaigns and highlight personal stories to tell the economic, restoration and community successes of watershed investments	<p>We Do This: (actions) <i>Short Term (1-3 years):</i></p> <ul style="list-style-type: none"> - Coordinate with Lottery, SWCDs, watershed councils and land trusts on 20th Anniversary Campaign, including training for local organizations to help tell the story. <p><i>Medium-Long Term (3-6 years):</i></p> <ul style="list-style-type: none"> - Develop a continuous feed of stories (people and actions) to provide for Lottery to highlight ongoing conservation actions. 	<p>So That: (outputs)</p> <ul style="list-style-type: none"> - Local partners are trained and have access to media and tools. - Local conservation organizations have meaningful connection to local media. - Each region has access to public engagement strategies that reach non-traditional audiences. - Oregon Lottery media campaigns have new stories every year of watershed work and progress. 	<p>To Make This Difference: (outcomes)</p> <ul style="list-style-type: none"> - Non-traditional partners are involved and engaged in strategic watershed approaches. - Successes are celebrated at the local and state level through use of appropriate tools. - More Oregonians: <ul style="list-style-type: none"> o are aware of the impacts of their investment in their watershed; o understand why healthy watersheds matter to their family and community; o understand their role in keeping their watershed healthy. 	<p>Evaluated by:</p> <ul style="list-style-type: none"> - Increase in public conversation about watersheds and people's role in keeping them healthy. - Increase recognition of landowner connection to healthy watersheds. - Broader representation/greater variation of populations represented in the Oregon watershed stories.
	2. Increase involvement of non-traditional partners in strategic watershed approaches	<p><i>Medium Term (3-6 years)</i></p> <ul style="list-style-type: none"> - Identify the needs, opportunities, and gaps that non-traditional partners can fill. - Work with the conservation partnership to engage with non-traditional partners toward a common goal, including organizations that may have different, but overlapping missions. - Support stakeholders as they work to engage more diverse partners 			
Priority 2 - Leaders at all levels of watershed work reflect the diversity of Oregonians					
Strategies	1. Listen, learn and gather Information about diverse populations	<p>We Do This: (actions) <i>Short Term (1-3 years):</i></p> <ul style="list-style-type: none"> - With partners, survey our grantees to learn about the demographics of their stakeholders. - Meet with other state and federal partners who are already doing DEI work to learn, understand available resources and find ways to partner. - Hold trainings for staff and board regarding both DEI and the state's unique relationship with tribes. 	<p>So That: (outputs)</p> <ul style="list-style-type: none"> - OWEB board and staff have been trained in diversity, equity and inclusion (DEI). - OWEB has DEI capacity. - OWEB grantees and partners have access to DEI tools and resources. - DEI are incorporated into OWEB grant programs, as appropriate. - OWEB staff and board develop awareness of how social, economic, and cultural differences impact individuals, organizations and business practices. - OWEB staff and board share a common understanding of OWEB's unique relationship with tribes. - Board and staff regularly engage with underrepresented partnerships and stakeholder groups to support DEI work. 	<p>To Make This Difference: (outcomes)</p> <ul style="list-style-type: none"> - New and varied populations are engaged in watershed restoration - Grantees and partners actively use DEI tools and resources to recruit a greater diversity of staff, board members and volunteers. - Increased engagement of under-represented communities in OWEB grant programs and programs of our stakeholders. - OWEB, state agencies, and other funders consider opportunities to fund natural resource projects with a DEI lens. 	<p>Evaluated by:</p> <ul style="list-style-type: none"> - Increased awareness by grantees of gaps in community representation. - Increased representation of Grantees and partners from diverse communities on boards, staff, and as volunteers. - Increased funding provided to culturally diverse stakeholders and populations.
	2. Create new opportunities to expand the conservation table	<p><i>Medium term (3-6 years):</i></p> <ul style="list-style-type: none"> - Following implementation of Strategy 2.1, develop work plan to expand diversity, equity and inclusion through OWEB's programs, staff, and board. - Build diversity, equity, and inclusion conversations and training in to staff and board onboarding processes. 			
	3. Develop funding strategies with a lens toward diversity, equity, and inclusion (DEI)	<p><i>Medium Term (3-6 years)</i></p> <ul style="list-style-type: none"> - Activities will be built out after OWEB's initial listening and learning in years 1-3 of the strategic plan. 			

Priority 3 - Community capacity and strategic partnerships achieve healthy watersheds

Strategies	<p>1. Evaluate and identify lessons learned from OWEB's past capacity funding</p>	<p>We Do This: (actions)</p> <p><i>Short Term (1-3 years):</i></p> <ul style="list-style-type: none"> - Exchange information with other funders to learn how they invest in organizational capacity. - Complete a qualitative and quantitative evaluation of past council and SWCD capacity investments. - Quantitative: Understand what our capacity dollars are already funding and the local accomplishments. - Qualitative: Interview current and previous SWCD/WC staff and board members. <p><i>Medium Term (3-6 years):</i></p> <ul style="list-style-type: none"> - Identify lessons learned. Share with partners (funders, state and federal agencies). - Use lessons learned to continue to adaptively manage capacity funding going forward. 	<p>So That: (outputs)</p> <ul style="list-style-type: none"> - Data exists to better understand the impacts of OWEB's capacity investments - Help exists for local groups to define their restoration 'community' for purposes of partnership/community capacity investments. - A suite of alternative options exists to invest in capacity to support conservation outcomes. - New mechanisms are available for watershed councils and soil and water conservation districts to report on outcomes of capacity funding. 	<p>To Make This Difference: (outcomes)</p> <ul style="list-style-type: none"> - Partners access best community capacity and strategic practices and approaches. - OWEB can clearly tell the story of the value of capacity funds. - Funders are aware of the importance of funding capacity. - Lessons learned from past capacity investments inform funding decisions. - Restoration projects involving multiple agencies are implemented more efficiently and effectively - State-federal agencies increase participation in strategic partnerships. 	<p>Evaluated by:</p> <ul style="list-style-type: none"> - Increase in indicators of capacity for entities. - Increased restoration project effectiveness from cross-agency efforts. - Increase in funding for capacity by funders other than OWEB.
	<p>2. Champion best approaches to build organizational, community, and partnership capacity</p>	<p><i>Short term (1-3 years):</i></p> <ul style="list-style-type: none"> - Analyze other capacity funding models, including diverse, non-traditional approaches. - Explore and share information and best practices on high-performing partnerships. - Explore geographic/regional capacity funding to fill core capacity functions, incorporating results from the retrospective evaluation. - Provide funding and support for regional shared services <p><i>Medium Term (3-6 years):</i></p> <ul style="list-style-type: none"> - Considering the life cycle of a partnership, community opportunities, and gaps, identify resources needed to improve stability for organizations, partnerships, and the restoration community. - Based on research, implement a pilot to test new ways for supporting organizational, community and/or partnership capacity. - Use results of research to evaluate OWEB's spending plan and fund allocation for Operating Capacity. - Assess needs for providing information to help foster a statewide network of high-performing partners. <p><i>Long Term (6-10 years):</i></p> <ul style="list-style-type: none"> - Review results of pilot and make any adjustments to OWEB's Operating Capacity funding. 	<ul style="list-style-type: none"> - A set of streamlined cross-agency processes exist to more effectively implement restoration projects. - Local capacity strengths and gaps are identified to address and implement large-scale conservation solutions . 		
	<p>3. Continue to catalyze and increase state/federal agency participation in strategic partnerships</p>	<p><i>Short term (1-3 years)</i></p> <ul style="list-style-type: none"> - Coordinate with federal and state agency OWEB board members to highlight the importance of agency collaboration. - Work with federal and state agency OWEB board members to continue to elevate the need for conservation and restoration coordination among agencies. - Continue to support existing effective federal/state agency partnerships, including providing updates at Board and interagency meetings 			

Priority 4 - Watershed organizations have access to a diverse and stable funding portfolio

Strategies

	<u>We Do This: (actions)</u>	<u>So That: (outputs)</u>	<u>To Make This Difference: (outcomes)</u>	<u>Evaluated by:</u>
<p>1. Increase coordination of public restoration investments and develop funding vision</p>	<p><i>Short Term (1-3 years)</i></p> <ul style="list-style-type: none"> - Map the landscape of natural resource funding around the state and identify areas for potential alignment. - Update OWEB mitigation policy to increase clarity around OWEB investments and how they work with mitigation funding. - <i>Medium Term (3-6 years)</i> - Research approaches to increase state-level granting across agencies. - Identify opportunities to leverage mitigation and restoration investments across state agencies. - Work with state-level agencies to develop state investment vision. - Identify innovative public agency investment strategies to better align with other funders. 	<ul style="list-style-type: none"> - OWEB has a clear understanding of its role in coordinating funding. - OWEB and other state and federal agencies have developed a system for formal communication and coordination around grants and other investments. - OWEB and partners have a coordinated outreach strategy for increasing watershed investments by state agencies, foundations, and corporations. 	<ul style="list-style-type: none"> - Agencies have a shared vision about how to invest strategically in restoration. - Oregon has a comprehensive analysis of the state's natural and built infrastructure to direct future investments. - Foundations and corporations are partners in watershed funding efforts. - Foundations and corporations increase their investment in restoration. 	<ul style="list-style-type: none"> - Increased match amount and diversity of match in projects - Increase in new and diverse funding sources. - Increase in creative funding mechanisms and strategies. - Increased high-quality conservation and restoration projects are funded without OWEB investment - Increased funding for bold and innovative, non-traditional investments
<p>2. Seek alignment of common investment areas with private foundations</p>	<p><i>Short Term (1-3 years):</i></p> <ul style="list-style-type: none"> - Map the landscape of natural resource funding around the state and identify areas for potential alignment. - Utilize existing convenings to highlight OWEB successes and open a dialogue with funders about co-investment. - <i>Medium Term (3-6 years):</i> - Use existing networks to meet with funders as the opportunities arise. - Explore opportunities for expanding conversations with foundations. - Share OWEB's innovations with private foundations to encourage their investment in conservation. - Identify new and innovative foundation investment strategies to better align with other funders. 	<ul style="list-style-type: none"> - Foundations and corporations are informed about the important restoration work occurring in Oregon and understand the additional community benefits of restoration projects. - Foundations and corporations know OWEB, how the agency's investments work, and how they can partner. - Foundations and corporations understand the importance of investing in healthy watersheds 	<ul style="list-style-type: none"> - Foundations and corporations know OWEB, how the agency's investments work, and how they can partner. - Foundations and corporations understand the importance of investing in healthy watersheds - Foundations and corporations consider restoration investments in their investment portfolios. - Oregon companies that depend on healthy watersheds are aware of the opportunity to invest in watershed health. 	
<p>3. Explore creative funding opportunities/partnerships with the private sector</p>	<p><i>Short-term (1-3 years):</i></p> <ul style="list-style-type: none"> - Map the landscape of natural resource funding around the state and identify areas for potential alignment. - <i>Medium term (3-6 years)</i> - Partner with foundations to develop messages around the economic, environmental, and community values of conservation investments for corporations. - <i>Long term (6-10 years)</i> - Identify new and innovative corporate investment strategies to better align with other funders. 	<ul style="list-style-type: none"> - Foundations and corporations consider restoration investments in their investment portfolios. - Oregon companies that depend on healthy watersheds are aware of the opportunity to invest in watershed health. 		
<p>4. Partner to design strategies for complex conservation issues that can only be solved by seeking new and creative funding sources</p>	<p><i>Short Term (1-3 years)</i></p> <ul style="list-style-type: none"> - Identify areas of alignment between state climate change legislation and initiatives and OWEB funding. - Partner to develop inventory, assessment, and prioritization approaches to identify water and other associated infrastructure needs. <p><i>Medium-Long Term (3-10 years)</i></p> <ul style="list-style-type: none"> - Identify additional areas of alignment for new and creative investment. 			

Priority 5 - The value of working lands is fully integrated into watershed health

Strategies	1. Implement the Oregon Agricultural Heritage Program	<p><u>We Do This: (actions)</u></p> <p><i>Short Term (1-3 years)</i></p> <ul style="list-style-type: none"> - Provide leadership for the Agricultural Heritage Commission. - Facilitate the Commission’s development of program rules. - Implement surveys and otherwise solicit the level of interest in the granting programs under the Commission’s purview to determine annual funding needs. - Support existing and new land trusts, soil and water conservation districts and other working land easement partners as they work with landowners interested in the program. 	<p><u>So That: (outputs)</u></p> <ul style="list-style-type: none"> - Landowner engagement strategies and tools are developed and used by local conservation organizations - Strategies and stories are being utilized to reach owners and managers of working lands who are not currently working with local organizations. - Local organizations have the technical assistance to address gaps in implementing working land conservation projects. - Examples of successful working lands conservation projects are available for local organizations to use. - New partners are engaged with owners and operators of working lands to increase conservation. - The Oregon Agricultural Heritage Commission has administrative rules and stable funding for the OAHF to protect working lands. - Local capacity exists to implement the Oregon Agricultural Heritage Program. 	<p><u>To Make This Difference: (outcomes)</u></p> <ul style="list-style-type: none"> - Generations of landowners continue to integrate conservation on their working lands while maintaining economic sustainability. - Fully functioning working landscapes remain resilient into the future. - Across the state, local partners have the resources necessary to better facilitate why and where restoration opportunities exist on working lands. - Sustained vitality of Oregon’s natural resources industries. 	<p><u>Evaluated by:</u></p> <ul style="list-style-type: none"> - Increased conservation awareness amongst owners and managers of working lands. - A better understanding of conservation participation, barriers and incentives for working lands owners. - Expanded relationships with agriculture and forestry associations. - Increased engagement of owners and managers of working lands conservation projects. - Increased working lands conservation projects on farm, ranch, and forest lands. - Expanded working lands partnerships improve habitat and water quality. - Expanded funding opportunities exist for working lands conservation.
	2. Strengthen engagement with a broad base of landowners	<p><i>Short-term (1-3 years)</i></p> <ul style="list-style-type: none"> - Invest with grantees and working lands advocates to survey landowners to better understand their motivation and barriers to implementing conservation. - Develop and design training and information sharing approaches. - <i>Medium Term (3-6 years)</i> - Work with partners to develop a pathway to increase working lands projects. - Work with partners to identify and support technical assistance to work with owners and managers of working lands. 			
	3. Enhance the work of partners to increase working lands projects on farm, ranch and forestlands	<p><i>Medium Term (3-6 years)</i></p> <ul style="list-style-type: none"> - Train review teams about the value of working lands for conservation. - Based on lessons learned from strategy 5.2, identify funding and funding gaps for working lands conservation projects. - Convene resource specialists to help identify species, habitat and water quality needs/opportunities and where they intersect with working lands; share this information broadly. - Establish and facilitate a state technical group to identify and recommend approaches to invest in technical support tools for local partners. 			
	4. Support technical assistance to work with owners/managers of working land	<p><i>Medium Term (3-6 years)</i></p> <ul style="list-style-type: none"> - Facilitate assessment of technical assistance needs. - Increase investment in technical assistance to grantees and working lands advocates. - Design monitoring and evaluation strategies for working lands restoration. - <i>Long term (6-10 years)</i> - Develop technical assessment materials to meet the needs of specific audiences. 			
	5. Develop engagement strategies for owners/managers of working lands who may not currently work with local organizations	<ul style="list-style-type: none"> - Additional activities will be developed based on lessons learned from strategy 5.2. 			

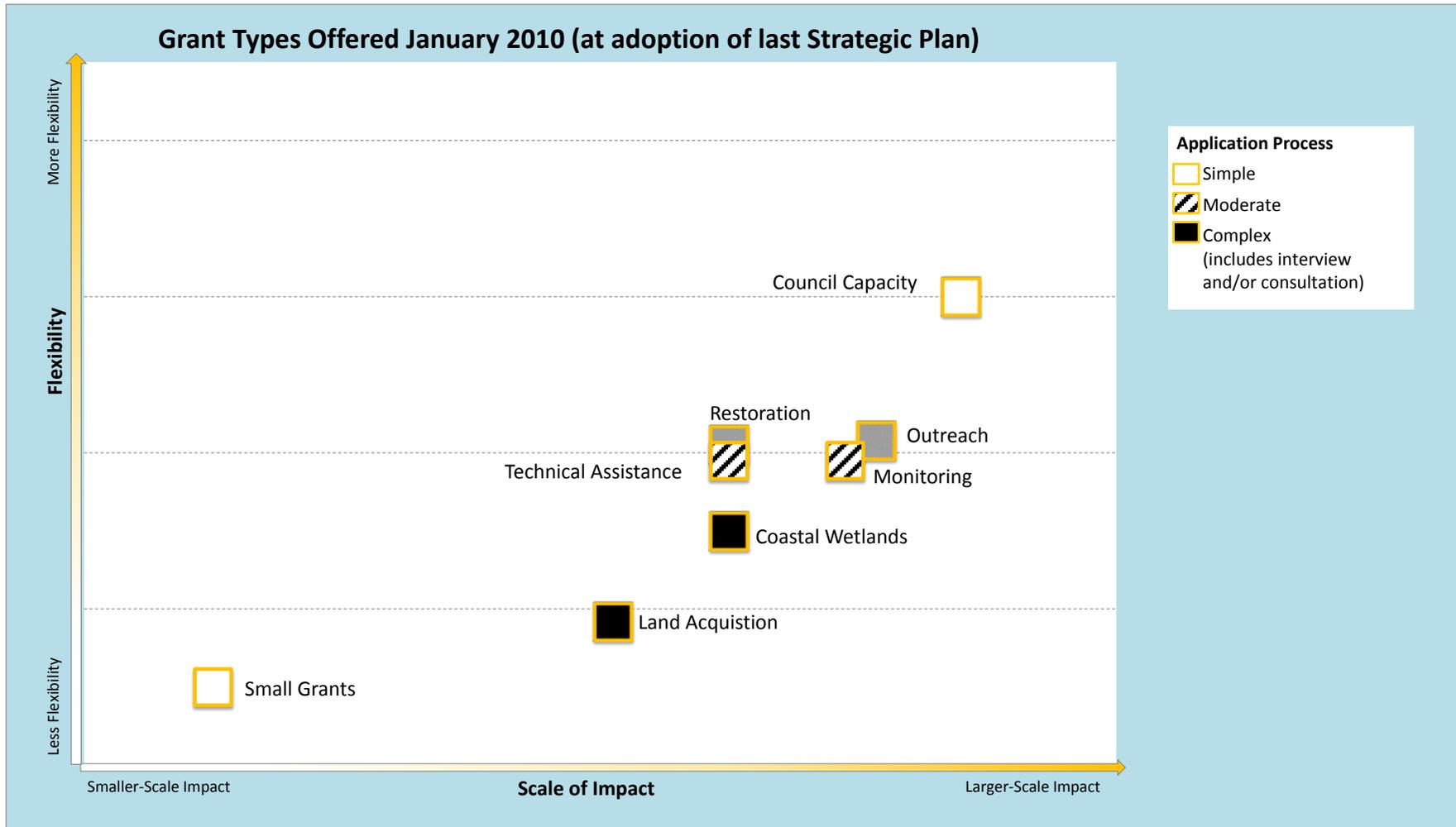
Priority 6 - Coordinated monitoring and shared learning to advance watershed restoration effectiveness

Strategies	<p>1. Broadly communicate restoration outcomes and impacts</p>	<p>We Do This: (actions) <i>Short term (1-3 years):</i></p> <ul style="list-style-type: none"> - Assess what information is readily available for tracking restoration results, outcomes, and impact and improve the quality and relevance of data collected as appropriate. - Work with grantees and other local partners to identify the best ways to communicate outcomes. - Build on existing processes for ‘telling the story’ to effectively interpret scientific information and communicate results in ways that are meaningful to diverse audiences. <p><i>Medium-Long Term (3-10 years):</i></p> <ul style="list-style-type: none"> - Link refinements to OWEB’s monitoring grant-making to OWEB’s approach to ‘telling the story of restoration’ and adaptively manage. - Continue to explore new and diverse ways to use online and social media. - Continue to build on successful awareness and communication efforts, expanding OWEB’s ability to reach new or under-represented sectors or demographic groups. 	<p>So That: (outputs)</p> <ul style="list-style-type: none"> - Additional technical resources—such as guidance and tools—are developed and/or made accessible to monitoring practitioners. - Priorities are proactively established and clearly articulated to plan for adequate monitoring resources that describe restoration investment outcomes. - Monitoring practitioners focus efforts on priority monitoring needs. - A network of experts is available to help grantees develop and implement successful monitoring projects. - Information is readily available to wide audiences to incorporate into adaptive management and strategic planning at the local level. - A dedicated process exists for continually improving how restoration outcomes are defined and described. - Strategic monitoring projects receive long-term funding 	<p>To Make This Difference: (outcomes)</p> <ul style="list-style-type: none"> - Decision-making at all levels is driven by insights derived from data and results. - Limited monitoring resources are focused on appropriate, high-quality, prioritized monitoring being conducted by state agencies, local groups, and federal agencies conducting monitoring. - Local organizations integrate monitoring goals into strategic planning. - Evaluation of impact, not just effort, is practiced broadly. - Impacts on ecological, economic and social factors are considered as a part of successful monitoring efforts. - Partners are using results-based restoration ‘stories’ to share conservation successes and lessons learned. - Monitoring frameworks are developed and shared. - Monitoring results that can be visualized across time and space are available at local, watershed and regional scales. - Limited monitoring resources provide return on investment for priority needs. 	<p>Evaluated by:</p> <ul style="list-style-type: none"> - Increased public awareness about the outcomes and effects of watershed restoration and why it matters to Oregonians - Increased utilization of effective and strategic monitoring practices by grantees and partners - Improved restoration and monitoring actions on the ground to meet local and state needs. - Increase in local organizations that integrate monitoring goals into strategic planning. - Increased engagement and support of restoration and conservation activities. - Increased decision-making at all levels is driven by insights derived from data and results. - Increased ability to evaluate social change that leads to ecological outcomes.
	<p>2. Invest in monitoring over the long term</p>	<p><i>Short-Medium term (2-4 years):</i></p> <ul style="list-style-type: none"> - Assess existing coordinated monitoring efforts and/or teams to understand how they have functioned. - Evaluate past OWEB investments in paired restoration and large-scale monitoring, FIP monitoring, and long standing monitoring projects/programs. <p><i>Long Term (5-10 years):</i></p> <ul style="list-style-type: none"> - Develop recommendations for the board about long-term investments in monitoring, and criteria for applicants to address the board priorities for long-term investments in monitoring. 			
	<p>3. Develop guidance and technical support for monitoring</p>	<p><i>Short-Medium Term (1-5 years):</i></p> <ul style="list-style-type: none"> - Prioritize findings of OWEB’s monitoring application guidance development process, develop a work plan for refining the agency’s monitoring grant-making, and begin implementation of the plan. <i>Example activities include:</i> - Compiling and communicating lessons learned from past monitoring investments. - Developing guidance documents for restoration and monitoring practitioners. 			
	<p>4. Increase communication between and among scientists and practitioners</p>	<p>We Do This: (actions) <i>Medium-Term (3-5 years):</i></p> <ul style="list-style-type: none"> - Explore and support existing information-sharing venues to share results of research and monitoring, including existing workshops, symposia, regional monitoring gatherings, and peer exchanges. - Share information about resources and tools available through existing regional networks. - Continue to coordinate with other states on opportunities for action-specific monitoring partnerships. 			

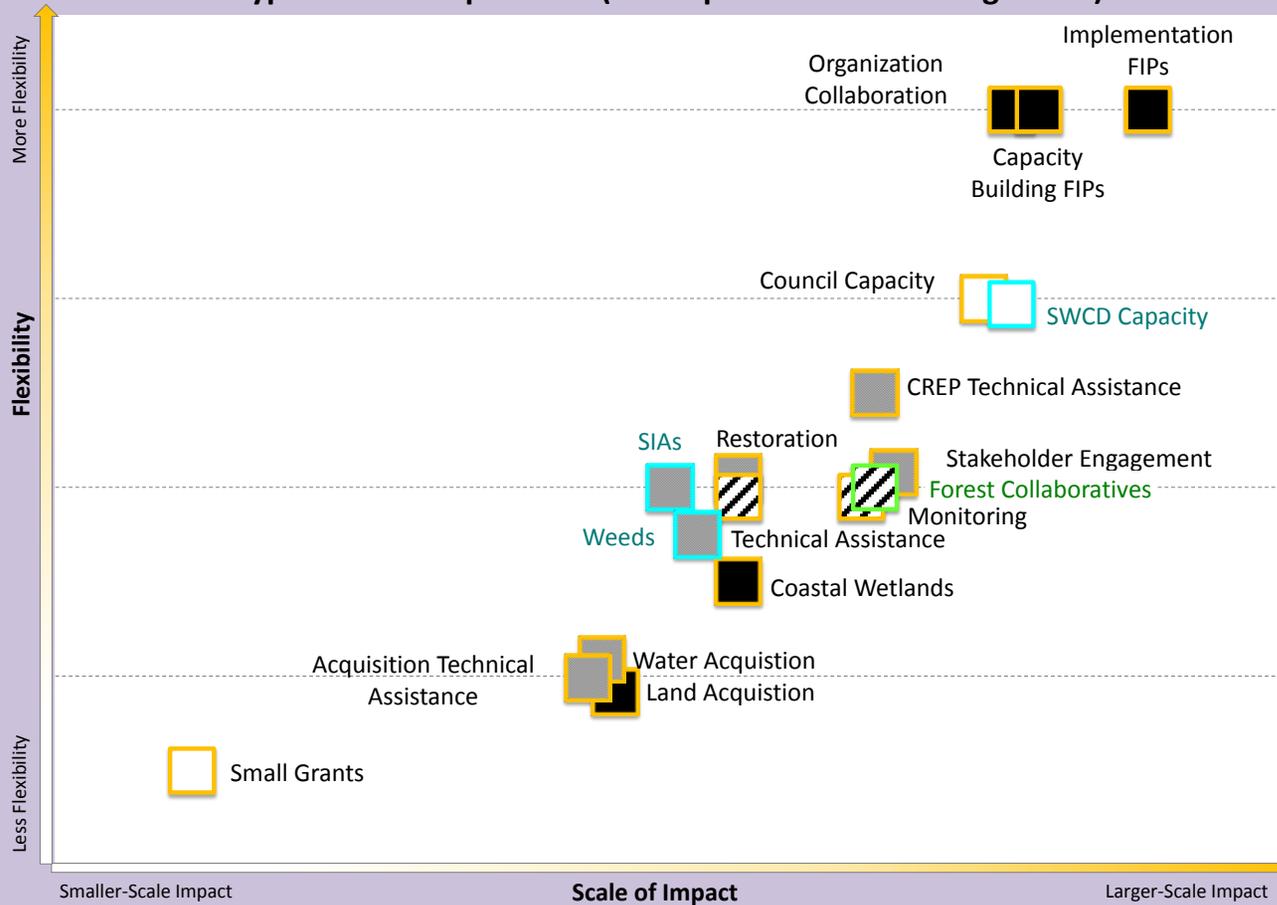
Strategies		<p><i>Long-Term (5-10 years):</i></p> <ul style="list-style-type: none"> - Explore the value of helping to organize informal networks that include scientists/researchers, technical/monitoring experts, and restoration practitioners. 			
	5. Define monitoring priorities	<p><i>Medium-Term (3-5 years):</i></p> <ul style="list-style-type: none"> - Assess and define what OWEB wants to achieve through monitoring. - Review the findings from other strategies under the Coordinated Monitoring priority. <p><i>Long-Term (5-10 years):</i></p> <ul style="list-style-type: none"> - Draft monitoring priorities for consideration by the full board - Use funding conversations with foundations and state agencies under Priority 4 to explore areas of common interest in funding monitoring, including assessment of other interested and willing funders. 			
	6. Develop and promote a monitoring framework	<p><i>Medium-Term (3-5 years):</i></p> <ul style="list-style-type: none"> - Continue implementation of current monitoring efforts and evaluate the use of approaches that bridge larger-to-smaller scales. - Evaluate existing monitoring strategies and consider their appropriateness as a foundation for developing a monitoring framework. - Share information with restoration and monitoring practitioners about existing and emerging data integration and visualization tools. 			

Priority 7 - Bold and innovative actions to achieve health in Oregon’s watersheds

Strategies	1. Invest in landscape restoration over the long term	<p>We Do This: (actions)</p> <p><i>Short term (1-3 years)</i></p> <ul style="list-style-type: none"> - Continue to fund long-term activities that lead to landscape scale restoration. - Develop evaluation processes for individual restoration grants that reward projects that may entail risk, but offer big potential upsides. <p><i>Medium term (3-6 years)</i></p> <ul style="list-style-type: none"> - Evaluate if other OWEB grant programs may be necessary to successfully invest in landscape scale restoration. 	<p>So That: (outputs)</p> <ul style="list-style-type: none"> - OWEB works with partners to share results of landscape scale restoration with broader conservation community. - OWEB and partners have a better understanding of how restoration approaches can be mutually beneficial for working lands and watershed health. - OWEB’s landscape-scale granting involves effective partnerships around the state. 	<p>To Make This Difference: (outcomes)</p> <ul style="list-style-type: none"> - Multi-phased, high-complexity, and large geographic footprint restoration projects are underway. - OWEB’s investment approaches recognize the dual conservation and economic drivers and benefits of watershed actions, where appropriate. - Diverse, non-traditional projects and activities that contribute to watershed health are now funded that weren’t previously. - Conservation communities value an experimental approach to learning and innovation. - Conservation communities become comfortable with properties and projects that show potential, even if the work is not demonstrated based on demonstrated past performance. - OWEB becomes better able to evaluate risk - OWEB encourages a culture of innovation. 	<p>Evaluated by:</p> <ul style="list-style-type: none"> - Increased watershed restoration footprint statewide. - Increased money for innovative watershed work from diverse funding sources. - Increased learning from bold and innovative actions so future decisions result in healthy watersheds in Oregon - New players or sectors—such as healthcare providers—engaged to invest in watershed restoration, enhancement and protection.
	2. Develop investment approaches in conservation that support healthy communities and strong economies	<p><i>Medium to long-term (4-10 years)</i></p> <ul style="list-style-type: none"> - Research cutting edge science that involves working lands and conservation outcomes. - Identify economic impacts of healthy fish runs, water quality, and healthy watersheds. - Develop resources that can help our partners in conservation communicate the economic benefits of restoration. 			
	3. Foster experimentation that aligns with OWEB’s mission	<p><i>Short term (1-3 years)</i></p> <ul style="list-style-type: none"> - Capture lessons learned from restoration and partnership investments and share with restoration practitioners to identify areas for innovation and increased risk-taking. - Develop approaches that allow grantees the space to clearly articulate risks and benefits of new and innovative approaches. <p><i>Medium term (3-6 years)</i></p> <ul style="list-style-type: none"> - Develop board and staff capacity to evaluate risk and to be able to weigh risk of innovation against proposed benefits. 			



Grant Types Offered April 2018 (at adoption of new Strategic Plan)



Application Process

-  Simple
-  Moderate
-  Complex (includes interview and/or consultation)

Partner Agency

-  Managed in coordination with ODA
-  Non-OWEB funds, managed for ODF



Oregon

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MEMORANDUM

TO: Oregon Watershed Enhancement Board
FROM: Meta Loftsgaarden, Executive Director
SUBJECT: Agenda Item E-2 - Strategic Plan Implementation Grants and Governor's Priorities
June 27, 2018 Board Meeting

I. Introduction

A number of priorities and strategies within OWEB's strategic plan will benefit from a broad partnership approach to their implementation. Staff will request the board include a new line in its spending plan to work with various partners to implement components of the newly adopted strategic plan, delegating authority to the director to enter into appropriate agreements.

Staff will also request delegation of authority to the director to invest Governor's Priority grant funds to support the Governor's priority tied to Strategic Plan implementation strategy 4.4 – "Partner to design strategies for complex conservation issues that can only be solved by seeking new and creative funding sources."

II. Opportunities for Partnership through Strategic Plan Implementation Grants

As OWEB staff reviewed the strategic plan, a number of areas are ripe for partnership, either to gather more information, to develop and complete monitoring, or to begin to implement key plan elements. Oregon has many highly equipped organizations that are poised to assist in this effort. However, funding may be needed in some instances to support organizational work. Examples include:

- **Priority 3: Community capacity and strategic partnerships achieve healthy watersheds.** Partnerships with the university system and experts in community capacity to design and implement monitoring for OWEB's capacity investments and analysis of current community capacity baseline, needs and gaps. This also supports the board's monitoring priority (6).
- **Priority 5: The value of working lands is fully integrated into watershed health.** Partnerships with Oregon agricultural and forestry organizations to implement strategies within this priority focused on community engagement and increasing access to technical assistance for landowners.

In addition to grants, some areas of strategic plan implementation are better suited to direct contracts with vendors who provide training or other services. An example is under **Priority 2: Leaders at all levels of watershed work reflect the diversity of Oregonians**. In this case, there are a number of organizations who do provide training and other technical services. Contracts are managed under OWEB's current operating budget, outside of the board's grant spending plan.

III. Opportunities for Partnership through Governor's Priorities Funding

In addition to specific investments through the Strategic Plan Implementation grants line item in the spending plan, one of the strategies within **Priority 4: Watershed organizations have access to a diverse and stable funding portfolio**, ties directly to one of Governor Brown's priorities. Governor Brown is seeking to ensure a secure and resilient water future for all Oregonians. This specifically connects to the board's strategy 4.4: "Partner to design strategies for complex conservation issues that can only be solved by seeking new and creative funding sources." The Governor's office and staff are requesting the board consider grant investments in this area to support both the board and Governor's priority. Work would focus on:

- Understanding the context for change, including what has been accomplished in other areas;
- Helping to better define and frame Oregon's water 'story' as it relates to community resiliency, economy, and health;
- Better understanding of who is working where, and why; and
- Developing a shared vision and path.

IV. Recommendation: Spending Plan Line Item Addition and Funding Requests

Given the strong connection with partners around some of the board's strategic plan areas, staff request the board consider two proposals:

1. An addition of a line item to the spending plan: Strategic Plan Implementation, totaling \$500,000. Staff request the board delegate authority to the director to enter into specific grant agreements that meet Measure 76 constitutional requirements and support implementation of the board's strategic plan. Staff and grantees will report both grants funded and associated progress to the board at their quarterly meetings.
2. Approval of \$65,450 from the Governor's Priority line item in the spending plan to support the Governor's work to ensure a secure and resilient water future for all Oregonians, and delegate to the director the authority to distribute the funds through appropriate agreements with an award date of June 27, 2018.



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MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Eric Williams, Grant Program Manager
Eric Hartstein, Senior Policy Coordinator

SUBJECT: Agenda Item F - Technical Assistance Grants Administrative Rules
June 27, 2018 Board Meeting

I. Introduction

This report requests board approval on proposed administrative rules for OWEB's Technical Assistance (TA) grant program.

II. Background

At the July 2017 meeting, the board authorized staff to initiate rulemaking for TA grants. OWEB does not currently have rules specifically for TA grants; instead the grants are authorized under Division 5, OWEB Grant Program administrative rules, which is a broad rule division that encompasses all of OWEB grants.

A rules advisory committee (RAC) was established to assist OWEB staff in developing TA administrative rules. A list of RAC members is found in Attachment A. The RAC met on two occasions between February and April to discuss concepts to include in rule language and to provide feedback on draft rules. OWEB staff incorporated these concepts into draft rules based on three TA grant categories:

- Organizational Technical Assistance Grants for groups of collaborating organizations seeking to improve organizational effectiveness to support actions that are necessary for carrying out eligible conservation actions or programs that lead to development of eligible projects;
- Resource Assessment and Planning Grants to support the development of information about existing water quality or habitat conditions and processes at an identified scale, and relates those conditions and processes to actions that will directly lead to desired future conditions; and
- Technical Design and Engineering Grants to support the development of project feasibility, designs, or engineering materials that directly lead to site-specific restoration or acquisition projects.

III. Public Comment on Proposed TA Grants Administrative Rules

OWEB released draft rule amendments for public comment on May 1, 2018. The public comment period was open from May 1 - May 31, 2018 with a public hearing in Salem on May 22. A summary of the written comments received during the public comment period, and OWEB staff response, are provided in Attachment B. At its June meeting, the board may only

receive public comment on the revisions to the proposed rules that have occurred since the close of the public comment period.

IV. Recommendation

Staff recommend the board approve the TA grants administrative rules found in Attachment C.

Attachments

- A. TA Grants RAC Members
- B. Public Comments Received and Staff Response
- C. Proposed TA Grants Rules

Technical Assistance Grants Rules Advisory Committee Members

Brian Barr, Rogue River Watershed Council

Aaron Bliesener, Union Soil and Water Conservation District

Theresa DeBardelaben, Oregon Department of Agriculture

Chris Gannon, Crooked River Watershed Council

Nancy Gramlich, Oregon Department of Environmental Quality

Bryce Hill, Baker County Soil and Water Conservation Districts

Amy Horstman, U.S. Fish and Wildlife Service

Haley Lutz, Nestucca-Neskowin and Sand Lake Watersheds Council

Eric Riley, Partnership for the Umpqua Rivers

Nell Scott, Trout Unlimited

Katie Voelke, North Coast Land Conservancy

Bryan Vogt, Monument Soil and Water Conservation District

Terry Warhol, Region 5 Regional Review Team and Retired U.S. Forest Service

Jared Weybright, McKenzie Watershed Council

Summary of Public Comments: Technical Assistance Grants Rules (Division 30)

Rules: 695-030-0045, Evaluation Criteria for Resource Assessment and Planning Grants			
Commenter(s)	Comments	Response	Rule Change
Thomas O'Neill, The Habitat Institute	Concerned that OWEB does not require an independent evaluation of work implemented through grants the agency has awarded.	Resource Assessment and Planning technical assistance grants are intended to gather information about water quality or habitat conditions and processes and relate those conditions and process to actions that will directly lead to desired conditions within a specific timeframe. Grantees are developing assessments and plans in order to guide future restoration and conservation efforts. These assessments and plans are often relied on to develop OWEB restoration or acquisition grant applications that are evaluated by interdisciplinary technical review teams that provide an independent evaluation of the restoration or conservation activities proposed.	No

Rule: General Comments			
Commenter(s)	Comments	Response	Rule Change
Thomas O'Neill, The Habitat Institute	Concern that OWEB does not have a consistent metric to measure ecological gain from restoration projects.	The proposed technical assistance grants rules are intended for a program that offers grants for resource assessment and planning, technical design and engineering, and organizational technical assistance that are necessary for carrying out eligible restoration and acquisition projects or programs. While measuring ecological gain from restoration projects is an important consideration, it is unrelated to the proposed technical assistance grants rules.	No

Division 30**Technical Assistance Grants****695-030-0005**

Purpose: As funds are available, the Board shall provide technical assistance grants for resource assessment and planning, technical design and engineering, and organizational technical assistance, that are necessary for carrying out eligible restoration and acquisition projects, or programs that lead to development of eligible projects, as described and required by ORS 541.956(4) and OR CONST Art. XV, §4b(2)(d).

695-030-0015**Definitions**

(1) “Delegated to the Director” means the grant funds that the Board has authorized to the Director to award and enter into appropriate agreements.

(2) “Organizational Technical Assistance Grants” means technical assistance grants for groups of collaborating organizations seeking to improve organizational effectiveness to support actions that are necessary for carrying out eligible programs that lead to development of eligible restoration and acquisition projects.

(3) “Professionally Accepted” means methodologies or techniques that have been vetted by experts in the field in which the applicant is seeking technical assistance.

(3) “Resource Assessment and Planning Grants” means technical assistance grants to support the development of information about existing water quality or habitat conditions and processes at an identified scale, and relates those conditions and processes to actions that will directly lead to desired future conditions within a specified timeframe.

(4) “Technical Design and Engineering Grants” means technical assistance grants to support the development of project feasibility reports, designs, or engineering materials that directly lead to site-specific restoration or acquisition projects within a specified timeframe.

(5) “Technical Review Team” means a team of designated personnel with relevant knowledge in technical assistance convened to evaluate grant applications, which includes established regional review teams as described in OAR 695-005-0020(4).

695-030-0025**Eligibility**

The Board will only consider technical assistance projects that will lead to eligible restoration or acquisition projects or programs.

695-030-0035

Application Requirements

Applications must be submitted on the most current form and process prescribed by the Board. Technical assistance applications must include a description of the direct connection the technical assistance project has with future restoration or acquisition projects or programs.

695-030-0045

Evaluation Criteria

Technical design and engineering grant applications will be evaluated on:

- (1) The extent to which the application describes a clear need for the proposed technical or engineering designs;
- (2) The extent to which the application describes how the technical design or engineering grant will address limiting factors designated in an existing conservation or recovery plan;
- (3) The extent to which the application describes an alternatives analysis demonstrating the applicant has considered the range of options in developing the application;
- (4) Whether the application contains, or proposes to collect, the appropriate data to inform the technical or engineering designs;
- (5) How the proposed costs are aligned with the work necessary to accomplish the objectives described in the application;
- (6) The qualifications of the technical staff of the applicant, or consultants to be retained, to accomplish the technical design or engineering activities described in the application;
- (7) The extent to which the application describes how the appropriate stakeholders will be engaged in the proposed technical or engineering design process;
- (8) The extent to which the application describes how professionally accepted technical or engineering approaches will be utilized;
- (9) The likelihood of success of the technical or engineering design project, including if the project will lead to future eligible restoration or acquisition projects; and
- (10) The organizational capacity of the applicant.

Resource Assessment and Planning grant applications will be evaluated on:

- (1) The extent to which the application contains professionally accepted resource gathering methods and parameters;

- (2) The extent to which the application describes a clear need to develop or update a resource assessment or planning document;
- (3) Whether the scope and scale of the resource assessment or planning actions described in the application is feasible;
- (4) The demonstrated ability of the applicant and partners described in the application to engage in collaborative work at the proposed scale;
- (5) The extent to which the application describes how appropriate stakeholders will be engaged in the development of the resource assessment or other planning;
- (6) How the proposed costs are aligned with the work necessary to accomplish the objectives described in the application;
- (7) The qualifications of the technical staff of the applicant, or consultants to be retained, to accomplish the resource assessment and planning activities described in the application;
- (8) The process by which data will be managed and shared with partners;
- (9) The likelihood that the project will result in a resource assessment or plan that leads to future eligible restoration or acquisition projects; and
- (10) The organizational capacity of the applicant.

Organizational technical assistance grant applications will be evaluated on:

- (1) The degree to which the application demonstrates support and engagement from the appropriate stakeholders;
- (2) The likely effectiveness of communication among the applicant and partners;
- (3) The extent to which the application describes partner roles and responsibilities;
- (4) The performance history and composition of the partnership;
- (5) How the proposed costs are aligned with the work necessary to accomplish the objectives described in the application;
- (6) The qualifications of the technical staff of the applicant, or consultants to be retained, to accomplish the activities described in the application;
- (7) The extent to which the application describes why the opportunity for organizational technical assistance is timely;
- (8) The extent to which the application identifies a common vision of success and potential barriers to success of the project;

(9) The likelihood of success of the organizational technical assistance project, including if the project will lead to future eligible restoration or acquisition projects; and

(10) The organizational capacity of the applicant.

695-030-0050

Definitions

~~(1) "Watershed Action Plan Project" means a project that identifies and prioritizes potential action that would benefit watershed conditions based on problems identified in a watershed assessment.~~

~~(2) "Watershed Assessment Project" means a project that systematically reviews existing information about watershed conditions and processes such as erosion rates, pollution sources, fish habitat conditions, riparian conditions, culvert fish passage problems, etc., and relates those conditions and processes to desired future conditions.~~

695-030-0055

Technical Review Process

(1) For technical assistance grant applications seeking grant funds that require the Board to make a funding decision:

(a) A technical review team will be convened to review technical assistance grant applications.

(b) Prior to the technical review team meeting, the technical review team:

(A) Shall receive each application, past evaluations for projects resubmitted in the current grant cycle, and an evaluation sheet that references criteria as described in OAR 695-030-0050 to complete for each application;

(B) Shall evaluate each application based on the information provided.

(c) At the technical review team meeting, the technical review team shall:

(A) Review and evaluate each project individually based on how well the proposed project meets the criteria in OAR 695-030-0050;

(B) Recommend the project as:

(i) Do fund;

(ii) Do fund with conditions;

(iii) Do not fund; or

(iv) Defer to staff or the Board with an explanation, if there is a policy issue or budget issue that needs to be addressed by the Board prior to a funding decision; and

(C) Rank order all projects recommended for funding based on how well the project meets the criteria established in OAR 695-030-0050.

(d) The project description, summary evaluation and funding recommendation for all projects, and the rank order of projects recommended for funding shall be forwarded from the technical review team to Board staff for their consideration. This information will be provided to all applicants and to the Board.

(2) For technical assistance grant applications seeking grant funds that have been delegated to the Director:

(a) A technical review team will be convened to review technical assistance grant applications.

(b) The technical review team shall review and evaluate each project individually based on how well the proposed project meets the criteria in OAR 695-030-0050 and provide evaluations and funding recommendations to OWEB staff. This information will be provided to the applicants.

~~695-030-0060~~

~~Assessment and Action Plan Priorities~~

~~For grant applications to be funded by the Watershed Conservation Grant Fund, the following preferences will apply:~~

~~(1) Watershed assessment projects that address whole basin conditions to focus restoration needs over single-function research projects; and~~

~~(2) Projects developed from a watershed-level assessment and analysis of conditions that includes an action plan for restoration or enhancement of watershed functions.~~

695-030-0065

Staff Funding Recommendation Process

(1) For technical assistance grant applications seeking grant funds that require the Board to make a funding decision:

(a) Staff shall review the recommendations from each technical review team and make a statewide funding recommendation to the Board based on available resources for the grant offering and type. The recommendation shall include any conditions placed on individual projects and may include proposed budget adjustments. The staff recommendation, as represented in the staff report to the Board, shall be sent to applicants and members of the technical review teams at least two weeks before the Board meeting where funding decisions are to be made.

(b) Applicants may provide written or oral comment to the Board on the staff recommendation prior to the Board decision.

(2) For technical assistance grant applications seeking grant funds that have been delegated to the Director, staff shall review the recommendations from each technical review team and make a funding recommendation to the Director based on available resources for the grant offering and type. The recommendation shall include any conditions placed on individual projects and may include proposed budget adjustments. The staff recommendation shall be provided to the applicants.

695-030-0075

Funding Decision

(1) For technical assistance grant applications seeking grant funds that require the Board to make a funding decision:

(a) The Board may fund a project in whole or in part.

(b) Projects not funded may be resubmitted during future application submission periods.

(2) For technical assistance grant applications seeking grant funds that have been delegated to the Director:

(a) The Director may fund a project in whole or in part.

(b) Projects not funded may be resubmitted during future application submission periods.

695-030-0085

Grant Agreement Conditions

(1) The Grantee must agree to complete the project as approved by the Board and within the timeframe specified in the grant agreement unless proposed modifications are submitted and approved by the Director prior to the beginning of any work proposed in the modification.

(2) The Director will consider project modifications including expansion of funded projects with moneys remaining from the original project allocation if the purpose and intent of the amendment remains the same as the original project, the proposed activity is within the same geographic area, and the modification would be compatible with acknowledged comprehensive plans.

(3) The Director may authorize minor changes within the scope of the original project plan.

(4) The Grantee must submit a report at completion of the project in accordance with reporting requirements described in the grant agreement.

695-030-0095

Waiver and Periodic Review of Rules

The Director may waive the requirements of Division 30 for individual grant applications unless required by statute, when doing so will result in more efficient or effective implementation of the Board's technical assistance grant program. Any waiver must be in writing and included in the grant file to which the waiver applies. The administrative rules for technical assistance grants shall be periodically reviewed by the Board and revised as necessary and appropriate.

695-030-0100

Evaluation Criteria

~~Watershed Assessment and/or Action plan projects will be funded on the basis of the extent to which they:~~

- ~~(1) Are developed in the context of the entire watershed;~~
- ~~(2) Follow appropriate protocols developed by the Board; and~~
- ~~(3) Use the information to implement or direct projects to enhance or sustain the health of watersheds.~~

June 27, 2018 OWEB Board Meeting

Executive Director Update G-1: Oregon Agricultural Heritage Program Update

Staff will update the board on the series of Oregon Agricultural Heritage Commission meetings since the April board meeting and next steps for the commission and rulemaking.

Background

Following appointment by the board in January, the commission met six times, including meetings in April and May, when the commission reached consensus on a draft set of program rules governing grants for succession planning, technical assistance, conservation management plans, and conservation easements and covenants. As of the time of this submission, the commission will also meet on June 25 to recommend a final draft of the rules for public comment.

Rulemaking Schedule

Based on the commission's recommendation on June 25, the public comment period is expected to be held during the month of July, including two public hearings, one east and one west of the Cascades. The commission will review public comment at its August meeting and submit recommended rules to the board for adoption at its October meeting. See Attachment A for the complete rulemaking schedule.

Recommended Statutory Changes

Throughout the process of establishing rules for the program, a set of needed statutory changes were identified by the commission. Proposed statutory changes include:

- 1) Shifting language in ORS 541.982 to remove requirement that continued agricultural use be an affirmative obligation of a conservation easement.
- 2) Providing a more accurate description of the individuals who would be eligible to participate in succession planning programs in ORS 541.984.
- 3) Changing wording regarding conservation management plans from 'purchasing' plans to 'developing' plans in ORS 541.981 and ORS 541.984.
- 4) Revising technical assistance grant use in 541.984 to more accurately reflect the purpose of the grant funds, and to expand the eligible applicants to all organizations that are eligible to enter into conservation easements or covenants.
- 5) Changing language to be consistent throughout the statute regarding the relationship between the commission and the board in ORS 541.988.
- 6) Revising language to match OWEB's process where technical committees can either advise staff who make recommendations to the board/commission or can advise the board/commission directly in ORS 541.988.

Budget Request

At the June 25 meeting, the commission will recommend a 2019-2021 budget request of \$10 million to fund the grant programs authorized in statute. The budget request will be considered by the board on June 27.

Next Steps

To quantify the need for working lands easement funding, the commission will solicit letters of interest from eligible applicants working with committed landowners interested in entering into conservation easements. This information will be provided to legislators and other interested parties in time for consideration, along with recommended statutory changes, during the 2019 legislative session.

Staff Contact

If you have questions or need additional information, contact Eric Williams at eric.williams@oregon.gov or 503-986-0047.

Attachments

- A. Rulemaking Schedule



Oregon Agricultural Heritage Program Proposed Schedule for OAHP Rule Making

Rulemaking Action	Dates/Deadlines
OWEB Board authorization for rulemaking	October 2017
Develop rule headers/concepts	November – December 2017E
OWEB Board update and vote on Commissioners	January 31, 2018
Commission Meeting #1: <ul style="list-style-type: none"> • OAHP 101 • Rule headers • Succession planning rulemaking 	Thursday, February 1, 2018
Commission Meeting #2: <ul style="list-style-type: none"> • Review succession planning rules • Conservation Management Plan rulemaking 	Thursday, February 22, 2018
Commission Meeting #3: CMP rules	Thursday, March 8, 2018
Commission Meeting #4: <ul style="list-style-type: none"> • Review succession planning rules • Conservation Management Plan rulemaking • Easement/Covenant rulemaking 	Thursday, April 5, 2018
Comm. Meeting #5: Easement/covenant rulemaking	Thursday, April 26, 2018
Commission Meeting #6: <ul style="list-style-type: none"> • Easement/Covenant rulemaking • Technical Assistance rulemaking • Procedural rulemaking 	Wednesday, May 23, 2018 afternoon Thursday, May 24, 2018 all day
Provide draft rules to DOJ for feedback	Early June, 2018
Draft Statement Need & Fiscal/ Economic Impact	Early June, 2018
Draft GovDelivery, Secretary of State notice, website	Early June, 2018
Exec. Team review draft rules after DOJ feedback	Mid-June, 2018
Notice filed with Secretary of State	June 20, 2018
Board Update	June 25, 2018
Public comment notice posted online and in Sec. of State bulletin; sent to GovDelivery and legislators	July 1, 2018
Public comment period; hearings around the state	July 1 – July 31, 2018
Exec. Team review and revise draft rules based on public comment	Early August, 2018
Commission Meeting #7: Review public comment	Early August, 2018
DOJ review any significant changes to rules	Mid-August, 2018
Commission Meeting #8: Final draft of rules	Late August, 2018
Send rules to Board to review	September 1, 2018
Board vote on rules	October 2018
Board submit final rules to Secretary of State	October/November 2018



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MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Meta Loftsgaarden, Executive Director
Jillian McCarthy, Partnerships Coordinator
Ken Fetcho, Effectiveness Monitoring Coordinator

SUBJECT: Agenda Item H – 2017-2019 Spending Plan Update
June 27, 2018 Board Meeting

I. Introduction

This report requests the board's approval of an update to the 2017-2019 spending plan, following receipt of funding from multiple sources.

II. Background

After the Oregon Legislature approves OWEB's budget at the beginning of each biennium, the board considers and approves a spending plan for the distribution of grant funding. The OWEB spending plan guides the agency's grant investments for the biennium. Available funding for the board to distribute includes Measure 76 Lottery, federal, and salmon license plate revenues, with the bulk coming from Lottery and Pacific Coastal Salmon Recovery Funding (PCSRF). In addition, the board may receive funding from other sources throughout the biennium, including funding from sources such as Pacific States Marine Fisheries Commission, the U.S. Fish and Wildlife Service's (USFWS) National Coastal Wetlands Conservation Grant Program, and other federal and state agencies. The Oregon Legislature allocates PCSRF funding for OWEB's budget based on estimated federal grant awards over the two years of each biennium.

At its July 2017 meeting, the board adopted a 2017-2019 spending plan totaling \$97.599 million, after accounting for carry-forward amounts and adjustments to individual spending plan line items based on board action. Based on the board's decision at the July 2017 meeting, the Small Grant Program and carryforward addition was finalized in January at \$3.150. In April, the board added \$3.5 million to the spending plan for a to-date total of \$100.949. Attachment A shows the approved spending plan, including recommendations for additional PCSRF funding if those funds became available.

III. PCSRF Funding

Since 2000, approximately one-third of OWEB's funding (both for grants and operations) has been provided through the competitive PCSRF grant process, which is offered by

NOAA Fisheries. Oregon has received more than \$221 million from PCSRF for salmon and steelhead recovery efforts in that time. The OWEB Board and the state's Legislature have used PCSRF funding to support watershed restoration-related actions and for staffing in state agencies. PCSRF has significantly enhanced OWEB's expenditures through grants in salmon and steelhead recovery areas around the state.

On an annual basis, OWEB applies for PCSRF funding on behalf of the State of Oregon. For FFY 2018, OWEB requested the maximum allowable \$25 million. Oregon provides the required 33% match through a combination of lottery funding, salmon license plate revenues, and Oregon Department of Fish and Wildlife (ODFW).

NOAA has tentatively awarded the state \$15.2 million in PCSRF funding for FFY 2018, contingent on a final revised grant application from OWEB. This amount is larger than the FFY 2017 award amount, which was \$14.65 million. Of the total award, \$5.1 million is available for grants in the 2017-19 spending plan, with the remainder invested in support of OWEB staff costs, distributed to ODFW, or held in reserve for future biennia spending plans.

Attachment A to the staff report outlines the categories in which PCSRF funding can be expended, and recommends a distribution of those funds based on the board's direction at the July 2017 meeting. Staff recommend \$3.45 million be added to the Open Solicitation Restoration line item, \$700,000 be added to the Open Solicitation Technical Assistance line items for both Restoration and Acquisitions, \$250,000 be added to the Open Solicitation Monitoring line item, and \$700,000 be added to the Open Solicitation Land and Water Acquisitions line item. These categories align with NOAA's top priorities for its investments and match categories the board identified at its July 2017 meeting as areas for additional investment.

IV. USFWS National Coastal Wetlands Conservation Grant Program

In 2017, OWEB submitted a National Coastal Wetlands Conservation Grant Program application to support acquisition and conservation of approximately 90 acres of coastal wetlands, riparian areas, and conifer forests on the Columbia River Estuary. In April 2018, the USFWS announced that the South Tongue Point Conservation Project was awarded \$1,000,000 through the program. The project's primary local implementer is the Columbia Land Trust (CLT). The board awarded \$332,080 in acquisition funds at the April 2018 meeting, which will be used in combination with CLT contributions to meet the match requirement of the federal award.

V. Farm Bill Programs

The Natural Resources Conservation Service (NRCS) works collaboratively with local partners to implement conservation programs under the federal Farm Bill. Recently in Oregon there has been an increase in landowner interest in these programs, and NRCS has been unable to meet the increased demand. To meet this increased demand, NRCS has \$1 million available to OWEB to support the capacity of local organizations to assist NRCS in the local delivery of Farm Bill programs. In utilizing this funding, OWEB will work

with NRCS to develop a grant offering and administer the additional funds through existing watershed council and soil and water conservation district Operating Capacity grant agreements. Local organizations will partner directly with NRCS staff to provide the needed technical and administrative assistance to support the delivery and implementation of Farm Bill programs in Oregon.

The Oregon Conservation Reserve Enhancement Program is a cooperative venture between the State of Oregon and the Farm Services Agency, with technical support from the NRCS and local implementers. The program restores riparian areas along agricultural lands to benefit fish, wildlife, and water quality. Landowners who voluntarily enroll in CREP receive annual rental payments and state and federal cost-share incentives to install approved conservation measures, such as planting riparian vegetation, and installing fencing and livestock water facilities.

The Oregon Department of Forestry has \$11,538 in federal CREP funds that are available to OWEB to conduct monitoring and tracking of CREP contracts. Funds will support a monitoring and tracking tools developed by OWEB staff and local CREP technicians. These tools will track performance of CREP practices over time and to help ensure landowners are achieving maintenance and performance requirements of their CREP contracts.

VI. Upper Middle Fork John Day River Intensively Monitored Watershed (IMW)

The IMW is designed to evaluate the implementation of watershed restoration projects over a large geography and extended period of time, with the intent of describing the collective benefits provided to salmon and steelhead populations, habitat, and water quality. OWEB provides overall direction and guidance to the study, and assists with securing funding for several monitoring aspects of the program.

The Pacific States Marine Fisheries Commission has offered OWEB \$291,000 in support of the IMW monitoring efforts. Funding will enable partners to continue to perform priority monitoring activities in 2018-2019 and plan future monitoring efforts in this IMW beyond 2018. Partners include the Oregon Department of Fish and Wildlife, the North Fork John Day Watershed Council, and the Confederated Tribes of Warm Springs Reservation of Oregon.

VII. Recommendation

Staff recommend the Board approve distribution of PCSRF Federal Fiscal Year 2018 funding in the identified categories of OWEB's 2017-2019 spending plan, as outlined in Attachment A of the staff report.

Staff recommend the board approve receipt of funding as noted in Table I, and delegate authority to the Executive Director to distribute funds, through the appropriate agreements with award dates listed in Table 1.

Table 1

Funding Source	Amount	Award Date
U.S Fish and Wildlife Service	\$1,000,000	January 1, 2018
Natural Resources Conservation Service	\$1,000,000	June 27, 2018
Oregon Department of Forestry	\$11,538	June 27,2018
Pacific States Marine Fisheries Commission	\$291,000	June 27, 2018

Attachments

- A. 2017-2019 OWEB spending plan, with proposed additions based on the receipt of FFY 2018 PCSRF funds and funds from other sources.

OWEB 2017-19 Proposed Spending Plan for the June 2018 Board Meeting

	OWEB SPENDING PLAN	Spending Plan as of April 2018	June 2018 additions for PCSRF	June 2018 Other additions	Spending Plan as of June 2018	TOTAL Board Awards To-Date	Remaining Spending Plan after To-Date Awards	June 2018 Proposed Awards	Remaining Spending Plan after June 2018 awards	
1	Open Solicitation:									
2	Restoration (includes USFW Coastal Wetlands)	29.550	3.450		33.000	17.060	15.940		15.940	
3	Technical Assistance									
4	Restoration TA	3.600	0.400		4.000	1.844	2.156		2.156	
5	CREP TA (includes NRCS & ODF funds)	1.375		0.012	1.387	1.375	0.012	0.012	0.000	
6	Stakeholder Engagement	0.700			0.700	0.169	0.531		0.531	
7	Monitoring grants	2.850	0.250		3.100	1.784	1.316		1.316	
8	Land and Water Acquisition									
9	Acquisition (includes USFW Coastal Wetlands)	8.200	0.700	1.000	9.900	5.630	4.270	1.000	3.270	
10	Acquisition Technical Assistance	0.300	0.300		0.600	0.150	0.450		0.450	
11	Weed Grants	3.000			3.000	3.000	0.000		0.000	
12	Small Grants	3.150			3.150	3.150	0.000		0.000	
13	Programmatic Effectiveness Monitoring	1.587			1.587	0.556	1.031		1.031	
14	TOTAL	54.312	5.100	1.012	60.424	34.718	25.706	1.012	24.694	
15	% of assumed Total Budget	60.97%			62.45%					
16	Focused Investments:									
17	Deschutes	4.000			4.000	4.000	0.000		0.000	
18	Willamette Mainstem Anchor Habitat	2.445			2.445	2.445	0.000		0.000	
19	Harney Basin Wetlands	1.970			1.970	1.970	0.000		0.000	
20	Sage Grouse	2.355			2.355	2.355	0.000		0.000	
21	Ashland Forest All-Lands	2.340			2.340	2.340	0.000		0.000	
22	Upper Grande Ronde	2.417			2.417	2.417	0.000		0.000	
23	Capacity-Building FIPs	1.150			1.150	0.572	0.578		0.578	
24	FI Effectiveness Monitoring	0.750			0.750	0.750	0.000		0.000	
25	TOTAL	17.427	0.000	0.000	17.427	16.849	0.578	0.000	0.578	
26	% of assumed Total Budget	19.56%			18.01%					
27	Operating Capacity:									
28	Capacity grants (WC/SWCD) incl. NRCS+LCWC	13.547		1.051	14.598	13.547	1.051	0.051	1.000	
29	Statewide org partnership support	0.450			0.450	0.450	0.000		0.000	
30	Organizational Collaborative Grants	0.400			0.400	0.400	0.000		0.000	
31	TOTAL	14.397	0.000	1.051	15.448	14.397	1.051	0.051	1.000	
32	% of assumed Total Budget	16.16%			15.97%					
33	Other:									
34	CREP	0.750			0.750	0.600	0.150		0.150	
35	Governor's Priorities	1.000			1.000	0.875	0.125	0.066	0.059	
36	Strategic Implementation Areas	1.200			1.200	1.200	0.000		0.000	
37	Strategic Plan Implementation Grants	0.000		0.500	0.500	0.000	0.500	0.500	0.000	
38	TOTAL	2.950	0.000	0.500	3.450	2.675	0.775	0.566	0.209	
39	% of assumed Total Budget	3.31%			3.57%					
40	TOTAL OWEB Spending Plan	89.086	5.100	2.563	96.749	68.639	28.110	1.629	26.481	
41	OTHER DISTRIBUTED FUNDS IN ADDITION TO SPENDING PLAN DISTRIBUTION									
42	Oregon Department of Fish and Wildlife - PCSRF	10.450			10.450	10.450	0.000		0.000	
43	Lower Columbia Estuary Partnership	0.309			0.309	0.309	0.000		0.000	
44	Forest Health Collaboratives from ODF	0.500			0.500	0.500	0.000		0.000	
45	PSMFC-IMW	0.438		0.291	0.729	0.438	0.291	0.291	0.000	
46	PSMFC-Coho Habitat Tools	0.166			0.166	0.166	0.000		0.000	
47	TOTAL	11.863	0.000	0.291	12.154	11.863	0.291	0.291	0.000	
48	TOTAL Including OWEB Spending Plan and Other Distributed Funds	100.949	5.100	2.854	108.903	80.502	28.401	1.920	26.481	



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MEMORANDUM

TO: Oregon Watershed Enhancement Board
FROM: Courtney Shaff, Capacity Programs Coordinator
SUBJECT: Agenda Item I – 2017-2019 Council Capacity Awards
June 27, 2018 Board Meeting

I. Introduction

This staff report provides an overview of the mid-biennium Council Capacity grant review of the Lower Columbia River Watershed Council (Council) and staff's funding recommendation. Staff recommend funding the Council at \$50,847.50.

II. Background

At its July 2017 meeting, the board discussed and awarded 2017-19 Council Capacity grants. Two watershed councils, Lower Columbia River and Seven Basins Watershed Councils, were not recommended for funding by staff. After deliberation, the board elected to fund the Lower Columbia River Watershed Council at a reduced level (\$47,347.50) for a period of one year. A second year of funding was contingent upon the Council demonstrating that it met grant agreement special conditions and the Council Capacity merit criteria.

III. Evaluation Process

The special conditions that the council must fulfill during the grant period include tasks to complete prior to the first payment request and quarterly progress reports documenting the council's work on each of the five merit criteria. In addition, OWEB staff attended several council meetings between September 2017 and April 2018 to check-in on the council's progress.

A technical review team including OWEB staff and two external reviewers met on May 10, 2018 to interview the Council board and contractors. The team reviewed all progress reports, original and updated work plans, and the fiscal sponsorship agreement. The technical review team evaluation is found in Attachment A.

IV. Analysis

The council board demonstrated it has invested considerable time and effort over the past year into improving its operations, governance, management, and planning. The council has a plan and path forward for restoration and community engagement, clearly meetings OWEB's five Council Capacity merit criteria. Specific accomplishments include

an updated fiscal sponsorship agreement between the council and Columbia Soil and Water Conservation District, holding council elections, completing a self-evaluation and hiring a two-person contracting team to facilitate the council's continued work.

V. Recommendation

Staff recommend the board award \$47,347.50 for the Lower Columbia Watershed Council's second year of capacity funding as described in the staff recommendation portion of the evaluation contained in Attachment A. Staff also recommend the board award an additional \$3,500 to pay for the consulting firm to report on and share with other councils the lessons learned from this unique approach to council management.

In total, staff recommend the board award \$50,847.50 of Council Capacity grant funds to the Lower Columbia River Watershed Council (grant agreement #218-002) for the remainder of the 2017-2019 biennium.

Attachments

A. Evaluation

**Oregon Watershed Enhancement Board
2017-2019 Council Capacity Grant
Mid-biennium Evaluation**

Application No.: 218-002 **Project Type: Operating Capacity**
Project Name: Lower Columbia River Watershed Council Capacity
Applicant: Columbia SWCD

Application Description

This project seeks to fund the Lower Columbia River Watershed Council. Council-identified watershed limiting factors include:

- habitat access - impaired access to habitat;
- hydrograph/water quantity - altered hydrology;
- knowledge gaps - lack of information;
- physical habitat quality - altered quality of physical habitat; and
- water quality - altered physical, chemical, or biological water characteristics.

REVIEW PROCESS

Evaluation

Merit Criterion #1: Effective Governance

During the application review and interview process, OWEB staff and the technical review team found the council to demonstrate effective governance, as evidenced by the following actions taken since August 2017:

- The council has met monthly since August 2017.
- The council completed a self-evaluation on January 11, 2018.
- The council keeps meeting minutes and provides copies of those minutes to OWEB staff.
- The council regularly receives financial updates from the SWCD.
- The council advertises its meetings broadly to the public.

Merit Criterion #2: Effective Management

During the application review and interview process, OWEB staff and the technical review team found the council to demonstrate effective management, as evidenced by the following actions taken since August 2017:

- The council fulfilled all progress report deadlines as described in the grant agreement special conditions.
- The council worked with its fiscal sponsor, Columbia SWCD, to review and update the fiscal sponsorship agreement between the two entities.
- The council updated its board officer position descriptions.
- The council, in coordination with the SWCD, advertised for and hired a two-person consulting firm to perform coordinator duties through the end of June 2018, outlined in a set of deliverables which the consulting team will provide. The technical review team appreciated this unique approach to the management of the council and encourages the

council to capture lessons learned through this process and share with both the Network of Oregon Watershed Councils and other watershed councils.

Merit Criterion #3: Progress in Planning

During the application review and interview process, OWEB staff and the technical review team found the council to demonstrate progress in planning, as evidenced by the following actions taken since August 2017:

- The council's work plan was updated and adopted by the council's governing body prior to the April 30, 2018 deadline.
- The council is beginning a strategic planning process through which they plan on broadly engaging the watershed community to help plan and prioritize the future work of the council and clarify the council's niche in the watershed moving forward.

Merit Criterion #4: Progress in On-the-Ground Watershed Restoration

During the application review and interview process, OWEB staff and the technical review team found the council to demonstrate progress in on-the-ground restoration, as evidenced by the following actions taken since August 2017:

- The council has focused work over this last year in developing effective governance and management. The council has worked to clarify its role in current restoration projects and is actively planning for future restoration projects.

Merit Criterion #5: Progress in Community Engagement for Watershed Restoration Purposes

During the application review and interview process, OWEB staff and the technical review team found the council to demonstrate progress in community engagement, as evidenced by the following actions taken since August 2017:

- The council has worked to clarify its role in community engagement activities and submitted a stakeholder engagement application for the May 2018 Open Solicitation grant cycle.
- The council will be working with the consultants to write an outreach plan, which will guide the council's future outreach efforts.

Technical Review Team Recommendation

Fund increased with conditions. The TRT recommends funding the council at 50% of the full funding amount (\$59,212.5). The increased funding, \$11,865.00, must be used to pay for the consulting firm to report on and share the lessons learned from this unique approach to the management of the council.

Staff Recommendation to the Board

Fund the second year of the council capacity grant at \$47,347.50 with conditions. Staff also recommend the board provide an additional \$3,500, to pay for the consulting firm to report on and share the lessons learned from this unique approach to the management of the council.

Staff Recommended Award

\$50,847.50



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MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Eric Williams, Grant Program Manager
Andrew Dutterer, Partnerships Coordinator

SUBJECT: Agenda Item J – Implementation FIP – Upper Grande Ronde Restoration Partnership Request
June 27, 2018 Board Meeting

I. Introduction

The Upper Grande Ronde Restoration Partnership requests to carry forward \$339,887 that was awarded in the 2015-2017 biennium.

II. Background

The Upper Grande Ronde Restoration Partnership obligated the entirety of its 2015-2017 biennium funds prior to the conclusion of that biennium. Since then, the Hall Ranch Restoration project along Catherine Creek, which was funded in the 2015-2017 biennium, has undergone a significant change in project site conditions. The Oregon Department of Transportation has agreed to the relocation of Highway 203 in the project reach. This will allow Catherine Creek to access the entire floodplain and offers a substantial increase in potential ecological gain in this reach of Catherine Creek, which provides critically important habitat for ESA-listed spring Chinook and summer steelhead.

III. Request

As a result of this change, the partnership would like to enter into a new grant agreement for the Hall Ranch Restoration project that will account for the extensive shift in restoration approach and implementation timeline. This requires the submission of a new proposal and technical review. Simply amending the existing grant agreement is not sufficient for representing the new restoration approach and ensuring technical soundness. Thus, the 2015-2017 biennium project funds are requested for carry-forward in order to submit a new proposal, conduct technical review, and enter into a new grant agreement for the project.

IV. Staff Recommendation

Staff recommend the board carry forward \$339,887 of 216-8205-12639, in order for the partnership to submit a new proposal and develop a new grant agreement for the Hall Ranch Restoration project.

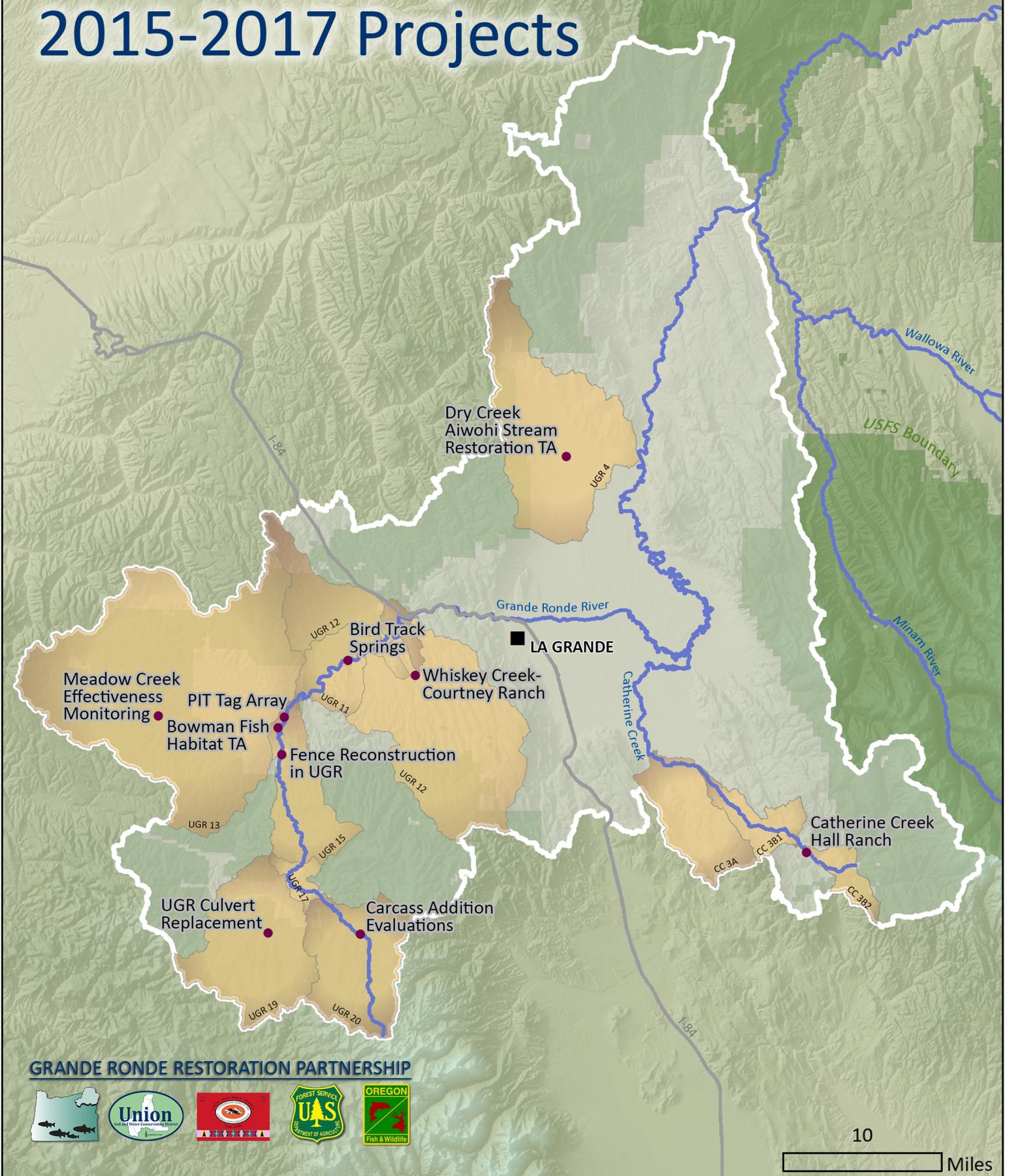
Attachments

- A. Map of restoration projects for the 2015-2017 biennium Upper Grande Ronde Restoration Partnership.

Upper Grande Ronde Partnership 2015-2017 Projects

Washington

Oregon



Dry Creek
Aiwohi Stream
Restoration TA

UGR 4

Grande Ronde River

LA GRANDE

Bird Track
Springs

UGR 12

Whiskey Creek-
Courtney Ranch

UGR 11

Meadow Creek
Effectiveness
Monitoring

PIT Tag Array

Bowman Fish
Habitat TA

UGR 13

Fence Reconstruction
in UGR

UGR 12

UGR Culvert
Replacement

UGR 19

Carcass Addition
Evaluations

UGR 20

Catherine Creek

Catherine Creek
Hall Ranch

CC 3A

CC 3B1

CC 3B2

Wallowa River

USFS Boundary

Minam River

I-84

I-84

GRANDE RONDE RESTORATION PARTNERSHIP



10

Miles



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MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Eric Williams, Grant Program Manager
Miriam Hulst, Acquisitions Coordinator

SUBJECT: Agenda Item K-1– 2017 Land Acquisition Portfolio Monitoring
June 27, 2018 Board Meeting

I. Introduction

This staff report provides a summary of 2017 land acquisition portfolio monitoring and considerations for future monitoring.

II. Background

OWEB has made approximately \$49 million in land acquisition grants since the late 1990s. The grants have involved the use of conservation easements to permanently protect approximately 79,000 acres of land for the benefit of board-designated priority ecosystems, plant communities, and species. OWEB periodically monitors the properties encumbered by conservation easements to ensure that the land is being managed in a manner consistent with the purposes of OWEB's funding.

III. 2017 Land Acquisition Portfolio Monitoring

A. Process

OWEB contractors completed monitoring in 2017 for 63 properties in which OWEB previously invested land acquisition funds. Using a standardized monitoring form, the contractors monitored each property for conservation easement compliance and assessed whether conservation values are being protected and ecological objectives are being met. The contractors' monitoring process included: reviewing project documents such as baseline reports and management plans, interviewing grantees to understand their successes and challenges in meeting project goals, conducting monitoring site visits, and preparing monitoring data and reports. A summary report of the monitoring results is provided as Attachment A to this staff report.

B. Results

In general, properties in which OWEB has invested land acquisition funds are performing well and have improved relative to the findings of OWEB's previous portfolio monitoring, which was conducted in 2012. OWEB contractors also used the monitoring as an opportunity to assist OWEB with relationship-building and identify ways OWEB

and grantees can work collaboratively to address project challenges for greater conservation outcomes.

C. Follow-up

While properties are generally performing well, the 2017 monitoring also identified specific needs for follow-up. Some grantees need funding and expertise, particularly to map and treat invasive species. Others need assistance to update management plans to better meet ecological goals for the properties. Grantees were made aware of these needs and OWEB project managers are following up on matters raised for land acquisition projects in their areas.

IV. Considerations for Future Land Acquisition Monitoring

Portfolio monitoring is an important part of ensuring the success of OWEB's land acquisition program. Each property should be monitored at a minimum of every five years.

The size of OWEB's growing portfolio presents challenges for conducting all of the monitoring in a single field season. In the future, it may be necessary to split the monitoring work between years, or biennia.

V. Attachments

- A. Summary Report – 2017 Land Acquisition Monitoring

**Summary Report
2017 Land Acquisition Monitoring**

January 5, 2018

Prepared for:
Oregon Watershed Enhancement Board
775 Summer St NE Suite 360
Salem, OR 97301-1290

Prepared by:
Karen Allen, *Aequinox*
1624 NW Trenton Ave.
Bend, OR 97703
(541) 617-1380

Background

In 2017, OWEB contracted with Karen Allen dba Aequinox under Contract 010-17-15369 for Land Acquisition Monitoring of Willamette Valley and Southern, Central, and Eastern Oregon properties and Coordination Services, and with John Sanchez dba Cutthroat Country Consulting under Contract 017-17-15370 for Land Acquisition Monitoring of Coast properties. For each property, contractors monitored for conservation easement compliance and assessed whether conservation values are being protected and ecological objectives are being met.

Monitors completed monitoring for 63 properties in which OWEB has invested. Of these, 1 is a recent acquisition in the early stages of implementation of management actions. A contractor completed 'compliance only' monitoring on this property. The remaining 62 properties were fully monitored to determine if each property's conservation values are being protected and assess compliance with the conservation easement and achievement of ecological goals. A 2017 Summary spreadsheet captures the contents of the monitoring reports and is the source of summary statistics described below.

Methods

Aequinox worked with OWEB in Spring 2017 to make minor updates to the land acquisition monitoring form and summary spreadsheet used in 2012 for monitors to use in 2017. To train all monitors, OWEB gave a webinar on March 15, 2017 to convey Land Acquisition Program principles and priorities, typical project materials, the variation found between projects, and objectives and process for 2017 monitoring. In addition, all monitors attended a Field Calibration Site Visit at the Pond Property in Central Oregon with OWEB to work through the monitoring form together, discuss appropriate level of detail to answer monitoring form questions, and ensure consistency among monitors. Monitors completed biweekly updates to document the time required to monitor each property.

Monitoring itself included the following tasks:

1. Check-in with OWEB regarding property information as needed
2. Review project documents, prioritizing review in this order:
 - a. Conservation Easement
 - b. Past 2012 OWEB monitoring report
 - c. Baseline Report
 - d. Management Plan
 - e. Intermittent grantee progress reports and correspondence
 - f. Grant Agreement
 - g. Other documents necessary to be able to effectively monitor, e.g. restoration plan, monitoring report
3. Phone interview with grantees
4. Plan efficient travel by combining monitoring of nearby properties (OWEB provided monitors with ArcGIS travel routes from cities in which monitors live for planning purposes)
5. Conduct monitoring site visit

6. Complete land acquisition monitoring form

Findings, Successes, and Challenges

Findings

The 2017 monitors used the same monitoring criteria and scoring process to rate each property as that developed in 2012. The table below summarizes important 2017 findings and those in relations to 2012 findings. Monitoring criteria refers to questions asked on the monitoring form (see form for more detailed descriptions of each). 2017 Compliance/Condition Total Scores are based on a scale of 0 to 10 with 10 being the highest possible summary score, and are derived from the following monitoring form elements:

- Habitat for Conservation-priorities Maintained & Enhanced
- Project Compliance
- Management Plan Development and Implementation
- Property Achieving Ecological Outcomes
- Priority Conservation Plant Communities Observed
- Provisions in Place for Long-term Maintenance (dedicated funding/endowment)

Monitoring Criteria or Compliance/Condition Score	Percent Meeting Criteria	Notes
Compliance/Condition Total Scores of 9 or better	76%	This is an increase from 43% reported in 2012. This positive trajectory suggests future opportunities for improvement in condition scores and that a goal for all properties to have a score of 9 or better may be within reach.
Compliance/Condition Total Scores of 6 or better	95%	This is an improvement from 87% reported in 2012. Only 3 properties scored a 5 or less.
Percent of Properties that performed as well or better than in 2012	82%	A total of 38 properties were fully monitored in both 2012 & 2017. Of these, 7 (18%) had the same compliance/condition total score, 24 (63%) had a better score, and 31 (82%) had the same or better score in 2017 than in 2012.
Project Compliance	95%	95% of the properties are in full compliance with the conservation easement (or covenant), grant agreement, and interagency agreement (if applicable). This is a significant increase from the 64% of properties in compliance found in 2012.
Achieving Ecological Goals stated in the project documents	65%	For 65% of the properties monitored, the current health of priority habitats is good and the property is achieving the ecological and conservation goals of the acquisition. This is an increase from 48% found in 2012.

Monitoring Criteria or Compliance/Condition Score	Percent Meeting Criteria	Notes
Management Plans Approved	89%	89% of properties have approved management plans, up from 57% in 2012. In 2% of projects, a plan was not required and 9% of properties have no required management plan.
Management Plan Development and Implementation	77%	In 77% of properties, a management plan has been approved by OWEB, management of the property is consistent with the plan, and the management activities are being implemented in a timely manner.
Capacity (grantees' assessment of 'funding or other barriers to management & restoration' provided during interview)	83%	Based on the information monitors gleaned from interviews, 83% of projects are run by grantees who appear to have the organizational capacity needed to successfully implement their projects (down from 89% in 2012).
Provisions for long-term maintenance	86%	Related to capacity, 86% of properties have dedicated funding or an endowment (compared with 64% in 2012).

Successes

1. In general, fee title and conservation easement properties acquired with OWEB funds are performing well and have improved overall relative to 2012 findings.
2. Monitoring served to re-engage grantees in project documents and obligations. While most grantees were clearly quite familiar with these, others appeared to benefit from the prompt and/or walking the site with the contractor to better understand them.
3. OWEB contractors embraced the indirect opportunity to assist OWEB with relationship building. Contractors tried to reinforce the grantee/OWEB relationship as partners, emphasizing that both grantees and OWEB have the same interests, to protect and restore conservation values and work toward properties attaining ecological outcomes. When grantees expressed concerns about deficiencies, contractors suggested they discuss them with OWEB to collaboratively try to locate resources to address the deficiencies. Now is an ideal time for OWEB to reflect on a) how best to leverage contractors' recent efforts, b) messaging regarding partnerships, and c) how best to assist grantees in finding resources to address deficiencies while meeting obligations and shared goals.
4. 2017 monitoring brought needs to light. Contractors heard about grantees biggest challenges and greatest needs to more effectively manage their lands. In some cases grantees need funding (e.g. to map and treat invasives), in others they need technical assistance (e.g. to update a management plan), and in others minor compliance issues came to light that prompted grantees to quickly resolve them before they became bigger issues (e.g. fencing to prevent livestock from entering an

area off-limits to them.). Final monitoring reports highlight these needs. Now is an opportune time for OWEB to follow up on these expressed needs, to help identify resources needed to protect conservation values and accelerate movement toward meeting ecological goals.

5. Innovative approaches by grantees came to light and are documented in final reports. For example, innovative forest management practices are being informed by some grantees' research findings. Other grantees pro-actively learn landowner intentions for management actions in the upcoming year as a way to build relationships and increase the likelihood of easement compliance.
6. Overall, the project reaffirmed the importance of conducting OWEB Land Acquisition Monitoring every five years, for the reasons noted above.

Challenges

The following list describes commonly observed project deficiencies and recommendations for offering future guidance and assistance to OWEB's partners:

1. Capacity: Based on the information monitors gleaned from interviews, 83% of projects are run by grantees who appear to have the organizational capacity needed to successfully implement their projects. For the 17% of projects that lack capacity, Aequinox recommends OWEB work closely with grantees to determine the best approach to improve capacity to implement management plans, conduct long-term maintenance, and ensure project success over time.
2. Invasives and lack of capacity to effectively manage invasives appears to be the primary cause of degradation in conservation values. Many grantees need assistance finding resources for baseline weed mapping, weed management plan development and implementation. OWEB can assist grantees in locating resources for baseline weed mapping, weed management plans, and treatment actions. They can offer example weed mapping and weed management plans to grantees to help them visualize how they might map weeds on their properties, research and prioritize treatment options, and track progress over time. Some grantees do this well and are actively managing weeds while others may benefit from support.
3. Invasive vegetation occurs on most sites. However, data shows some positive trends concerning invasives. In terms of severity, invasives are dominant and major control efforts are needed on approximately 20% of properties for each habitat type (riparian, wetland, upland). Interview results show that grantees are actively managing weeds on 86% of properties. Data indicates that in all habitat types, more invasives are moving onto acquisitions than are moving off. In 8% of properties with uplands and 31% of those with riparian habitats, invasives are likely moving off the properties onto adjacent lands. Since riparian areas are, by definition, adjacent to rivers/streams, movement on and off site via water is expected.
4. Management not in accordance with Management Plans: In some cases, grantees have outdated management plans that were approved by OWEB, but contain management actions that the grantee has no intention of implementing. These cases are well-documented in final reports with the recommendation to update the Management Plan to accurately reflect current management intentions or to manage according to plan. In other cases in which a management plan did not

include a timeline, the property was given a green mark for management activities being implemented in a timely manner, but a recommendation was added to include a timeline in the next plan update.

Monitoring Challenges

1. Estimating Invasives: On each property, contractors noted invasive species present and approximate percent cover on a sub-sample of any given habitat to the best of their ability. The larger the property, the smaller the sub-sample in relation to the whole property size and the more generalized the estimation (e.g. assessment of 5 acres across several parts of a 10 acre property will be more accurate than an assessment of 5 acres across a property 1,000 acre in size).
2. Determining whether the invasive plant species are spreading onto the property from adjacent lands, are spreading from the property onto adjacent lands, and the trend in population size all require good baselines against which to evaluate current populations. Information on baseline invasive conditions was commonly missing from baseline reports and management plans. Best professional judgement was used to answer these questions. Monitors considered seed dispersal methods, proximity to flowing water, proximity to property boundaries, and used 2012 monitoring as a rough baseline to help answer these questions. Sometimes monitors noted “difficult to determine,” “unclear,” or “likely on or off based on seed dispersal method.” A possible way forward for OWEB to get a better handle on the answers to these questions in the future would be to require baseline weed mapping for every project.



Oregon

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MEMORANDUM

TO: Oregon Watershed Enhancement Board
FROM: Eric Williams, Grant Program Manager
SUBJECT: Agenda Item K-2 – OWEB Land Acquisition Rulemaking
June 27, 2018 Board Meeting

I. Introduction

This report seeks board authorization to initiate rulemaking for OWEB Land Acquisition grants (Division 45).

II. Background

Land Acquisition grants are an integral OWEB grant offering, protecting nearly 100 properties during the past 20 years. Administrative rules for the program were last updated in 2013, and ORS 183.405 requires administrative rules adopted after January 1, 2006 to be reviewed no later than five years after adoption. Staff propose to work with a rules advisory committee (RAC) to determine whether the administrative rules should be updated to reflect the current state of practice.

III. Proposed Rulemaking Process

Staff will convene a RAC for the land acquisition rulemaking process. The RAC will be composed of grantees, stakeholders, and staff to review the proposed rules. Staff propose to develop the Land Acquisition program rules according to the draft schedule below.

Table 1

Rulemaking Action	Land Acquisition Dates/Deadlines
Board Authorization for Rulemaking	June 2018
RAC Meetings to Vet Draft Rules and Provide Feedback	July-December 2018
Draft Rules Revisions Based on RAC Feedback	January 1, 2019
Notice Filed with Secretary of State	January 15, 2019
Public Comment Materials posted online	February 1, 2019
Notice to Agency Mailing List and Legislators	February 1, 2019

Secretary of State's Bulletin	February 1, 2019 (published)
Public Comment Period	February 1-31, 2019
Public Hearing(s)	February, 2019
Revisions to Draft Rules Based on Public Comment	Early March, 2019
Board Adoption of Rules	April, 2019

IV. Recommendation

Staff recommend that the board authorize rulemaking for OWEB Land Acquisition grants.



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MEMORANDUM

TO: Oregon Watershed Enhancement Board

FROM: Renee Davis, Deputy Director
Meta Loftsgaarden, Executive Director

SUBJECT: Agenda Item M – 2019-2021 Agency Request Budget
June 27, 2018 Board Meeting

I. Introduction

This report requests the board's approval of budget proposals that will be included in OWEB's Agency Request Budget (ARB) for the 2019-2021 biennium.

II. Budget Preparations for the 2019 Legislative Session

The Oregon Legislature approves budgets for state agencies on a biennial basis. In preparing for the next biennium, budgets are structured so that each agency's current (or "base") budget is recalibrated and submitted without need for specific policy description or justification. Any resources requested to be added to the base budget by agencies must be identified separately with policy narratives and justification. The requested additions to an agency's base budget are called "Policy Packages."

OWEB must submit its ARB narrative to the Governor and the Department of Administrative Services (DAS) by August 31, 2018. The Governor's Office will then develop state budget recommendations in partnership with agencies, known as the Governor's Recommended Budget (GRB). This budget proposal may also include additional Policy Packages that reflect the Governor's priorities and initiatives. The GRB is the starting point for agency budget discussions at legislative hearings. During the legislative session, agencies may advocate for their individual Policy Packages only to the extent that they are included in the GRB.

III. Budget Outlook

As staff described to the board at the April 2018 meeting, recent economic forecasts project that revenues will continue to grow at a modest, but slower pace than in recent years. The latest revenue forecast is more positive than previous forecasts, indicating that revenues will be more in line with increasing state costs. This will result in a much lower deficit than indicated in previous forecasts.

Each biennium, agencies are required to submit a report that lists 10 percent reduction options from current service level by priority for all fund sources. Full reductions have

not been taken in the past few budget cycles. Future reductions will depend on the revenue outlook and the level of remaining ending balances from the 2017-19 biennium.

IV. Budget Proposals for the 2019-2021 Biennium

Attachment A provides the current agency organizational chart. As noted at the April 2018 meeting, OWEB's budget proposals for next biennium are based on an analysis of current staffing relative to agency functions anticipated to be needed during the 2019-2021 biennium, including if and how needed functions could be completed with existing staffing or contract resources. The budget proposals also reflect needs associated with broader initiatives coordinated with the Governor's Office and other agencies. As a result, OWEB's Executive Team proposes that, in addition to the agency's base budget, the ARB include funding for positions and contracted services identified in Attachment B to the staff report.

V. Next Steps for Budget Development

Staff will use the budget proposals approved by the board at the June 2018 meeting as a foundation for developing policy packages for inclusion in the ARB. At future meetings, staff will keep the board apprised about the status of the 2019-21 biennium budget process.

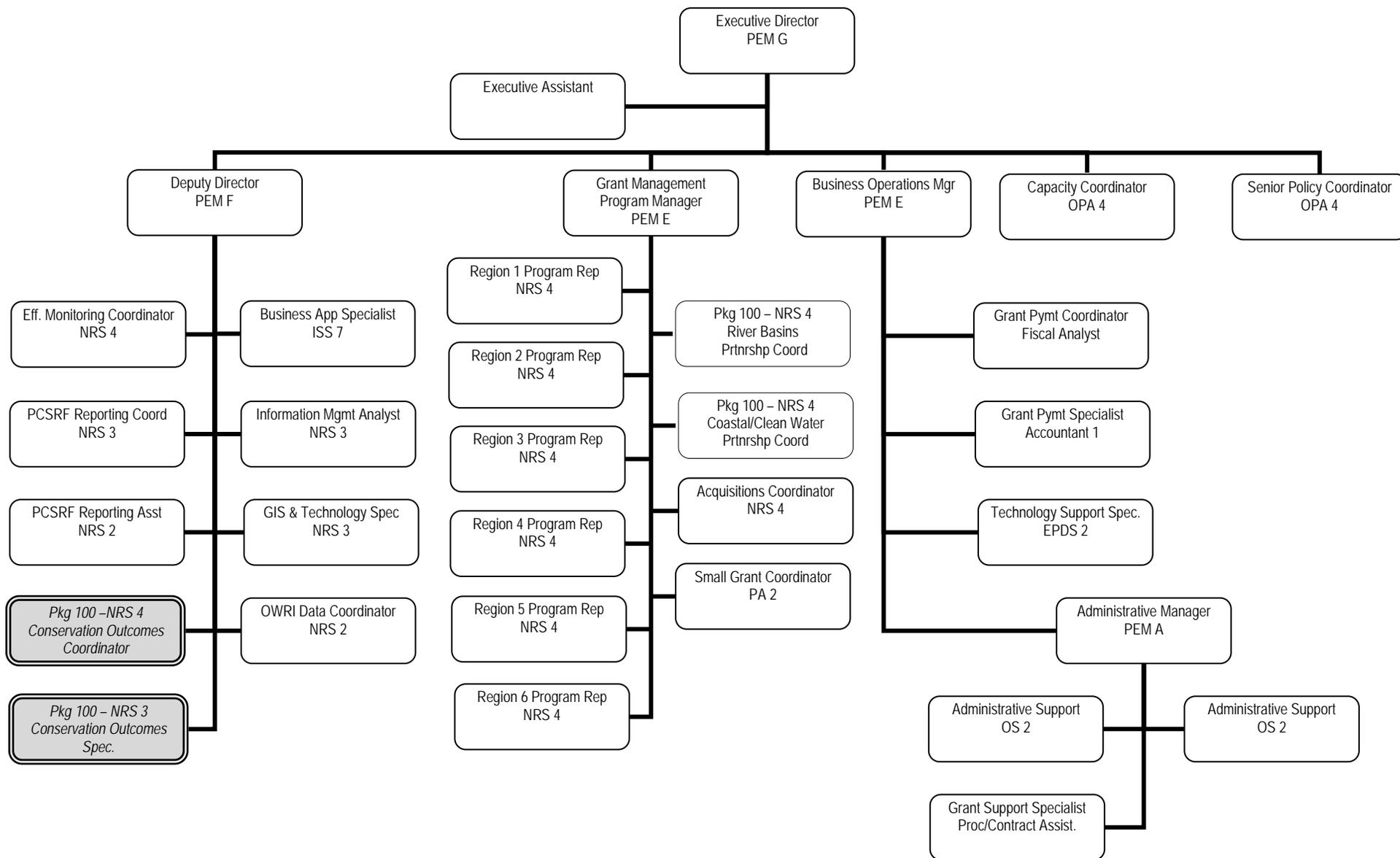
VI. Recommendation

Staff recommend the board approve the budget proposals included in Attachment B of this staff report, for inclusion in OWEB's 2019-2021 Agency Request Budget.

Attachments

- A. OWEB Organizational Chart, 2017-2019
- B. Draft Proposed Policy Option Packages for OWEB's 2019-21 Agency Request Budget

Oregon Watershed Enhancement Board Organizational Chart 2017-2019 Legislatively Adopted Budget



Permanent

Limited Duration FTE

33.0 - FTE
33.0 - Positions

**OWEB 2019-2021 Agency Request Budget
Policy Option Package Proposals**

1. Program Continuity	Estimated Amount	FTE	Proposed Fund Source	OWEB Strategic Plan Priority¹
<p><u>Conservation Outcomes Coordinator (NRS4)</u> – Continues a position and requests change from limited duration to permanent. The position leads OWEB’s program to measure and report on the ecological, economic and social outcomes resulting from OWEB grant investments at the landscape level. The position coordinates with other state and federal agencies to determine priorities and carry out implementation efforts of the Coordinated Streamside Management program, the Conservation Effectiveness Partnership and other similar initiatives. The position works with other agencies and local stakeholders to develop conservation outcome metrics, coordinate monitoring and data management frameworks, and report results at the landscape level and statewide scales. This position helps to measure and report on salmon habitat and recovery activities across the state.</p>	<p>\$300,000</p>	<p>1.00</p>	<p>Federal Funds</p>	<p>6 and 1</p>
<p><u>Conservation Outcomes Specialist (NRS3)</u> – Continues a limited duration position to implement aspects of OWEB’s program to measure and report on ecological, economic and social outcomes resulting from OWEB grant investments at the landscape level. The position assists with implementation of coordinated monitoring, adaptive management, and shared learning aspects of OWEB’s updated strategic plan.</p>	<p>\$240,000</p>	<p>1.00</p>	<p>Lottery Funds</p>	<p>6 and 1</p>

¹ Based on the current draft of OWEB’s strategic plan, these references denote connections between policy option packages and strategic plan priorities.

2. Program Enhancement	Estimated Amount	FTE	Proposed Fund Source	OWEB Strategic Plan Priority
<p><u>Contracted Services</u> – OWEB Measure 76 grant funds are not eligible to use for contracting. There are certain work products and functions required by OWEB’s programs that are most efficiently and effectively accomplished through personal services contracts. The contracting funds included in OWEB’s base budget are not sufficient to cover the full range of the agency’s contracting needs. This request ensures OWEB has adequate funds available for contracting purposes next biennium. These funds will be used in lieu of hiring additional staff to provide:</p> <ol style="list-style-type: none"> 1. Long-term protection implementation (e.g., ecological, title and appraisal reviews) for the increasing number of land acquisition grant applications being submitted, and initiation of the first biennial cycle of 6-year monitoring for all of OWEB’s land acquisitions investments; 2. Assistance with implementation of OWEB’s 2018 strategic plan, including, but not limited to activities associated with diversity, equity and inclusion; 3. Effectiveness monitoring of OWEB’s restoration investments with the federal government via the Conservation Reserve Enhancement Program; 4. Improvements to OWEB’s statutorily required reporting for the Oregon Plan for Salmon and Watersheds Biennial Report; and 5. Staff training to ensure effective management of grants that support watershed restoration and conservation. 	\$375,000	N/A	Lottery Funds	1, 3 and 6
<p><u>Online Systems Project Management</u> – Beginning in the 2015-2017 biennium, OWEB initiated a series of improvements to its business processes to increase efficiency and provide higher quality customer service. One component was creation of an online grant application system to complement OWEB’s existing fiscal management data system. OWEB continues to transition more of its processes online, and requests a limited duration position (Project Manager 2) to work with OWEB customers and staff to scope online system functionality, manage system improvements and coordinate testing and refinement of the system through time.</p>	\$300,000	1.0	Lottery Funds	N/A

2. Program Enhancement (continued)	Amount	FTE	Proposed Fund Source	OWEB Strategic Plan Priority
<p><u>Partnerships Coordinator (NRS4)</u> – A project management position is needed to address workload created by the board’s increase in grants for Focused Investment Partnerships, which are long-term investments in high performing partnerships implementing restoration actions to achieve ecological outcomes at the landscape scale. Based on preliminary discussions, the board is expected to increase FIP investment by \$7 million in the 19-21 biennium, to a total of \$22 million, or 25% of OWEB’s grant portfolio. The additional position is needed to manage this increased investment.</p>	\$285,000	1.0	Lottery Funds	3 and 7

3. Oregon Agricultural Heritage Program (OAHP)	Estimated Amount	FTE	Proposed Fund Source	OWEB Strategic Plan Priority
<p><u>OAHP Grants</u> – This request is for funding to support grants associated with the Oregon Agricultural Heritage Program. This program offers voluntary tools that help farmers and ranchers maintain land as active farms and ranches while providing incentives and support for conservation on those lands. The request includes \$9.25 million in grants for succession planning, conservation management plans, and working land conservation covenants and easements.</p>	\$9.25 million	N/A	General Funds	5
<p><u>OAHP Staffing</u> – This request is for funding to support staffing needs associated with the Oregon Agricultural Heritage Program. This program offers voluntary tools that help farmers and ranchers maintain land as active farms and ranches while providing incentives and support for conservation on those lands. The request includes \$750,000 for staffing costs to implement the program. Positions needed to implement this program include: OPA4 to provide overall program coordination; NRS4 or similar position to coordinate the working land covenants and easements; and OS2 (0.5 FTE) to provide program support.</p>	\$750,000	2.5	Primarily General Funds; very modest amount of Lottery Funds for a portion of OPA4	5

4. Carry Forward	Estimated Amount	FTE	Proposed Fund Source	OWEB Strategic Plan
This policy package proposes to extend expenditure limitation for non-lottery fund grants that have been awarded and continue to be active. This will allow funds for these grants to be expended in the 2019-2021 biennium.	TBD	N/A	Federal Funds, Other Funds	N/A

5. Additional Grant Funds – Forest Collaboratives	Estimated Amount	FTE	Proposed Fund Source	OWEB Strategic Plan
This policy package would allow OWEB to receive and expend funds from Oregon Department of Forestry (ODF) as grants for forest collaboratives under the state’s Federal Forest Health Program, should this service be requested and if additional funds are appropriated by the Legislature for these purposes in 2019-2021.	\$750,000	N/A	Other Funds via ODF	4

6. Additional Grant Funds – Federal Funds and Other Funds Limitation	Estimated Amount	FTE	Proposed Fund Source	OWEB Strategic Plan
This policy package would allow OWEB to receive and expend as grants funding from other sources, should this service be requested and if federal and/or other funds are available for this purpose during the 2019-21 biennium. An example of additional grant funds is funding from Natural Resources Conservation Service for local technical and administrative assistance. (If needed based on when the funding is available, a portion of this request may be made to the Oregon Legislature prior to the 2019 session, during interim Legislative Days.)	\$2 million	N/A	Federal Funds, Other Funds	3 and 4

7. Upper Klamath Salmon and Steelhead Reintroduction and Habitat Restoration	Estimated Amount	FTE	Proposed Fund Source	OWEB Strategic Plan
Four significant dams on the Klamath River are scheduled to be removed in early 2021. This historic event creates an opportunity to truly ‘move the needle’ on the recovery of salmon in Oregon. Funding will expand and better integrate existing programs housed in several natural resources agencies. A focus on restoration on common priorities previously identified by tribes, agricultural interests, conservationists, and state and federal agencies. OWEB’s request for funding will support on-the-ground restoration, fish screening and passage, land and water acquisition, and technical assistance projects via grants during the 2019-21 biennium.	\$13.4 million	N/A	Lottery or Federal Funds	3, 4 and 7

8. Clean Water State Revolving Fund Septic Systems Loans – Other Funds Limitation	Estimated Amount	FTE	Proposed Fund Source	OWEB Strategic Plan
<p>This policy package would allow OWEB to pass -through Clean Water State Revolving Fund (SRF) loan funds from the Oregon Department of Environmental Quality (DEQ) to a third-party entity that is addressing failing septic systems in communities around Oregon. Only governmental subdivisions are eligible to apply for SRF loans. OWEB will apply to DEQ for loan funds, and then execute an agreement with a third party to provide low-interest loans to homeowners and others to replace failing septic systems that degrade water quality. (If needed based on when the funding is available, a portion of this request may be made to the Oregon Legislature prior to the 2019 session, during interim Legislative Days.)</p>	<p>\$2 million</p>	<p>N/A</p>	<p>Other Funds</p>	<p>3, 4 and 7</p>

OWEB Strategic Plan Priorities

1. Broad awareness of the relationship between people and watersheds
2. Leaders at all levels of watershed work reflect the diversity of Oregonians
3. Community capacity and strategic partnerships support resilience in watersheds
4. Watershed organizations have access to a diverse and stable funding portfolio
5. The value of working lands is fully integrated into watershed health
6. Coordinated monitoring and shared learning to advance watershed restoration effectiveness
7. Bold and innovative actions to achieve health in Oregon’s watersheds



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MEMORANDUM

TO: Oregon Watershed Enhancement Board
FROM: Courtney Shaff, Capacity Programs Coordinator
SUBJECT: Agenda Item N – Partnership Learning Project
June 27, 2018 Board Meeting

I. Introduction

This report introduces the Partnership Learning Project – Part 2. The full report is available as Attachment A to the staff report.

II. Background

OWEB's Focused Investment Partnership (FIP) program was initiated in the 2015-2017 biennium to invest in a partnership approach that strategically prioritizes activities at a large scale to accelerate progress toward restoration of priority species and habitats. In January 2016, the board awarded the initial grants for the FIP program, awarding \$13.7 million for both Implementation and Development FIPs. Eight partnerships were awarded two-year Development FIP grants to build resilient, sustainable partnerships capable of implementing effective restoration programs. Six partnerships were awarded Implementation FIP grants to support large-scale on-the-ground restoration for up to six years.

The board awarded funds to the Bonneville Environmental Foundation for FIP effectiveness monitoring, including the Partnership Learning Project, at the April 2016 Board meeting.

III. Partnership Learning Project

The purpose of the Partnership Learning Project is to better understand what partnerships need to be resilient and maintain a high level of performance, and how OWEB can improve the FIP program to support these partnerships to achieve desired ecological outcomes.

Jennifer Arnold of Reciprocity Consulting presented part one of the Partnership Learning Project at the July 2017 board meeting. The initial report focused on lessons learned from the eight Development FIPs. Results from the initial report informed the FIP rulemaking process as well as the evaluation the Development FIP applications funded at the October 2017 board meeting. The report also resulted in the board's approval of

additional funds for partnerships to develop financial plans related to their FIP programs.

The attached report represents findings from both the initial report and the evaluation of the six Implementation FIPs. The information in the report is rolled up so as to prevent linking comments or findings directly to any one grantee. Arnold collected the information contained in the report by attending meetings of all FIPs, conducting in-depth interviews with partners, and evaluating partner survey responses.

IV. Recommendation

This is an information item only. OWEB staff and project partners will be at the June board meeting to present the report and answer questions about the Partnership Learning Project.

Attachments

- A. Partnership Learning Project Report

PART TWO

Partnership Learning Project



ECOLOGICAL RESEARCH



A REPORT FOR **Oregon Watershed Enhancement Board**
In collaboration with Bonneville Environmental Foundation



PREPARED BY

Jennifer Arnold, Ph.D.

RECIPROCITY CONSULTING LLC

June 2018



BEAR CREEK, BEFORE AND AFTER (ECO LOGICAL RESEARCH)

Acknowledgements

This project was funded by the Oregon Watershed Enhancement Board in coordination with Bonneville Environmental Foundation. The findings presented here were made possible through the generous and thoughtful reflections of participating partners.

Thank you to all who shared your experiences and insights. It is hoped that this report will support your continued success.



ABOUT RECIPROCITY CONSULTING

Reciprocity Consulting, LLC is a women-owned small business based in Tacoma, Washington that provides customized support to build partnerships and engage diverse stakeholders.

Owner Jennifer S. Arnold, Ph.D. has over 15 years of experience in research, facilitation, and training focused on collaborative approaches to conservation and community development. She specializes in launching new collaborative efforts, growing existing partnerships, managing conflicts productively, addressing equity and effectively engaging diverse stakeholders to have a lasting positive impact in our communities and our environment.

Partnership Learning Project

A TWO-PART REPORT

1 **PART ONE** emphasizes what it takes to initiate or formalize a partnership and work through the growing pains of planning and governance (*focus on Development FIP grantees*).

2 **PART TWO** emphasizes the dynamic nature of partnerships and the resources, support and guidance from funders that can build resiliency and boost impact (*focus on Implementation FIP grantees integrated with Part One findings*).

Common Terms

Oregon Watershed Enhancement Board (OWEB)

The Oregon Watershed Enhancement Board is a state agency that provides grants to help Oregonians take care of local streams, rivers, wetlands and natural areas. OWEB grants are funded from the Oregon Lottery, federal dollars, and salmon license plate revenue. The agency 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.

Focused Investment Partnership (FIP)

A Focused Investment Partnership is an OWEB investment that:

- addresses a Board-identified priority of significance to the state;
- achieves clear and measurable ecological outcomes;
- uses integrated, results-oriented approaches as identified through a strategic action plan; and
- is implemented by a high-performing partnership.

Development FIP Grant

(formerly Capacity Building FIP grant)

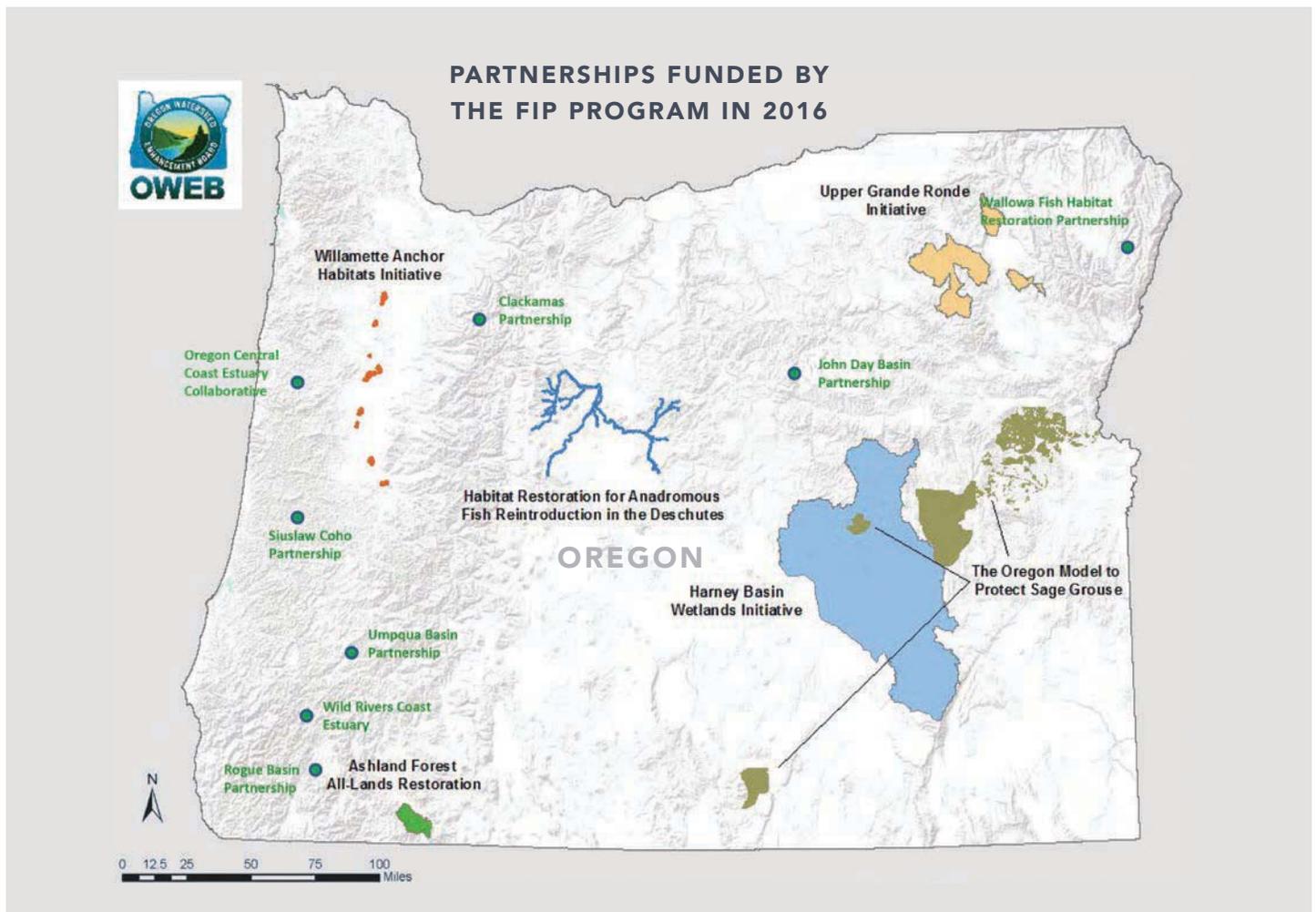
Two-year grants, which are part of OWEB's FIP Program, that are awarded to partnerships to develop a strategic action plan, governance documents and otherwise build capacity to perform at a higher level.

Implementation FIP Grant

Six-year grants, which are part of OWEB's FIP Program, that are awarded to high-performing partnerships to implement on-the-ground restoration projects.

Board-identified Priorities for FIP Investments by Habitat

- Aquatic Habitat for Native Fish Species
- Closed Lakes Basin Wetland
- Coastal Estuaries
- Coho Habitat and Populations along the Coast
- Dry-Type Forest Habitat
- Oak Woodland and Prairie
- Sagebrush / Sage-Steppe



Executive Summary

OWEB’s Focused Investment Partnership (FIP) Program was inspired by the idea of “collective impact” that partnerships can uniquely leverage the collective capacity of multiple organizations and accelerate the pace and scale of restoration when partners are strategically aligned around shared priorities and committed to mutually reinforcing actions. In the 2015-2016 biennium, two types of multi-year FIP grants were awarded – a Development FIP grant to develop partnership capacity and an Implementation FIP grant to implement restoration projects.

In January 2016, the OWEB Board awarded \$13.7 million to fourteen partnerships:



OWEB recognized this was very different from their other grant programs and initiated this study to better understand:

- 1 What do partnerships need to be resilient and maintain a high level of performance?
- 2 How can OWEB improve and innovate the Focused Investment Partnership (FIP) program to support high-performing, resilient partnerships that can make progress toward desired ecological outcomes?

GRANT	PURPOSE	AMT/TIME	FUNDED PARTNERSHIPS
<p>Development FIP grants <i>(formerly Capacity Building FIP grants)</i></p>	<p>Develop partnership capacity, e.g., a strategic action plan, governance documents, a funding plan, etc.</p>	<p>Up to \$150,000 each over 2 years</p>	<p>8 Partnerships: Clackamas Basin Partnership John Day Basin Partnership Oregon Central Coast Estuaries Collaborative Rogue Basin Partnership Siuslaw Coho Partnership Umpqua Basin Partnership Willowa Habitat Restoration Partnership Wild Rivers Estuary Partnership</p>
<p>Implementation FIP grants</p>	<p>Implement large-scale, on-the-ground restoration projects, including some technical assistance and focused outreach</p>	<p>About \$6 million each over 6 years</p>	<p>6 Partnerships: Ashland Forest All Lands Restoration Initiative Deschutes Partnership Grande Ronde Restoration Partnership Harney Basin Wetland Initiative Oregon Model to Protect Sage Grouse Willamette Anchor Habitat Working Group</p>

Partnerships are networks of people and organizations working together to advance shared interests.

They operate on the fundamental belief that partners can achieve more collectively than individually. Partnerships require upfront investment in relationship building, typically one to three years, and once a partnership is established, there are inherent costs and challenges related to communication, decision-making, and coordinated action (Brouwer and others 2015).

ROGUE BASIN PARTNERSHIP



Methods

To guarantee confidentiality and encourage candid feedback, OWEB contracted with an independent social scientist Jennifer Arnold, Ph.D. of Reciprocity Consulting LLC. From Fall 2016 to Spring 2018, Jennifer reached out to all 14 funded partnerships:

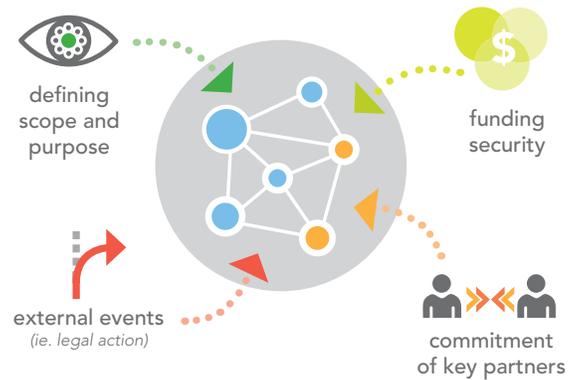
Attended a meeting of each of the 14 partnerships,

Participated in 4 conference calls with OWEB and the Development FIP grantees,

Interviewed 47 partners (ave. 3-4 per partnership) and

Received survey feedback from 137 partners (ave. 10 per partnership).

The data were analyzed using a qualitative approach called **grounded theory**, where an explanation of the system is inductively developed from participant experiences and reflections (Charmaz 2006). This report represents a synthesis of insights across the 14 partnerships with quotes presented anonymously to bring to life the experiences of partners. While these quotes reflect individual perspectives that are meaningful to the bigger picture, they may not be representative of all the partnerships.



Partnerships are dynamic.

They take on different forms over time in response to funding, commitment of key partners, external events and how the purpose and scope are defined.

Findings

★ Different types of partnerships have different costs, risks and benefits. Resilient high-performers find the right type of partnership to provide the greatest value proposition to partners. (See Figure 1, page 14)

Partnerships are dynamic and take on different forms over time in response to funding, commitment of key partners and how the purpose and scope are defined.

Partners and funders commit time and resources based on their perception of the value proposition, which may change over time in response to funding, external events or a shift in the key partners or scope.

Over their history, many of the 14 partnerships have moved along the continuum of partnership types, sometimes back and forth, with different levels of commitment and funding.

Coordinated and collaborative partnerships are often idealized as the model to strive for, yet learning networks or cooperative partnerships with lower costs and risks may have a higher value proposition, especially in the absence of long-term, reliable funding.

RECOMMENDATION

Create funding opportunities and support to sustain partnerships as learning networks, especially in the absence of large-scale implementation funding.

Continuum of Partnership Types



Different types of partnerships along a continuum from more autonomous to more interdependent have different costs, risks and benefits. Over time, partnerships may transition from being more autonomous to more interdependent. A better understanding of the value propositions of different partnership types can help partners and funders target their investments and set realistic expectations for short-term and long-term performance.

(Adapted from Habana-Hafner, S. and H. B. Reed. 1989. Partnerships for Community Developments. Center for International Education.)

★ Efficiency is critically important to performance and resiliency.

Collaboration is a double-edged sword. A more fully developed collaborative process is needed to develop trust and shared accountability, but an overly burdensome process directly stifles group morale, capacity to advance the work and retention of skilled leaders. While exceedingly grateful for the funding, partnerships consistently suggested ways to streamline the program. They also acknowledged OWEB's culture of collaboration and flexibility as critical to navigating the bureaucratic process.

RECOMMENDATION

Increase efficiencies in the FIP application process and grant administration wherever possible.

★ Large, inclusive partnerships that seek alignment and shared accountability have greater costs for coordination and partner engagement.

Efficiency is a more pronounced challenge for large, inclusive partnerships. A more collaborative approach to planning, implementation, reporting and accountability in these contexts has greater potential to be overly burdensome because of the logistics of keeping everyone engaged, aligned and responsive. There are also greater risks that the process will feel exclusive to new partners and that the cost of running the partnership cannot be sustained.

RECOMMENDATION

Revisit expectations in the FIP rules that partnerships should be inclusive. Provide additional capacity to coordinate inclusive partnerships.

★ Even as partnerships move toward increased coordination and alignment, they find shared accountability is a much higher bar to reach.

The 14 partnerships have aimed for increased coordination, and especially those focused on implementation, have made substantial progress, including:

Integrated Project Planning – multiple organizations propose and implement projects together;

Collective Reporting – partners agree on metrics to track and report progress sometimes to multiple funders; and

Cross-Organizational Learning – organizations learn from each other to propose better projects.

These are all key building blocks to develop a sense of shared accountability, where partners hold each other accountable to design and implement the best projects to advance their collective goals, yet shared accountability is a much higher bar to reach. Many, if not most, partnerships have found they are not quite able to ask those harder questions although they aspire to that goal.

RECOMMENDATION

Consider whether there is adequate, reliable funding for partnerships to operate at a higher level of coordination and shared accountability – or whether a more modest level of strategic planning and cooperative decision-making would provide a better value.

★ **More ambitious goals require careful facilitation and clarity around decision-making.** Innovative approaches to restoration, including work in ecosystems that are not well-understood, tend to yield greater differences in philosophy and expert opinion due to greater uncertainties and risks (Arnold and others 2012).

Many of the 14 partnerships have expanded the focus and complexity of their work, such as:

Working with new partners with different perspectives,

Broadening the scope to include multiple species or upland and in-stream habitat,

Expanding the geography to include basins with different hydrology and geology, and

Expanding objectives and prioritization to include social and economic considerations.

In these contexts, partners can work more productively through differences with more clarity around how decisions are made and by whom and more support for careful facilitation. Individuals from many of the partnerships expressed a strong interest to improve in these areas. Effective facilitators, which can be internal or external to the partnership, remind people of decisions already made and effectively open up discussion on key questions to fully leverage the wisdom and expertise of partners.

RECOMMENDATION

Create training opportunities for facilitation, team building, leadership and how to manage competition.

★ **Funding drives commitment among partners, which is critical to high performance and resiliency. Multiple aligned funders over longer time frames create the potential for greater impact.**

Trusting relationships, respected leadership, open communication, efficiency and a willingness to learn and act together are all critical to a partnership's success, but they are not sufficient for high performance and resiliency if funding is not in place.

Partnerships described a leap of faith when transitioning from strategic action planning to implementation. If implementation funding is not secured, partners may not be able to sustain their commitment, and the energy invested in the plan may not yield the value expected.

When funders are aligned, for example around priorities, timelines and reporting requirements, partners increase their

commitment to each other and are incentivized to develop systems of shared accountability to reach collective goals.

When multiple funders make aligned investments over longer timeframes, partners are better able to commit to a science-based approach to adaptive management that requires substantial investment in developing a planning, monitoring and decision-making framework.

RECOMMENDATION

Work with other funders to create alignment around funding priorities, grant duration and reporting and monitoring requirements to offer complementary partnership-focused investments.

★ **To effectively boost impact, the FIP grant program must consider the funding landscape beyond the two-year or six-year grant duration.**

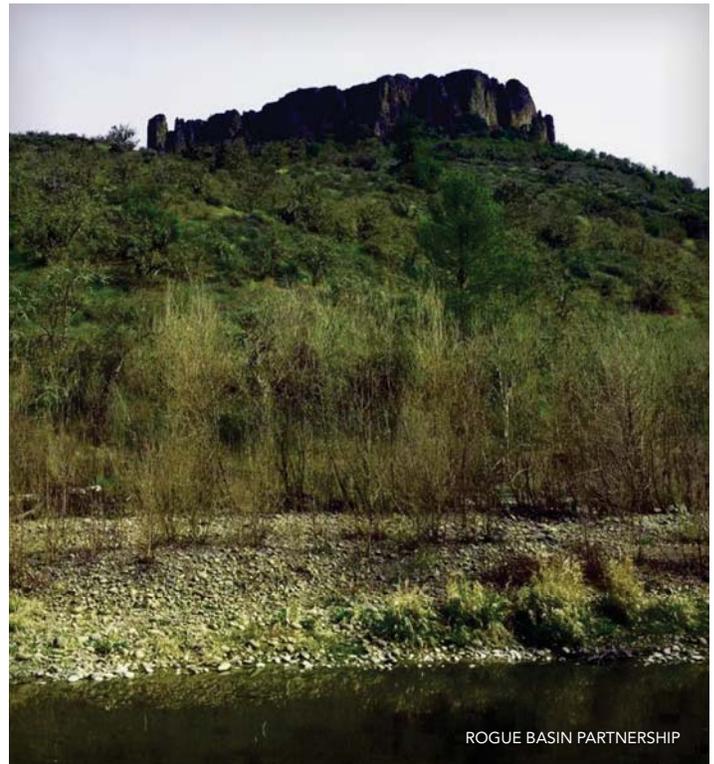
Many partners have said there is no roadmap for what funding will support their work after the FIP grant recognizing that sustained effort will be required on the order of decades, to realize desired ecological outcomes. While grantees were exceedingly grateful, many encouraged deeper thinking about the implications of a six-year timeframe. For many, the tight focus on an ambitious implementation timeline reduced capacity to maintain connection to the strategic action plan, continue updating it based on learning and develop new ideas for future opportunities. As partnerships concluded the two-year Development FIP grant, there was also considerable speculation and jostling about how to carve out the most competitive set of projects for their Implementation FIP application. A better understanding of the overall funding landscape and the value proposition of different partnerships types can help partnerships and funders target their investments and set realistic expectations for short-term and long-term performance.

RECOMMENDATIONS

- 1 Meet with partnerships two years before the end of their six-year grant or at the end of their two-year grant to assess progress and help identify resources and a roadmap forward that holds the greatest value proposition.
- 2 Consider adjusting the grant duration, offering a two-year grant after an Implementation FIP grant or awarding a second six-year grant after a waiting period.

“I’m really grateful that our partnership has shown sustained success and growth — new partners and additional investment, national and even international attention. It is helping to transform how society is thinking about the bigger problem and, I think, cultivating the ground for a much larger increase in the pace, scale and quality of restoration. We are on the cusp of an orbital leap of what we are able to accomplish because of the success of this project.”

Implementation FIP grantee



★ Partners need to reach broader audiences and constituencies to boost their efforts to a higher level. They have been exploring new approaches and expertise, but funding is limited to do so.

Many partners have felt they have had sufficient public awareness and support to be effective in the short term, yet they need to build broader awareness and support to reach long-term goals, especially for:

Efforts focused on public lands that will expand to private lands in the future or

Efforts focused on more liberal communities that would like to extend into more conservative communities.

Across partnerships, people recognized that you don’t have to win over the whole population to be effective, but you do have to communicate effectively with a smaller subset who care about these issues and who can be fierce critics in the absence of engagement and proactive efforts. Many partners have recognized this is an area where growth is needed and are seeking funding, tools and expertise along these lines.

RECOMMENDATION

Consider flexibility within the FIP program to fund communications and monitoring – needed to proactively build public support, improve practices and tell a meaningful, science-based story of progress – or work with other funders to address these critical gaps.

★ Tribes have unique and valuable perspectives with respect to long-term restoration goals.

Among the 14 partnerships, tribes have taken on a breadth of roles from a convening or leadership role to a peripheral or new partner. Tribal partners discussed a range of complexities that are often not well-understood but that heavily influence their interest and ability to engage. Partnerships requested more support and guidance on these topics. (See more in Part 1, pages 19-22).

RECOMMENDATION

Continue exploring creative approaches to support respectful tribal engagement and leadership.

Conclusion

Partners have greatly appreciated the opportunity to work and learn with OWEB through this study and this innovative partnership approach to restoration. The findings presented here aim to provide a roadmap and some next steps to push onward toward the next level of innovation and impact.



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Introduction

OWEB’s Focused Investment Partnership (FIP) Program was inspired by the idea of “collective impact” that partnerships can uniquely leverage the collective capacity of multiple organizations and accelerate the pace and scale of restoration when partners are strategically aligned around shared priorities and committed to mutually reinforcing actions (Kania and Kramer 2011).

The goals of OWEB’s FIP program are two-pronged:

1 To accelerate restoration and increase impact at the landscape scale by awarding a small number of Implementation FIP grants to high-performing partnerships to implement projects on the ground (about \$6 million dollars each over 6 years) and



2 To increase capacity and performance of partnerships by awarding a slightly larger number of Development FIP grants, formerly called Capacity Building grants, to support development of a strategic action plan and/or governance documents, which describe how partners will work together (up to \$150,000 each over 2 years).

While both grants are competitive, the Implementation FIP grant has been highly competitive. In January 2016, the OWEB Board awarded \$13.7 million to fourteen partnerships:

	PURPOSE	AMT/TIME	FUNDED PARTNERSHIPS
Development FIP grants <i>(formerly Capacity Building FIP grants)</i>	Develop partnership capacity, e.g., a strategic action plan, governance documents, a funding plan, etc.	Up to \$150,000 each over 2 years	8 Partnerships: Clackamas Basin Partnership John Day Basin Partnership Oregon Central Coast Estuaries Collaborative Rogue Basin Partnership Siuslaw Coho Partnership Umpqua Basin Partnership Willowa Habitat Restoration Partnership Wild Rivers Estuary Partnership
Implementation FIP grants	Implement large-scale, on-the-ground restoration projects, including some technical assistance and focused outreach	About \$6 million each over 6 years	6 Partnerships: Ashland Forest All Lands Restoration Initiative Deschutes Partnership Grande Ronde Restoration Partnership Harney Basin Wetland Initiative Oregon Model to Protect Sage Grouse Willamette Anchor Habitat Working Group

As OWEB launched this program, they recognized it was very different from their other grant programs. Their thinking was that the FIP grant offerings would incentivize the development of more formalized partnerships with well-developed strategic action plans and governance documents across the state, which would increase the collective capacity for landscape-scale restoration and attract more funding in general terms – whether or not the work of a particular partnership would be funded through a FIP grant. OWEB initiated this study to better understand how the FIP program can advance statewide restoration priorities through investments in partnerships.



Guiding Questions

1 What do partnerships need to be resilient and maintain a high level of performance and impact?

2 How can OWEB improve and innovate the Focused Investment Partnership (FIP) program to support high performing, resilient partnerships that make progress toward desired ecological outcomes?

Methods

To guarantee confidentiality and encourage candid feedback, OWEB contracted with an independent social scientist Jennifer Arnold, Ph.D. of Reciprocity Consulting LLC. From Fall 2016 to Spring 2018, Jennifer reached out to all 14 funded partnerships:

- **Attended a meeting of each of the 14 partnerships** that received a FIP grant in 2016. (lasting 3-15 hours)
- **Participated in 4 conference calls** (1.5-2 hours) with representatives of 8 partnerships hosted by OWEB to encourage peer-to-peer learning among Development FIP grantees

- **Conducted interviews with 47 partners** from diverse backgrounds lasting 30-90 minutes to understand the history, context and vision for each partnership, including expected benefits and costs from the partnership and their approaches to managing challenges and risks
- **Received survey feedback from 136 partners** across the 14 partnerships using a confidential online survey (See Appendix) that asked about experiences with the partnership and suggestions for what is most needed to build a resilient partnership, and
- Analyzed interviews, surveys and meeting notes using a **qualitative approach called grounded theory** which builds an explanation of the system inductively from the collective experiences and reflections of participants (*Charmaz 2006*).

Diversity of Partnerships

The 14 partnerships that are the focus of this project have different histories and context, which influence the culture of the group, how they work together, their ability to attract key partners, their potential for fundraising and their outlook for large-scale implementation. Aspects of diversity are described in more detail in Part 1 (see pages 3-5) and include:

- Time that partners have worked together
- Number and size of partner organizations
- Tribal involvement and potential for competing tribal interests
- Agency involvement and the longevity of staff in key positions
- Regional and national environmental non-profit involvement
- Mix of urban and rural communities and proximity to large or affluent urban areas
- “Anchor” funders with an interest in the focus area
- Mix of younger and experienced professionals with connections to local communities
- Prior experience with strategic planning and/or collaborative groups
- Prior experience contributing to the development of OWEB’s FIP Program
- Geographic scope and breadth of activities covered in the strategic action plan
- Rules defining “membership” and
- Degree of formalization of the partnership structure.



A Useful Way to Think About Partnerships

Partnerships are networks of people and organizations working together to advance shared interests. They operate on the fundamental belief that partners can achieve more collectively than individually. Partnerships require a great deal of upfront investment in relationship building, typically one to three years (See Part 1 pages 43-46), and once a partnership is established, there are inherent costs and challenges related to communication, decision-making, and coordinated action (Brouwer and others 2015).

Partners and funders commit time and resources based on their perception that the expected value of the partnership outweighs the costs, challenges, and risks. Various

internal or external events, such as changes in staffing or policies, may influence people’s perceptions of the value and costs of the partnership, and thus partners’ commitment and the overall performance of the partnership. A resilient partnership emphasizes learning and feedback to continually build confidence in the value of the partnership and actively manage the inherent costs, challenges, and risks to maintain a strong value proposition that can maintain engagement despite crisis and change (Habana-Hafner and others 1989; Cigler 1999).

For partnership champions and funders, understanding the range of partnership types can help guide the group strategically toward the structure that best fits the history, context and value proposition for partners. From the Public Administration literature, partnerships are described along a continuum where partners are more autonomous at one end and more interdependent at the other (Habana-Hafner and others 1989; Cigler 1999; Mandell 2001).

Continuum of Partnership Types



(Adapted from Habana-Hafner, S. and H. B. Reed. 1989. *Partnerships for Community Developments*. Center for International Education.)

LEARNING NETWORKS

Partners come together to share information but may have little formal connection or shared work together.

COOPERATIVE PARTNERSHIPS

Partners remain autonomous, while sharing responsibilities for specific projects, such as a contractual relationship or task force.

COORDINATED PARTNERSHIPS

Partners retain most of their autonomy, but actively work with each other to align their missions and activities to strategically advance mutual goals.

COLLABORATIVE PARTNERSHIPS

Partners commit to a long-term shared vision and take on complementary roles and responsibilities to achieve that vision, often referred to as the collective impact model (Kania and Kramer 2011).

The key distinction is the degree to which individual partners remain separate and autonomous or form new combined organizational structures for long-term change and interaction (Cigler 1999, Mandell 2001). They also represent different purposes and structural characteristics that require different levels of trust, depth of communication, investment in partnership operations, and length of time to develop. As you move from left to right on the continuum, you find increasing:

- Complexity of purpose,
- Intensity of linkages,
- Formality of agreements,
- Commitment to each other and greater whole,
- Interdependence of purpose and operations,
- Risk to individual organizations,
- Capacity to achieve systems change, and
- Investment in governance and communications

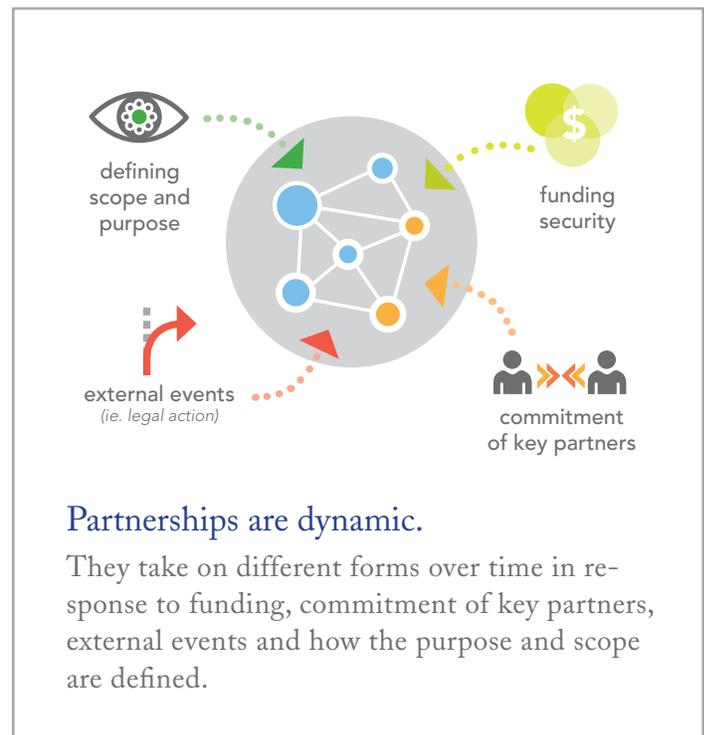
Partnerships are dynamic and may shift along this continuum over time, for example in response to changes in leadership, a crisis, or opportunity. Common challenges frequently encountered by even the most successful partnerships include:

- High staff turnover,
- Personality clashes, including institutional and cultural differences,
- Coping with high expectations,
- Reducing transaction costs, and
- Maintaining the interest of the private business sector (Sanginga and others 2007).

Often new partnerships establish first as a coordinated network and may evolve to a collaborative network with pooled resources and a combined organizational structure as trust and commitment build over time (Raine and Watt 2013). Conversely, some partnerships operate quite effectively as a learning network or cooperative partnership, and the expected value of a more complex, collaborative structure does not offset the increased costs. Some partnerships are established for a specific purpose and time period, which again may not warrant a more resource-intensive collaborative structure. Partnerships are highly dynamic and do not necessarily follow linear trajectories of development (Mandell and Keast 2008).

Findings

The 14 partnerships in this study represented the full range of partnership types (See Figure 1, page 14) They differ greatly with respect to their history and context. Many have taken on different forms over time in response to changes in funding, commitment of key partners, external events, such as changes in policy or litigation, and how the purpose and scope have been defined.



These findings represent a distillation and synthesis of insights across the 14 partnerships interpreting how each of their contexts shape the larger picture of how partnerships function and what is important for high performance and impact.

Confidential interviews yielded candid feedback, and anonymous quotes in this report are used to bring to life the words and specific experiences of partners. While these quotes reflect individual perspectives that are meaningful to the bigger picture, they may not be representative of all the partnerships.

What do partnerships need to be resilient, high-performers?

1 Different types of partnerships have different costs, risks and benefits. Resilient, high-performers find the right type of partnership to provide the greatest value proposition to partners. (See Figure 1, page 14)

The partnerships in this study have each provided different value and required different levels of resources to be effective. Looking back at the history of each partnership, many have moved along the continuum of partnership types, sometimes back and forth, with different levels of commitment and interdependency at different times in large part driven by funding.

Coordinated or collaborative partnerships, which require a high level of alignment and coordination among partners, are often believed to provide the greatest value and are held up as an ideal that all partnerships should work toward. However, learning networks and cooperative partnerships, which require less investment and hold less risk for individual partners, may provide a greater return on investment in many or most contexts. Cooperative partnerships, in particular, which are typically structured to achieve specific project deliverables, can be an efficient way to accelerate implementation and impact.



Learning networks in many cases have had a negative stigma as funders and partners feel there is a risk that learning may not be focused on strategic questions and may not directly increase performance or capacity for impact – or if it did, it would be difficult to quantify or track. However, there is ample literature to suggest if well-designed and targeted, learning networks can and do have great impact (Brown and Salafsky 2004; Senge 2006; Wenger and others 2002). Also, partners clearly expressed the need to strengthen relationships and increase communication and learning to avoid working in silos and proposing piecemeal projects suggesting that the value proposition for learning networks has not yet been fully explored.

“I’m a fan of collaboration in this mechanism where there is a start and an end. I’m an action oriented person. I like to see results from our discussion. Especially working with our land owners, if they commit to restoration, we need to walk the talk and provide technical and financial assistance to do projects so we can demonstrate impact 10 years down the road.”

Core Partner

“I appreciate the cultural shift even in the few years since the I-FIP grant. Connecting more frequently, sharing ideas and plans, technical knowledge and peer-to-peer sharing is great. It will help the greater movement. I hope we can keep that culture going even when the funding for implementation isn’t there.”

Core Partner

Figure 1

Identifying the Value Proposition of Different Partnership Types

Different types of partnerships along a continuum from more autonomous to more interdependent have different costs, risks and benefits. Over time, partnerships may transition from being more autonomous to more interdependent and even back again, often driven by funding and the value proposition of the partnership as perceived by key partners and funders. A better understanding of the value propositions of different partnership types can help partners and funders target their investments and set realistic expectations for short-term and long-term performance.

More autonomous

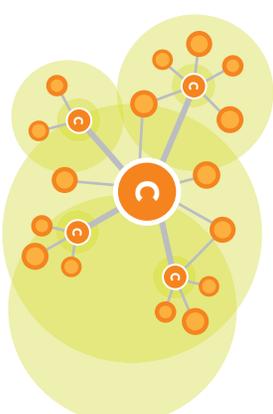
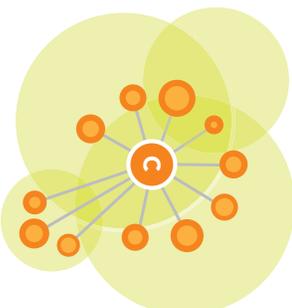
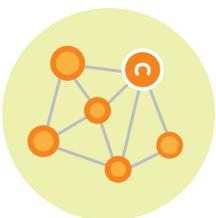
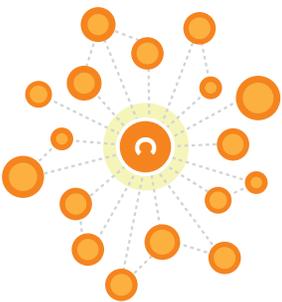
More interdependent

Learning Network

Cooperative Partnership

Coordinating Partnership

Collaborative Partnership



Purpose: Share information, improve on best practices and build social capital for future collaboration.

Usually a large number of partners.

C Coordinator serves as an ambassador and convener.

\$ A low level of investment focused on convening, learning and communication.



Partners are **loosely committed** to high-level strategic priorities for learning and communication.

Purpose: Increase capacity to implement projects identified as a shared priority.

Usually a small number of partners.

C Coordinator serves as a project manager, often a role taken by one of the partners, in some cases rotated among partners.

\$ A moderate to high level of investment focused on project implementation.



Partners are **moderately committed** to a strategic action plan as long as there is funding for implementation.

Purpose: Align partners around shared priorities and coordinate implementation.

Usually a moderate number of partners.

C Coordinator serves as facilitator and project manager

\$ A high level of sustained investment, typically multiple large funders, focused on planning and implementation with some outreach and monitoring.



Partners are **moderately to strongly committed** to a strategic action plan. Their commitment is renewed with each new round of funding.

Purpose: Align around shared priorities, coordinate implementation and improve outcomes through science-based adaptive management.

Usually a moderate to large number of partners.

C Coordinator serves as a facilitator, convener and ambassador. If the structure includes work groups, the coordinators of these work groups serve as project managers.

\$ A very high level of sustained investment, typically multiple aligned funders, focused on planning, implementation, monitoring, outreach and adaptive management.



Partners are **strongly committed** to a strategic action plan and an adaptive management framework based on reliable long-term funding.

2 Funding drives commitment among partners, which is critical to high performance and resiliency.

Funding that has required or promoted collaborative work, such as OWEB's FIP program, has pushed partnerships toward being more interdependent.

"The process for applying [for an Implementation FIP grant] although complicated does a great job of pushing partnerships to organize for successful planning, implementation and monitoring of projects."

"The FIP program helps to form resilient partnerships by forcing partners to work together through the implementation of the FIP grant itself. Significant relationships can be built in 6 years, whereas the partnership may have unraveled without funding to help push it along for those 6 years."

"Money drives commitment in a big way. However, not all project concepts evolve the way they were initially thought of, so commitments have to also evolve."

Quotes from Core Partners

3 Aligned funders create greater commitment and shared accountability among partners, for example when funders are aligned around priorities, timelines, reporting requirements, etc. Aligned funders over longer timeframes create the potential for greater impact and the possibility of science-based, landscape-scale adaptive management.

The most pronounced examples of collaborative, integrated work among the 14 partnerships have developed alongside the alignment of multiple large funders, referring to complementary or mutually reinforcing funding priorities, timelines, reporting requirements, etc. In essence, significant funding awarded to the partnership drives greater commitment and interdependency. And greater alignment among funders especially over longer

timeframes motivates even greater commitment and integration among partners, to the point where partners are willing to invest in shared structures for planning, reporting and continuous improvement that go beyond grant requirements.

This long-term commitment that develops from aligned, reliable funding creates more long-term possibilities to effectively implement a collaborative approach to science-based, landscape-scale adaptive management – which is the idealized vision of how partnerships can collectively increase their impact, often referred to as collective impact (Kania and Kramer 2011) or collaborative adaptive management (Scarlett 2013; Susskind and others 2012).

Alignment among funders is extremely valuable with the caveat that flexibility is also critically important to partnership performance. Many partnerships were able to increase performance because they had the flexibility within their portfolio of funders to mix and match project proposals and funding sources based on project duration, geographic focus, specified land ownership and preferred type of activity, etc. If funders were too rigidly aligned around the same priorities or requirements, partnerships might not have this type of flexibility.

4 Trusting relationships, respected leadership, open communication, efficiency and a willingness to learn and act together are critical to success, but not sufficient for high performance and resiliency if funding is not in place.

While commitment has largely been driven by funding, partners described how their success and ability to live up to the partnership's potential was largely tied to their ability to build trust and open communication so that partners work effectively together and build public support. However, even with high levels of trust and willingness to work together, partners described a clear risk that without funding to support their collective work they may not be able to maintain strong linkages and continue working together in a sustained way (See Part 1 pages 25-27). Overall, this study finds that partner commitment is largely driven by funding and efficiency, while collective success is largely also driven by trusting relationships, respected leadership, open communication and a willingness to learn and act together.

“One of the problems that that I see crop up from time to time is the lack of monetary compensation for participation as this can take away time and energy from partners’ day-to-day work. Right now, we have all decided that this is worth it, but in the long run, we all will need to dedicate time and resources we sometimes don’t have readily available. Monitoring and evaluation programs are time consuming and don’t get enough funding to provide the necessary feedback to the partners.”

Core Partner

In many cases, partnerships have invested significant resources in relationship building and planning to stretch and grow to a higher level of commitment along the continuum where they hope to more intentionally integrate their work and attract partnership funding to tackle ambitious landscape-scale objectives. In other cases, partnerships have experienced trust issues, but they continue to work effectively together and realize success because of the interdependency established by the funding along with commitment to their shared vision and pride in their work.

5 Integrated project planning, collective reporting and cross-organizational learning are key building blocks to developing a sense of shared accountability for greater impact. Shared accountability is a much higher bar to reach.

Based on long-term reliable funding or good prospects for funding and high partner commitment, most partnerships focused on implementation have made substantial progress toward integrated project planning, collective reporting and cross-organizational learning – although achieving shared accountability is still a work in progress.

Several partnerships have promoted integrated project planning by defining partner roles and structuring work groups in ways that require different organizational partners to work together in designing and implementing projects. Yet for many partnerships, projects are still proposed and implemented by individual organizations working relatively independently of each other. Thinking into the future, many of these partners are increasingly

interested in developing collaborative projects, referring to the difference between “slicing the pie,” as in dividing available funding among partners, and “expanding the pie,” as in working together creatively to attract more funding. However, partners need a certain level of trust and capacity to invest the time and take on the risk of developing project proposals jointly and jointly applying for funding.

“Our partnership is strong and stable but also growing and strengthening as partners are slowly beginning to collaborate more and more on a project level with one another.”

“This is relatively new for the old guy in the room. We can let some project ideas fall off the list if there are better ideas in the room. We have the opportunity to talk about it instead of sending a flurry of applications to the funder independently.”

“The partnership and FIP grant has helped to align our groups to work more closely together toward a shared common goal. We are really getting to know each much better, building trust between one another and collaborating much more with one another than ever before. Several of us have taken on new projects together as a result of getting to know and trust each other more through our partnership.”

Quotes from Core Partners

Most partnerships, which are actively focused on implementation, have made progress developing systems to report collectively across funding sources, typically focused on outputs, but in some cases also ecological outcomes. Most partners realized quickly that this is no small lift and requires capacity to agree on categories of data to track, to collect and manage data and to generate reports that are meaningful to different audiences. Several

partnerships have invested time and resources in developing databases and a streamlined workflow to maximize efficiency and the usefulness of data collected and shared. Time for discussion and agreement is needed to identify processes and metrics that work for everyone, including considerations for land owner privacy and expectations for how data will be analyzed and used. Some partnerships used grant funds to develop databases and improve workflow. Some partners have reported investing considerably more time than budgeted, but admit the investment is worthwhile if it establishes a system that everyone can use moving forward assuming the partnership continues to attract funding.

Most partnerships discussed clear “wins” in cross-organization learning, mostly directed at improving best practices and project implementation, as a result of more frequent communication, better established relationships and in some cases the technical review process. Partnerships have approached technical review in different ways. Some technical review teams have been initiated by OWEB, while others were already established by the partnerships and influenced by other funders. Not all partners view the technical review process as beneficial primarily due to the inefficiencies and awkwardness of the bureaucratic process. However, many partners do find value in technical review beyond the funder’s requirement for due diligence, especially when there is a site visit component or other facilitated forum to encourage learning among project proponents and technical reviewers that goes beyond receiving and responding to comments.

“Meeting quarterly seems good for our group. I think it would be really helpful for us to have at least one field trip annually to see partner projects on the ground so we can also be collaborating on successes, challenges etc. Conversations will be very different when on site compared to in a meeting room all day.”

Core Partner

Many partners had specific suggestions for improving the technical review process to enhance cross-organizational learning, for example developing a structured decision-making framework, inviting in specialized technical experts, providing support for stronger facilitation and creating layers of review to tease out strategic policy

questions from technical issues. Partners who shared some of these suggestions had mixed feelings about how to share their ideas with funders and/or other partners, which indicates room for improvement to promote open communication and shared accountability.

Overall, developing a sense of shared accountability, where organizations hold each other accountable to effectively implement projects and advance the larger collective vision, is a much higher bar than integrated planning or collective reporting. Shared accountability requires significant trust, well-developed communication skills, strong and diplomatic leaders and a culture centered around feedback, learning and adaptation to achieve the collective vision. As one partner explained, we have not yet developed the trust to ask those harder questions during project development and technical review, but that is where we would like to go.

“I feel responsible for my specific project. I feel zero commitment in other people’s projects. Ideally, I guess we would all want to see one another succeed, but there is a weird level of competition and few incentives to cooperate when we compete for funding.”

“People are just starting to share projects – they are not yet asking deeper questions to critique each other’s projects. They are still careful and polite and don’t want to step on toes. If I were to ask those deeper questions as the coordinator, they might stop responding to my emails.”

Quotes from Core Partners

Not surprisingly, this is a persistent challenge in partnerships since accountability can be a sizeable challenge even in well-run traditional organizations that have the luxury of clear lines of authority with policies and procedures to promote accountability in job descriptions, work plans, performance reviews, promotion criteria, etc. (Senge 2006).

Partnerships that demonstrated the clearest examples of integrated planning and collective reporting, which are the building blocks of shared accountability, come from partnerships where there is some alignment among large

funders. This seems to drive coordination and collaboration most even where trust among partners is limited. In some partnerships, trust among partners and commitment to a larger vision have created the push for integrated planning, but even in these cases, partner commitment to implementation and accountability has become clearer and more explicit when funders are aligned.

6 When working with innovative restoration approaches or in ecosystems not well-understood, partnerships benefit from more clarity around decision-making and more support for careful facilitation to productively work through differences in philosophy and expert opinion.

Innovative approaches to restoration, including restoration in ecosystems that are not well-understood, tend to yield greater differences in philosophy and expert opinion – for good reason, because there are greater uncertainties and greater risks about whether planned activities will have the desired impacts (Arnold and others 2012). However, the potential for learning is also greater in these situations and arguably that learning is critical to the recovery of priority species and habitats.

In these contexts, partners are better able to productively work through differences in philosophy and expert opinion when there is more clarity around decision-making, for example clarity for how decisions are made and by whom, and support for careful facilitation. Individuals from many of the partnerships expressed a strong interest in improving in this area. Effective facilitators, whether internal or external to the partnership, can remind people of decisions already made through the accepted process and effectively open up discussion on key questions to fully take advantage of the wisdom and expertise of the partnership. (See *benefits and risks of internal and external facilitators in Part 1 pages 27-28.*)

Several partnerships also discussed the challenge of teasing apart philosophical questions at the level of strategic action planning, for example what type of restoration activities are prioritized in what areas, and technical questions at the level of project development, for example best practices for weed control or placing woody debris in sensitive wetland areas. In some cases, philosophical issues are not identified until specific projects are discussed through the technical review process. For example, in some cases, new partners or new experts to the technical review process have stepped into a partnership with questions about decisions that were already fully vetted



“While we meet fairly regularly, we still need to work on developing a clear decision-making process. Are we a democracy with majority rules or is there room for dissenting opinions? We don’t have this down yet, and it does lead to some confusion among partners. That being said, we are light years ahead from where we were just six or seven years ago.”

“This group often uses a ‘consensus’ model in which two or three vocal individuals express their thoughts openly. If the other individuals in the group remain silent instead of agreeing or disagreeing, then the group facilitator assumes they have reached group ‘consensus.’ Silence can’t be interpreted as consensus since many team members don’t feel comfortable disagreeing with others publicly.”

Quotes from Core Partners

and established. If the new person represents a key constituency and the partnership would like to encourage their long-term commitment, it may be important to slow down and revisit decisions. In other cases, facilitators can reiterate the decisions already made to bring the new person up to speed and move onto other discussion topics. In the worst-case scenario if not handled well, these situations can lead to hard feelings, distrust and frustra-



tion among partners who either feel shut out of a decision or who feel paralyzed that the work is not moving forward despite past decisions to do so.

Partners highlighted a few key steps to facilitate these philosophical and technical conversations smoothly:

- documenting key strategic decisions and providing a clear rationale for each,
- clarifying who makes decisions in strategic action planning and in the technical review process,
- ensuring everyone feels comfortable sharing their views, and
- clarifying how consensus is reached.

On this last point, partners from a few different partnerships described a familiar situation where the facilitator would ask if everyone was in agreement and when people nodded and no one spoke up, the facilitator concluded that consensus had been reached. These partners felt that at times there were differences of opinion where the group would have benefited from more discussion and that facilitators could use more training and clarity on how to facilitate consensus building. Some partners also suggested that training and mentoring on facilitation, team building, leadership and how to manage competition would greatly help partnership performance.

RECOMMENDATION

Create training and mentoring opportunities for facilitation, team building, leadership and how to manage competition.

7 Partners need to reach broader audiences and constituencies to boost their efforts to a higher level. They have been exploring new approaches and expertise, but funding is limited to do so.

Most partnerships have built community credibility through the diversity of their boards (or the boards of their partner organizations), who represent different interest groups, constituencies and sectors. Also, a few partnerships have had remarkable success developing trust and buy-in among landowners – and much can be learned from them. Yet most partnerships have admitted that their potential to build public awareness and support in a broader sense is underdeveloped. Many partners felt they have had sufficient public awareness and support to be effective in the short term, yet they need to build broader awareness and support to reach long-term goals, especially for efforts focused on public lands that will expand to private lands in the future or efforts focused on more liberal communities that would like to extend into more conservative communities.

“You’re not going to resolve most natural resource issues within boundaries, especially if you want to maintain ecological productivity. Most habitat is on private lands, not just the federal lands. If we want to be effective, we have to work with private land owners, and we need relationships to do that.”

Core Partner

Across partnerships, people recognized that you don’t have to win over the whole population to be effective, but you do have to communicate effectively with a smaller subset who care about these issues and who can be fierce critics in the absence of engagement and proactive efforts. However, across the partnerships concern was expressed that few funding sources are available for proactively building relationships and conducting education and outreach, which limits the time and capacity that people have to dedicate to reaching these broader audiences.

“The inability to implement restoration actions on private land has posed a chronic challenge.”

Core Partner

“While the entire public is not even interested in being informed, the few that are want it badly. They will get information from the partnership, as well as potential detractors, so it is important to provide the positive narrative.”

“For the most part, 80% or more of our public has no interest in this work, so the support (or lack thereof) from the 20% becomes magnified (or not). This is a challenge to us only in that the interested 20% of the public can drive debate, discord and delay around our project implementation schedule and costs.”

Quotes from Core Partners

Despite this limitation, some partnerships have been positioning themselves to boost their efforts to a higher level of engagement working with consultants, hiring communications staff and/or relying on in-kind partner contributions. These partnerships have worked on a range of engagement and communications activities, such as:

- defining specific target audiences,
- more intentionally building relationships for example through a neighbor-to-neighbor approach,
- building a “library” of successful restoration projects for public tours,
- developing a communications plan,
- building an online and social media presence,
- increasing visibility through videos and storytelling, and
- working with social scientists to understand social acceptability and economic trade-offs.

Many partners have recognized this is an area where growth is needed and are seeking funding, tools and expertise along these lines. (See Part 1 pages 22-24 for more examples.)



“We need more outreach and education to the community about progress and successes. We want to do this, but it’s hard to find time, capacity and funding for it. We need to come up with an achievable communication and outreach plan, and we need to have specific messages for defined audiences (current grant funders, potential grant funders, farmers and rural residential, urban, etc.). We need more funding to achieve this.”

“When we look at the landscape. everyone really loves the word resilient. What does it mean? Adaptive to change. It’s really hard because so much stuff is changing all the time, human conditions, economics, climate change, sea level — you have to more realistic about the timeline. It’s got to evolve organically. You’ve got to respect the people that live there. I asked land owners why they were willing to work with me. They said, you walked into this room and you really cared about what we had to say and you didn’t have an agenda. That’s why we said we want to work with someone like you.”

Quotes from Core Partners

8 Tribes have unique and valuable perspectives with respect to long-term restoration goals. Partners requested more support to respectfully engage tribes.

Among the 14 partnerships, tribes have taken on a breadth of roles from a convening or leadership role to a supporting or new partner. As discussed in Part 1 of the report, tribal partners discussed a range of complexities that are often not well-understood but that heavily influence their interest and ability to engage (See Part 1 pages 19-22).

After reviewing Part 1, many non-tribal partners expressed a strong interest in this section of the report, especially some partnership leaders who are highly motivated to build stronger relationships with tribes. Several partners acknowledged that their standard approach of calling or emailing tribal representatives about upcoming meetings falls far short of their goals for tribal engagement. People have been very interested in tools and strategies to build authentic tribal engagement, yet relationship building takes time and capacity is often limited. Several partners expressed gratitude for the training presented by the Confederated Tribes of Grand Ronde and organized by the Network of Oregon Watershed Councils.

RECOMMENDATION

Continue exploring creative approaches to support respectful tribal engagement and leadership.

9 Efficiency is critically important to performance and resiliency. Collaboration is a double-edged sword. A more fully developed collaborative process is needed to develop shared accountability, but an overly burdensome process directly stifles group morale, capacity to advance the work and retention of skilled leaders.

Keeping partnerships functioning smoothly is no small task – both for coordinators who provide leadership and connectivity, but also for individual partners who must keep up with decisions at the partnership level along with specific tasks associated with planning, outreach, proposal development, project management, technical review, reporting, etc. The more time-intensive or bureaucratic any of these tasks become, the more risk there is that partners might not be willing or able to follow through, which can directly impact group morale.

Some partners brought up the risk that an overly burdensome or bureaucratic process may push skilled leaders to

“The biggest challenge is commitment of time, not that I’m not willing. It’s just easy for this work to bump to a second or third priority as other things come up that are more important to my primary responsibilities, especially knowing that someone else will step up.”

Supporting Partner

look for other opportunities where they would have more capacity or flexibility to do the work they are most passionate about. Partnerships broadly expressed that the real cost of keeping everyone connected, informed, engaged and making decisions together is generally underestimated and underfunded. And yet to realize the ideal of a collaborating partnership through greater interdependence and shared accountability requires greater investment and complexity at each step to maintain buy-in and incorporate learning into implementation.

Many partnerships have an informal style of running meetings and communicating with each other as a result of working together for many years. Yet many partners also emphasized the value of formalizing their partnership as a result of the FIP grant, which led them to have more open conversations about scope, vision, roles, responsibilities and decision-making – the importance of this step was especially emphasized by some tribal partners (see Part 1 page 21). An informal approach can be more efficient as long as leaders are able to maintain trust and open communication so that all partners can contribute to planning and prioritization decisions, which becomes more difficult as the partnership stretches to achieve more ambitious goals, work in new geographies and/or include new partners as evidenced by the partners who felt strongly that more clarity was needed around decision-making (see Finding 6 above).

“One of the partners felt we needed a partnership document early on – an agreement of how we will work together. We said, ‘No, we know how.’ But ultimately, they were right. We needed an inter-organizational agreement to resolve issues that came up. We haven’t returned to it since, but we can go back to our agreement if something does come up.”

Core Partner

In some partnerships, trust has been stretched thin, and partners have different expectations for roles and work products, which have not been fully discussed leading to tensions and even divisions in some cases. Partnerships that have long-term underlying trust issues require more time and investment to manage tensions and perceptions of territoriality. Across the partnerships, there was interest in more tools, support and access to coaching to help partners proactively work through challenging trust issues and build a framework for open communication that would free up time and energy to advance their work, ultimately increasing efficiency and performance.

“Sometimes partners can’t articulate or identify the type of help they need. Professional coaches could come in and help partners with internal relationships and mechanics. OWEB might not be the right funding source, but some partners might need things like that to advance to the next level challenges.”

“The most challenging is the combo of different levels of commitment and engagement from different stakeholders and tension with different people’s priorities that shift over time too. It’s frustrating and hard. Sometimes you click with some personalities and with others you don’t.”

Quotes from Core Partner

When considering efficiency, governance documents are another area where important conversations and decisions can help set a foundation for success, while too much time or formality can feel burdensome. Many partners described governance documents as useful, especially the conversations that went into developing them, but they also emphasized that respected leadership and group culture was equally or more important to building trust, open communication and ultimately working effectively together.

RECOMMENDATION

Provide more tools and leadership training on group dynamics and governance could so partnerships can “right-size” their governance documents, including defining roles, responsibilities and decision-making rules.

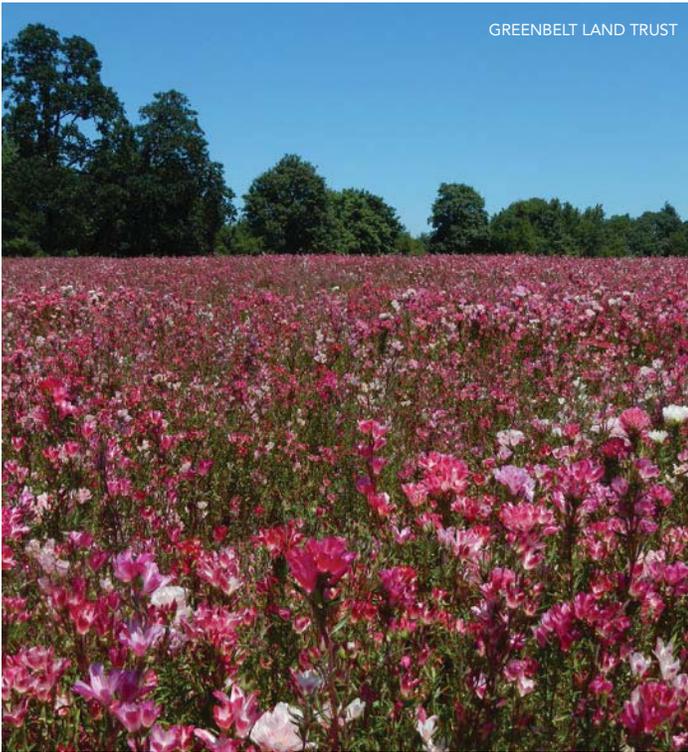
10 Large, inclusive partnerships that seek alignment and shared accountability have greater costs for coordination and partner engagement. Efficiency is a more pronounced challenge. There are greater risks that the process will be overly burdensome and feel exclusive to new partners. There are also greater risks that the cost of running the partnership cannot be sustained.

Large, inclusive partnerships that cover a broad geographic area and encourage new participants have even higher costs for outreach, onboarding and ongoing communications. A coordinated or collaborative approach to planning, implementation, reporting and accountability in these contexts has greater potential to be overly burdensome because of the logistics of keeping everyone engaged, aligned and responsive. The amount of time required for active engagement and the limited implementation funding available to each partner may create significant barriers for participation. In some of these seemingly inclusive partnerships, new partners have felt excluded or that they had to be persistent to find an opening to participate.

“About a year ago I engaged with this group. There were LOTS of phone calls and emails with our coordinator. I had such a steep learning curve. It’s a little hard to engage in a funding process when there are no funds on the table for you, but you are written down as a partner. It’s been a challenge at some points to convince our board that it’s worth the staff time to go.”

New Partner

Coordination for these large successful partnerships requires in-kind or general capacity funding, but this type of flexible funding at the scale required is difficult to secure. In many cases, it is only available in specific geographies or habitats where funding agencies or private donors have existing investments. With these costs and inefficiencies associated with large, inclusive partnerships, there is greater risk that the process will be overly burdensome and that there will not be long-term funding to support coordination and broad partner engagement.



“In hindsight, there is too little money for the role of coordinating such a large partnership. I was totally naïve about that. I completely underestimated. A lot of things would be good for partners to know – reporting on funder priorities and interpreting technical review comments – but there’s not a lot of capacity for me to do that. People start cutting budgets, and you cut in those places because you want the projects on the ground.”

Core Partner

Shared accountability can also be a bigger lift in large, inclusive partnerships. Coordinators, especially of inclusive partnerships, carefully weigh efficiency and diplomacy as they reach out to partners to request input, feedback or participation in shared work. They have a key vantage point to see gaps in follow-through and offer feedback or ask hard questions to improve shared accountability. However, they also realize that if they push too hard or ask for too much from partners, they risk overwhelming or alienating them, which could actually reduce participation and follow-through, for example asking partners to contribute to a shared reporting database that is different from other reporting requirements or asking partners to reprioritize proposed projects based on new information.

11 A roadmap for how to sustain funding is critical for resiliency. A better understanding of the value propositions of different partnerships types can help partnerships and funders target their investments in planning and set realistic expectations for short-term and long-term performance.

Many partners have said there is no roadmap for what funding will support their work after the Implementation FIP grant – or after the Development FIP grant if they are not successful in getting an Implementation FIP grant. After the Implementation FIP grant, some partnerships may be close to completing the actions in their strategic action plan if it addressed a focused scope of work and geography that was designed to fit the six-year funding window for the FIP grant (See Figure 2, pages 24-25, Scenario A). These partnerships may be ready to transition their work to a maintenance and monitoring phase. Other partnerships focused on large-scale, complex restoration challenges will have to secure additional funding to continue working in a coordinated or collaborative partnership.

“From a partner perspective, it’s going to be a challenge. I don’t know if other partnerships have gotten to this part where initial investments to keep partners at the table are not there the way they were in the past.”

“Frankly you don’t have resiliency without institutional funding. You build the capacity, the strategic thinking, the ability to fundraise – that’s your resiliency – but there needs to be institutional funding if you want the partnerships to thrive in the future. Otherwise it will be hard to them together.”

Quotes from Core Partners

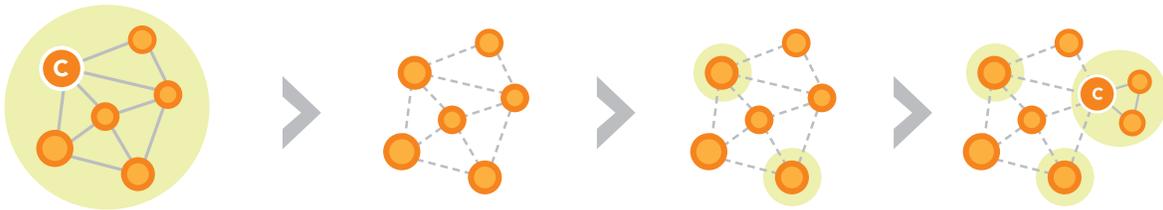
Many partnerships have said they have some flexibility for general capacity support to hold the partnership together after the FIP grant, but the long-term outlook will depend on what funding opportunities can be lined up (See Figure 2, pages 24-25, Scenarios B and C). A few partnerships have other large reliable funding sources, but many of these are also scheduled to ramp down over the next few years. Several partnerships have been optimistic that they will attract other large funders to support a high level of collaboration even though their sources might not yet be fully identified.

Figure 2

A Roadmap for Partnerships with Different Funding Options



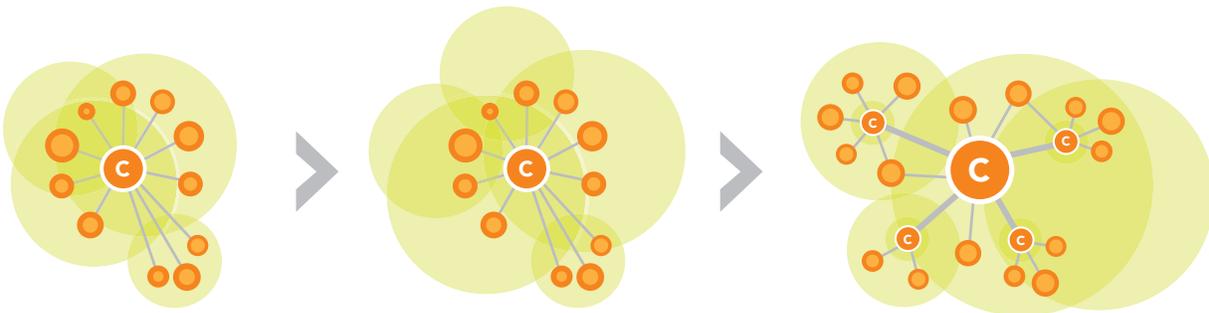
Scenario A Investment in Accelerated Implementation



Partners develop a focused strategic action plan and raise enough funds to complete priority actions.

Then linkages and commitments among partners become looser or potentially the partnership is reconfigured to focus on a new geography or set of priorities.

Scenario B Investment in Long-term Coordination and Implementation with Potential for Adaptive Management

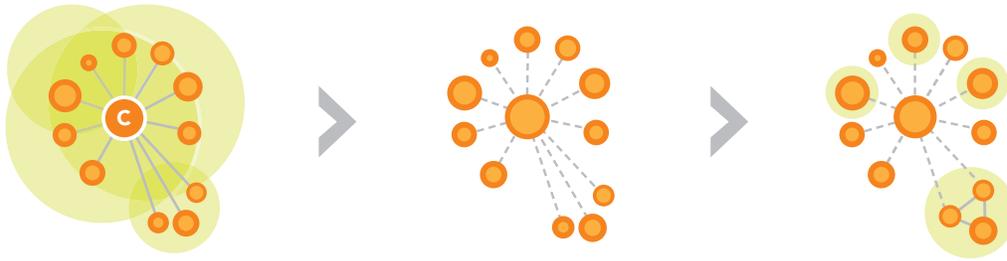


Partners create a long-term strategic action plan and secure adequate funding to support ongoing coordination and implementation of collaborative projects.

With multiple aligned funders, there is a greater chance that they will develop commitment for shared reporting, monitoring and adaptive management.

Scenario C

Investment or Incentives for Long-term Coordination with Risk that Implementation Funding is Not Secured

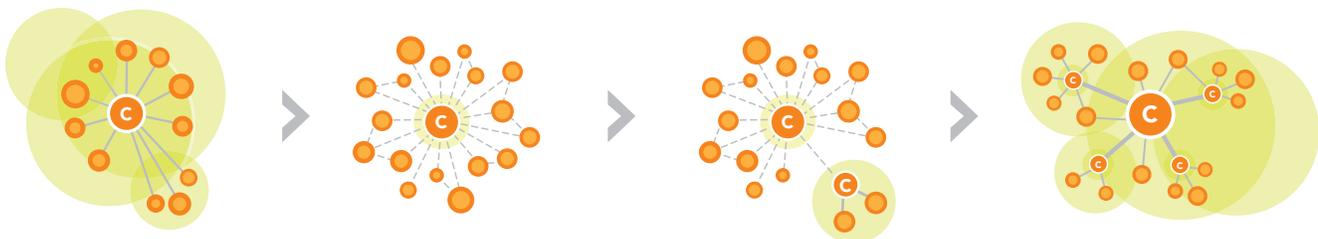


Partners create a long-term strategic action plan, but implementation funding is not secured for the partnership, only grants to individual projects.

The linkages and commitments among partners become looser. The plan may still be used for general guidance as partners find it useful, but there is no capacity to coordinate joint fundraising, project planning and reporting or to update the plan based on new information and learning.

Scenario D

Investment or Incentives for Long-term Coordination with Risk Mitigated by Investment in a Continued Learning Network



Partners create a long-term strategic action plan, but implementation funding is not secured.

A subsequent investment in the coordination of a learning network could sustain the partnership at a lower level of coordination, while building social capital for future collaboration as funding becomes available.

Scenario E

Investment in Learning Networks with Potential for Adaptive Management



Partners create a high-level strategic plan focused on key assumptions and learning objectives, for example centered around best practices and priority restoration strategies.

Targeted investments in convenings and communications create the potential for adaptive management and learning that could yield more robust, more impactful restoration projects even if the partnership does not tightly coordinate which projects are prioritized for implementation.

“We want to bring in significantly larger amounts of funding into the basin if we are going to deliver on the action plan. We need to steadily increase investment in the basin for our collective work. We’ve had some early successes, but we need to continue to grow our funding base and tap into new ones.”

Core Partner

“I take a lot of pride in our work. It’s a great process that we’ve built as a partnership. Everyone is a great professional and really knowledgeable. I’ve grown as a person from participating.”

Core Partner

In many if not all cases, partnerships have crafted their governance documents and strategic action plans assuming that the partnership will continue to function at a similar scale and level of coordination to complete the work needed to meet objectives. However, if significant funding is not secured for joint work, it is possible that the partners will each go their separate ways to implement restoration actions individually, in pairs or small groups based on project funding (See Figure 2, pages 24-25, Scenario C). There is a moderate to high risk that there will not be consistent capacity to keep the strategic action plan updated in a living document that captures lessons learned and adapts strategies to have the most impact.

Many partners in leadership or coordination positions have begun taking a close look at the future funding outlook, while many project managers have maintained a tight focus on their ambitious implementation schedule. Project managers have appreciated the value of the partnership and may not be questioning whether it will continue or what resources are needed to keep it going. Others who are asking questions have considered how might the focus and scale of their work be affected by their future funding outlook and to what extent will their investments in planning and governance pay off? Will partners come and go based on other funding opportunities? Will a subset of the partnership shift its focus to a different geography? These answers will be different for each partnership, and as this study finds, partner commitments will largely be driven by funding opportunities.

However, as many partners expressed, even if the partnership would dissolve in the absence of funding, over the six years of the Implementation grants or the two years of the Development grants, relationships have been strengthened, trust and learning have increased and lines of communication have opened considerably.

In the absence of sustained funding for implementation, this study suggests that a modest and well-targeted investment in maintaining the partnership as a learning network focused on convening, communications and learning has great potential to sustain the partnership at a lower level of commitment, while continuing to build social capital and a readiness for future collaboration as funding becomes available (See Figure 2, pages 24-25, Scenarios D and E). Central to this idea is the ability for partnerships to clearly define what types of learning and relationships would advance their long-term restoration vision and how targeted investments in convening and communications could yield a worthy return on investment (Brown and Salafsky 2004; Senge 2006; Wenger and others 2002)— an approach that would address the negative stigma that funders and partners often associate with loosely defined convenings with overly broad learning objectives.

A better understanding of the value propositions of different partnerships types can help partnerships and funders better target their investments in planning and set realistic expectations for short-term versus long-term benefits, which is a good transition to the second set of findings focused specifically on the FIP program.



GOLD BEACH, ROGUE BASIN PARTNERSHIP



How can OWEB improve and innovate the FIP program to support high-performing, resilient partnerships?

12 Streamline the FIP application process and grant administration wherever possible to boost efficiency, which directly affects partner commitment and performance.

With respect to the efficiency of the FIP program, partners consistently suggested opportunities to streamline requirements describing the application process and grant administration as cumbersome, repetitive, confusing and requiring more time and effort than expected at multiple points along the process.

“Once you get down to the project level proposals, there is a lot that OWEB asks of the partner coordinator in particular, and there are not a lot of streamlined processes or shortcuts to get the grants. My feedback — continue to find ways to make this more efficient.”

“Every OWEB grant we’ve ever gotten, we’ve been asked to do more with the same money — and sometimes even less time by the time they get the money out.”

Quotes from Core Partners

Efficiency is important both for maintaining partner commitment, and also for maximizing the leadership, energy and resources dedicated to maintaining high performance and impact (see *Finding 10 Efficiency*).

“You want talented people to stay around and see that things get done. When you saddle them with the nit-picky admin stuff, it is a morale killer. You don’t want to use their talent and depth of relationships and knowledge of an ecosystem and how it responds to outputs for so much admin. One of the highest priorities for OWEB is to improve on efficiency. Maybe there could be a partnership secretary at OWEB that could make the admin easier.”

Core Partner

Many partners acknowledged some process steps were legal requirements, and others emphasized that the size of the Implementation grants in particular warranted a rigorous application and review process.

However even considering these points, partners suggested opportunities for streamlining, for example minimizing redundancy in the application and reducing the number of awards for each Implementation FIP grant received instead of splitting out separate grants for technical assistance, monitoring, etc. Also, if at all possible, reducing the review time between when OWEB makes a funding decision and when the funds are available. As one partner described, a three-month lag time in getting I-FIP funds was a challenge due to the seasonality and sequencing of their restoration treatments. They were able to still make progress on their work plan, but then they had excess budget that they needed to carry over to the next biennium. They appreciated that OWEB allowed carry-over, but it created more administrative work to manage multiple budgets at the same time, each with their own reporting requirements.

“We’re managing six awards at once. That’s my main gripe that it should be easier to manage the award. Other than that, the amount of money dedicated is amazing. It does achieve our goal and have that larger impact.”

“The application is pretty much more work than the regular grant program with some increased flexibility and the ability to plan.”

Quotes from Core Partners

Another suggestion included more standardized email communications from OWEB so that partners receive regular updates and understand expectations for submitting proposals. Improving OWEB's website was also mentioned so that partners who do not have a history of working with OWEB can easily navigate and find information. In a few instances, partners described not being aware of deadlines or steps to submit proposals, for example obtaining a grantee login or not being able to easily review online applications with other partners, which caused a time crunch that affected other work or an unnecessarily delay in receiving funds. The inefficiencies related to these issues were more pronounced for people who had less experience working with OWEB and also for coordinators who had more administrative responsibilities in general.

Consistently, partners described the strengths of OWEB's leadership, organizational culture and staff as critical to helping them navigating these time-consuming and at times confusing requirements emphasizing strengths in listening, flexibility and collaborative problem-solving. However, as explained by multiple partners, more streamlining and efficiencies would go far to boost morale, capacity and impact. Partners acknowledged these near-term challenges related to efficiency and workload seem relatively small in the big picture, but their toll is significant.

“Long-term outcomes [for the FIP program] outweigh short-term challenges, but the short-term challenges are significant – especially when it comes to unfunded bodies of work that are essential to telling the conservation and restoration story (i.e. monitoring and outreach).”

Core Partner

13 Revisit the assumption that partnerships can accelerate impact without significant funding for outreach, education and monitoring needed to proactively build public support, improve practices and tell a meaningful, science-based story of progress.

The biggest gap discussed across partnerships was the lack of funding for outreach, education and also monitoring, which are all needed to proactively build public support, improve practices and tell a meaningful, science-based story of progress.

“It’s really important that we start with trust and relationships before trying to push projects forward. There are groups that talk, talk, talk, and they haven’t talked to the land owners. Then they are playing catch up, and the land owners are taken aback asking, what are you doing?”

Core Partner

Further, without monitoring, the potential for adaptive management is weakened with less information to feed-back into the cycle of learning and adaptation.

“Effectiveness monitoring would help us tell the story – all those numbers, costs and area treated – this is like gold, very valuable information. And if we really keep track, it’s something that can help us scale up this work.”

Core Partner

While some partners recognize that OWEB has legal restrictions on the types of activities they can fund, like education, and that there are negative stigmas associated with other activities based on history and political forces, such as data collection and experimentation, these represent a key gap that limit the performance and resiliency of partnerships and ultimately their ability to reach long-term restoration goals. Partners have been thinking creatively to find ways to fund some of these gaps (See Part 1 pages 22-24).

RECOMMENDATION

Consider flexibility within the FIP program to fund communications and monitoring – needed to proactively build public support, improve practices and tell a meaningful, science-based story of progress – or work with other funders to address these critical gaps.

14 Analyze the funding landscape and work with other funders to create alignment, particularly with respect to funding priorities, grant duration and reporting and monitoring requirements, that could be targeted to support a focused number of collaborative partnerships.

Based on findings from this report, one of the best ways to support the success of coordinated and collaborative partnerships is for OWEB to more fully analyze the funding landscape and build greater alignment with other funders to create realistic scenarios for sustaining a focused number of coordinated or collaborative partnerships over longer timeframes. A more targeted approach with commitment from other funders would warrant a higher investment in planning, monitoring and adaptive management with a greater chance that a partnership would be able to maintain the focus and commitment to see an increase in performance and impact from these initial investments (See Figure 2, pages 24-25, Scenarios B and C).

“With our monitoring approach, a three-year interval for data collection is currently funded with the I-FIP, but after that, there is no commitment to continue that monitoring. There is a big leap of faith – investment in a whole framework, approach and metrics – on the hope that after two times of measuring, someone else will pick it up. Otherwise, it is only an effort to report to OWEB. After the FIP funds go away, what is left of the partnership and the pieces that we put together?”

“It’s a big investment in a partnership that doesn’t have a clear future. It feels like we could use a consultant to look at that cost-benefit relationship and even bring their expertise to develop new funding sources so that people could use their time wisely – Is there something to build after this or should people start thinking about maximum use of their time?”

Quotes from Core Partners

Ironically, despite funders general enthusiasm for collective impact and collaboration among grantees, it can be quite challenging for funders to collaborate with each other to align their investments (Thompson 2014). Yet partners consistently describe OWEB’s culture of collaboration

and progress toward funder alignment. In one instance, partners described how they brought OWEB and another funder into conversation that led to increased coordination and aligned investments. More often, funders are in a position to see the larger funding landscape and network among their philanthropic peers to explore where interests overlap (Brown and others 2016).

RECOMMENDATION

Work with other funders to create alignment around funding priorities, grant duration and reporting and monitoring requirements to offer complementary partnership-focused investments.

15 Revisit the six-year limit on Implementation FIP grants and the requirement that applicants identify a full slate of ambitious projects for six years.

Partners recognized the value in OWEB’s decision to put a time limit on the Implementation FIP grants to push partners to be disciplined about how they would use the funds and also to create opportunities for other partnerships throughout the state. While all Implementation FIP recipients were exceedingly grateful, they also encouraged deeper thinking about the implications of a six-year timeframe.

Partners consistently questioned why the Implementation FIP grants were limited to six years when different lengths of time were needed to meet different types of objectives in different ecosystems. Some partners suggested that different types of implementation grants with different durations and types of funded activities could be more targeted, for example one designed to accelerate implementation in well-studied ecosystems using commonly accepted restoration practices and another funding opportunity designed to promote learning alongside implementation, such as in ecosystems not as well-understood or where innovative restoration approaches had the greatest potential for impact. Others suggested that partner-

“When we developed the I-FIP proposal, we asked for a lot. We needed to be ambitious, to stretch, to be competitive. What we identified as the steps were right, but we were too ambitious. Maybe we need a 4-biennium, 8-year process?”

Core Partner

ships should be able to apply for another Implementation FIP grant to extend the six-year timeframe even if there was a waiting period before they could apply again. While many partners recognized the need to put some kind of time limit on the Implementation FIP grants, it was unclear if a fixed six-year timeline was the best approach.

Many partnerships that received a Development FIP grant and planned to submit an Implementation FIP application spent considerable time speculating about how to best segment their larger strategic action plan into a six-year set of projects that could have the most impact. Some partners questioned whether this was the best approach since they were not debating the top priority projects for the first six years of an ambitious multi-decadal plan, but the top priority projects that could yield the greatest impact after six years of implementation. This results in a subtle shift in how priorities are framed that could leave some partners without funding to advance their part of the bigger picture due to the limitation that partners working within a geography and set of activities already included in an Implementation FIP grant are not eligible to apply for OWEB's open solicitation grant program. This subtle shift seems to give an advantage to proposals and partners that emphasize dramatic, short-term wins over a slower build up to long-term wins, which may disproportionately impact small organizations, such as watershed councils, that focus on a more modest neighbor-to-neighbor approach to restoration on private lands. Small watershed councils expressed concerns along these lines (See Part 1 pages 39-41 for further discussion).

In the experience of many partnerships, the tight focus on an ambitious implementation timeline over six years reduced capacity for the partnership to maintain connection to the strategic action plan, continue updating it based on learning and develop new project ideas for future funding opportunities. Project managers and partnership coordinators had to be disciplined to ramp up quickly, sustain focus to meet benchmarks and sequence stages of seasonal work to be ready to ramp down at the end of the grant period. Many partners had limited capacity to focus on continued planning, monitoring or adaptive management except



“Six years seems long, but in an ecological sense, it is a blip. You can barely do site prep, planting and plant establishment on one reveg project in six years, let alone see any ecological outcomes from that work. Please remember the ecological outcomes we are working towards are many years to decades ahead of us.”

Core Partner

where some partners had research or monitoring responsibilities within their job descriptions, but even then, they admitted limited capacity to dedicate to the partnership without funding. In most contexts, partners recognized that sustained effort is required over a much longer timeframe, on the order of decades, to realize the ecological outcomes described in their strategic action plans.

“No one was talking about social science three years ago. Now we are. Being flexible is important. I realize it’s not easy for OWEB.”

Core Partner

A six-year focus on implementation also seemed to keep partnerships tightly focused on the projects initially proposed in the “project pipeline” to meet ambitious timelines, which could potentially inhibit opportunities for adaptive management and increased performance over a longer timeframe. Timelines proposed for the Implementation FIP grants were especially ambitious to maximize their chances with this highly competitive grant.

“Six years is a very short period of time speaking in terms of ecological changes. We’re taking on a huge challenge, and if we successfully get all our FIP money put to the ground and monitored, we will still be a long way from where we are going.”

Core Partner



In several partnerships, the question was raised whether new project ideas could be developed that might better meet objectives in the strategic action plan. While there was flexibility to change project ideas already in the pipeline, most of this flexibility was exercised when an original project idea ended up not being feasible. In some cases, sudden landowner willingness created an opportunity to move forward with a proposal, and projects already in the pipeline were shuffled around in response to these timing considerations. However, despite this flexibility, many partners described that there was no time to slow down and reprioritize projects as long as the originally proposed projects were able to move forward with adjustments. Although six years is not long in terms of the time needed to implement restoration in these systems, as some partners expressed it is a fairly long time to focus on the same set of projects without an opportunity to revisit or reprioritize based on new information. Also, partners reflected on potential challenges if there were a newly proposed project and it ended up taking funding from one already in

“Sharing of funding always comes up. There were already pre-negotiations when we developed the I-FIP application, and then some partners wanted to change things so significantly that it became contentious in some of the meetings. It was going to change the stake that our organization had financially. If you have a strong enough partnership, those things can be pushed aside. Even if you are not benefiting as much as you hoped in this or that area, you are still benefiting overall. Funding for your organization is never number one, but it still becomes an issue.”

Core Partner

the pipeline. It would likely cause jostling for position and funding among partner organizations, which could disrupt the delicate balance of commitment and buy-in established through the Implementation FIP application process.

Lastly the suggestion was raised that perhaps there could be some kind of eligibility check-in two years prior to the end of the Implementation FIP grant where OWEB could assess the scale and level of work. Partnerships would appreciate OWEB’s guidance and feedback relative to future funding options so they could decide whether to wrap up the work cleanly and ramp down or whether there might be other funding opportunities to maintain an accelerated pace for another two years, six years or more.

RECOMMENDATIONS

- 1 Meet with partnerships two years before the end of their six-year grant or at the end of their two-year grant to assess progress and help identify resources and a roadmap forward that holds the greatest value proposition.
- 2 Consider adjusting the grant duration, offering a two-year grant after an Implementation FIP grant or awarding a second six-year grant after a waiting period.

16 Consider whether there is a more modest level of strategic planning and partnership support that would still provide value to partners if they could not secure implementation funding to sustain the idealized model of a coordinated or collaborative partnership.

As a result of the FIP program, more restoration partnerships have formalized throughout the state and developed strategic action plans and governance documents. Partnerships have taken seriously the strategic action plan guidance provided by OWEB, which is an eligibility requirement for the Implementation FIP grant, in an attempt to be as competitive as possible. The planning guidance, which integrates concepts from the Open Standards for Conservation Practice (Conservation Measures Partnership 2013) and collective impact literature (Kania and Kramer 2011), assumes that the partnership will continue to operate as a coordinated or collaborative partnership where partners are aligned around priorities and collecting monitoring data to learn from and adapt their strategies and actions over time. While this is a comprehensive and well-respected planning framework, it requires significant capacity and investment over long timeframes to use in practice (See Figure 2 , pages 24-25, Scenario B).

By design, OWEB has awarded more Development FIP grants, which emphasize strategic action planning, than Implementation FIP grants, which emphasize on-the-ground restoration projects, with the idea that more formalized partnerships in the state with clearly articulated shared priorities will attract more funding and accelerate restoration overall. OWEB's vision is to stimulate the development of many well-organized partnerships and provide some funding for implementation. Many partnerships have formalized as a result of the Development FIP grants, while others have formalized using other resources, in large part motivated by the opportunity to apply for and hopefully get an Implementation FIP grant.

Yet across the diversity of partnerships, the outlook for long-term sustained funding is not clear. Awarding a higher number of Development FIPs to develop plans for a coordinated or collaborative partnership without knowing whether there is adequate funding for implementation creates a moderate to high risk that the investment in planning and partnership building will not reach the potential originally envisioned (See Figure 2 Funding Scenario C). For partnerships that are not able to find sustained funding, there may be frustration and hard feelings among partners and even toward OWEB for substantial time spent in planning that may not directly be translated to action. Many partnerships that were awarded Implementation FIP grants are greatly appreciative of the large grants, but still have questions about how they will raise funds to sustain their momentum toward long-term goals.

“To take our partnership to the next level, some things would have to change — our ability to fundraise at a higher level, to share funds in a different way. An assumption I hear circulated around is that somehow capacity is built and it sustains itself. Capacity and work needs to be funded every day. When the funding stops, the work stops. None of this happens for free. This partnership has given us a lot of capacity to learn more and work together to solve different problems. It means we are likely to find more money. Our staff is so amazing, but if the funding is gone next year, then the staff are gone too.”

Core Partner

“We build these partnerships — don’t we want them to grow into something more over these 6 years? We’re working to engage new partners, all that stuff. We’re building the nucleus of something really valuable, with really limited capacity to build upon it. The pace that we go determines how we are involved in other things.”

Core Partner

These findings raise the question whether there is a more modest level of strategic planning and partnership support that would still provide value to partners even if they are not able to sustain funding to support the idealized model of a coordinated or collaborative partnership. For example, a more modest level of strategic planning might require partners reach agreement on high level strategic questions, such as what are the limiting factors for restoration or what types of restoration treatments are most likely to meet objectives, without taking the next step of prioritizing specific projects together.

RECOMMENDATION

Develop a more modest planning framework that would provide alignment and coordination at a high strategic level without requiring a higher level of commitment and funding to fully integrate project planning and reporting if the resources aren't there to sustain it.

Another suggestion is to make a modest investment in maintaining communications and learning, specifically for partnerships to operate as a learning network focused on specific learning objectives related to identifying strategic approaches or refining best practices for restoration. In some cases, the value proposition and impact would be maximized for a partnership to operate as a learning network over the long-term (See Figure 2 Funding Scenario E). In other cases, it may make sense for a partnership to operate as a learning network until they can raise the funds to operate as a more collaborative partnership (See Figure 2 Funding Scenario D).



“One of the most difficult things that we’re facing right now is we need to keep up the work, the communication, the dialog, the meetings, all of that needs to continue to keep developing where we are and where we are going. We’re making a tremendous amount of headway all positive and beneficial, thanks in large part to the FIP program, but all of that takes a great deal of effort, and it is expensive.”

Core Partner

RECOMMENDATION

Create funding opportunities and support to sustain partnerships as learning networks, especially in the absence of large-scale implementation funding.

17 Consider the added costs and complexity of inclusive collaborative partnerships when providing guidance about whether partnerships should strive for an inclusive or a more focused approach.

Inclusive collaborative partnerships are often idealized for bringing greater capacity and representation of diverse interests to tackle shared priorities and increase collective impact. Inclusive partnerships can take different forms along the continuum of partnership types from an inclusive learning network, where partners come together for learning, to an inclusive collaborative partnership, where partners are aligned and coordinated to advance shared priorities (See Figure 1, page 14 Partnership Continuum). More collaborative inclusive partnerships require much greater investment in coordination, communication and onboarding, which means it may be quite challenging to find adequate funding to sustain commitment. On the other hand, sometimes an inclusive partnership is able to access new and different

funding sources because of the diversity of partners and their funding relationships.

Efficiency is also a persistent challenge for inclusive collaborative partnerships since a robust and inclusive planning process requires layers of process to invite feedback and make decisions together. These process steps create potential barriers for new partners, which ironically can create a feeling of exclusion. Inclusive learning networks, which have much lower costs and risks, focus on convening partners and promoting communication and learning. Through inclusive learning networks, partners can develop and refine best practices, identify high level priorities and build social capital for future collaboration at the project level (See Figure 2 Scenario E). This approach to inclusive partnerships may yield a better return on investment if there are limited sources to sustain funding for an inclusive collaborative partnership at the scale required.

With this in mind, OWEB may want to consider their expectation that I-FIP partnerships should be inclusive, which is articulated in the FIP rule that organizations are not eligible to apply for OWEB’s open solicitation grants if they work in a geographic area and propose activities already covered by the scope of a funded Implementation FIP grant. One suggestion that perhaps would mitigate the challenges of expecting all partnerships to be inclusive of all organizations in their geography would be to allow organizations to apply for open solicitation grants, but to ask them to explain how their proposed project uniquely contributes or complements the work of the partnership and assign a rating or point system that would give a lower rating for duplication or lack of coordination.

RECOMMENDATIONS

- 1 Revisit expectations in the FIP rules that I-FIP partnerships should be inclusive.
- 2 Provide additional funding for coordination of inclusive partnerships.

18 Continue OWEB's much appreciated focus on listening, flexibility and collaborative problem-solving, but also realize that partnerships are cautious about sharing candid feedback and questioning FIP program assumptions, especially since OWEB is one of their most prominent funders.

Overall, partners enthusiastically praised OWEB's leadership, organizational culture and staff emphasizing listening, flexibility and collaborative problem-solving as critical to their success in the FIP program. Some partners affectionately described OWEB staff as a partner and colleague.

"OWEB is a partner as much as a funder."

"OWEB has been very helpful, flexible and truly acted as a partner through the whole process."

Quotes from Core Partners

Yet, for most partners, OWEB is one of their most prominent funders, and as such, they put considerable care and thought into how and when to raise questions and share feedback.

Overall, this study found that partners were cautious about sharing candid feedback about the FIP program and questioning core assumptions held by OWEB, especially when their comments might question OWEB's confidence in them as a high performing, resilient partnership. Partners seemed to hold back on several important topics, including assumptions about technical review, guidance for strategic action planning, expectations for monitoring and assumptions about funding to sustain their partnership.

Relative to technical review, some partnerships felt the process was overly cumbersome and repetitive. OWEB has worked with partnerships to customize the process to meet their needs for due diligence as a funder, while also providing value to partnerships by strengthening project proposals through technical feedback. Some partners struggled with how to provide feedback that the technical review process as structured is not the best vehicle to strengthen project proposals.

Relative to strategic action plan guidance used by Development FIP grantees, some partners struggled with OWEB's expectations of how broad and inclusive their

plan should be alongside their hopes of getting an Implementation FIP grant and their own questions about how to fund and sustain a larger effort over time. Partners did not necessarily want to raise concerns that they might not be able to sustain a large effort if their most prominent funder thought they could or should be able to.

Relative to expectations about monitoring, many partners questioned OWEB's assumptions about the capacity and expertise needed to take on responsibilities for long-term monitoring when they felt their responsibilities should stay focused on meeting the benchmarks for their ambitious implementation timelines. Some partners also referenced that historically watershed councils were discouraged from engaging in monitoring and especially research and so they questioned whether those expectations were now shifting and whether they even wanted to take on those responsibilities.

Finally, relative to assumptions about sustainability, partnerships did not want to question OWEB's optimism that they would be able to attract new funding after the end of an Implementation or Development FIP grant, yet they did have questions about where the funding would come from and what realistic options they could plan for. They did not want their success over six years to be discounted if the partnership did not continue to function in the same form or at the same scale after the end of the grant.

Findings throughout this study indicate there would be value in continuing to explore assumptions related to the technical review process, the level of strategic planning recommended, expectations for monitoring and realistic scenarios for sustaining funding. These discussions will likely continue to be challenging for funders to facilitate with grantees, and perhaps it would be more effective to convene partners and discuss expectations in broad terms without drilling down to the specific details of any one partnership.

RECOMMENDATION

Continue to support peer-to-peer learning among partnerships, like the FIP grantee gathering in March 2018, and opportunities to provide feedback to OWEB collectively in ways which takes the pressure off individual grantees, for example using a third-party facilitator who can help partners summarize and deliver feedback anonymously.

Conclusion

Overall, the partnerships were greatly appreciative to OWEB for commissioning this study and for the opportunity to learn from each other alongside OWEB as part of this innovative and much appreciated funding program.

As a result of increased communication among the partnerships and OWEB throughout this project, OWEB made two offerings in response to feedback. In direct response to feedback about the lack of capacity for financial planning from Part 1 of this report, OWEB made \$15,000 available to each of the eight Development FIPs to develop a financial plan consistent with their Strategic Action Plan, including identification of funding sources and development of fundraising strategies.

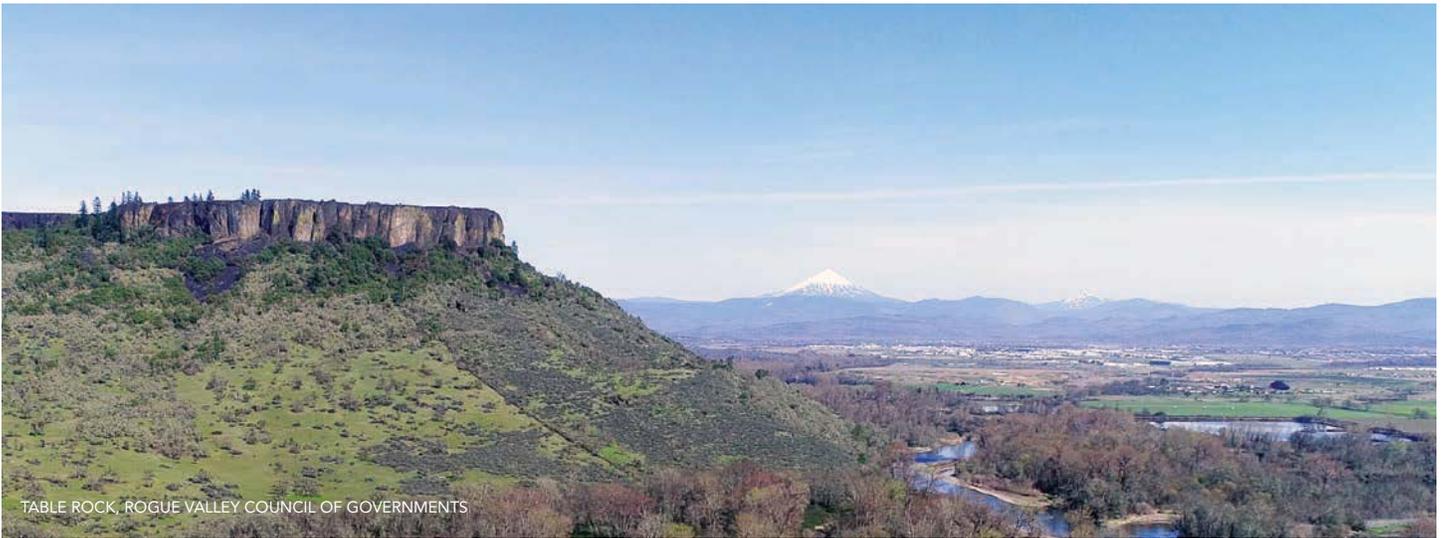
Secondly, in response to an interest among the FIP partnerships to learn from each other directly, OWEB organized a gathering in March 2018 inviting representatives from the 14 partnerships described in this report plus the new cohort of partnerships that were awarded a Development FIP in the second round of funding. From the mix of presentations and discussion sessions, the question of how to sustain a partnership emerged as an important topic and one that closely relates to the findings and initial recommendations proposed here. This report represents a step along that path of exploring and addressing this question of how to support resilient partnerships for sustained performance and impact with the hope that it will continue to spark dialog among funders and partners to get to the next level.

“A heartfelt thank you for the support OWEB has given us. And I appreciate this study. It’s a good way for the funding organizations to understand what’s going on without a bunch of bias or perceived bias. I hope some of my comments have been helpful in that way.”

“I enjoy the opportunity to have that cross-pollination with the other partnerships, lessons learned and all that. Continuing to come together would be well-received to keep from re-inventing the wheel.”

“I’m really grateful and thankful that our partnership has shown sustained success and growth — new partners and additional investment, national and even international attention. It is helping to transform how society is thinking about the bigger problem and, I think, cultivating the ground for a much larger increase in the pace, scale and quality of restoration. We are on the cusp of an orbital leap of what we are able to accomplish because of the success of this project.”

Quotes from Core Partners



Summary of Recommendations to Evolve the FIP Program

Efficiencies

- 1 Increase efficiencies** in the application process and grant administration wherever possible
 - Reduce redundancies in the application process
 - Reduce the number of awards for each I-FIP grant
 - Reduce the wait time between funding decisions and when funding is available
 - Consider hiring an administrative support person at OWEB that could centrally take on some of the routine tasks currently handled by partnership coordinators
 - Standardize email communications, including notifications and updates related to the FIP grant administration so that all grantees are aware of deadlines and requirements for proposal submission, management of sub-awards, etc.
 - Improve the website and online application portal, especially considering first time users

Capacity Building

- 1 Create training and mentoring opportunities** for facilitation, team building, leadership and how to manage competition.
- 2 Provide more tools and leadership training** on group dynamics and governance could so partnerships can “right-size” their governance documents, including defining roles, responsibilities and decision-making rules.
- 3 Continue exploring creative approaches** to support respectful tribal engagement and leadership.

Funding

- 1 Consider flexibility within the FIP program** to fund communications and monitoring – needed to proactively build public support, improve practices and tell a meaningful, science-based story of progress – or work with other funders to address these critical gaps.
- 2 Work with other funders** to align opportunities to support partnerships, particularly with respect to funding priorities, grant duration and reporting and monitoring requirements.
- 3 Work with other funders** to assess the funding landscape and get a sense for how many coordinated or collaborative partnerships could be sustained throughout the state to fully implement an adaptive management approach to restoration as outlined in the strategic action planning guidance.



Planning Guidance and Program Rules

1 Consider adjusting the duration of I-FIP grants and the requirement that applicants identify a full slate of ambitious projects for six years.

- Consider alternatives to the six-year Implementation FIP grant to provide opportunities for accelerated implementation and innovation in a variety of ecosystems requiring different time periods and different types of activities to be successful.
- Meet with I-FIP partnerships two years before the end of their six-year grant to assess progress and the funding landscape to continue operating as a partnership.
- Consider the possibility of offering a two-year grant to conclude an I-FIP or awarding a second six-year I-FIP after a waiting period.

“OWEB could be a compelling convener for an annual conference to talk about what works and doesn’t work among the partnerships. Maybe even twice a year? To talk about all of those things that partnerships typically need at some point, latch onto that general list of needs and focus on how to solve the puzzles.”

Core Partner

2 Adjust expectations for the type of partnership and level of planning that is promoted through the Development and Implementation FIP grants.

- Develop a more modest planning framework that would provide alignment and coordination at a high strategic level without requiring a higher level of commitment and funding to fully integrate project planning and reporting if the resources aren’t there to sustain it.
- Create funding opportunities and support to sustain partnerships as learning networks, especially in the absence of large-scale implementation funding.
 - Provide capacity for a coordinator to convene partners and facilitate communication and learning around clearly defined strategic issues.
 - Provide training to coordinators to develop effective learning networks and tell the story of their impact.

3 Revisit expectations in the FIP rules that I-FIP partnerships should be inclusive.

4 Provide additional funding for coordination of inclusive partnerships.

Learning and Feedback

1 Continue to support peer-to-peer learning among partnerships, like the FIP grantee gathering in March 2018, and opportunities to provide feedback to OWEB collectively in ways which takes the pressure off individual grantees, for example using a third-party facilitator who can help partners summarize and deliver feedback anonymously.

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Appendix – Partnership Survey

Thank you for taking the time to share your reflections and feedback! Even the most successful partnerships face common challenges, such as recruiting key partners and staff turnover. Performance is dynamic, with normal ups and downs expected. This study does not attempt to categorize partnership performance, but collect insights from your experience to understand what partnerships need to be resilient and how OWEB’s Focused Investment Partnership (FIP) Program can support your success.

If you are short on time, you can complete the required questions in 8-10 minutes. If you have more time, please add your comments, suggestions and examples to promote learning and sharing.

This survey is confidential. At the end, we ask for your name to keep track of who completed the survey. However, your name will not be connected in any way with your answers in the presentation of results. The summarized survey results for your partnership will be shared with you; however, they will not be shared with OWEB. OWEB will only see results that are generalized across all FIP partnerships, and FIP partnerships will have the chance to review preliminary findings.

Questions?

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PARTNERSHIP

1 To what extent do you feel your partnership is actively changing and evolving or stable and established?

Actively changing and evolving 1 2 3 4 5 6 7 Stable and established

2 To what extent are you satisfied with your partnership’s process to develop your strategic action plan?

Not satisfied at all 1 2 3 4 5 6 7 Extremely satisfied

★ Any comments or reflections on the structure, scope or content of your strategic action plan? Any advice for groups just starting their plan?

CORE PARTNERS

3 To what extent do you think the right people, organizations, and stakeholders are actively involved in the partnership, referring to the core partners that will help achieve your goals?

Lacking core partners or not active

1

2

3

4

5

6

7

All core partners involved, active

★ Are there specific people or organizations you would like to see more involved? If yes, please explain what you hope they would bring to the partnership and your thoughts about why they are not as involved as you would like.

★ Any comments or suggestions for recruiting core partners? Any advice to share with other groups?

COMMUNICATION

4 To what extent are you satisfied with the frequency and quality of communication among core partners for planning and coordination?

Not satisfied at all

1

2

3

4

5

6

7

Extremely satisfied

5 To what extent are you satisfied with how the partnership communicates with external stakeholders?

Not satisfied at all

1

2

3

4

5

6

7

Extremely satisfied

6 To what extent do you think core partners hold themselves and each other accountable to follow through on their commitments?

Significant gaps in follow-through and accountability

1

2

3

4

5

6

7

Exceptional in follow-through and accountability

★ Any comments or suggestions to improve follow-through and accountability? Advice that could benefit other groups?

GOVERNANCE

7 To what extent are you satisfied with the way that core partners work together to make decisions, for example deciding on the scope for the FIP grant, prioritizing grant funds, or assigning project leads?

Not satisfied at all 1 2 3 4 5 6 7 Extremely satisfied

8 To what extent do you think your governance documents, such as MOU, accurately reflect how partners work together and are useful in supporting your success? If you feel your governance documents are a good start, but would benefit from further development, please note that in the comments below.

Not accurate, useful 1 2 3 4 5 6 7 Highly accurate, very not useful

★ Any comments or suggestions about the usefulness of governance documents or how they can be improved to support your success?

VALUE OF PARTNERSHIP

9 To what extent do you feel the benefits of participating in the partnership are greater than the costs?

Costs far greater than benefits 1 2 3 4 5 6 7 Benefits far greater than costs

★ Please tell us about the costs and benefits that matter most to you and your organization.

CHALLENGES & ADAPTATION

10 To what extent has the partnership faced external challenges that limited what you could achieve, such as changes in laws, policies, land ownership, elected officials, funding, etc.

Few, minimal changes 1 2 3 4 5 6 7 Continual, extreme challenges

11 To what extent has the partnership responded well given these limitations?

Struggled to respond 1 2 3 4 5 6 7 Responded extremely well

★ Please share an example of an external challenge faced and how the partnership responded.

SUCCESS

12 To what extent do you feel the partnership has made good progress developing a strategic action plan and the capacity to implement it?

Limited progress with action plan and capacity 1 2 3 4 5 6 7 Exceptional progress with action plan and capacity

★ Please share your reflections on what have been the key drivers of your success or lack thereof?

13 To what extent do you feel public awareness and support are important to achieving your restoration goals?

Not at all important 1 2 3 4 5 6 7 Extremely important

14 To what extent do you feel the public is aware and supportive of the value of the partnership’s work? If the partnership has not yet conducted the public outreach desired, please note in the comments below.

Public not aware or supportive 1 2 3 4 5 6 7 Public very much aware and supportive

★ Any comments about your success with public outreach or the outreach your partnership plans to do in the future? Suggestions for how OWEB resources could help you achieve your public outreach goals? Advice for other groups?

15 To what extent were you satisfied with the FIP application and selection process?

Not at all satisfied 1 2 3 4 5 6 7 Extremely satisfied

★ Any comments or suggestions to improve the FIP application and selection process in the future?

16 To what extent have you been satisfied with the frequency and quality of communication with OWEB staff?

Not at all satisfied 1 2 3 4 5 6 7 Extremely satisfied

★ Any comments or suggestions for OWEB to improve communication?

17 To what extent are you satisfied with the FIP program as an approach to support resilient partnerships and implement ecological restoration?

Not at all satisfied 1 2 3 4 5 6 7 Extremely satisfied

★ Please share any specific feedback for how OWEB can better structure the FIP program and associated funding to support your partnership's success.



ECO LOGICAL RESEARCH



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