



**Report on OWEB's
Long-Term Investment Strategy Listening Sessions
May-June 2012**

**Prepared for the
Oregon Watershed Enhancement Board**

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EXECUTIVE SUMMARY

Background

With the passage of Measure 76, the Oregon Watershed Enhancement Board (OWEB) was granted a long term funding horizon and with it, more flexibility to determine how to target its investments. This long-term funding horizon makes it important for OWEB to develop a long-term investment strategy. OWEB recognizes that tremendous gains have been made since 1999 and values all the good work and accomplishments of its many partners. It also recognizes that there is not enough OWEB grant funding to meet all needs.

A goal of developing a long-term investment strategy is increased transparency around OWEB's investment priorities and decision processes so that everyone can understand OWEB's programs and objectives and align their work with them when needed. To that end, OWEB initiated a series of statewide Listening Sessions to kick off its Long Term Investment Strategy development process in order to hear insights and ideas from its stakeholders (including partners, grantees, and other local citizens) about the long term investment vision for the organization. The purpose of the sessions was to:

- Provide information about OWEB's plans for developing a Long-Term Investment Strategy, and a brief history of OWEB's programs over time;
- Review OWEB's Mission, Strategic Plan Goals and Measure 76; and
- Begin a dialogue with OWEB's partners, grantees and the public about their priorities, to ensure the Board is aware of these priorities and considers them as the Board develops the Long-Term Investment Strategy.

Listening Sessions Overview

The OWEB team, with the assistance of an independent facilitation team from DS Consulting, designed a process to engage in small and large group dialogue to gain a better understanding of partner, grantee and public ideas related to a long term investment strategy. Through this process, the team gathered inputs from over 200 participants at six different listening session locations: Baker City, John Day, Bend, Pacific City, Salem and Grants Pass. In addition, the process allowed more than 50 people to participate via a live webinar and 130 people responded via an online survey offered for those interested, but unable to attend a Listening Session.

This report is the facilitation team's analysis of the input received at the Listening Sessions (both oral and written comments) and received in writing via the webinar and on-line survey comments. The Executive Summary includes the themes and key messages derived from the more than 1,500 comments received and describes the process, while Appendices A-G include: the agenda for the sessions; participant lists; detailed inputs from each of the six sessions, the webinar and the survey; and the combined Listening Sessions' evaluation.

Overarching Themes and Key Messages

The facilitation team used an iterative process to analyze inputs received via the various engagement forums described above. The overarching themes initially emerged after the first Listening Session. Once the six sessions were completed, the facilitation team tested these themes against the written inputs received each of the sessions and refined them based on their analysis of the combined inputs. Once these themes had been refined, the team rolled messages from each location into a set of ‘key messages’. They were then refined further with the inputs from the webinar and the survey results to get a combined set of Key Messages for the Board to consider. The following themes are listed in order of the number of comments received for each theme during the in-person sessions. The raw data that supports this analysis is attached in Appendix D, Individual Listening Session Reports.

Theme 1 Big Picture Priorities/Investment Philosophy

This theme had the highest number of responses for all locations combined. The responses can be characterized by the following key messages:

1. Provide a clear vision so that councils and other partners know what is of interest to the agency.
 - Keep goals and objectives clear so people can respond.
 - Be conscious of how issues get framed to gain support and participation from the maximum number of participants.
2. Preserve and protect the general/current responsive grant fund while supporting innovation and strong partnerships:
 - Remember that the east and west sides of the state are different and, as such, need different types of funding approaches to support long term success.
 - Build on and leverage partner efforts to maximize investments and build a more integrated, statewide impact.
 - Enhance overall accountability by focusing grantees on clearly articulated outcomes and measured achievements.
3. Use a whole-watershed approach for funding:
 - Look at large-scale ecosystem functions.
 - Support effective, sustainable restoration work.
 - Focus on restoring ecological processes that accelerate stream/riparian corridor restoration.
 - Balance improvements in water quality and fish with upland and terrestrial components.
 - Consider targeted investments that help residents and native species be resilient to altered precipitation, temperature and other changes.
4. Consider monitoring to be an integral part of your portfolio
 - Fund monitoring at all levels—not only to monitor project impacts, but also to tell the bigger story of what is happening in Oregon and how OWEB is helping it happen.

5. Keep investing with a goal of making OWEB's ecological benefits economically viable and fostering community building at the local and statewide levels.
 - Invest as fairly as possible so many communities and landscapes can benefit.
6. Provide funding approaches that support strategic investments at the landscape scale and which promote basin scale priorities.
 - Allow more diverse, longer-term funding approaches that will keep comprehensive projects moving to completion of large scale, high impact outcomes.
 - Work within basins to create regional priorities involving local input.
7. Provide some funds to target high value watersheds or geographic locations that have a broader impact.

Theme 2 Grant Programs Responsive to Local and State Needs

This theme had a high number of responses in all cities. However, Baker City, Bend and Grants Pass had almost double the numbers of comments than the west side locations did. Responses ranged from focusing on local needs to focusing on state or statewide needs. Responses can be characterized by the following messages:

1. Provide clear descriptions of high priority project areas. Develop regional priorities and work with local watersheds to develop basin scale priorities. Local priorities should contribute to regional and state-wide priorities.
2. Provide well-defined expectations of quantifiable outcomes and expect local groups to develop goals and strategies to meet those outcomes.
 - Invest in those watersheds that have goals and strategies in place.
3. Until state and regional integrated strategies are in place, focus on place-based strategies addressing the limiting factors identified in watershed assessments and sub-basin plans.
 - Do so in a manner appropriate and acceptable to local people.
4. Lengthen the time span of projects.
 - Longer-term commitments of funds would save on project review and get more, larger complex projects accomplished.
 - If a project needs multiple years of funding – fund all the years.
5. Provide grant funds for weeds, uplands, and capacity building/organizational support both at the local and regional level.

Theme 3 Education, Outreach and Awareness

Education, outreach and awareness received a significant number of comments in each location. Grants Pass and Salem had the most comments in this area. The combined key messages were:

1. A substantial investment in the education and awareness of Oregonians about watershed health is important—and needed. Target audiences include:
 - The general population

- All Oregonians should demonstrate an understanding of basic watershed issues and knowledge of OWEB and be able to connect why watershed health connects and is important to them.
 - Students & Youth Organizations
 - Use approaches including educational materials, involvement in restoration and field trips to get kids thinking about why water quality and watershed health is important to them, etc. Examples of good efforts include “Stream Web”, Portland Metro’s “Intertwine Conservation Education Leadership Council” and the “Oregon Environmental Literacy Plan”.
 - Local watersheds and communities
 - Empower projects and local organizations to educate people in their communities. Get people out into their watersheds to experience the environment.
 - Natural resources ‘users’: landowners/managers, agriculture and forest services, fish and wildlife enthusiasts, tourists, recreationists.
 - Use multiple approaches to get messages sent to these populations that focus on improved management practices and strategies.
 - Develop or support the development of educational materials, videography, signage etc. that can be used by councils, districts and other partner educators.
- 2. Invest time and resources for the development and conduct of outreach materials and activities.
 - Help is needed for reaching organizations and landowners who are potential partners, but either are not partners yet—or are difficult to reach.
 - OWEB should do specific outreach to grant writers to promote a deeper understanding of the issues.
- 3. Tell OWEB’s story – people love success stories!
 - Broker opportunities to share results of successful projects: between partners, with the public and with other funders.
 - Consider a newsletter that highlights on the ground projects and management activities.

Theme 4 Organizational Support/Capacity Building

Organizational support and/or capacity building was another area of high interest in all locations. Pacific City and Salem offered a few more comments on this theme than the other four locations. There were numerous comments that centered on the following ideas.

1. OWEB should invest in building and maintaining capacity for watershed councils, SWCDs, land trusts, other local organizations and combined collaborative efforts of all of these so that they can handle a broad spectrum of watershed issues.
 - Better developed capacity will lead to successful project planning and management, grant administration, and ultimately to achievement of longer-term desired outcomes.
 - Provide funding for organizational ‘gaps’, technical assistance and/or professional service needs, and training.

2. OWEB would enhance its overall investments by funding or assisting in the development of networks for sharing staff expertise, technical expertise and other key resources.
 - Establishing “networks for shared resources” across watershed councils, regions, agencies, and other organizations would aid cost savings for OWEB—and its partners. Spot funding for short-term needs is also important.
3. Invest in larger scales of organization and geographic coordination. Integrate organizations and ideas.

Theme 5 Catalyzing Collaboration and Fostering Partnerships

OWEB was described by many Listening Session participants as a ‘catalyst’ for connecting communities and efforts related to watershed health. This theme received several comments in all locations and got more comments in Grants Pass, Baker City and Pacific City. Key investment messages include:

1. OWEB’s investment in collaboration and partnerships helps achieve more ecological, economic, and funding success for all.
 - There is strong support for OWEB to be a leader, convener and advocate for collaboration among all partners as a means of setting goals and priorities, getting work done and monitored, and getting results out to implementers and the public.
2. OWEB should invest in work with partner organizations and agencies to examine priorities and look for opportunities to leverage funds and collaborate on resource protection.
 - Include watershed councils, SWCDs and other appropriate partners in the development of strategic approaches.
 - Provide leadership at the state and local level for working together and with tribes to address natural resource issues.
3. Provide leadership at the local and regional levels to encourage collaboration among and between watershed councils, land trusts, SWCDs, agencies, and local governments.

Theme 6 Monitoring

Very clearly, Listening Session participants across all locations see OWEB as a vital leader in supporting monitoring efforts whose primary role is to link data to outcomes so that an accurate story can be told about what is working and what needs to be changed. This will, in turn, inform future investments and on the ground efforts. Here are the key messages:

1. Fund monitoring at a meaningful level and do more of it.
 - Pre and post project monitoring is important to understand the baseline and any changes (positive or negative) that management practices are making.
 - Measure the outcomes of projects.
2. Effectiveness monitoring is important but also do implementation monitoring.
3. Limit monitoring to those things for which statistical rigor is reasonably attainable.

4. Develop shared data programs and databases, and fund data analysis.

Theme 7 Innovation/Creativity

There were some comments on this theme in each of the locations. Baker City, Pacific City and Grants Pass were particularly interested in OWEB funding innovative approaches and creative solutions to watershed work. The key messages from all areas were:

1. Support, promote, and share innovative and creative approaches.
 - Specifically allocate a small percentage portion of the budget/investment funds to innovative approaches to watershed health
 - Consider whole watershed initiative that are not solely fish driven
2. Provide incentives for landowner participation and creativity.
 - Give extra points for unique or creative approaches
3. Support creative ‘trials’ of new methods and/or old methods approached differently.
 - When applying ‘new and creative’ do so at scales which balance the risk and monitor results so lessons can be learned.

Theme 8 Communication: Public Relations and Messaging

According to a large number of Listening Session participants, communication in the form of public relations and messaging is an important tool OWEB has and should use to ensure the success of its Mission. Across the Listening Sessions, participants viewed OWEB as a key communicator of the good work that has been accomplished and a conduit for information exchange about lessons learned that will inform future on the ground efforts.

Key messages heard in this theme were:

1. Invest in strategies that further communication about the value of watershed health, restoration and related work around the state.
 - Focus on the ‘sense of place’ that resonates for Oregonians.
 - Target more populated metropolitan areas if messages are going to be successful at changing perceptions and behaviors.
2. Analyze and invest in messages that communicate the benefits/incentives related to doing good watershed work.
 - Get messages heard by people who may not gravitate towards the term ‘environmental’. Reframe and approach this with words that work for the publics you seek to reach.

Theme 9 Acquisitions

There were few comments on this theme—however, only a third were positive about acquisitions and the others were either neutral or negative on the topic. Here are the two key messages:

1. Continue doing acquisitions for longer-term conservation benefits.
 - Increase the number of and budget for acquisitions. (or)
2. Simplify OWEB's acquisitions work: Transfer knowledge and people to other organizations who are doing this work and fund them.

Theme 10 Emergency/Opportunity Fund

There were a handful of comments that focused on OWEB having funds dedicated to emergencies. These comments can be articulated as follows:

1. Provide emergency funding to deal with unforeseen circumstances (biological emergencies). This money should be available between grant cycles.

Additional Advice for OWEB Managers and Staff

In addition to providing high level ideas for OWEB's long term investment strategy, participants at all sessions provided ideas about which tools OWEB should use and what OWEB might do differently:

Tools and Programs OWEB should have in its Toolbox

The following ideas were mentioned by multiple commenters as helpful tools that OWEB's program staff could or should be utilizing to help partners, grantees and others achieve their desired goals:

- Administrative operating capacity
 - More funds available for this item
 - Capacity building tools
 - Training
 - Outreach to landowners
 - Up to date standards and guidelines
 - Budgeting
- Collaboration support:
 - Funding for watershed councils and SWCDs that supports collaborative efforts
 - Serving as a convener of diverse groups
 - Assisting with landowner outreach
 - Leading cross-agency communication and education
- Connecting people and programs
 - Regular communication about what is happening in watershed and District efforts
 - Assistance with networking across boundaries/regions
 - Leadership among state agencies to make certain that policies and activities align with OWEB investments

- Leading and assisting with cooperative work on state and federal lands
- Look for new partnerships – e.g. private foundations, OSU Sea Grant, land trusts
- Data collection and disbursement
 - Aerial photos
 - Database development
 - Information available for use by councils and others
 - Monitoring specific treatments and communicating the value of them based on results
 - Stream temperature, flow and soil data collection
- Ecological indicators to guide statewide, regional and local strategies and to allow for tracking progress
- Education
 - General public outreach and education campaigns
 - Provide educational packages including communication technical support such as web based tools, videography, etc.
 - Provide appropriate levels of public access to projects and watersheds as a hands-on education tool
 - Best practices for councils and districts
 - Success stories (and lessons learned from failures)
- Funding projects (as a tool to aid conservation work)
- Green certification (e.g. Salmon Safe in more places)
- Incentive programs
- Small Grants Program Restoration Fund
- Stakeholder Assistance
 - Analysis of and assistance with (funding or otherwise) the incentives that get more stakeholders engaged and keep them engaged
- Technical assistance and technical feedback to aid improvements in practices
 - Shared technical resources on a basin or regional basis (people and things, such as supplies)
- Weed control: techniques, tools and public outreach/education

OWEB Should Do Differently

Suggestions for what OWEB should do differently at a program level that were heard/seen from multiple sources included:

- Analyze (or fund an analysis) of what incentives work to engage people in watershed work, then share that information with councils and districts
- Enhance OWEB's education efforts
 - Put OWEB's experienced staff into teaching roles to build capacity internally and externally

- Lessons learned shared between councils, districts
- More emphasis and focus on broad public awareness of watershed health
- Enhance public relations/media messaging to support watershed health and
 - Share what gets developed for use by councils/partners
- Expand the small grant program so that is it broader in scope
- Focus more attention on Uplands restoration
- Grant approvals should be based on strategic approaches
 - Require local groups to develop strategies, prioritize projects, and avoid “random” projects
- Hold money in a Project Follow-Up Fund to ensure longer term nature of investments
- Longer-term funding programs/partnerships in addition to the current shorter term grants
- Monitor the social and economic benefits of OWEB’s investments
- Publicly acknowledge successful programs
 - Get more media coverage of success stories
 - OWEB’s supportive statements can help leverage other funds
- Regional Review Teams
 - Provide more opportunities for grantees to communicate with regional review teams on project proposals earlier in the process
 - Revisit make-up of RRTs to be more diverse and balanced, and more consistent across regions
- Regional solutions-develop a framework that enables the creation of regional water management plans or solutions to other larger scale watershed issues that can be sustained over the long term
- Streamline the grant process
 - Develop an on-line application process that accommodates add-on (i.e. additional year or more) grant requests for projects that have been funded and need more time/money to have longer term ecological benefit
 - Consider pre-proposals more broadly to streamline/reduce the number of full applications that have to be both written and reviewed.

Listening Session Process Design

The Listening Session agendas were designed to elicit participant responses to key questions the Board felt would inform their deliberations and development of a Long Term Investment Strategy. After overview information was presented by the Executive Director, a board member and the Grants Program Manager, two exercises were used. The inputs received from all six Listening Sessions and survey responses fed into the summary of themes outlined above.

Priorities Indicator: In all cities, participants heard about OWEB’s Constitutional mandate to provide ecological benefits to Oregon’s watersheds—and OWEB’s mission: “To help protect

and restore healthy watersheds and natural habitats that support thriving communities and strong economies.” They also heard about changes resulting from Measure 76, OWEB’s Strategic Goals and provided a brief overview of OWEB’s grant programs. Participants were then asked to consider, of the ‘triple bottom line’ benefits articulated in OWEB’s Mission (ecological, social/community and economic), what was their relative weight of importance? The purpose of this exercise was to get a quick read of what values were important to participants.

Across all locations, the three areas showed fairly balanced weightings, with ecological gaining slightly more emphasis than the other two, especially on the west side of the state (according to those who participated in the exercises conducted at the Listening Sessions). In the dialogue that followed, the three benefits were considered to be interconnected. Participants noted that economic benefits included local job creation through OWEB grants, as well as resource savings from use of efficient tools. Social/community benefits ranged from community spaces that everyone can enjoy to a broader public awareness and shared responsibility for taking care of the environment.

Stations Questions: Participants provided input and heard others’ responses to the following questions which were designed to engage people at high, medium and low levels of thinking. Participants were broken up into small groups and given about 15 minutes at each question station before being asked to move to the next question. They reviewed the work of the prior group and then added their own ideas to the topic. While they were talking, OWEB Board members and Executive Director wandered around listening and looking at the recorded comments made by each group. The four questions were:

1. Looking 10 years into the future, what outcomes should OWEB achieve through its investments and how will we know we have achieved them?
2. Picture your watershed: What tools and programs can OWEB provide in its toolbox to help you achieve your goals for your watershed?
3. What does OWEB need to do differently to achieve the benefits (ecological, social/community, and/or economic) that are important to you?
4. If you were in charge of designing OWEB’s investment strategy, how would you design it to be specific and focused while allowing opportunities to support new and creative ideas to achieve restoration outcomes?

Large Group Exchange

Following the station question exercise, the groups returned to the large group to hear what key messages Board members and Tom took away from the discussions. Following this overview, the group was invited to ask questions, make final comments and exchange final thoughts. At all locations, board members and the management team stayed after the session to answer one-on-

one questions or hear additional comments from participants who wished to share their ideas with them.

Conclusion

All participants who attended the 2012 Listening Sessions did so because they care about the work of OWEB— and the work they do in connection with OWEB. After reviewing all of the inputs, it becomes clear that there are many directions the Board can take given the diversity of ideas and inputs heard across the state. The goodwill and positive regard for OWEB, its Board members and staff was evident at each of the Listening Sessions. Session evaluations show that participants found the information to be useful and the opportunity to dialogue within the small groups to be VERY useful.

Still, one thing remains clear: whatever direction the Board takes needs to be clearly communicated. This communication needs to include why the direction was chosen and how that direction will be implemented. This information needs to be communicated not only to the people with whom OWEB has worked in the past, but also with new people and new generations to come who can help continue OWEB's important legacy of supporting the ecological, social, community and economic fabric of Oregon's diverse landscapes. Providing the leadership and clarity of direction will help foster long term partnerships and long term benefits for Oregon's communities—and its multiple, diverse landscapes.