

# PLACE-BASED WATER PLANNING

**ORS 537.872 - 537.873; OAR Chapter 690 Division 602**

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## **A Handbook for Place-Based Integrated Water Resources Planning in Oregon**

**DRAFT HANDBOOK FOR PUBLIC COMMENT**

September 2025

Prepared by the Oregon Water Resources Department

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Place-Based Water Planning (PBP) is a voluntary, locally led, and collaborative process that brings together an area's water interests to develop a holistic understanding of the area's water resources and plan for a water future that promotes and sustains a healthy economy, environment, and society. Through PBP, the Oregon Water Resources Department (OWRD) and other state agencies provide guidance, funding, and technical assistance to place-based initiatives to bring interested parties together, develop and update plans, and coordinate plan implementation. Upon completion, state-recognized Place-Based Water Plans: identify actions that help meet current and future instream and out-of-stream water quantity, quality, and ecosystem needs; aid state agencies in identifying and considering regional priorities; and provide a platform for continued collaboration to solve complex regional water issues.

This handbook provides guidance for Place-Based Water Planning in Oregon. It is an essential resource for communities considering Place-Based Water Planning, for Planning Collaboratives engaged in Place-Based Water Planning, and for those implementing Place-Based Water Plans. The handbook describes why Place-Based Planning is important, identifies best practices for the planning process, and outlines the process, content, and structure required to receive OWRD grant funding for Place-Based Water Planning and to gain state recognition of a Place-Based Water Plan. Planning Collaboratives that have been convened prior to the publication date of this handbook may be able to follow previous Place-Based Water Planning guidance to meet state funding and recognition requirements. See *Appendix A* for more information.

**How to Use this Handbook:** The Overview section provides a brief introduction to Place-Based Water Planning. Each subsequent section is focused on a different phase of planning, providing readers with in-depth information on expected outcomes, grant opportunities, agency support, and detailed process and plan guidance. The appendices provide additional information on community engagement and technical assistance, along with example templates, forms, and other resources.

This handbook is based on Oregon Revised Statutes (ORS) 537.872 – 537.873 and Oregon Administrative Rules (OAR) 690-602. It was developed with assistance from several natural resource agencies, public engagement, and using the following sources:

McLain, R., Boyers, S., Downey, J., Davis, E.J. 2022. *Oregon's Place-Based Integrated Water Resources Planning Program: A Participatory Evaluation*.

<https://www.oregon.gov/owrd/Documents/McLain%20et%20al%20april%2027%202022%20place%20based%20planning%20evaluation.pdf>

Oregon Consensus. 2022. *Report of the Work Group on State-Supported Regional Water Planning & Management: House Bill 5006 (2021)*.

[https://www.oregon.gov/owrd/Documents/HB%205006%20Work%20Group\\_FINAL%20REPORT.docx%20\(2\)%20\(2\).pdf](https://www.oregon.gov/owrd/Documents/HB%205006%20Work%20Group_FINAL%20REPORT.docx%20(2)%20(2).pdf)

Oregon Water Resources Department. 2015. *Draft Guidelines: A Tool for Conducting Place-Based Integrated Water Resources Planning in Oregon*.

[https://www.oregon.gov/owrd/WRDPublications1/2015\\_February\\_Draft\\_Place\\_Based\\_Guidelines.pdf](https://www.oregon.gov/owrd/WRDPublications1/2015_February_Draft_Place_Based_Guidelines.pdf)

Oregon Water Resources Department. 2018. *Place-Based Integrated Water Resources Planning: Draft Guidance for Planning Step 3*.

Oregon Water Resources Department. 2018. *Place-Based Integrated Water Resources Planning: Draft Guidance for Planning Step 4*.

Oregon Water Resources Department. 2019. *Place-Based Integrated Water Resources Planning: Draft Guidance for Planning Step 5*.

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## Definitions:

**Community:** The people impacted by the water resources of the planning area, entities with an interest or obligation related to water resources or ecosystems in or impacted by the planning area, and federal, state, local, and Tribal governments. (OAR 690-602-0200(5))

**Convener:** The persons, public bodies, Indian Tribes, or nonprofit organizations that bring together a balanced representation of instream and out-of-stream water interests to undertake place-based water planning; ensure an open, equitable, and transparent process; and impartially guide and support the planning and implementation processes. (OAR 690-602-0200(2))

**Consensus:** General agreement among participants. Consensus does not always mean 100% agreement but does require buy-in from most participants. A simple majority of participants does not meet the requirements of a consensus.

**Environmental Justice Community:** Includes communities of color, communities experiencing lower incomes, communities experiencing health inequities, Tribal communities, rural communities, remote communities, coastal communities, communities with limited infrastructure and other communities traditionally underrepresented in public processes and adversely harmed by environmental and health hazards, including seniors, youth and persons with disabilities. (ORS 182.535)

**Facilitator:** A neutral party that works to ensure a collaborative process and supports consensus building. (OAR 690-602-0200(9))

**Place-Based Water Plan:** A place-based integrated water resources plan that: (A) Is developed for a planning area associated with waters from sources within a shared hydrologic boundary; (B) Is developed in collaboration with a balanced representation of interests; (C) Addresses current and future in-stream and out-of-stream needs; (D) Includes the development of actions that are consistent with the state water resources policy and other state laws concerning the water resources of this state; (E) Is developed using an open, equitable and transparent process that fosters public participation and meaningful engagement with environmental justice communities, consistent with the requirements of ORS 182.545; (F) Is developed in consultation with the Oregon Water Resources Department and other relevant state agencies; (G) Facilitates implementation of local water resources solutions and supports the knowledge and relationships needed to implement the solutions; (H) Assesses actions that are compatible with local comprehensive plans; (I) Strives to integrate solutions to cost-effectively achieve multiple benefits; (J) Is consistent with the guiding principles of the integrated state water resources strategy; and (K) Complies with the rules of the Water Resources Commission, including any rules regarding the development of place-based integrated water resources plans. (ORS 537.873(1)(e))

**Planning Area:** A shared hydrologic area that is within hydrologic and size limitations defined by OWRD (OAR 690-602-0200(18)). See *Phase 1, Section 4.C* for guidance for determining a planning area.

**Planning Collaborative:** The balanced representation of instream and out-of-stream water interests from the community that develop, implement, or update a place-based integrated water resources plan consistent with their shared governance agreement. (OAR 690-602-0200(3))

**Shared Governance Agreement:** A written document adopted by a Planning Collaborative through consensus that governs the Planning Collaborative's organizational structures, decision-making processes, roles, commitments, communications, and other provisions needed to support group governance or collaboration. (OAR 690-602-0200(19))

Oregon's Integrated Water Resources Strategy (IWRS) coordinates water management efforts at a statewide level with the dual goals of improving our understanding of Oregon's water resources and meeting Oregon's instream and out-of-stream water needs. The IWRS recognizes that place-based water planning between local communities and state agencies offers a unique opportunity for the implementation of a wide range of strategies to meet those goals. From land-use practices to natural resources management and emergency preparedness, communities are well-positioned to build trust, hold difficult conversations, and make progress on critical water issues beyond what state agencies can do on their own.

Additionally, every river basin in Oregon is unique, with widely varying ecological issues, community values, and economic dynamics. Accordingly, each basin has its own water challenges that if left unaddressed can impair the quality of life for Oregonians and hinder communities from reaching their economic, social, and environmental potential. Taking a place-based approach allows communities to develop a shared understanding of how their instream and out-of-stream water quantity, water quality, and ecosystem needs will be met today and in the future.

**“Place-based integrated water resources planning”** means a collaborative and inclusive process that is designed to:

- (A) Gather information to develop a shared understanding of water resources and identify critical issues and knowledge gaps;
- (B) Examine the existing and future in-stream and out-of-stream water needs for people, the economy and the environment;
- (C) Identify and prioritize strategic, integrated solutions to understand and meet in-stream and out-of-stream water needs; and
- (D) Develop, implement and update a place-based integrated water resources plan.

*ORS 537.873(1)(f)*

## 1. What is Place-Based Water Planning?

Place-Based Water Planning is a type of bottom-up integrated water resources planning that empowers communities to achieve a shared vision for a secure and resilient water future at a scale that recognizes the unique context of a place. This type of planning integrates water quality, water quantity, and ecosystem needs with a goal of sustaining a healthy economy, environment, and society. In bringing together diverse water interests, Place-Based Water Planning builds community trust and relationships, gives communities a stronger voice in their water future, and provides a pathway for building political, public, and financial support to address an area's critical water issues.

## PLACE-BASED WATER PLANNING PRINCIPLES

Adherence to Place-Based Water Planning principles is required for grantees and for maintaining state recognition of a Place-Based Water Plan. These principles were developed using the statutory definition of a place-based integrated water resources plan (ORS 537.873(1)(e)), the state's 2017 Integrated Water Resources Strategy, and recommendations from the 2022 State Supported Regional Water Planning and Management Workgroup.

- a. Voluntary and locally led
- b. Developed in collaboration with a balanced representation of water interests
- c. Addresses current and future instream and out-of-stream needs, including water quantity, quality and ecosystem needs
- d. Includes the development of actions that are consistent with state law and policy
- e. Uses an open, equitable and transparent process that fosters public participation and meaningful community engagement, including environmental justice communities
- f. Developed in consultation with the Oregon Water Resources Department and other relevant state agencies
- g. Facilitates implementation of local solutions and supports the knowledge and relationships needed to implement the solutions
- h. Assesses actions that are compatible with local comprehensive plans
- i. Strives to integrate solutions to cost-effectively achieve multiple benefits
- j. Consistent with the guiding principles of Oregon's Integrated Water Resources Strategy (*Appendix B*)
- k. Builds on and integrates existing studies and plans
- l. Informed by the best available data and information
- m. Recognizes the public interest in water
- n. Does not jeopardize existing water rights

Place-Based Water Planning can:

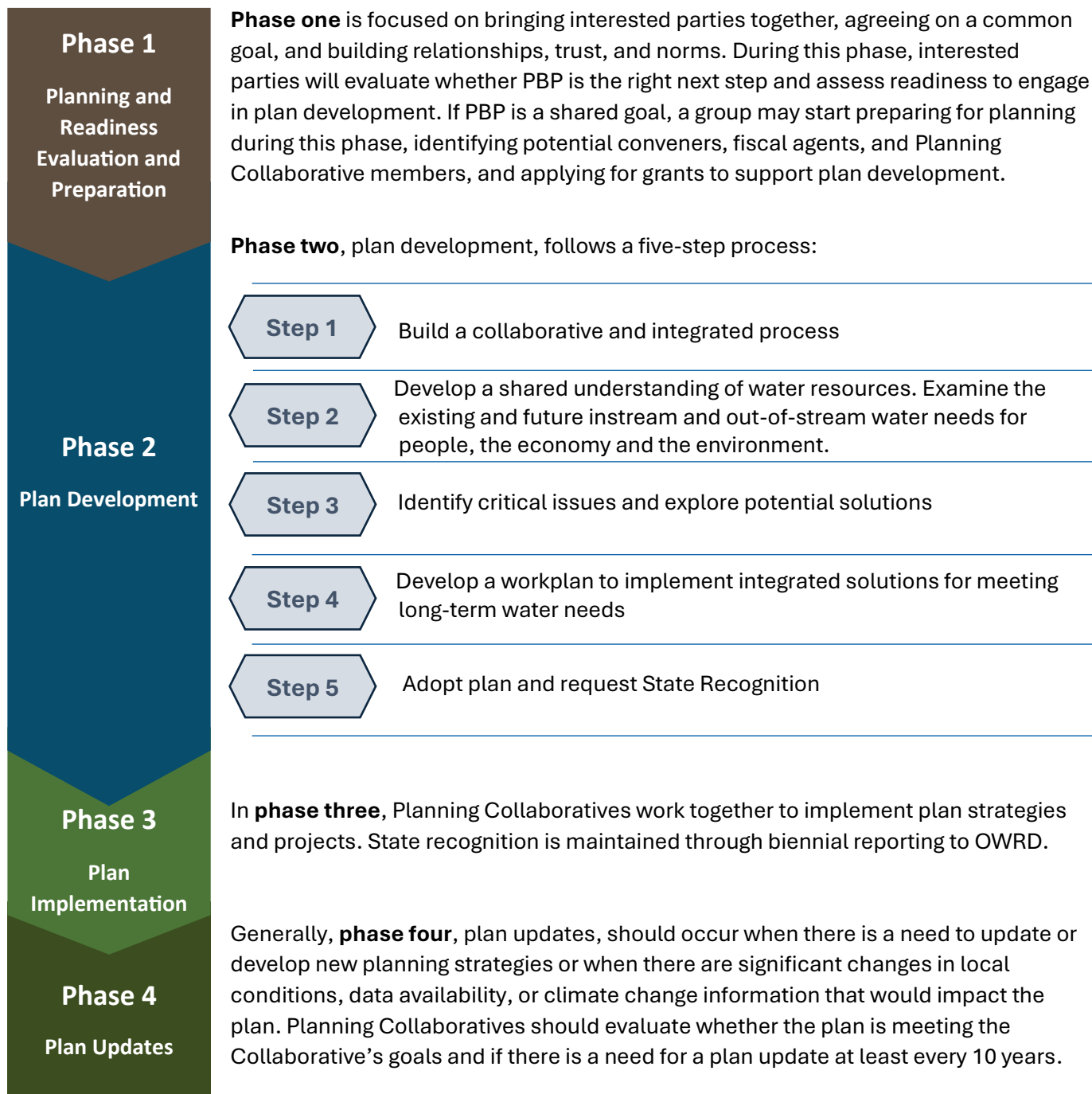
- *Give communities a competitive edge for funding opportunities.* Plans built through a locally-led, collaborative process describe recommended actions that may be attractive investment opportunities for funding programs offered by state and federal agencies, philanthropic organizations, partners, local government, the state legislature, and others.
- *Support relationship development.* Developing the plan brings diverse water interests together, provides new opportunities for dialogue about difficult water issues, and builds new levels of cooperation, trust, and respect for differing perspectives. These relationships can have positive benefits for many years, especially as the Planning Collaborative transitions from planning to implementation of the plan.
- *Provide a shared vision for action.* Planning Collaboratives develop a deep, common understanding of their local water resources, the water challenges they face, and the best strategies to address those challenges. Being better informed and having a vision and plan for a better future can lead to improved cooperation and proactive solutions to complex water challenges.
- *Serve as a useful communication tool.* A plan containing consensus-based solutions/strategies that are broadly supported by diverse interests is a powerful tool for communicating to decisionmakers and the public what is needed to succeed. The plan will communicate to decision-makers - local,



# Overview

state, and federal - the community's vision and the financial and technical resources, and cooperation, needed to achieve that vision.

The process for Place-Based Water Planning will depend on the specific needs of a place, but planning generally happens in the four phases outlined below. Detailed guidance for each phase is in the corresponding section of this handbook.



## 2. Who is Involved in Place-Based Water Planning?

Place-Based Water Planning Collaboratives (Planning Collaboratives) include the people, organizations, and governments that have an interest in the water resources of a planning area. A Planning Collaborative should

### POTENTIAL PARTICIPANTS

- Local governments (cities, counties, and special districts)
- Tribal governments
- Special districts (e.g., irrigation, public utilities, flood control, parks/recreation, drainage, ports, etc.)
- Water and wastewater utilities
- Major industries or employers
- Agriculture (small and large operations)
- Forestry (small and large operations)
- Conservation/environmental groups
- Power companies
- Small business
- Private landowners
- Water-dependent recreation
- Anglers/hunters
- Tourism
- Private domestic well users
- Self-supplied water users
- Environmental justice communities
- Watershed Councils
- Soil and Water Conservation Districts
- State and federal agencies (natural resources, land management, business development)

have a balanced representation of interests that reflects the unique attributes of a planning area. Engaging diverse interests helps ensure a process that meets instream and out-of-stream water quantity, quality, and ecosystem needs for both surface water and groundwater. This diversity of interests includes individuals from environmental justice communities, members of minority or low-income communities, Tribal communities, and those traditionally under-represented in public processes. *Appendix C* contains guidance around how to best engage the community in a planning process.

State agencies also play a critical role in Place-Based Water Planning as funders, planning participants, collaborators, technical assistance providers (see *Appendix D Technical Assistance In Place-Based Water Planning*), and implementation partners. Each state agency brings different expertise to Place-Based Water Planning. In addition to the Oregon Water Resources Department (OWRD), core Place-Based Water Planning agencies include Oregon Department of Agriculture (ODA), Oregon Department of Environmental Quality (ODEQ), Oregon Department of Fish and Wildlife (ODFW), Oregon Department of Land Conservation and Development (DLCD), Oregon Health Authority (OHA), and Oregon Watershed Enhancement Board (OWEB). The level of agency engagement and consultation generally depends on specific agency capacity to participate and provide information and technical assistance.

## 3. What is a State Recognized Plan?

Once a Planning Collaborative adopts a plan, the Collaborative may apply for state-recognition of that plan. State recognition of a place-based integrated water resources plan demonstrates that plan actions are consistent with certain state requirements and are well-vetted and supported at the local level. The benefits to state recognition include:

- (1) Eligibility for post-plan coordination and plan update grant funding
- (2) State agency support of certain implementation strategies<sup>1</sup>
- (3) Consideration when updating the IWRS
- (4) Access to technical assistance, and shared learning opportunities

### **“State-recognized place-based integrated water resources plan”**

means a place-based integrated water resources plan that has been reviewed by the Water Resources Commission and recognized by a commission resolution stating that the completed place-based integrated water resources plan adheres to applicable requirements.

*ORS 537.873(1)(i)*

## 4. What OWRD funding is available to support Place-Based Water Planning?

Place-Based Water Planning Grants are available to support all four phases of planning:

- (1) **Planning Readiness Evaluation and Preparation (PREP) Grants** support the preparation for or assessment of a community's readiness to engage in place-based integrated water resources planning for a proposed planning area.
- (2) **Plan Development Grants** support the development of a place-based integrated water resources plan for a planning area consistent with a shared governance agreement, using place-based integrated water resources planning, and following the process, content, and structure provided by OWRD.
- (3) **Post-Plan Coordination Grants** support implementation coordination of a state-recognized place-based integrated water resources plan.
- (4) **Plan Update Grants** support updates to a state-recognized place-based integrated water resources plan.

Please see the [Place-Based Water Planning webpage](#) for current information on planning grant solicitation. All Place-Based Water Planning grants are awarded through a competitive application process. Planning grant solicitation schedules are dependent on funding available, state staff capacity to support Planning Collaboratives, and program needs.

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<sup>1</sup> Agency support for implementation may include a variety of actions and will be determined by agencies based on an agency's mission, authorities, and priorities as resources and capacity allow. Note that agency support does not include any changes or advantages in agency permitting or enforcement procedures or influence grant awards unless otherwise indicated.

# Phase 1: Planning Readiness Evaluation and Preparation (PREP)

In the pre-planning phase of place-based water planning, interested parties from the community come together and assess readiness for Place-Based Integrated Water Resources Planning. Readiness may include things like data availability assessments, community capacity building, and relationship building. In this phase, the potential Planning Collaborative will start to understand dynamics and the capacity required to plan. This section of the handbook will provide guidance for this pre-planning phase, including what should be considered when assessing readiness to plan and what steps should be taken in preparation for planning.

## 1. Expected Outcomes\*

- ☒ Relationship building
- ☒ Goals identified
- ☒ Planning area defined (if applicable)
- ☒ Information gathered
- ☒ Convener identified (if applicable)
- ☒ Readiness Assessment completed

*\*Note: Outcomes may vary for a grant and will be tailored to the needs of the place.*

## 2. OWRD PREP Grants

Planning Readiness Evaluation and Assessment (PREP) Grants support this early phase of planning and are awarded through a competitive grant process. See the [OWRD website](#) for current information on grant solicitations. Additional state agency resources are available to grantees in the form of technical assistance, participation, and process support.

### **Planning Readiness Evaluation and Preparation Grant applications shall be evaluated on:**

- (a) The commitment and expected ability of the grantee to effectively engage a balance of instream and out-of-stream water interests on place-based water resources issues;
- (b) The need for the community to assess its readiness or prepare for place-based water planning;
- (c) The proposed approach to public participation and engagement of environmental justice communities; and
- (d) Strategic priorities identified in the state's Integrated Water Resources Strategy, the Department's strategic plan, or by the Director, and included in grant solicitation materials.

OAR 690-602-0600 (1)

## 3. State Agency Support for PREP Grantees

Agency capacity to support the PREP phase will differ across agencies and will be identified before the start of grant work. Generally, agency support is available in the form of technical assistance, participation, and process support. If a community has not been awarded PREP grant funding, state agency assistance for this phase is limited and may not include the support outlined below.

# Phase 1: Planning Readiness Evaluation and Preparation (PREP)

**Technical Assistance (TA):** During the PREP phase, grant recipients receive proactive support to access and understand agency data and information relevant to planning. This interactive process helps identify major data gaps and may inform TA design during the subsequent plan development phase. See *Appendix D Technical Assistance In Place-Based Water Planning* and the [Place-Based Water Planning webpage](#) for more information.

**Participation:** Dedicated agency staff may attend and participate in group meetings on a regular basis.

**Process Support:** A dedicated OWRD staff person with expertise in Place-Based Water Planning may provide real-time support on process. Specific duties will depend on staff capacity and group needs.

## 4. Guidance

### A. Invite and Involve Diverse Interests

Inviting a diverse representation of interests to the table is essential to ensuring a collaborative and robust public process. A community should use the Potential Participants list located in the Handbook's *Overview* section to help identify water interests and the best practices in community engagement (*Appendix C*) to help develop an inclusive and transparent process and build relationships between potential Planning Collaborative members.

### B. Identify Shared Goals for Water Planning

In the PREP phase, a community should identify shared goals for water planning and explore whether PBP is the appropriate approach for achieving those goals. Place-based integrated water resources planning is a powerful planning tool, in part, because it considers all aspects of the resource, including water quantity, water quality, ecosystem needs, groundwater and surface water. Planning in this way takes time, so before undertaking plan development, it is essential that a community evaluate whether this type of water planning is the most suitable to meet the community's needs.

### C. Define the Planning Area

Planning Collaboratives have the flexibility of establishing their own geographic planning areas. Collaboratives should select a size that is both hydrologically connected and logistically feasible for collaboration. Generally, this means that planning areas range between 500 mi<sup>2</sup> to 4,000 mi<sup>2</sup> and do not cross [OWRD administrative basin boundaries](#). Collaboratives should consider several factors in determining their planning area boundaries, including:

- Hydrological connectedness of the resource (e.g. watershed boundaries, groundwater basin boundaries)
- Climate
- Geology
- Ecological conditions
- Water infrastructure
- Distance and logistics of gathering people to meet
- Scale of information available to support planning
- Legal and political boundaries

# Phase 1: Planning Readiness Evaluation and Preparation (PREP)

- Socioeconomic characteristics
- Scale of implementation strategies

The Oregon Water Resources Department's existing administrative drainage basins are a good starting point for identifying the planning scale. These administrative boundaries are further divided into smaller geographic areas within OWRD's basin programs (refer to OAR Chapter 690, Divisions 500-520). Planning Collaboratives can choose to focus on smaller geographic areas, such as a sub-basin, or a group of sub-basins, within these boundaries. For example, Planning Collaboratives could focus on the upper, middle, or lower section of a basin. Whenever possible, Planning Collaboratives should use watershed-based boundaries, accounting for both groundwater and surface water, and for situations where the source of water for certain uses (e.g., drinking water or irrigation) originates in an adjacent basin or sub-basin.

## D. Gather Information

Place-Based Water Plans build upon and integrate existing studies and plans and are informed by the best available data and information. Potential Planning Collaboratives should document data sources and any existing technical information available for the planning area, including studies, plans, and reports. See the [Place-Based Water Planning website](#) for a preliminary list of sources to consider when gathering information.

## E. Identify Convener(s)

If a group decides to pursue place-based water planning, identifying a convener, or a set of co-conveners, for the plan development process is a valuable outcome of the PREP phase. Conveners lend credibility and legitimacy to the process, serving as a public face for planning and implementation. They are generally well-known to the community with a reputation for serving the public interest and are skilled at bringing people together and mediating conflict.

**“Convener”** means the persons, public bodies, Indian Tribes, or nonprofit organizations that bring together a balanced representation of instream and out-of-stream water interests to undertake place-based water planning; ensure an open, equitable, and transparent process; and impartially guide and support the planning and implementation processes.

OAR 690-602-0200(2)

From plan development through plan implementation, conveners are responsible for ensuring the Planning Collaborative is committed to collaboration and upholding Place-Based Water Planning Principles. Convener responsibilities include, but are not limited to:

- Being the primary point of contact for communications about Place-Based Water Planning.
- Leading the planning process, keeping people moving and working together.
- Framing meetings, discussions, and issues.
- Ushering the plan through the state-recognition process, including presenting the Planning Collaborative's final plan to the Water Resources Commission.
- Demonstrating ongoing commitment through plan implementation.

In many cases, a convener may also serve as a fiscal agent for the collaborative.

# Phase 1: Planning Readiness Evaluation and Preparation (PREP)

Selecting a convener (or conveners) requires careful identification of any potential conflicts of interest or bias. It should be done through a transparent process that considers the unique interests of a planning area. When selecting convener(s), a potential Planning Collaborative should consider ability to be impartial and to engage a wide range of interests in the planning process. A convener should be inclusive and welcoming of all interests, including those that have been historically underrepresented and those that have the economic, political, or technical resources to help create a successful process.

## **F. Place-Based Water Planning Readiness Assessment**

A readiness assessment helps potential Planning Collaboratives understand whether Place-Based Water Planning is suitable for the community's needs and whether they are ready to begin plan development. Completing a readiness assessment will also prepare groups to apply for the Plan Development Grant opportunity. See the [Place-Based Water Planning website](#) for readiness assessment examples. Elements of a readiness assessment should include the following:

- (1) Planning area description and map
- (2) Description of Planning Collaborative's goals, including:
  - Value of Place-Based Water Planning
  - Need for a Place-Based Water Plan
- (3) Assessment of organizational readiness, including:
  - Convener(s)
  - Commitment of an initial set of planning participants that represent instream and out-of-stream water interests
  - Initial engagement of the public, Tribes, local governments, state agencies, and a balanced representation of instream and out-of-stream water interests
  - Techniques to ensure meaningful collaboration and a neutral process
  - Approach to public participation and engagement of environmental justice communities
- (4) Assessment of technical readiness, including:
  - Data, technical information and planning tools available to support planning
  - Existing data gaps
  - Existing plans/studies
- (5) Assessment of resources required to support planning



# Phase 2: Plan Development

During plan development, Planning Collaborative members work together to develop a place-based integrated water resources plan. Plan development follows a collaborative and inclusive process that is designed to:

- (A) Gather information to develop a shared understanding of water resources and identify critical issues and knowledge gaps.
- (B) Examine the existing and future in-stream and out-of-stream water needs for people, the economy and the environment.
- (C) Identify and prioritize strategic, integrated solutions to understand and meet in-stream and out-of-stream water needs.

This section of the handbook provides guidance for plan development, including guidance for a shared governance agreement and a place-based integrated water resources plan, criteria considered for state recognition of a plan, expectations for neutral facilitation and technical writing, and the roles and responsibilities of state agencies, conveners, and Planning Collaborative members.

## 1. Expected Outcomes

- ☒ Shared Governance Agreement
- ☒ State Recognized Place-Based Water Plan

## 2. OWRD Plan Development Grants

Plan Development Grants are designed to support a 3 to 4-year planning process and are awarded through a competitive grant process. See the [OWRD website](#) for current information regarding grant solicitation.

### **Plan Development Grant applications shall be evaluated on:**

- (a) The convener and potential collaborative members ability to meaningfully engage and collaborate in a neutral process over multiple years, with the public, Tribes, local governments, state agencies, and a balanced representation of instream and out-of-stream water interests. Commitment to a neutral process may be demonstrated, in part, through the use of neutral facilitator;
- (b) The proposed data, technical information, and planning tools that would support planning in the area;
- (c) The proposed approach to public participation and engagement of environmental justice communities;
- (d) Strategic priorities identified in the state's Integrated Water Resources Strategy, the Department's strategic plan, or by the Director, and included in grant solicitation materials;
- (e) The value of place-based integrated water resources planning in the planning area and the demonstration of a clear need for a Plan; and
- (f) State agency capacity to support the proposed planning process.

*OAR 690-602-0600 (2)*

Additional [state agency resources](#) are available to grantees in the form of technical assistance, participation,



# Phase 2: Plan Development

and process support. Recipients of Plan Development Grants are required to pursue state recognition of their plans.

## 3. State Agency Support for Plan Development Grantees

Place-based integrated water resources plans must be developed in consultation with OWRD and other relevant state agencies. Agency capacity to consult/support will differ across agencies and will be identified before the start of grant work. Generally, agency support is available in the form of technical assistance, participation, and process support. If an area has not been awarded grant funding, state agency assistance for this phase is limited and may not reflect the support outlined below.

**Technical Assistance (TA):** OWRD will provide Technical Assistance Packages (TAPs) as a proactive resource to support plan development (see *Appendix D*). Additional assistance may be available through responsive TA, where state agencies contribute specific expertise or participate in technical workgroups. Any technical assistance products provided by a state agency should be incorporated into the final plan unless the Planning Collaborative receives written approval of an acceptable alternative. See *Appendix D Technical Assistance In Place-Based Water Planning* and the [Place-Based Water Planning webpage](#) for more information.

**Agency Review of Plan Chapters:** Planning Collaboratives should provide agencies with materials for review at least 45 days before any consensus votes on plan chapters or appendices. Agencies will aim to complete their review within 30 days and provide their feedback at least 15 days prior to a Collaborative vote. Agency review of plan chapters before a Collaborative consensus vote streamlines the process and can reduce the number of required improvements when the Plan Review Team evaluates the plan for state recognition.

**Agency Participation:** Dedicated agency staff may attend and participate in Planning Collaborative meetings on a regular basis.

**Process Support:** A dedicated OWRD staff person with expertise in Place-Based Water Planning may provide real-time support on process. Specific duties will depend on staff capacity and the needs of the Planning Collaborative.

## 4. Guidance

Plan development follows a five-step planning process:

Step 1: Build a collaborative and integrated process.

Step 2: Develop a shared understanding of water resources. Examine the existing and future instream and out-of-stream water needs for people, the economy and the environment.

Step 3: Identify critical issues and explore potential solutions.

Step 4: Develop a workplan to implement integrated solutions for meeting long-term water needs.

Step 5: Adopt the Plan and receive State Recognition.

# Phase 2: Plan Development

## A. Plan Structure

Outlining a plan's general structure at the beginning of a planning process can help focus each planning step to produce a section of the final plan. An example of plan structure can be found in *Appendix E*. Plans do not have to follow this exact order and may contain additional or modified sections.

In addition to the required contents, a Planning Collaborative might consider the following during plan development:

- Document length. There is no prescribed length for a plan, however a plan should not be a voluminous collection of documents previously developed during the planning process. The plan should be a summary of the key products, findings, and recommendations from the planning process. If additional supporting information is needed, consider including it as an appendix or referring to separate documents or websites.
- Audience. A plan often has many audiences such as water partners, the public, potential funders, and decision-makers. The Planning Collaborative should consider who its primary audiences are and structure the plan organization and content accordingly. For instance, if a Planning Collaborative intends to pursue funding from the Oregon Watershed Enhancement Board (OWEB), it's worthwhile to include plan components that could make the Planning Collaborative eligible for OWEB funds.
- Visuals. Maps, figures, graphs, diagrams, and pictures are powerful ways to communicate information and increase the plan's visual appeal and readability.
- Supporting materials. Other materials such as brochures, videos, one-pagers, or story maps may be more effective at communicating some aspects of the plan to different audiences. While not required, Planning Collaboratives might consider how these supporting materials could add value and enhance understanding.
- Setting plan up for success. Other ways to set the plan up for success include: 1) telling a clear and compelling story that can be understood by both the Planning Collaborative and others who have not been involved in the planning process, 2) clearly identifying immediate next steps to facilitate the transition to plan implementation, and 3) being thoughtful about wrestling with tough or complex issues versus deferring them to a later date (it may be tempting to quickly write up a plan, but it may be worth spending extra time to work through potential barriers to successful implementation).

## B. Plan Process and Content

### Step 1

### *Step 1: Build a collaborative and integrated process*

Building a collaborative and integrated process begins in the PREP phase. In Step One of plan development, this foundation is expanded by creating a governance structure and process that encourages collaboration and unites Planning Collaborative members to work toward the common purpose of maintaining healthy water resources for both instream and out-of-stream water needs. Specifically, in Step One, Planning Collaboratives invite and involve diverse interests, establish a public process and consensus-based decision-making approach, and define the roles and responsibilities of the Collaborative. These decisions are documented, along with other Collaborative governance decisions in a Shared Governance Agreement.

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## *Step 1: (a) Invite and Involve Diverse Interests*

A Planning Collaborative should reflect the diverse water interests of a community and include representatives from instream and out-of-stream water users. Inviting a diverse representation of interests to the table is essential for supporting a collaborative and public process and for achieving a balanced representation of water interests during plan development. This inclusive approach also ensures that surface water, groundwater, water quantity, water quality, and ecosystem needs are integrated into plan development.

When determining the composition of a Planning Collaborative, it is important to make sure that all people impacted by the water resources of the planning area – including entities with an interest or responsibility to water resources or ecosystems – have the opportunity to participate in decision-making. This includes environmental justice communities, which are defined as communities of color, communities experiencing lower incomes, communities experiencing health inequities, Tribal communities, rural communities, remote communities, coastal communities, communities with limited infrastructure and other communities traditionally underrepresented in public processes and adversely harmed by environmental and health hazards, including seniors, youth and persons with disabilities (ORS 182.535).

See *Appendix C* for more guidance related to community engagement.

## *Step 1: (b) Ensure a Public Process*

All place-based plans need to employ a strong communication strategy, not only to ensure public participation in plan development, but to also engage the broader community on implementation of the plan.

- ✓ Publicize, in advance, Planning Collaborative meetings, and provide opportunities for the public to engage with the planning process.
- ✓ Utilize a diverse set of communication resources.
- ✓ Establish a means of online communication by setting up a website and posting materials regularly.
- ✓ Consider using a list-serve, and/or a dedicated email account to quickly and broadly disseminate information.
- ✓ Advertise upcoming meetings and public comment opportunities using these platforms, as well as print media or other channels.

## *Step 1: (c) Determine Roles and Responsibilities*

Defining roles and responsibilities early in the process is critical to ensuring transparent decision-making, building trust, reducing duplication of effort, and promoting accountability. Establishing clear expectations enables a Planning Collaborative to operate more efficiently and equitably, ultimately leading to more resilient and inclusive planning outcomes. Below is a

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list of common roles in Planning Collaboratives. Individuals can play multiple roles in the planning process.

**Convener(s):** Conveners bring together a balanced representation of instream and out-of-stream water interests to undertake place-based water planning; ensure an open, equitable, and transparent process; and impartially guide and support the planning and implementation processes. Conveners lend credibility and legitimacy to the process, serving as a public face for planning and implementation. They are generally well-known to the community with a reputation for serving the public interest and are skilled at bringing people together and mediating conflict. Selecting a convener should be done through a transparent process that considers the unique interests of a planning area.

**Neutral Facilitator:** A facilitator is a person who helps a group of people work together better, have open and meaningful discussions, understand their common objectives, and plan how to achieve these objectives during meetings or discussions. In doing so, the facilitator remains neutral, meaning they do not take a particular position in the discussion. Facilitator tools can assist the group in achieving a consensus on any disagreements that preexist or emerge in the meeting so that the group has a solid basis for future action. Skilled facilitation is necessary for consensus decision-making to work well.

**Fiscal Agent:** The fiscal agent is the recipient of the Plan Development Grant and is ultimately responsible for meeting all grant requirements and disbursement of grant funds.

**Project Coordinator/Manager:** A project manager helps guide the planning process, develop agendas, disburse meeting summaries, maintain communications and website updates, and facilitate outreach.

**Coordinating/Steering Committee:** A coordinating or steering committee can play an important role in the planning process. These committees typically help keep the Collaborative moving forward by setting meeting agendas, organizing communications, and supporting overall coordination. Committee members often represent key interest groups and bring a range of perspectives to ensure the process remains balanced, transparent, and responsive to the needs of all participants.

**Technical Experts:** Technical experts help Planning Collaboratives better understand their water resources and write plans. Expertise is often provided by Planning Collaborative members, state agencies, universities, external partners, or other specialists.

**Technical Assistance Liaison:** A dedicated point of contact from the Planning Collaborative that works with agency staff to request technical assistance.

**Planning Collaborative Members:** Planning Collaborative members are responsible for engaging in the collaborative process. This includes preparing for meetings, participating in workgroups, and other duties as outlined in their shared governance agreement. Often, community members have skills or expertise that can be employed in the plan development process (e.g., project management, community engagement, facilitation, water science, ecology or biology, water law, and technical plan writing).

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## *Step 1: (d) Establish Group Expectations and Meeting Protocols*

Establishing ground rules, meeting protocols, and other Planning Collaborative norms and expectations will help maintain respectful and cooperative conversations. These pieces will help planning participants know what is expected of them, what to expect from the conveners, and what they can expect from each other.

The convener(s) and facilitator(s) should take an active role in guiding an open and productive discussion. Participants will likely have questions, ideas, and concerns along the way that need to be considered to gain a clear understanding and agreement. It is important that the facilitator keep everyone engaged; participants who are quiet and reserved should be given alternative ways to engage. Silence should not be mistaken for agreement.

## *Step 1: (e) Employ Consensus Decision Making*

Reaching decisions within the Planning Collaborative must be an inclusive and transparent process that employs consensus decision making. Consensus decision-making is an effective approach in which most members support a decision—or can ‘live with it’—even if one or two group members dissent. Getting to consensus provides a solid foundation upon which to build and implement a plan because it signals long-term support and commitment from a diverse set of stakeholders and partners.

Consensus decision-making is a collaborative process where a group works together to reach an agreement that most can accept or live with—even if it’s not everyone’s first choice. It emphasizes inclusion, mutual understanding, and collective ownership of decisions.

Examples of consensus decision making include:

- *Voting with level of support:* Instead of a simple yes/no vote, voting members rate their support for a proposal on a scale. The Planning Collaborative moves forward if everyone is at least neutral, allowing room for flexibility and nuance.
  - 1 - Enthusiastic support
  - 2 - Support
  - 3 - Neutral
  - 4 - Serious concerns or questions
  - 5 - No way; will actively seek to block this from moving forward
- *Stop light or thumbs system:* During a vote, voting members can use:
  - Thumbs up/Green light - agree
  - Neutral thumb/Yellow light - neutral or can live with it
  - Thumbs down/Red light - cannot support

The Planning Collaborative refines the proposal until all thumbs are up (green) or neutral (yellow).

At some point, the Collaborative may become stuck short of consensus and further progress cannot be made. The Collaborative’s facilitator or an outside mediator can help work through this challenge or refocus the group on the areas where there is agreement.

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## *Step 1: (f) Develop and Sign a Shared Governance Agreement*

A shared governance agreement is a written document adopted by a consensus of the Planning Collaborative that governs the Planning Collaborative's organizational structures, decision-making processes, roles, commitments, communications, and other provisions needed to support group governance or collaboration. Below is a list of required sections of a shared governance agreement; Planning Collaboratives may choose to add additional sections as they are helpful. An example template is available on the [Place-Based Water Planning website](#).

- Planning purpose/goals
- Group expectations and meeting protocols
- Planning collaborative structure (e.g., coordinating committee, workgroups, etc.)
- Decision making (e.g., when consensus decisions are required, voting procedures)
- Conflict resolution protocols
- Description of neutral facilitation
- Internal and external communications
- Schedule
- Planning Collaborative membership/signatories

### Step 2

## ***Step 2: Develop a shared understanding of water resources. Examine the existing and future instream and out-of-stream water needs for people, the economy and the environment.***

Step Two is focused on developing plan chapters that describe and assess current water supplies, water quality, and the overall health of ecosystems. Planning Collaboratives determine how much water is required to meet current and future water needs, including water quantity, water quality, and ecosystem demands. Plans should consider the impacts of climate change, population growth, and land use on water resources and the community's ability to meet these needs. Water needs should be evaluated within the context of specific watersheds, considering the hydrological, geological, biological, climatic, socio-economic, cultural, legal, and political conditions of the community. Communities will have differing levels of data availability, which will affect the types of analysis that can be done in Step Two.

This planning step often requires the most technical assistance from state agencies (e.g., ODFW's guidance on estimating instream needs, OWRD's Technical Assistance Package related to water rights and legal protections). Please see *Appendix D Technical Assistance in Place-Based Water Planning* for more information about how to access this assistance.

## *Step 2: (a) Develop a Shared Understanding of Water Resources*

This step provides a foundation for planning by describing the physical, climatic, and human factors that shape water availability, quality, and ecosystem health in the planning area. A shared understanding of these conditions is essential for identifying current challenges, opportunities for collaboration, and the unique characteristics of the planning area.

### **Describe the physical and climatic setting**

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Outlining the planning area's physical geography, geology, hydrography, and climate patterns will provide a foundation for understanding its hydrologic system.

- ✓ Describe the geography and geology of the planning area, including elevation ranges, topographic features, and dominant geologic formations (natural or manmade). These elements influence how water moves, is stored, and interacts with surface and subsurface systems, which impacts water availability, distribution, and quality.
- ✓ Describe the water resources of the area, including major rivers, tributaries, lakes, wetlands, springs, and aquifers. Characterize the primary water sources as rain, snow, or springs, and describe any groundwater-surface water interactions important for water availability or ecosystem health.
- ✓ Characterize the planning area's climate patterns, including long-term precipitation and temperature trends, seasonal variability, and key drivers of interannual variability (e.g., El Niño-Southern Oscillation, atmospheric rivers). Describe how climate-related hazards such as drought, flooding, wildfire, or heatwaves affect the timing, availability, and quality of water.

## **Describe the socioeconomic and land use setting**

The human dimensions of the planning area influence both water demand and management strategies.

- ✓ Investigate land use patterns in the planning area, including agriculture, urban areas, industry, forestry, and conservation lands and how they shape water use. Map any land ownership distinctions—such as Tribal lands, federal or state-managed lands, and private property—that may affect water governance or access.
- ✓ Describe population trends, including urbanization, population growth or decline, and community development needs and trends. Discuss how these trends influence water demand and management priorities.
- ✓ Identify the economic drivers of water use in the region, such as irrigated agriculture, food processing, hydropower, tourism, or municipal use. Recognize the cultural and social values tied to water, including community identity, recreation, ecosystem services, and Tribal and Indigenous water uses and rights.

## **Describe and assess current water supplies**

- ✓ Describe how water sources fluctuate naturally and in response to human influences, including an assessment of flow variability and trends. This can help planners understand risks related to droughts, floods, and groundwater sustainability.
- ✓ Summarize the supply of surface water and groundwater within the planning area. Where possible, use observed or modeled data to describe and graphically illustrate long-term trends in streamflow, baseflow contributions, recharge, and aquifer storage. Include seasonal patterns and variability across wet and dry years.



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- ✓ Identify any extreme, historical hydrologic events, such as flood events, drought periods, or low-flow seasons, that have shaped the reliability of water supplies in the past or are expected to do so in the future.

### **Describe existing water quality conditions**

- ✓ Describe the status of surface water and groundwater quality, referencing available data sources. Identify impaired water bodies (e.g., those on the 303(d) list), Total Maximum Daily Loads (TMDLs), and known point and non-point pollution sources. Note if the planning area contains Groundwater Management Areas (GWMAs) or other designated areas of concern.
- ✓ Identify known areas with water quality concerns, such as harmful algal blooms (HABs), areas of contamination, and contamination plumes related to things like underground storage tanks or landfills.
- ✓ Include information on designated beneficial uses, permitted discharges, and relevant monitoring data or reports from state or federal agencies, where available.

### **Describe the general condition of ecosystems**

- ✓ Provide an overview of the ecological health of the area, with a focus on aquatic habitats and groundwater-dependent ecosystems.
- ✓ Identify any sensitive, threatened, or endangered species present in the planning area, including species listed under the Endangered Species Act or on Oregon's State Sensitive Species list.
- ✓ Describe historical and current presence of aquatic species, including native migratory fish, and assess limiting factors for aquatic habitat health. These may include low flows, high temperatures, sedimentation, habitat fragmentation, or loss of riparian vegetation. Consider referencing tools such as Oregon's State Wildlife Action Plan (SWAP) to guide this assessment.
- ✓ Describe any existing instream flow protections for fish and wildlife and their effectiveness in protecting instream flow. Examining the priority date of instream water rights can help understand their effectiveness.

### **Examine the Legal, Institutional, and Infrastructure Systems that Shape Water Use**

Water availability is shaped not only by physical conditions, but also by legal rights, administrative rules, and the infrastructure used to divert, store, and deliver water. This step describes the systems—both natural and built—that influence how water is allocated, accessed, and managed in the planning area.

#### ***Summarize existing water rights and legal protections***

- ✓ Provide an overview of existing water rights, the legal framework governing water allocation, and the adjudication status of surface water rights in the planning area. This information is critical for understanding the regulatory constraints and opportunities that affect water supply management decisions.



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- ✓ Describe the existing water rights in the planning area, distinguishing between consumptive uses (such as municipal, agricultural, industrial, and domestic) and instream uses (such as ecological, scenic, or recreational purposes). Note the types and quantity of water rights where information is available, and the primary sources used to meet these rights (surface water, groundwater, stored water, or alternative sources like recycled or treated water).
- ✓ Provide a summary of the legal and administrative framework that governs water allocation in the planning area. Include references to any special designations, classifications, or protected areas.
- ✓ Describe the adjudication status of rivers, streams, and groundwater registrations in the planning area—indicating whether surface water or groundwater rights have been confirmed through judicial or administrative processes. Consider referencing the existence of historic or ongoing adjudications, accounting for any groundwater registrations, and how undetermined rights may affect water uncertainty in the future.
- ✓ Discuss how Tribal rights, if applicable, are recognized and reflected in water management.

### ***Assess regulatory water availability and constraints***

- ✓ Use approved water availability tools to assess where water is already fully allocated or over-appropriated during parts of the year. These tools help planners understand the regulatory constraints on new allocations and provides insight into how existing water rights shape water management decisions.
- ✓ Assess trends in water allocation. Describe the status of water use in the basin and how seasonal patterns influence the availability of water for new and existing uses.
- ✓ Identify locations or times where regulatory constraints limit access to water, even when water may be physically present. This may include areas where instream flow rights are rarely met, or where downstream obligations require curtailment of upstream use.

### ***Describe natural and built infrastructure***

Water infrastructure plays a critical role in managing how water is stored, conveyed, and made available for use.

- ✓ Describe and map key features of the built water system, including reservoirs, diversion structures, canals, pipes, pumps, wells, treatment plants, and flood control structures. Where available, include information on the age, condition, capacity, and reliability of these systems.
- ✓ Describe and map natural infrastructure such as wetlands, floodplains, springs, waterfalls, and riparian corridors. Describe their role in supporting water storage,

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groundwater recharge, flood mitigation, water quality, and ecosystem health. Identify areas where these systems are intact, degraded, or have been disconnected from the flow regime.

- ✓ Assess how natural and built systems interact within the planning area. For example, how do levees affect floodplain function? Do reservoirs alter seasonal flow availability? Are there places where nature-based infrastructure could supplement or improve the resilience of built systems?

### *Step 2: (b) Examine the Existing and Future Instream and Out-of-Stream Water Needs for People, the Economy, and the Environment*

- ✓ Identify how much water is needed to support current and future uses.
- ✓ Examine where and when water demands are met—or not met—under current conditions and evaluate how these needs may evolve in the coming decades due to climate change, land use change, and population growth.

Meeting water needs should be considered within the context of specific watersheds, accounting for the hydrological, geological, biological, climatic, socio-economic, cultural, legal, and political conditions of a community.

Understanding the deficits of instream needs (such as habitat and water quality) and out-of-stream needs (such as municipal, agricultural, or industrial use) is essential for identifying future risks and developing solutions during later planning steps.

#### **Estimate current and future water needs**

- ✓ Describe the diverse types of beneficial uses, including consumptive and instream uses.
- ✓ Assess currently available information on species specific and reach specific flow need studies like Basin Investigative reports (BIR) or Instream Flow Incremental Methodology (IFIM) studies.
- ✓ Quantify current use across sectors and sources (e.g., surface water, groundwater, stored water, or alternative sources like recycled or treated water), where possible.
- ✓ Identify locations and time periods where water shortages or supply-demand imbalances occur, including areas with regular curtailments, delivery limitations, or unmet instream flow targets. Use available tools such as annual water use reports, watermaster data, and infrastructure assessments to evaluate these conditions.
- ✓ Consider how future water demands may change over the planning horizon (typically 50 years). Reflect on potential shifts in population, land use, crop types, industrial activity, fish distribution, or conservation objectives. Reference relevant planning documents (e.g., municipal or agricultural water management and conservation plans, conservation and recovery plans) to understand future projections.

#### **Describe how climate change and natural hazards impact water systems**

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- ✓ Analyze how future climate conditions may influence the variability of water sources and how water demands are expected to evolve across different sectors. These analyses help identify potential mismatches between supply and demand.
- ✓ Describe how climate change and natural hazards are expected to affect water demand and availability. This includes:
  - Warmer temperatures and longer growing seasons
  - Changes in precipitation patterns and snowpack
  - Increased evaporation
  - Altered flood and drought cycles
  - Wildfire and post-fire sedimentation impacts
  - Exposure to extreme heat, floods, or seismic risks
- ✓ Describe how these changes could impact human systems (e.g., infrastructure, public health, economic sectors), natural systems (e.g., streamflow, habitat, fish distribution and run timing, water quality), and infrastructure performance (e.g., reliability of storage and conveyance systems).

Planning Collaboratives are encouraged to explore multi-year or worst-case scenarios that reflect plausible climate futures, especially if the planning area has limited storage or existing vulnerabilities.

## Identify data gaps and key uncertainties

- ✓ Identify any critical data gaps or uncertainties that limit the ability to assess current or future water needs. Examples may include:
  - Limited groundwater monitoring or well data
  - Incomplete water use reporting information
  - Uncertainties in crop demand projections
  - Gaps in habitat-based flow data or temperature thresholds
  - Lack of high-resolution climate models
- ✓ Clarify where additional data, coordination, or modeling would strengthen future assessments. This can help prioritize investment in monitoring and build transparency in assumptions used during the planning process.

### Step 3

## Step 3: Identify critical issues and explore potential solutions

In Step Three, Planning Collaboratives use the information gathered in Step Two to identify critical issues, including vulnerabilities and knowledge gaps. Critical issues establish the foundation for Planning Collaboratives to explore a wide range of solutions, before evaluating which solutions the Planning Collaborative wants to pursue as implementation actions.

### *Step 3: (a) Identify Place-Based Critical Water Issues*

A critical water issue is a water-related problem or challenge that, if not resolved, inhibits the ability to meet instream and out-of-stream water needs. This includes key vulnerabilities and knowledge gaps. Identifying and defining critical water issues in a planning area is essential to

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finding appropriate solutions. When a Planning Collaborative and the broader community understand the status of water resources and critical water issues in the planning area, they are more likely to understand the value of potential solutions.

Critical water issues should be clearly defined, quantified to the extent possible, and prioritized. If desired, the Planning Collaborative can organize critical water issues by type (e.g., instream, agricultural, municipal, or industrial) or area (e.g., stream reach or sub-watershed). Depending on the issue, the Collaborative may also choose to define a metric that it can measure progress towards during plan implementation.

### *Step 3: (b) Explore a Variety of Potential Solutions*

Considering the diversity of water challenges and perspectives, Planning Collaboratives should consider a wide range of potential water solutions, examining various options for addressing critical water issues. Different planning participants will likely have different levels of familiarity and understanding of different water solutions. This is an opportunity for Planning Collaboratives to learn together and be open to traditional, new, and innovative approaches.

The state's Integrated Water Resources Strategy provides a list of potential solutions, but it is not exhaustive. Unique circumstances within a planning area—or smaller sub-area—may call for creative, locally tailored solutions that the Planning Collaborative should consider. Solutions may include maintaining current practices if they are sufficient to meet future needs/demands, but this is also the time to evaluate new practices and innovative approaches. Planning Collaboratives should also consult local comprehensive plans to assess what actions might be compatible.

While all solutions must align with state water policy and law, Planning Collaboratives may choose to explore policy solutions. A Place-Based Water Plan, on its own, cannot change state law, policy, or management—but it can recommend changes. If a Planning Collaborative chooses to pursue policy solutions, the Collaboratives should consult with the appropriate state agency to understand existing legal or regulatory barriers. In some cases, state agencies may determine that the barriers are significant and may advise that a recommended policy solution not be included in the final plan.

#### **Examples: Critical Water Issues**

Critical water issues can include, but are not limited to, data gaps, water quality concerns, water supply shortfalls, and ecosystem impacts. Examples include:

- Monitoring needs and gaps.
- Climate variability impacts on streamflow and groundwater recharge.
- Aging or insufficient infrastructure limiting water storage and conveyance.
- Overallocated water supplies leading to conflicts and shortages.
- Declining aquifers due to overuse or reduced recharge.
- Water quality degradation from pollution, wildfires, and land-use changes.
- Habitat/ecological degradation, including loss of wetlands and fish passage barriers.

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Learning about solutions can be especially helpful when it involves a combination of background research, presentations from specialists, field tours, and group discussions. For instance, if a Planning Collaborative is considering an irrigation lining/piping solution, it may be helpful to visit an existing piping project and learn about its design, location, construction and maintenance costs, the funding mechanism, benefits, permitting and reporting requirements, and any challenges encountered in the construction or operation of the project.

Flyers and other informational materials about past solutions from the planning area, other parts of Oregon, other states, or even other countries may provide useful background information on potential solutions. Soil and Water Conservation Districts, watershed councils, state and federal agencies, Tribes, cities, districts and other entities may have existing information on potential solutions that the Planning Collaborative could use or reference.

### *Step 3: (c) Develop and Implement a System for Evaluating Potential Solutions*

Once a Planning Collaborative has identified critical issues and potential solutions, a Collaborative should evaluate and prioritize those solutions for implementation. This involves:

- **Identifying potential benefits and challenges** related to implementation of each solution.
- **Integrating solutions, where practical.** Integrated solutions are linked or related solutions that work together to solve problems or manage water more effectively than a single, discreet solution alone. Integrating solutions may help negotiate outcomes with partners. A solution alone may not be appealing to one partner, but in the context of an integrated package of solutions, it may become more acceptable.
- **Prioritizing solutions.** Prioritization may involve ranking solutions, placing solutions into types/categories (e.g., instream, agriculture, municipal, or integrated) or tiers (e.g., high, medium, low priority), or a combination.

Using a **Decision Support Framework (DSF)** can help Planning Collaborative complete this step and brings legitimacy to the planning process and the plan it produces. A DSF is a tool that will help answer the fundamental question: Is this the right solution, or mix of solutions, to help address the critical water issue? By considering all potential solutions in a fair and consistent manner, a DSF helps Planning Collaboratives prioritize solutions that the Collaborative, the larger community, funders, regulatory agencies, and others support.

#### **Common Tools in a DSF**

- Alternatives analysis
- Cost-benefit analysis
- Multi-criteria decision analysis
- Prioritization matrix
- Scenario planning
- GIS and data visualization

***DSF Example:*** Use a matrix to evaluate solutions based on multiple criteria such as cost, potential benefits and impacts, size or scale, time to implement, risk, availability of funding, secondary benefits, technical difficulty, community support, and more. Each of

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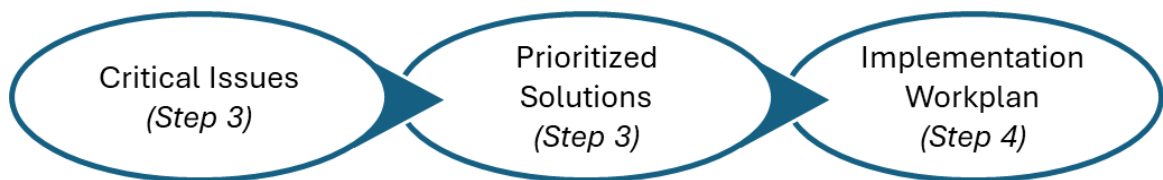
the criteria can be assigned a weight and ultimately each solution can be scored for prioritization ranking.

After identifying or developing a system for evaluating solutions, Planning Collaboratives apply the evaluation system to the potential solutions to (1) learn if/how they might address the identified critical water issues and (2) determine a priority list of solutions.

### Step 4

#### ***Step 4: Develop a workplan to implement integrated solutions for meeting long-term water needs***

In Step Four, Planning Collaboratives use the solutions identified in Step Three to develop an integrated workplan that outlines how prioritized solutions will be implemented to meet instream and out-of-stream needs. The workplan should be actionable and build a strong foundation entering the implementation phase.



#### ***Step 4: (a) Identify potential projects and next steps for priority solutions.***

The first step in developing an implementation workplan is to identify potential projects and next steps for priority solutions. For example, if a Planning Collaborative identifies on-farm efficiency as a priority solution, next steps may include 1) surveying landowner interest, 2) using or building upon existing conservation programs doing this work, 3) developing a cost estimate, 4) applying for an OWRD [Feasibility Study Grant](#) or other funds to determine feasibility of specific on-farm efficiency projects.

#### ***Step 4: (b) Workplan Development***

A workplan considers the Planning Collaborative's prioritized solutions and related projects to develop a clear pathway for implementation. To the extent possible, the workplan should describe which solutions will be addressed first, what funding is needed to implement various aspects of the plan, and the timeline for plan implementation. The workplan should also specify who will lead each aspect of the plan implementation, the critical issues each solution/project is addressing, and what resources are needed to keep the Planning Collaborative engaged and coordinated throughout implementation.

At a minimum, a workplan includes:

- **Roles and Responsibilities.** The workplan should identify leaders and partner entities for implementation of priority solutions and related projects (e.g., Planning Collaborative workgroup, individual participants/organization). Most priority solutions should have designated leaders; implementation leaders and partners should identify and document their commitment to moving a solution/project forward.

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Additionally, the Planning Collaborative should outline the role of the Collaborative during implementation and update their shared governance agreement accordingly (see *Step 4: (c) Updated Implementation Governance* below).

- **Timeline and Milestones:** Timelines for implementation should be identified for solutions and related projects. For example, solutions may be implemented in the short term (0-5 years), medium term (5-10 years), or long term (10-20 years). Timelines might be related to things like relative priority, project durations, or readiness to implement.

For priority solutions and projects, milestones should be developed to help clarify project structure, facilitate future decision making, ensure accountability, and track progress. Milestones should generally be specific, time-bound, and actionable.

- **Monitoring Plan:** Using information from the workplan timeline and milestones, Planning Collaboratives should develop a way to measure and track plan implementation progress. Tracking can be an invaluable tool for communicating the plan's impact and is useful in meeting biennial state-recognition reporting requirements. Identifying project metrics (e.g., cfs of water conserved, square miles of riparian restoration, miles of pipeline installed) is helpful to measure project/plan impact.
- **Budget and Funding Sources:** There are many potential funding sources available for plan projects. Identifying potential funding opportunities and related budget needs in the workplan helps inform project milestones and plan implementation. OWRD Place-Based Water Planning grants may also be available to support post-planning Collaborative coordination (see the [Place-Based Water Planning website](#) for current information on funding opportunities).

### *Step 4: (c) Updated Implementation Governance*

During implementation, Planning Collaboratives continue their commitment to collaboration and adherence to principles of Place-Based Water Planning and the IWRS. To set themselves up for success, Collaboratives should update their shared governance agreement to outline how the Collaborative will make decisions and function during implementation. Updated shared governance agreements may include:

- An adaptive planning framework (e.g., how the plan will evolve with new information or changing conditions, when the Collaborative will assess the need to update the plan)
- Role of Collaborative in project support (e.g., funding support letters)
- Post-planning Collaborative organization (e.g., implementation workgroup(s) led by a dedicated coordinator; quarterly Planning Collaborative meetings where interested parties are updated on progress, help draft funding proposals, visit project sites, or review other work products.)
- New governance arrangements, like the creation of a new entity/non-profit
- Updated community engagement plan



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Keeping the Planning Collaborative working together over a sustained timeframe is critical to the success of plan implementation and is required to maintain state recognition (see *Phase 3 Plan Implementation Guidance* below). See the [Place-Based Water Planning website](#) for templates and examples.

## Step 5

### ***Step 5: Adopt the plan and request State Recognition***

In Step Five, a Planning Collaborative formally adopts its plan and requests state recognition. To achieve state recognition, a plan must be developed using a place-based integrated water resources planning process, meet the definition of a place-based integrated water resources plan, and follow the process, content, and structure outlined in this handbook.

#### ***Step 5: (a) Consensus on the Final Draft Plan***

Though Planning Collaboratives will take different approaches to involving partners or participants in drafting the plan, it is important that participants have a meaningful way to contribute so they are well-informed and invested in the plan's contents and will support plan implementation. To help build consensus and prevent surprises, Collaboratives should vote to approve plan chapters as they are completed in planning steps 1-4 and hold a final consensus vote on the entire draft plan.

#### **State Recognition of Plans**

- (1) A collaborative is eligible to apply for state-recognition of their Plan after it is adopted by the collaborative through consensus as defined in the collaborative's shared governance agreement.

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**Collaborative Review:** The timeline for review prior to a consensus vote should be well thought out and communicated to the Collaborative. Collaboratives should build in sufficient time for participants to review the entire draft plan. This might include time for review from other people within their organizations. In addition to the Collaborative, other interested parties/audiences may benefit from a presentation of the draft plan. Collaboratives should also allow adequate time to incorporate feedback from the review, addressing any concerns and improving the draft plan to gain broad support.

**Public Input:** Although this should not be the first time the broader community hears about the planning effort, review of the draft plan is an important way to foster public input and build support before a plan is completed (see *Appendix C Community Engagement*).



## Phase 2: Plan Development

### *Step 5: (b) State Agency Review of Final Draft Plan*

Once a Planning Collaborative has reached consensus on its final draft plan, they may apply for state recognition. The first step to achieving state recognition is review by a state agency Plan Review Team (PRT). The PRT evaluates whether a plan meets the requirements for state recognition.

#### **State Recognition of Plans**

- (2) The Plan Review Team shall review plans for adherence to the definition of a place-based integrated water resources plan, place-based integrated water resources planning, and the related process, content, and structure provided by the Department. The Plan Review Team shall make a recommendation to the Director about state recognition of the Plan within 120 days of plan submission. If the Plan Review Team requires changes to recommend the Plan for state recognition, the Collaborative shall be given an opportunity to amend its plan before a final recommendation is made.

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**Plan Review Team (PRT) Members:** Several agencies will bring different areas of expertise to the review. The Oregon Water Resources Department (OWRD) will serve on the Plan Review Team and also invite the Oregon Department of Agriculture (ODA), Oregon Department of Environmental Quality (ODEQ), Oregon Department of Fish and Wildlife (ODFW), Oregon Department of Land Conservation and Development (DLCD), Oregon Health Authority (OHA), and Oregon Watershed Enhancement Board (OWEB) to serve on the PRT. OWRD may also invite additional state agencies with relevant knowledge or expertise to serve on the PRT. The Collaborative can request other agencies be invited to participate.

**Review Steps and Timeline:** OWRD will coordinate the state agency review process according to the estimated timeline in Table 1 below. The PRT will strive to complete their initial review for state recognition within 80 days of plan submission. During this period, OWRD will also host a required 45-day public comment period on the final draft plan. Comments received during this period will be considered by Water Resources Commission. If the PRT requires changes to the plan, the Planning Collaborative will be given at least 20 days to amend its plan before a final recommendation about state-recognition is made.

The Planning Collaborative may find it beneficial to present an overview of the draft plan to the PRT to explain the planning process, the plan, and answer questions. A presentation to the PRT should be considered in the Collaborative's review process, schedule, and communicated to agencies as early as possible. Requesting a presentation may increase the length of time required for the review, with an in-person meeting in the planning area requiring more time to schedule compared to a conference call/webinar.

# Phase 2: Plan Development

**Table 1. State Agency Review Steps and Estimated Timeline**

State Agency Review Steps	Example Timeline
Final draft Place-Based Water Plan submitted to OWRD*	Day 1
OWRD begins a 45-day public comment period of the final draft Place-Based Water Plan, with written notice to relevant county and Tribal governments	Day 10
The PRT completes its review of the draft Place-Based Water Plan	Day 60
The PRT meets to discuss and develop feedback for draft Place-Based Water Plan	Day 70
OWRD sends consolidated plan feedback to the Collaborative's Convener(s)	Day 80
The Collaborative resubmits the revised final Place-Based Water Plan to OWRD (if needed)	Day 100
The PRT reviews the final Place-Based Water Plan and makes its final state-recognition recommendation to the OWRD Director	Day 120
The Collaborative adopts its final Place-Based Water Plan	Day 120+
Water Resources Commission meeting: the Collaborative presents its final Place-Based Water Plan for state-recognition	Day 120+**

\*Provide advance notice to OWRD, if possible, to assist in scheduling.

\*\*The Water Resources Commission meeting schedule is posted to its [website](#). Final Place-Based Water Plans must be adopted by the Planning Collaborative at least 2.5 months prior to a Commission meeting to be considered for the Commission's agenda.

**Review Criteria:** The PRT will review the planning process and plan content and structure according to the evaluation criteria outlined in *Appendix F*. The PRT will check for technical accuracy according to agency expertise, but Planning Collaboratives are ultimately responsible for assuring the quality and accuracy of technical work in their plans. The PRT will also consider comments received during the 45-day public comment period. The PRT's feedback will include a summary of plan strengths, suggestions for improvements, and required improvements for state recognition.

## *Step 5: (c) Adoption of the Final Plan by the Planning Collaborative*

The Planning Collaborative should formally adopt its final plan after the PRT review is complete and the Planning Collaborative has made any required or recommended revisions. The Collaborative should follow the decision-making process outlined in its governance agreement to formally adopt the final plan.

# Phase 2: Plan Development

## Step 5: (d) State Recognition

### State Recognition of Plans

- (3) A Plan may be recognized by the Commission if it meets the definition of a place-based integrated water resources plan, was developed using place-based integrated water resources planning, follows the process, content, and structure provided by the Department, and upon recommendation by the Director.

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Once the PRT has reviewed and recommended a plan for state recognition and it has been adopted by the Planning Collaborative, the plan may be presented to the Water Resources Commission for state-recognition. Final plans must be adopted by the Collaborative at least 2.5 months prior to a Commission meeting to be included on the Commission's agenda.

The Collaborative's convener(s) and designated staff will work with OWRD to prepare their presentations for state-recognition. All materials, including any public comments received, will be provided to the Commission in advance and posted to the Commission's website.

Plans will be recognized by the Commission in a formal resolution signed by the Commissioners. Recognition of a place-based integrated water resources plan by the Water Resources Commission demonstrates that plan actions are consistent with certain state requirements and are well-vetted and supported at the local level<sup>2</sup>.

State recognition makes a Planning Collaborative eligible for state agency support during implementation and additional coordination funding during plan implementation and plan updates. State-recognized plans are also considered in updates and work planning for the IWRS. See the next two sections of this handbook on *Phase 3 Plan Implementation* and *Phase 4 Plan Updates* for more information.

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<sup>2</sup> Commission recognition does not legally bind the State to perform any activity; obligate the State to provide financial assistance for any activity; obligate the State to rely on or utilize any analysis performed in the planning process; indicate all the plan contents are technically accurate as technical accuracy is the responsibility of the Planning Collaboratives; or indicate that a proposed action has been approved or is being directly promoted by OWRD or other agencies.

# Phase 3: Plan Implementation

In phase three of planning, Collaboratives work together to implement plan strategies and projects. State agencies support Planning Collaboratives during implementation of state-recognized plans and may lead or assist with relevant projects. State recognition is maintained through biennial reporting to OWRD.

## State Recognition of Plans

- (5) The Department, in consultation with other relevant state agencies, shall identify, document, and communicate to collaboratives which Plan strategies are consistent with an agency's mission, authorities, and priorities, and whether and how they may be supported by those agencies as resources and capacity allow.
- (6) Plans that achieve state recognition before the Department begins updating the state's next Integrated Water Resources Strategy shall be considered in the update. The Department, in consultation with other relevant state agencies, shall identify, and may incorporate common themes, critical issues, or individual strategies emerging from state-recognized Plans into updates and any associated workplans, consistent with the agency missions, authorities, and priorities, and as capacity allows.

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## 1. Expected Outcomes

- ☒ Collaborative and strategic implementation of the place-based water plan
- ☒ Tracking and biennial reporting on implementation progress
- ☒ Continued Collaborative and community engagement

## 2. OWRD Post-Plan Coordination Grants

Post-Plan Coordination Grants support Planning Collaborative coordination during implementation and are awarded through a competitive grant process. These grants do not fund projects. See the [OWRD website](#) for the most up-to-date information regarding grant solicitation. Additional [state agency resources](#) are available to grantees in the form of technical assistance, participation, and process support.

### Post Plan Coordination Grant applications shall be evaluated as follows:

- (a) If a Collaborative's Plan has received state-recognition for the first time within the last two years and it has not received a Post Plan Coordination Grant previously, its application may be given preference and shall be evaluated on:
  - A. Demonstration of plan strategies and actions that represent a balance of instream and out-of-stream water interests and a commitment to collaboration and place-based planning principles;
  - B. The proposed approach to public participation and engagement of environmental justice communities; and
  - C. Strategic priorities identified in the state's Integrated Water Resources Strategy, the Department's strategic plan, or determined by the Director, and included in grant solicitation materials.

(Continued on next page)

# Phase 3: Plan Implementation

(Continued)

- (b) If the Collaborative's Plan received state-recognition two or more years before the application deadline, its application shall be evaluated on:
- A. Demonstration of the pursuit of Plan strategies and actions that continue to represent a balance of instream and out-of-stream water interests and a commitment to collaboration and place-based planning principles; and
  - B. Progress made towards Plan implementation, including how progress aligns with the Plan's implementation strategies and continues to represent a balance of in-stream and out-of-stream water interests;
  - C. The proposed approach to public participation and engagement of environmental justice communities; and
  - D. Strategic priorities identified in the state's Integrated Water Resources Strategy, the Department's strategic plan, or determined by the Director, and included in grant solicitation materials.

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## 3. State Agency Support

State-recognized place-based water plans are eligible for support by OWRD and other relevant state agencies. Capacity to support implementation will differ across agencies. Generally, agency support is available in the categories outlined below.

**Technical Assistance:** Depending on a Planning Collaborative's needs during implementation, additional support may be provided through Responsive TA. Examples include presentations on available funding or related agency projects, and enhanced assistance with agency data. See the *appendix D Technical Assistance In Place-Based Water Planning* and the [Place-Based Water Planning webpage](#) for more information.

**Participation:** Dedicated agency staff may attend and participate in Collaborative meetings on a regular basis.

**Implementation Coordination Support:** A dedicated OWRD staff person with expertise in Place-Based Water Planning may provide real-time support on coordination during implementation. Specific duties will depend on staff capacity and the needs of the Planning Collaborative.

**Implementation Support:** Agencies may support implementation of a Collaborative's workplan in a variety of different ways. During workplan development and throughout implementation, agencies will identify plan solutions and projects that are consistent with their missions, authorities, and priorities and communicate whether and how they plan to support them with their available resources and capacity. When agencies are not taking a lead role on strategies, they might also serve on implementation workgroups or write letters of support when appropriate.

# Phase 3: Plan Implementation

## 4. Guidance

### A. Planning Collaborative Meetings & Implementation Tracking

A place-based water plan is active, meaning that Planning Collaboratives do not disappear after plan adoption and state recognition. Instead, Planning Collaboratives continue to meet, implementing plan solutions collaboratively while continuing to follow the principles of place-based water planning and the IWRS. Continuing to meet and collaborate after a plan is completed helps to move projects forward, maintain momentum, and provides a forum to discuss new and emerging water issues.

Each Planning Collaborative will have its own approach to the implementation phase. The sideboards for this phase are set up by the Planning Collaborative during workplan development (see *Plan Development Step 4 Guidance* above). See the [Place-Based Water Planning website](#) for examples of how to structure this phase.

### B. Maintaining State Recognition

To maintain state recognition of their place-based water plans, Planning Collaboratives are required to report on their progress to OWRD every two years. Progress towards plan implementation must align with the place-based water plan, represent a balance of instream and out-of-stream water interests, and the Planning Collaborative must continue to demonstrate a commitment to collaboration and the principles of place-based water planning and the IWRS. Reporting forms can be found on the [Place-Based Water Planning website](#).

## Phase 4: Plan Updates

Planning Collaboratives should consider updating their plan every 10-15 years. Plan update frequency should be based on the need to develop new strategies or actions or because of significant changes in local conditions, data availability, or climate change information.

*Note: This section will be updated with more complete guidance in future versions of the PBP Handbook.*

# Appendix A: Applicable Planning Guidelines

Division 602 rules took effect for Place-Based Planning on April 1, 2025 ([OAR 690-602](#)). The table below indicates how this Handbook applies to Planning Collaboratives based on the Collaborative's status on that date.

Planning Collaborative Status	Applicable Planning Guidance for <i>achieving</i> State Recognition	Applicable Planning Guidance for <i>maintaining</i> State Recognition
<b>After April 1, 2025</b> , the Planning Collaborative: <ul style="list-style-type: none"> <li>Received PBP grant funding; and/or</li> <li>Began plan development</li> </ul>	2025 updated Place-Based Water Planning Handbook	2025 updated Place-Based Water Planning Handbook
<b>Prior to April 1, 2025</b> , the Planning Collaborative completed significant plan development as outlined in the 2015 DRAFT Guidelines and additional 2018/2019 Draft Guidance.	2015 DRAFT Guidelines and additional 2018/2019 Draft Guidance	2025 updated Place-Based Water Planning Handbook
<b>Prior to April 1, 2025</b> , the Planning Collaborative received state recognition.	N/A ( <i>already state-recognized</i> )	2025 updated Place-Based Water Planning Handbook



# Appendix B: IWRS Guiding Principles

The fifty-year vision and guiding principles from the state's 2025 Integrated Water Resources Strategy (IWRS) are reproduced below as a reference for Planning Collaboratives. The guiding principles were developed to help shape the development and implementation of the Strategy. These principles should serve as a constant reminder to recognize the public interest in water, to include a meaningful process for public involvement, and to maintain a balanced representation of all interests.

## **Accountable and Enforceable Actions**

Ensure that actions comply with existing water laws and policies. Actions should include better measurement and enforcement tools to ensure desired results.

## **Balance**

The [place-based] strategy must balance current and future instream and out-of-stream needs supplied by all water systems (above ground and below ground). Actions should consider and balance tradeoffs between ecosystem benefits and traditional management of water supplies.

## **Collaboration**

Support formation of regional, coordinated, and collaborative partnerships that include representatives of all levels of government, private, and non-profit sectors, Tribes, stakeholders, and the public. Collaborate in ways that help agencies cut across silos.

## **Conflict Resolution**

Be cognizant of and work to address long-standing conflicts.

## **Facilitation by the State**

The State should provide direction and maintain authority for local planning and implementation. Where appropriate, the State sets the framework, provides tools, and defines the direction.

## **Incentives**

Where appropriate, utilize incentive-based approaches. These could be funding, technical assistance, partnerships / shared resources, regulatory flexibility, or other incentives.

## **Implementation**

Actions should empower Oregonians to implement local solutions; recognize regional differences, while supporting the statewide strategy and resources. Take into account the success of existing plans, tools, data, and programs; do not lose

commonsense approach; develop actions that are measurable, attainable, and effective.

## **Interconnection/Integration**

Recognize that many actions (e.g. land-use actions) in some way affect water resources (quality and/or quantity); recognize the relationship between water quantity and water quality; integrate participation of agencies and parties.

## **Public Process**

Employ an open, transparent process that fosters public participation and supports social equity, fairness, and environmental justice. Advocate for all Oregonians.

## **Reasonable Cost**

Weigh the cost of an approach with its benefits to determine whether one approach is better than another, or whether an approach is worth pursuing at all. Actions should focus on reducing the costs of delivering services to the state's residents, without neglecting social and environmental costs.

## **Science-Based, Flexible Approaches**

Base decisions on best available science and local input. Employ an iterative process that includes "lessons learned" from the previous round. Establish a policy framework that is flexible. Build in mechanisms that allow for learning, adaptation, and innovative ideas or approaches.

## **Streamlining**

Streamline processes without circumventing the law or cutting corners. Avoid recommendations that are overly complicated, legalistic, or administrative.

## **Sustainability**

Ensure that actions sustain water resources by balancing the needs of Oregon's environment, economy, and communities.

# Appendix C: Community Engagement in PBP

Central to Place-Based Water Planning is proactive community engagement. Incorporating community needs, knowledge, and lived experiences into planning helps generate durable and creative solutions and helps to ensure a secure and resilient water future. Effective community engagement encourages practices that maximize opportunities to participate. Community engagement:

- ✓ Helps people weigh a variety of perspectives and listen to each other's views.
- ✓ Creates shared understanding, manages differences, and establishes direction for moving ahead on tough issues.
- ✓ Builds trust and improves communication between members of the planning group and the broader public.
- ✓ Points out unintended consequences of certain decisions for better, more equitable, and durable outcomes.
- ✓ Creates a deeper sense of ownership.
- ✓ Helps to avoid conflict or opposition to a planning effort in the future.
- ✓ Creates new opportunities for community members to become involved in public problem solving and decision making.

It is important to thoughtfully plan out community engagement to ensure a holistic approach to planning. A Planning Collaborative should continually evaluate how well it is engaging partners as well as those interests that are not sitting at the planning table. Community engagement for place-based water planning should consider the following best practices:

**A. Balanced and Inclusive Participation:** Before planning begins, identify and invite the community's diverse water interests to the planning process. This includes instream and out-of-stream water users, federal, state, local, and Tribal governments, economically impacted community members, disproportionately impacted communities, entities that advocate for fish and wildlife/the environment or other community interests, and those traditionally under-represented in public processes.

The identification of disproportionately impacted communities and local demographics is a critical first step to meaningful community engagement. Although it may be difficult to identify all interested parties, a planning collaborative should consider who may have important perspectives to share based on the unique characteristics of the planning area. A preliminary list of water interests to consider during community engagement is outlined in the *Overview* section of this handbook.

**B. Tribal Engagement:** Invite Tribal communities in Oregon to participate in water planning; acknowledging each individual Tribe's preference and capacity for collaboration. Tribal Nations as sovereigns may wish to participate as government partners, consult only with the state in a formal government-to-government consultation, or may choose not to participate. Planning Collaboratives should familiarize themselves with what it means for a Tribe to be a sovereign before engaging.

Planning Collaboratives should be aware of and acknowledge Tribal rights, both inherent as well as those explicitly defined through treaties and trusts, formal consultation, settlements, and any completed or outstanding adjudication procedures that may impact the sideboards of a planning effort. It is only through engagement with Tribes that Tribal rights and interests can be identified and understood and included in planning efforts and plans.

# Appendix C: Community Engagement in PBP

- C. Build Trust:** Build relationships with disproportionately impacted communities and ensure all parties' voices are heard and included in meaningful ways in the planning process. Provide time and resources to build relationships before beginning plan development and continue to build and maintain relationships along the way.

Consider opportunities to build trust within a Planning Collaborative, including with state and federal agencies and coordinate with the community and across planning participants to leverage resources, staff, and data. Examples of how to do this include conducting community assets and needs assessments to address what's known and in existence, and where there may be gaps; creating opportunities for knowledge exchange between local communities and state agencies; and coordinating public engagement with other efforts, when possible, to support capacity and broader participation, and to build upon existing efforts. Planning Collaboratives should clearly identify ways to optimize community engagement considering effective use of community members' time and resources.

Strive to ensure differences between participants are recognized and valued during the planning process. Planning Collaboratives should think about interactions and how water planning may physically, socially, economically, environmentally, culturally, or emotionally impact participants. Respect may be expressed differently depending on the participant.

Develop cooperative ground rules to create a shared understanding of acceptable and unacceptable ways to interact with planning partners. These should be documented in the Collaborative's shared governance agreement.

- D. Foster Community Input:** Outreach to the public should be done early in the planning process. Develop an intentional plan for ongoing public communication, outreach, and opportunities for input throughout the planning process, including strategies for identifying and reaching out to a wide array of impacted groups and people. Be clear about how opportunities for input can influence the planning process and document how input has been considered. Engage the public, when possible, in data gathering, analysis, and plan review to make information more digestible and trusted.
- E. Accessibility:** Address knowledge gaps around water planning through shared learning, clear communication, and approachable materials. Co-create planning processes that are inclusive. Consider reducing engagement barriers by providing opportunities for virtual interactions, providing participation stipends, and holding gatherings at times outside of traditional business hours, near public transit, or in centrally located areas (e.g., libraries, schools). Other accommodations may be needed to ensure participation by those with small children.
- F. Transparency:** Ensure communications and information are shared in a timely, transparent manner, and in languages and formats commonly used or preferred by disproportionately impacted communities. This may include accommodations for people who lack access to the internet/technology, who have visual or hearing impairments, who learn differently, or whose primary language is one other than English.

Use a dedicated webpage to publicly post all information and material related to the planning process, including meeting information, shared governance agreement, plan materials, and outreach materials, and opportunities to engage.

## Appendix C: Community Engagement in PBP

- G. Accountability:** Evaluate community engagement effectiveness throughout the planning process and during implementation, based on communities' goals and capacities, and adapt planning processes as appropriate. Establish a mechanism of accountability for partners, the public, and decision-makers to document when agreements have occurred (e.g., MOUs). Strive to monitor and document the positive and negative impacts of place-based water planning in the planning area.

### Considerations for Developing Engagement Strategies

**Know your audience.** When trying to understand and describe water needs, it is important to think of your key audiences and what is important to them. Ask your partners about the different ways water is used. Do some strategic outreach to potential audiences to inform your approach. What do they care about? What messages will resonate with them? What are the barriers to their participation?

**Make it easy.** Before you engage these audiences think about how you meaningfully engage them while reducing participation barriers. Be sure to tailor your requests based on what you know about the different audiences and their ability to participate. Engagement may take significant coordination – we suggest having a coordinator for this who has limited other responsibilities within the planning effort.

**Be strategic.** Do not forget that any engagement effort provides an opportunity to inform people about the planning effort and build new partnerships. Make sure everyone you engage learns the basics about the planning effort and knows how to stay engaged if they are interested.

**Ask what they need.** Long-term engagement and partnerships are built on reciprocity. Make sure you ask what they need even if it has nothing to do with what you need – it may lead to interesting places.

**Circle back.** People generally want to know how their feedback and input is used. Make sure to build in continuous feedback loops so that people can understand how they have influenced the process or outcomes.

# Appendix D: Technical Assistance in PBP

Place-Based Water Planning brings communities together to understand water resources, assess instream and out-of-stream needs, and identify integrated solutions. Many of these tasks require significant technical work. This appendix describes the role of technical assistance in supporting that work.

Having sufficient technical capacity is critical for plan completion. Planning Collaboratives may be able to complete some technical work through the use of volunteers, working groups, and contractors. Before plan development, a Planning Collaborative should assess what skills and capacities are available within the Collaborative and what additional expertise may need to be contracted. Use the guidance in the *Phase 2: Plan Development* and *Appendix F: State-Recognition Evaluation Framework* to understand what technical capacity is needed.

State agencies also have a significant role as a technical assistance provider during Place-Based Water Planning. State-provided Technical Assistance is designed to empower Planning Collaboratives with the knowledge, tools, and resources necessary to develop evidenced-based, community-driven strategies. State-provided Technical Assistance supports planning collaboratives throughout all phases of the planning process (i.e., PREP, plan development, implementation, plan updates). It may include foundational data and analysis products, training and capacity building, technical review of plan materials, and guidance on planning requirements. State-provided technical assistance includes two complementary approaches: Proactive Technical Assistance and Responsive Technical Assistance.

**Proactive** and **responsive** describe how technical assistance is initiated. *Proactive Technical Assistance* consists of standardized, agency-initiated resources provided to all planning groups, such as Technical Assistance Packages (TAPs) and statewide training sessions. *Responsive Technical Assistance* consists of tailored support that planning collaboratives may request through a structured process, such as data queries, technical consultations, or policy clarifications.

## Proactive Technical Assistance

Proactive technical assistance refers to standardized, agency-initiated resources provided to Planning Collaboratives at the outset of plan development. These resources are designed to frontload common needs, provide a consistent technical baseline, and reduce the burden on Collaboratives to assemble foundational information themselves.

One form of proactive assistance Collaboratives can expect are **Technical Assistance Packages (TAPs)**. TAPs are structured, non-regulatory reports that compile and interpret existing agency datasets to provide a shared understanding of water resources in a planning area. By delivering this baseline early, TAPs ensure consistency across planning areas, transparency in the use of state data, and alignment with evaluation criteria in the PBP Handbook.

At a minimum, TAPs will be provided by OWRD that focus on water supply (surface water and groundwater) and water rights. These TAPs will (1) use standardized, reproducible methods to summarize the best available state datasets, and (2) deliver products in plain-language reports with charts, maps, and narratives that support a Planning Collaborative's understanding of their planning area. Other state agencies may also provide proactive technical assistance. A description of all available proactive technical assistance, including TAPs, is available on the [Place-Based Water Planning webpage](#).

# Appendix D: Technical Assistance in PBP

## Responsive Technical Assistance

Responsive technical assistance is available from participating state agencies across all phases of place-based planning—from PREP through plan development, implementation, and updates. Unlike proactive assistance, which provides standardized, agency-initiated products, responsive technical assistance is initiated by Planning Collaboratives. It addresses technical or policy questions through a structured request process. The type of support and timeframe for delivery will vary by request and depend on staff availability. Participating agencies maintain datasets, tools, and expertise that can help Collaboratives address planning questions. Examples of responsive assistance include:

- Compiling relevant data or information
- Consulting on how data and information should be used
- Helping clarify technical questions and define a feasible scope
- Providing feedback on plan materials
- Assisting in seeking additional resources to answer policy and/or technical questions
- Selectively performing data queries or analyses to answer specific questions
- Training on how to access and use technical information

All requests for responsive technical assistance should be submitted according to the *Responsive Technical Assistance Process* described below. Once a request is received, participating agencies will determine if/when a request can be fulfilled and communicate that decision in writing to the planning collaborative.

### Process for Requesting Responsive Technical Assistance

- 1. Designate a Technical Liaison.** Using processes outlined in the Collaborative’s shared governance agreement, a Collaborative should designate a **technical liaison** authorized to work with the state agency team on requests. Using a single point of contact improves coordination and avoids duplicate requests.
- 2. Submit an Initial Request.** The Collaborative’s technical liaison should discuss the request with designated agency staff and submit a formal request in writing. Include (as applicable/if known):
  - A. The main question you want to answer.
  - B. Why this question matters for your planning process and how the information will be used.
  - C. The agency you believe is best suited to provide the information.
  - D. The approach, datasets, and tools you think could be used.
  - E. The products you would like delivered and preferred presentation format.
  - F. Any additional assistance available to help answer this question within your Collaborative.
  - G. The request’s priority to your work plan and other requests.
- 3. Confirm Scope.** Agency staff will work with the Collaborative’s technical liaison to ensure the request is well-documented, and the scope is clear and feasible.
- 4. Review Capacity.** Agency staff will determine if they have the capacity and skills to assist and will provide a written response indicating acceptance, modifications, or deferral.
- 5. Deliver Assistance.** If the request can be fulfilled, agency staff will complete the work and deliver it in a format useful to the planning process. Deliverables will include a brief methods note and basic metadata. The Collaborative may request a presentation of the work to the broader group from agency staff. The time needed to prepare and schedule such a presentation will vary depending on the scope of the work.

# Appendix E: Example Plan Template

## Executive Summary

### Introduction

- Planning Purpose
- Geographic Scope
- Plan Organization

### Chapter 1: The Planning Process

- Planning Participants
- Roles and Responsibilities
- Governance and Organizational Structure
- Collaborative, Open and Transparent Public Process
- Community Engagement and Outreach

### Chapter 2: Water Resources (Planning Step 2)

- Physical and Climatic Setting
- Socioeconomic and Land Use Setting
- Current Water Supplies
- Water Quality Conditions
- Ecosystem Conditions
- Legal, Institutional, and Infrastructure Systems that Shape Water Use
- Data Gaps and Uncertainty

### Chapter 3: Current Uses and Future Water Demands (Planning Step 2)

- Current and Future Water Needs
- Impacts of Climate Change and Natural Hazards
- Data Gaps and Uncertainty

### Chapter 4: Critical Water Issues and Potential Solutions (Planning Step 3)

- Critical Water Issues
- Potential Solutions Considered
- System for Evaluating Potential Solutions

### Chapter 5: Implementation Workplan (Planning Step 4)

- Priority Actions
  - Roles and Responsibilities
  - Timeline and Milestones
  - Monitoring Plan
  - Budget and Funding Sources
- Implementation governance

**Appendices:** references, acronyms, acknowledgements, signatory page, participants in critical votes, shared governance agreement (original and updated), plan outreach materials, etc.



# Appendix F: Evaluation Framework for State Recognition

**Planning Collaborative Name:**

**Collaborative Convener(s):**

**Primary Contact:**

**Collaborative would like to present the plan to the PRT before it makes its recommendation:** Yes/No

## Eligibility Criteria

A plan will be accepted for review by the Plan Review Team if the following criteria are met:

- ☐ The planning area is hydrologically connected
- ☐ The plan is adopted by a consensus vote of the Planning Collaborative as described in the Collaborative's shared governance agreement
- ☐ The plan includes:
  - a. An executive summary
  - b. A map of the planning area that includes major characteristics, including topography, population centers, major roads, and key water features
  - c. A planning time horizon
  - d. Identification of a timeline for plan revision or amendment
  - e. The Collaborative's shared governance agreement
  - f. An updated governance plan for implementation

## Review Criteria

### Structure

Structure Requirement	Met	Not Met
The plan is clear and understandable to non-experts		
The plan follows a logical structure		
The plan includes outreach materials		

PRT Feedback	
Strengths	
Required Improvements	
Suggested Improvements	
Other	



# Appendix F: Evaluation Framework for State Recognition

## Process

Process Requirement	Met	Not Met
<b>(A) The plan was developed in collaboration with a balanced representation of water interests</b>		
(1) Outreach to and active participation of representatives of appropriate levels of government, private and non-profit sectors, Tribes, interested parties, and the public		
(2) Process for engaging all interests in a fair and balanced manner		
(3) Active participation from instream and out-of-stream needs		
(4) Balanced attention given to instream and out-of-stream needs		
(5) In the event some water sectors did not actively participate, a description of efforts made to engage that sector is provided		
<b>(B) The plan was developed consultation with the Oregon Water Resources Department and other relevant state agencies</b>		
(1) Agencies were invited to attend and engage in the planning process		
(2) Agencies were given a chance to review plan chapters along the way		
(3) Technical Assistance provided by agencies was incorporated into the plan (unless otherwise agreed upon)		
<b>(C) The plan was developed using a collaborative and integrative process</b>		
(1) The Planning Collaborative adopted a shared governance agreement that includes: <ul style="list-style-type: none"> <li>• Planning purpose/goals</li> <li>• Group expectations and meeting protocols</li> <li>• Planning Collaborative structure (e.g., coordinating committee, workgroups, etc.)</li> <li>• Decision making (e.g., when are consensus decisions required, voting procedures)</li> <li>• Conflict resolution protocols</li> <li>• Description of neutral facilitation</li> <li>• Internal and external communications</li> <li>• Schedule</li> <li>• Planning Collaborative membership/signatories</li> </ul>		
(2) Decisions to adopt the plan and interim work products were done in accordance with the adopted shared governance agreement		

# Appendix F: Evaluation Framework for State Recognition

Process Requirement	Met	Not Met
(3) The plan is integrated to form a shared understanding of instream and out-of-stream water needs and interests and includes both surface water and groundwater		
<b>(D) The plan was developed using an open, equitable and transparent process that fosters public participation and meaningful engagement with environmental justice communities</b>		
(1) The public was invited to participate in meetings, planning discussions, and/or plan development		
(2) Meetings were advertised/noticed in a way that demonstrated considerable effort to engage the public with outreach specific to environmental justice communities		
(3) There was an opportunity for public comment or input during key steps in plan development, including the final draft plan		
(4) Meetings were accessible in both time and location		
(5) The process was neutral and unbiased towards any particular water interest group		

PRT Feedback	
Strengths	
Required Improvements	
Suggested Improvements	
Other	

## Content

Content Requirement	Met	Not Met
<b>(E) The plan contains a shared understanding of water resources (Step 2a)</b>		
(1) Physical Setting: <ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Physical Geography and Geology</i>: Describes the topography, elevation ranges, and geological formations that influence hydrologic flow paths, groundwater storage, and erosion patterns</li> <li><input type="checkbox"/> <i>Hydrography</i>: Identifies major rivers, lakes, tributaries, wetlands, and groundwater systems that define the planning area's hydrology</li> <li><input type="checkbox"/> <i>Climate Patterns</i>: Characterizes long-term precipitation and temperature patterns, including their seasonal and interannual variability</li> </ul>		

# Appendix F: Evaluation Framework for State Recognition

Content Requirement	Met	Not Met
<input type="checkbox"/> <i>Climate-related Hazards</i> : Considers how hydroclimate drivers (e.g., atmospheric rivers, drought cycles) shape water availability at different timescales		
(2) Socioeconomic Setting: <ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Land Use and Ownership</i>:               <ul style="list-style-type: none"> <li>• Describes land use patterns (agricultural, urban, industrial, forested, etc.) and how they shape water use</li> <li>• Incorporates land ownership structures (e.g., private, Tribal, federal, state-managed lands) to understand regulatory implications</li> </ul> </li> <li><input type="checkbox"/> <i>Population Changes and Urbanization</i>: Describes population growth and urbanization trends</li> <li><input type="checkbox"/> <i>Economic Needs and Cultural Values</i>:               <ul style="list-style-type: none"> <li>• Identifies the primary economic drivers of water use (e.g., agriculture, industry, municipal needs, and hydropower)</li> <li>• Integrates cultural values, recognizing the importance of water for recreation, ecosystem services, and Tribal water rights</li> </ul> </li> </ul>		
(3) Current Water Supplies and Variability: <ul style="list-style-type: none"> <li><input type="checkbox"/> Describes surface water and groundwater supplies</li> <li><input type="checkbox"/> Where possible, uses observed or modeled data to describe and graphically illustrate long-term trends in streamflow, baseflow contributions, recharge, and aquifer storage</li> <li><input type="checkbox"/> Describes seasonal patterns and variability across wet and dry years</li> <li><input type="checkbox"/> Examines the frequency and intensity of extreme hydrologic events such as peak flows, floods, low flows, and droughts and describes their impact on water supply reliability</li> </ul>		
(4) Water Quality Conditions: <ul style="list-style-type: none"> <li><input type="checkbox"/> Summarizes the condition of surface and groundwater quality, identifying contaminants, pollution sources, and regulatory impairments</li> <li><input type="checkbox"/> Identifies impaired water bodies (303(d) list), Total Maximum Daily Loads (TMDLs), and permitted discharges</li> <li><input type="checkbox"/> Evaluates groundwater contamination risks, focusing on Groundwater Management Areas (GMAs) and statewide monitoring efforts</li> </ul>		

# Appendix F: Evaluation Framework for State Recognition

Content Requirement	Met	Not Met
<input type="checkbox"/> Identifies known areas of harmful algal blooms (HABs), contamination, and contamination plumes <input type="checkbox"/> Describes point and non-point pollution sources		
(5) Ecosystem Conditions: <input type="checkbox"/> Evaluates aquatic habitat conditions, focusing on species status, instream flow protections, and groundwater-dependent ecosystems <input type="checkbox"/> Identifies fish and wildlife habitats, with emphasis on sensitive, threatened, and endangered species <input type="checkbox"/> Describes instream flow needs for fish and wildlife		
(6) Existing Water Rights and Legal Protections: <input type="checkbox"/> Summarizes the current water rights within the planning area, distinguishing between consumptive use rights (e.g., municipal, agricultural, industrial) and instream water rights established for ecological, scenic, and recreational purposes <input type="checkbox"/> Discusses the statutory and administrative framework that regulates water use within the planning area <input type="checkbox"/> Describes the adjudication status of rivers and streams in the planning area		
(7) Regulatory Water Availability and Constraints: <input type="checkbox"/> Assesses trends in water allocation (e.g., when and where surface water fully allocated or over-appropriated) <input type="checkbox"/> Identifies where instream flow rights and existing withdrawals may limit new appropriations <input type="checkbox"/> Considers how seasonal water availability patterns influence local water management decisions		
(8) Water Infrastructure: <input type="checkbox"/> <i>Built Infrastructure</i> : Examines the existence, condition, and capacity of built infrastructure that supports water supply, storage, and distribution <input type="checkbox"/> <i>Natural Infrastructure</i> : Assesses the condition, role, and capacity of wetlands, floodplains, and riparian areas in water management <input type="checkbox"/> Explores how natural and built infrastructure interact to influence water availability, quality, and resilience		
(9) Identifies associated data gaps and uncertainty		
<b>(F) The plan examines existing and future instream and out-of-stream needs for people, the economy, and the environment (Step 2b)</b>		

# Appendix F: Evaluation Framework for State Recognition

Content Requirement	Met	Not Met
(1) Summarizes actual water use in the planning area, distinguishing between consumptive (municipal, agricultural, industrial) and instream uses (minimum flow protections, environmental water rights)		
(2) Summarizes total water demands within the planning area, covering both instream and out-of-stream uses for human, agricultural, and ecological needs		
(3) Analyzes potential imbalances where water demand exceeds supply, identifying areas at risk of water shortages and seasonal stress		
(4) Analyzes how future climate conditions may influence the variability of water sources and how water demands are expected to evolve across different sectors		
(5) Identifies associated data gaps and uncertainty		
<b>(G) The plan identifies critical water issues and explores potential solutions (Step 3)</b>		
(1) Critical water issues are defined and described, along with methods used to identify them.		
(2) Describes the system for evaluating and prioritizing potential solutions		
(3) Includes a prioritized list of solutions and describes how each solution will address the planning area's critical water issues		
(4) Potential benefits and challenges related to implementation of solutions are identified		
(5) Solutions are: <ul style="list-style-type: none"> <li><input type="checkbox"/> Consistent with the state water resources policy and other state laws concerning the water resources of this state</li> <li><input type="checkbox"/> Considered and/or included for each water sector throughout the planning area</li> </ul>		
(6) The plan assesses solutions that are compatible with local comprehensive plans		
(7) The plan strives to integrate solutions to cost-effectively achieve multiple benefits		
<b>(H) The plan includes a workplan to implement integrated solutions for meeting long-term water needs (Step 4)</b>		
(1) The workplan facilitates implementation of local water resources solutions and supports the knowledge and relationships needed to implement the solutions		
(2) The workplan identifies potential projects and next steps for priority solutions		
(3) The workplan includes:		

# Appendix F: Evaluation Framework for State Recognition

Content Requirement	Met	Not Met
<input type="checkbox"/> Roles and responsibilities <input type="checkbox"/> Timelines and milestones <input type="checkbox"/> Monitoring plan <input type="checkbox"/> Budget and funding sources		
(4) The plan identifies a timeline for plan revision or amendment		
(5) The plan includes updated implementation governance		
<b>(I) The plan is based on accurate, appropriate, and adequate information in the characterization of the water resources, identification of critical issues, and selection of solutions</b>		
(1) Data sources are cited appropriately		
(2) Integrates existing studies and plans		
(3) Information, data, and technical analyses used are described and represent the best available data and information		
<b>PRT Feedback</b>		
Strengths		
Required Improvements		
Suggested Improvements		
Other		

# Appendix G: Additional Resources

**Grant Administration and Procedures:** Please see the [PBP Website](#) for information about grant reporting, grant administration, and other procedures for recipients of Place-Based Water Planning funds.

**Place-Based Water Planning Support Tools:** Please see the [PBP Website](#) for additional planning support tools. Examples of planning support tools include decision support tools, resources to help navigate conflict, and best practices for convening Planning Collaborative groups and conducting meetings.

**Place-Based Water Planning Technical Assistance:** Please see [the PBP website](#) for more information about available Technical Assistance Packages and responsive TA requests.