



# Evaluation Summary

## Place-Based Integrated Water Resources Planning Grant

### Purpose, Background and Overview

The purpose of this document is to provide further context and clarification for how the Oregon Water Resources Department (OWRD) developed its funding recommendations for the Place-Based Planning Grants that will support communities as they pilot the [2015 Draft Place Based Guidelines](#). This document also provides feedback on the Letters of Interest that were submitted for consideration.

In December 2015, OWRD received sixteen Letters of Interest (“proposals”) requesting grants to pilot place-based planning. Grant requests totaled more than \$3.6 million dollars. As to be expected with a new program, the proposals presented a wide range of ideas and approaches from different parts of the state. Letters of Interest were evaluated against a set of review factors by both OWRD staff and a state inter-agency team. The review factors included:

1. **Evaluation criteria** – Strengths and weaknesses of each proposal were evaluated in the areas of leadership, partnerships, capacity, integration, planning needs/outcomes, approach, need for assistance, readiness, and likelihood of developing a plan in 2-3 years.
2. **Variation among pilots** – Factors that allow for testing place-based planning in places with different characteristics were considered such as geography, scale, type of convener, local capacity, proposed approach and backgrounds in water planning and collaborative planning.
3. **Public comments** – OWRD received public comments on the Letters of Interest, which were considered during the reviews. For a copy of the public comments, [click here](#).

The inter-agency review team used the review factors to sort Letters of Interest into groups based on strengths and narrowed the potential pool for OWRD to consider internally. OWRD staff then used program level considerations to develop its final recommendations. The approach used by OWRD and the inter-agency review team to review the Letters of Interest and develop funding recommendations are contained in the following pages.

The contents of this document are summarized in the table below:

| Section   | Description   | Pages |
|---|---|-------|
| Place-Based Planning Pilot Objectives                               | Objectives for the pilot phase of this program influenced the overall funding recommendations.  | 2     |
| Criteria, Considerations and Factors for Developing Recommendations | In addition to pilot considerations, OWRD and an inter-agency review team considered evaluation criteria and other factors.               | 3     |
| Summary of Groupings  | Based on inter-agency review team input, OWRD placed proposals into a group that corresponds with the overall strength of their proposal. | 4     |
| Feedback on Letters of Interest                                     | An overview of the evaluation summary sheets were developed to provide feedback on each proposal..  | 4     |
| Summary Sheets for Places Recommended for Funding                   | Evaluation summaries, organized by group, provide an overview of the strengths and weaknesses of each proposal.                           | 5-12  |
| Summary Sheets for Places Not Recommended for Funding               | Evaluation summaries, organized by group, provide an overview of the strengths and weaknesses of each proposal.                           | 13-34 |

## Place-Based Planning Pilot Objectives

Place-based, integrated, water resources planning is a recommended action in the 2012 Integrated Water Resources Strategy (IWRS) and is a part of the Water Resources Development Program. Place-based planning is currently in a pilot phase, meaning that OWRD is gathering feedback, learning and adapting as it implements this initiative. Place-based planning and the pilot phase of this program are tied to numerous OWRD objectives. Below is a list of those objectives and their origins.

### **Integrated Water Resources Strategy (<http://bit.ly/owrdiwr>):**

- Help communities better understand and meet instream and out-of-stream needs, taking into account water quantity, water quality, and ecosystem needs.
- Action 9A: Undertake Place-Based Integrated Water Resources Planning.
  - Develop a template for place-based integrated water resources strategies.
  - Provide assistance to communities undertaking place-based planning.
  - Compile relevant water-related information to support place-based planning.

### **Water Resources Development Program (<http://bit.ly/owrdwrp>):**

- Help individuals and communities meet their instream and out-of-stream water supply needs now and into the future, accounting for water quantity, water quality and ecosystem needs.

### **Place-Based Integrated Water Resources Planning (<http://bit.ly/owrdplanning>):**

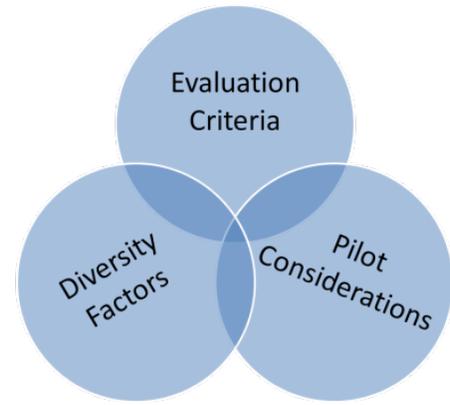
- Help communities build a collaborative and integrated water planning process.
- Help communities understand their water resources.
- Help communities understand their near-term and long-term instream and out-of-stream needs.
- Help communities identify and agree upon integrated solutions to meet their instream and out-of-stream needs.
- Help communities develop integrated water resources plans that provide a road map for implementing integrated solutions at the local level and inform the IWRS.

### **Place-Based Planning Pilot Phase:**

- Partner with local leaders and community groups to pilot integrated water resources planning at the local level using the [2015 Draft Place Based Guidelines](#) as a framework.
- Solicit input and feedback on how best to undertake integrated water resources planning at the local level and how this type of local planning can best inform the IWRS.
- Develop at least two Place-Based Integrated Water Resources Plans with actionable solutions in by 2019, including projects that may be a good fit for other OWRD funding programs.
- Develop outcomes by 2019 that can be communicated to the Oregon Legislature.
- Demonstrate if and how the place-based planning framework can serve as a catalyst for collaborative and integrated approaches to water planning across the state.
- Test place-based planning in areas with diverse characteristics.
- Provide unique opportunities to test integration with other programs, groups and efforts and develop transferrable lessons learned.
- Build capacity and support for collaborative, integrated and inventive approaches to planning.
- Leverage other funding and resources to maximize investments during the pilot phase.
- Provide additional guidance and structure for future place-based planning efforts.

## Criteria, Considerations, and Factors for Developing Recommendations

OWRD is interested in funding pilot areas that represent diverse characteristics and provide unique and timely opportunities to test the [2015 Draft Place Based Guidelines](#). In addition to traditional evaluation criteria, OWRD took pilot considerations and diversity factors into account to develop a strategic portfolio of pilot areas. Evaluation criteria, diversity factor and other considerations are summarized below.



|                                 |  |
|---------------------------------|--|
| <b>Evaluation Criteria</b>      | All proposed efforts were evaluated using the following criteria to identify strengths and weaknesses.   |
| <b>Leadership</b>               | The proposed effort will be led by an appropriate and capable convener.  |
| <b>Partnerships</b>             | The proposed effort is likely to include a broad representation of interests and a strong network of partners.   |
| <b>Capacity</b>                 | The convener and partners are likely to contribute the time, energy and resources necessary to conduct collaborative planning.   |
| <b>Integration</b>              | The proposed effort is likely to follow an integrated approach consistent with the IWRS.   |
| <b>Needs/Outcomes</b>           | The need for integrated water planning is clear, positive outcomes are likely, and Place-Based Planning is the appropriate tool.   |
| <b>Approach</b>                 | The proposed approach is consistent with the Guidelines and is reasonable in terms of scope, strategy, schedule, and cost.   |
| <b>Diversity Factors</b>        | The Department seeks to fund pilot areas with diverse characteristics to maximize learning and transferability.  |
| <b>Geography/Scale</b>          | The Guidelines should be tested in different regions at different scales.  |
| <b>Convener Type</b>            | Pilot areas should represent a diversity of capable conveners who will lead the local effort.  |
| <b>Capacity</b>                 | Pilot areas should present different levels of local capacity, including places with higher needs and limited capacity.  |
| <b>Proposed Approach</b>        | Pilot areas should present different ways to approach the process and implement the Guidelines.  |
| <b>History</b>                  | Pilot areas should represent different backgrounds/experience with water planning and collaborative planning as well as varying access to existing data and plans.                         |
| <b>Other Considerations</b>     | The following factors were also taken into consideration during the review process.  |
| <b>Pilot Objectives</b>         | The proposed effort will help the Department achieve its pilot objectives.   |
| <b>Fit for the Pilot Phase</b>  | The proposed effort demonstrates characteristics or qualities that make it a good fit during the pilot phase.  |
| <b>Need for Assistance</b>      | Department assistance, both financial and technical, is likely to have a significant impact on water planning efforts.   |
| <b>Readiness</b>                | The proposal demonstrates that there is local momentum towards integrated and collaborative approaches and partners seem committed to undertaking place-based planning.                    |
| <b>Likelihood of Completion</b> | The proposed effort is likely to result in a Place-Based Integrated Water Resources Plan with actionable solutions acceptable to a broad representation of interests <i>in 2-3 years</i> . |

## Summary of Groupings

OWRD staff, with input from the inter-agency review team, used the review factors above to sort Letters of Interest (“proposals”) into the following four groups based on their relative strength. The inter-agency review team recommended funding proposals from Group A and Group B. Characteristics of each group are as follows:

- **Group A** – Proposals demonstrated strengths against all of the criteria, have a moderate need for assistance, demonstrated readiness, and have a high likelihood of completing a plan in 2-3 years. This group includes: [Lower John Day](#), [Tualatin](#), [Upper Grande Ronde](#), and the [Upper Willamette](#).
- **Group B** – Proposals performed well against the evaluation criteria, have emerging partnerships, a high need for assistance, demonstrated readiness, and present interesting opportunities to test the Guidelines in areas that have a high need and desire to pursue more integrated and collaborative approaches. This group includes: [Malheur Lake](#), [Mid-Coast](#), [Pudding](#), [Rogue](#), and [Walla Walla](#).
- **Group C** – Proposals have capable leadership and emerging partnerships, but they did not perform as well against the evaluation criteria, and aspects of the approach need to be strengthened. This group includes: [North Coast](#), [Polk County](#), and [South Santiam](#).
- **Group D** – Proposals did not provide adequate information to evaluate some criteria, are at the beginning phases of initiating a collaborative effort, and aspects of the approach need to be strengthened. This group includes: [Eola Amity/Walnut Hills](#), [Lower Rogue](#), and [North Powder](#).

## Feedback on the Letters of Interest

The following section beginning on page 5 presents summary sheets for each of the Letters of Interest, including an overview of their strengths and weaknesses.. The summary sheets are organized by group. The first four summary sheets represent those from Group A and Group B that are recommended for funding. The remaining summary sheets represent those that are not recommended for funding at this time.

**Letter of Interest:** NC\_06\_21\_LowerJohnDay

**Overview of Evaluation and Funding Recommendation**

**Recommended for Funding:** Yes – Fully fund \$190,000\* to undertake all 5 planning steps described in the 2015 Draft Place Based Planning Guidelines.

\*If funded by the Commission this pilot area would work with OWRD to ensure their approach follows the Guidelines and will lead to the development of a Place-Based Integrated Water Resources Plan.

**Grouping: Group A** Proposal demonstrates strengths against all of the criteria, has a moderate need for assistance, demonstrated readiness, and has a high likelihood of completing a plan in 2-3 years.

**Summary** (see following page for more information):

- Very strong proposal with a capable local convener and a strong network of local partners who are likely to contribute to a multi-year collaborative effort.
- The proposal demonstrates an understanding of the IWRS and Place-Based Planning and is likely to result in a Plan that is consistent with OWRD expectations in 2-3 years.
- This proposal builds on an existing partnership with a governance agreement in place and presents a timely opportunity to test integration with the Oregon Watershed Enhancement Board (OWEB) Strategic Action Planning process.
- The approach is very well reasoned and the proposal clearly describes why this place is a good fit for the pilot phase, including a local commitment to collaborative and innovative approaches.

**Summary Information from the Letter of Interest**

**Convener:** John Day Basin Partnership

**Hydrologic unit/scale:** Lower John Day Sub-basin (44% of the John Day River Basin) covering 3,712 square miles.

**Water issues/drivers:** Builds off of existing partnership to address: current and anticipated impacts of recurring drought which affects stream flows (lower than usual) and agricultural viability; climate change; limited storage capacity and need for creative capture, storage and recharge projects; limited data/knowledge about groundwater resources (recent declines in water tables).

|                           |           |                    |  |
|---------------------------|-----------|--------------------|--|
| <b>Funding requested:</b> | \$190,000 | <b>Cost-share:</b> | \$36,000 (secured in-kind)<br>\$195,000 (pending cash & in-kind) |
|---------------------------|-----------|--------------------|--|

**Other support requested:** OWRD participation, technical assistance, information assistance.

**Executive Summary:** The John Day Basin Partnership will pilot a place-based water planning effort to identify and implement integrated solutions to the water quantity and quality challenges facing the Lower John Day. This area supports a robust agriculture-based economy and important wild anadromous fish habitat that depends upon reliable water resources. The lower river and its tributaries rely heavily on their watersheds’ ability to capture, store, and slowly release precipitation received each year. Water is historically scarce with annual precipitation of 8 to 20 inches. Several years of drought and the emerging impact of climate change further threaten supplies. Additionally, there is almost no large scale water storage, very little major conveyance infrastructure, and no plan for efficiently developing, conserving, storing, and utilizing water in the region. For the region to support further economic development and healthy fisheries in the future, a comprehensive place-based plan for developing and using water is essential. The Lower John Day is well-suited to pursue a pilot because of the area’s reliance on water, limited infrastructure, and Steps #1 and #2 of OWRD’s planning guidelines are largely complete with a partnership in place and water and ecological issues characterized in the basin-wide Strategic Action Plan developed for OWEB. With financial and technical assistance from OWRD, we can complete Steps #3-#5 of the guidelines, identify priority projects, and more efficiently manage our water resources to best meet long-term water needs of the Lower John Day community.

## Inter-Agency Review Team Feedback

Proposals were evaluated against a set of review factors by both OWRD and a state inter-agency team. Evaluation criteria were used to identify strengths and weaknesses of the proposed efforts in the areas of **leadership, partnerships, capacity, integration, planning needs/outcomes, and approach**. This proposal demonstrated strengths against all of the evaluation criteria. The review team also assessed **need for assistance, readiness, and likelihood of developing a plan in 2-3 years**, which is summarized below.

### Strengths

- **Leadership.** The proposed convener has diverse representation, serves multiple interests and can be perceived as impartial and inclusive. The proposed convener has a demonstrated interest in and commitment to water resources planning and management.
- **Partnerships.** The partners have been assembled and have a governance agreement in place to structure involvement. The proposed convener has past experience with building and maintaining strong partnerships.
- **Capacity.** The proposed convener and partners have demonstrated capacity to work collaboratively and undertake multi-year planning efforts. Partners have already been assembled and have engaged a capable facilitator. The proposal has considerable cash match and anticipated in-kind contributions.
- **Integration.** The proposal indicates an awareness of existing information and complementary efforts. This proposal provides a timely opportunity to test how Place-Based Planning can integrate with the Oregon Watershed Enhancement Board (OWEB) Strategic Action Planning process.
- **Needs/Outcomes.** This effort has a high likelihood of developing a quality plan in 2-3 years that identifies viable and actionable solutions acceptable to diverse interests. The proposal clearly describes the immediate need for integrated water planning as well as the long-term objectives for the basin. The proposal conveys how this process can serve as a model for adjoining sub-basins.
- **Approach.** The approach is very well-reasoned, demonstrates a very clear understanding of the IWRS principles, and describes how this process will effectively build on the 2015 Draft Place-Based Planning .

### Weaknesses (to be addressed in Partnership with OWRD during planning step 1)

- **Leadership.** It is unclear which individual(s) from the convening body will be the local champion of the process.
- **Partnerships.** As proposed, the list of partners may not be inclusive of all relevant interests (e.g. municipal needs and demands). Letters of support could strengthen this proposal.
- **Integration.** The proposed effort is focused on water supply and quantity. While this is an appropriate driver for integrated water planning, it is important that the effort continue to pursue planning in an integrated approach (considering water quality and ecosystem health).
- **Capacity.** It is unclear how the members of the John Day Partnership will contribute to the planning process in the Lower John Day sub-basin. The relationship between the Partnership and the Lower John Day Working Group needs to be clarified.
- **Approach.** While the proposed convener and partners have made significant headway on Planning Step #1, OWRD may recommend modifications to the existing governance agreement to ensure that there is a balanced representation of interests and may require a work plan before the planning group proceeds with Planning Step #2.

|   |          |
|---|----------|
| <b>Need for Assistance:</b>             | Moderate |
| <b>Readiness:</b>                       | High     |
| <b>Likelihood of Completing a Plan:</b> | High     |

**Letter of Interest: E\_08\_06\_UpperGrandeRonde**

**Overview of Evaluation and Funding Recommendation**

**Recommended for Funding:** Yes – Fully fund \$197,000\* to undertake all 5 planning steps described in the 2015 Draft Place Based Planning Guidelines.

\*If funded by the Commission this pilot area would work with OWRD to ensure their approach follows the Guidelines and will lead to the development of a Place-Based Integrated Water Resources Plan.

**Grouping: Group A** Proposal demonstrates strengths against all of the criteria, has a moderate need for assistance, demonstrated readiness, and has a high likelihood of completing a plan in 2-3 years.

**Summary** (see following page for more information):

- Very strong proposal with a capable local convener and a strong network of local partners who are likely to contribute to a multi-year collaborative effort.
- The proposal demonstrates an understanding of the IWRS and Place-Based Planning and is likely to result in a Plan that is consistent with Department expectations.
- The approach is well reasoned and demonstrates that the convener and partners have been thinking about how best to implement the 2015 Draft Place-Based Planning Guidelines in a way that address local water issues.

The proposal provides an opportunity to build on past collaborative work in a more integrated approach and clearly describes why this place is a good fit for the pilot phase, including a local commitment to collaborative and innovative approaches.

**Summary Information from the Letter of Interest**

**Convener:** Union County

**Hydrologic unit/scale:** The planning area is the Upper Grande Ronde River Watershed located in northeast Oregon. The watershed boundary closely aligns with the boundary of Union County.

**Water issues/drivers:** Water supply shortages for in-stream and out-of-stream uses; water quantity effects on quality and habitat; need to better understand and address imbalances in water supply and demand based on seasonal availability; drought; climate change.

**Funding requested:** \$197,000      **Cost-share:** \$75,000 (secured in-kind)

**Other support requested:** Participate in meetings, planning assistance (assist with coordination of information gathering efforts with other state agencies, review documents), technical assistance (gather and analyze water rights information, assist with climate change projections, review documents).

**Executive Summary:** The Upper Grande Ronde River Watershed is a vital ecosystem that supports ranchers, farmers, and urban residents as well as an array of fish and wildlife species. Union County is convening a place-based integrated water resources planning effort to evaluate all demands on water resources within the watershed compared to available water resources. This will be a collaborative effort among a balanced representation of local organizations that have a vested interest in the area’s water resources. While there is a significant body of research on water quality, quantity, and ecological demands in the watershed, there is a lack of seasonal-level analysis to evaluate whether the demands are aligned with available water quality and quantity. This effort will analyze water quality and quantity versus demand for each week of the year to determine when water quantity and quality exceed demand and when demand exceeds available supply. Analyzed data will be used to develop strategies to balance water demand with supply. This may include improvements in water storage, conveyance, treatment, and reuse. The planning effort will evaluate, on a watershed scale, possible water resources management strategies to meet the demands, and possible improvements to maximize water use efficiencies. The objective is to have a complete document outlining available water resources in the watershed compared to the demands on each resource that will serve as a “roadmap” to best align the demands with the available resources for an integrated and sustainable system.

## Inter-Agency Review Team Feedback

Letters of Interest were evaluated against a set of review factors by both OWRD and a state inter-agency team. Evaluation criteria were used to identify strengths and weaknesses of the proposed efforts in the areas of **leadership, partnerships, capacity, integration, planning needs/outcomes, and approach**. This proposal demonstrated strengths against all of the evaluation criteria. The review team also assessed **need for assistance, readiness, and likelihood of developing a plan in 2-3 years**, which is summarized below.

### Strengths

- **Leadership.** The proposed convener serves a broad public interest, is perceived as inclusive and impartial, can engage with a broad representation of water interests, and has a demonstrated interest in water planning. The proposed convener brings political clout to the process and has assembled a team that will provide added capacity.
- **Partnerships.** Local, state and federal partners are identified in addition to the skills/resources they would contribute. The proposed convener has past experience with building and maintaining strong partnerships.
- **Capacity.** The proposed convener has identified a team of individuals who will assist in day-to-day coordination (county staff, Regional Solutions, and a local consulting firm). The proposed convener and partners have led or participated in multi-year collaborative planning efforts.
- **Integration.** The proposed convener demonstrates awareness of existing groups, data and plans and it is likely that this process will build off of and integrate with other relevant efforts.
- **Needs/Outcomes.** This effort has a high likelihood of developing a quality plan that identifies viable and actionable solutions in 2-3 years. The Letter conveys why this place is a good fit for the pilot phase.
- **Approach.** The proposed scale is well-reasoned and appropriate for planning. The proposal identifies clear activities and outputs. As proposed, the schedule and budget are reasonable and appropriate to execute the proposed approach.

### Weaknesses (to be addressed in Partnership with OWRD during planning step 1)

- **Partnerships.** The differentiation between “Place-Based Partners” and “Place-Based Stakeholders” is confusing and potentially problematic. The composition and structure of the group should reflect the integrated nature of water resources beyond water quantity and water rights.
- **Capacity.** A pending or secured cash match could strengthen this effort. The estimated cost per hour for partner organizations seems high compared to other proposals.
- **Integration.** The proposed effort is focused on water supply and quantity. While this is an appropriate driver for integrated water planning, it is important that the effort continue to pursue planning in an integrated approach (considering water quality and ecosystem health).
- **Needs/Outcomes.** The proposal does not emphasize the timeliness of this particular opportunity (i.e, are there opportunities lost if it does not move forward now?)
- **Approach.** The proposal demonstrates a vision for place-based planning with clear activities and outputs, which is generally considered a strength. However, the convener needs to remain open and flexible to the needs and interests of the partner organizations as they emerge through the collaborative process.

|   |          |
|---|----------|
| <b>Need for Assistance:</b>             | Moderate |
| <b>Readiness:</b>                       | High     |
| <b>Likelihood of Completing a Plan:</b> | High     |

**Letter of Interest: E\_12\_10\_MalheurLake**

**Overview of Evaluation and Funding Recommendation**

**Recommended for Funding:** Yes – Partial funding (\$135,000)\* to focus on Planning Steps 1-3.  
 \*If funded by the Commission this pilot area would work with OWRD to ensure their approach follows the Guidelines and will lead to the development of a Place-Based Integrated Water Resources Plan.

**Grouping: Group B** Proposal scored well against the evaluation criteria, has emerging partnerships, a high need for assistance, demonstrated readiness, and presents interesting opportunities to test the Guidelines given its high need and desire to pursue more integrated and collaborative approaches.

**Summary** (see following page for more information):

- Strong proposal with a capable local convener and a network of engaged local partners who are likely to contribute to a multi-year collaborative effort.
- The proposal demonstrates an understanding of the IWRS and Place-Based Planning and is likely to result in a Plan that is consistent with OWRD expectations.
- The need for assistance is clearly articulated and this presents a timely opportunity to collaborate with local partners to fully characterize water resources in a data limited basin and develop a shared vision for sustainably managing water resources.
- This is an opportune time to begin place-based planning as OWRD embarks on a multi-year study to characterize groundwater resources. While the study is distinct from place-based planning, OWRD recommends using this as an opportunity to build stronger partnerships with local stakeholders as they implement Planning Steps 1-3 (collaborative information gathering).

**Summary Information from the Letter of Interest**

**Convener(s):** Harney County Watershed Council

**Co-Convener:** Harney County Court (*potential*)

**Hydrologic unit/scale:** Malheur Lake Basin, which includes seven 4<sup>th</sup> level hydrologic units.

**Water issues/drivers:** Long-standing need and desire to better understand groundwater resources, heightened by proposed groundwater limited area; opportunities to integrate surface water/groundwater issues and look at recharge options; surface water and groundwater quality; build on collaborative work being done on wetland management (Harney Wetlands Initiative).

|                           |           |                    |  |
|---------------------------|-----------|--------------------|--|
| <b>Funding requested:</b> | \$205,500 | <b>Cost-share:</b> | \$24,683 (secured in-kind & cash)<br>\$35-\$65,000 (pending in-kind) |
|---------------------------|-----------|--------------------|--|

**Other support requested:** The applicant requests an active and full partnership with OWRD through the planning process, including planning assistance.

**Executive Summary:** In Harney County, hay and cattle are our largest industries and are the lifeblood of the county’s economic health. Recent drought years have contributed to declining groundwater levels in several areas of the basin, enough to cause OWRD to propose a new groundwater limited area. Fear and uncertainty are becoming endemic among land users and owners and employees of associated businesses and suggests that they not only need to better understand the nature and causes of this apparent trend, but participate in discussing actions that may be needed in the short and long-term to ensure water sustainability and economic vitality. Sharing their collective wisdom about water fluctuations in the areas where they live and work in a neutral, collaborative, place-based process, can help provide the innovative solutions to help bring demand more in line with supply, solutions that no one individual or agency could have conceived unilaterally. The process can provide a better understanding of how water resources can be effectively managed, not just in periods of decline, but forward into the future. The process will provide a good opportunity for OWRD to become a partner in solving the challenging issues land users and their business networks face, as opposed to just regulating them. The community’s participation in a collaborative process is the ideal arena to foster trust and cooperation among those affected by water fluctuations and help support OWRD’s efforts. The recent formation of the Rules Advisory Committee to

help update basin rules is evidence of a desire for community involvement to foster better communication between the agency, the community and those with environmental concerns.

## Inter-Agency Review Team Feedback

Letters of Interest were evaluated against a set of review factors by both OWRD and a state inter-agency team. Evaluation criteria were used to identify strengths and weaknesses of the proposed efforts in the areas of **leadership, partnerships, capacity, integration, planning needs/outcomes, and approach**. This proposal performed well against all of the evaluation criteria. The review team also assessed **need for assistance, readiness, and likelihood of developing a plan in 2-3 years**, as summarized below.

### Strengths

- **Leadership.** The proposed convener has diverse representation on its board, serves multiple interests and can be perceived as impartial and inclusive. The proposed convener has a demonstrated interest in and commitment to water resources planning and management.
- **Partnerships.** Partners have a long and successful history of working collaboratively as demonstrated through past efforts. The proposal indicates clear support from a diverse network of partners. The proposed convener has past experience with building and maintaining strong partnerships.
- **Capacity.** The proposed convener and partners have led and participated in numerous multi-year collaborative efforts to address challenging natural resources issues. Citizen engagement is high. The proposed convener had past success with Oregon Consensus and proposes to utilize their services in this effort.
- **Integration.** The proposal indicates an awareness of existing information and is likely to build on and integrate with complementary efforts. The proposal touches on water quantity, water quality and ecological needs.
- **Needs/Outcomes.** The proposed convener clearly describes the high need and timeliness for place-based planning and indicates an immediate need for collaborative information gathering to develop a shared understanding and vision for water resources management.
- **Approach.** The approach is well-reasoned and consistent with the 2015 Draft Place-Based Planning Guidelines. The proposed convener demonstrates a thorough understanding of collaborative efforts.

### Weaknesses (to be addressed in Partnership with OWRD during planning step 1)

- **Leadership.** It is unclear which individual(s) from the proposed convening body will be the local champion of the process.
- **Partnerships.** As proposed, the list of partners may not be inclusive of all relevant interests (e.g. municipalities, instream/conservation interests). Letters of support from conservation interests could strengthen this proposal.
- **Capacity.** The Watershed Council may have limited capacity to do the day-to-day work of coordinating the planning process and has indicated a need to hire a part-time project manager to assist with capacity. In-kind contributions are not secured.
- **Integration.** The proposal could benefit from a more detailed discussion of different water interests and needs, including municipal needs and conservation needs.
- **Approach.** The Malheur Lake Basin is a very large basin and may not be the appropriate scale for planning. Given the limited data available in the Malheur Lake Basin it may not be appropriate to expect a plan in 2-3 years.

|   |          |
|---|----------|
| <b>Need for Assistance:</b>             | High     |
| <b>Readiness:</b>                       | High     |
| <b>Likelihood of Completing a Plan:</b> | Moderate |

**Letter of Interest: NW\_18\_01\_MidCoast**

**Overview of Evaluation and Funding Recommendation**

**Recommended for Funding:** Yes – Partially fund \$135,000\* to focus on Planning Steps 1-3.

\*If funded by the Commission this pilot area would work with OWRD to ensure their approach follows the Guidelines and will lead to the development of a Place-Based Integrated Water Resources Plan.

**Grouping: Group B** Proposal scored well against the evaluation criteria, has emerging partnerships, a high need for assistance, demonstrated readiness, and presents interesting opportunities to test the Guidelines given its high need and desire to pursue more integrated and collaborative approaches.

**Summary** (see following page for more information):

- Strong proposal with a capable local convener and a network of engaged local partners who are likely to contribute to a multi-year collaborative effort.
- The proposal demonstrates an understanding of the IWRS and Place-Based Planning and is likely to result in a Plan that is consistent with Department expectations.
- The need for assistance is clearly articulated and this presents a timely opportunity to collaborate with local partners to fully characterize water resources and identify integrated solutions for near-term and long-term water challenges in an area with distributed water challenges.
- This place has demonstrated momentum towards more collaborative and integrated approaches and OWRD recommends funding to maintain this momentum. This proposal also presents OWRD with an opportunity to co-convene in a basin as they develop their collaborative capacity.

**Summary Information from the Letter of Interest**

**Convener:** City of Newport

**Co-Convener:** Oregon Water Resources Department (*requested*)

**Hydrologic unit/scale:** Lower Siletz, Lower Yaquina, and Devils Lake-Moolack Frontal watersheds.

**Water issues/drivers:** Need for regional water planning that coordinates water users; unreliable supply (some water providers cannot meet current demands); mismatch between water supply and demand; opportunities for storage; improved water quality monitoring; climate change; earthquakes/tsunamis.

|                           |           |                    |                                    |
|---------------------------|-----------|--------------------|------------------------------------|
| <b>Funding requested:</b> | \$330,300 | <b>Cost-share:</b> | \$177,000 (secured cash & in-kind) |
|---------------------------|-----------|--------------------|------------------------------------|

**Other support requested:** Requests OWRD to serve as a co-convener. Planning assistance (stakeholder outreach), data/information assistance (coordinating information gathering from state agencies), technical assistance (analyze current and projected demands, study surface water and groundwater connectivity).

**Executive Summary:**

The City of Newport, Oregon, on behalf of the Mid-Coast Basin Planning Group, is submitting this proposal to conduct a place-based integrated water resources planning study in the Mid-Coast Basin. Initially this study will examine the water supply and demand needs within the Lower Siletz, Lower Yaquina, and Devils Lake-Moolack Frontal watersheds.

The primary goals of this planning study are to:

1. Engage a diverse set of stakeholders within the Mid-Coast Basin in an effort to better understand and characterize water resources within the study area;
2. Collaboratively identify the current and future in-stream and out-of-stream water supply needs and demands;
3. Collaboratively develop and prioritize options to respond to any identified imbalances, and;
4. Develop an integrated water resources plan that will inform long-term planning and support regional strategies for addressing watershed challenges in the Mid-Coast Basin.

## Inter-Agency Review Team Feedback

Letters of Interest were evaluated against a set of review factors by both OWRD and a state inter-agency team. Evaluation criteria were used to identify strengths and weaknesses of the proposed efforts in the areas of **leadership, partnerships, capacity, integration, planning needs/outcomes, and approach**. This proposal performed well against all of the evaluation criteria. The review team also assessed **need for assistance, readiness, and likelihood of developing a plan in 2-3 years**, which is summarized below.

### Strengths

- **Leadership.** The proposed convener has a demonstrated interest in and commitment to water resources planning and management. Within the past few years the proposed convener has actively pursued more collaborative approaches to address regional water issues, which indicates a willingness and ability to serve broader interests.
- **Partnerships.** The proposed convener has actively reached out to local partners representing diverse interests. The proposal indicates local momentum among partners toward characterizing and addressing water challenges in a more collaborative and integrated manner.
- **Capacity.** The proposed convener has assembled a consulting team to assist with coordinating partners and implementing the planning steps. The proposed convener is actively seeking other funding sources to support regional planning efforts.
- **Integration.** The proposed convener demonstrates awareness of existing groups, data and plans and it is likely that this process will build off of and integrate with other relevant and complementary efforts. The proposal expresses an intent to address water quantity, water quality and ecological needs.
- **Needs/Outcomes.** The proposal conveys clear and immediate needs to address water issues in an integrated approach given current water shortages and water quality challenges.
- **Approach.** The proposal emphasizes the proposed convener’s intent to establish metrics and milestones to evaluate and communicate progress.

### Weaknesses (to be addressed in Partnership with OWRD during planning step 1)

- **Leadership.** The proposed convener covers a limited geographic area and may not be perceived as impartial or inclusive by some partners. The proposed convener has invited OWRD to serve as a co-convener, which may help to address this.
- **Partnerships.** As proposed, the list of partners may not be inclusive of all relevant interests. The current list of partners includes many downstream users, but it is unclear how the proposed convener will engage with upstream partners through the planning process.
- **Capacity.** Many small community partners on the coast may not have the capacity to fully participate in planning efforts. This proposal is largely dependent on a consulting team for support.
- **Integration.** The proposed effort is focused on water supply and quantity. While this is an appropriate driver for integrated water planning, it is important that the effort continue to pursue planning in an integrated approach (considering water quality and ecosystem health).
- **Needs/Outcomes.** The proposal indicates an interest in investigating and addressing multiple water issues, but focuses on storage as a solution. While it is appropriate for the proposal to indicate potential solutions, the convener needs to remain open and flexible to the needs and interests of the partner organizations as they emerge through the collaborative process.
- **Approach.** The current planning scale is unclear and does not follow hydrologic boundaries.

|   |          |
|---|----------|
| <b>Need for Assistance:</b>             | High     |
| <b>Readiness:</b>                       | High     |
| <b>Likelihood of Completing a Plan:</b> | Moderate |

**Letter of Interest: NW\_02C\_18\_Tualatin**

**Overview of Evaluation and Funding Recommendation**

**Recommended for Funding:** Not at this time

**Grouping: Group A** Proposal demonstrates strengths against all of the criteria, has a moderate need for assistance, demonstrated readiness, and has a high likelihood of completing a plan in 2-3 years.

**Summary** (see following page for more information):

- Very strong proposal with a capable local convener and a strong network of local partners who are likely to contribute to a multi-year collaborative effort.
- The proposal demonstrates a clear understanding of the IWRS and Place-Based Planning and is likely to result in a Plan that is consistent with Department expectations.
- This place has very high capacity partners and already appears to be employing integrated and collaborative approaches to water planning. This place has a unique combination of factors that may limit transferability of lessons learned. Place-Based Planning would support and enhance existing efforts but may not serve as a catalyst in this community.
- This proposal clearly demonstrates readiness to undertake Place-Based Integrated Water Resources Planning in partnership with OWRD . OWRD encourages the proposed convener and partners to stay engaged during the pilot phase to inform program development and also strongly encourages partners to apply for future funding opportunities associated with place-based planning (if and when available).

**Summary Information from Letter of Interest**

**Convener:** Tualatin River Watershed Council

**Co-Convener:** Oregon Water Resources Department (*requested*)

**Hydrologic unit/scale:** Tualatin River Watershed

**Water issues/drivers:** Water quantity limited for instream and out-of-stream needs; population growth; low summer flows; potential groundwater declines; water quality issues; storm water management; climate change; restoration of complex ecological functions.

**Funding requested:** \$225,000      **Cost-share:** \$82,700 (secured cash and in-kind)

**Other support requested:** Requests OWRD to serve as a co-convener. Technical assistance (water rights analyses, modeling, scenario planning, GIS support, etc), planning assistance (project management, stakeholder outreach, etc.)

**Executive Summary:** The Tualatin Basin is home to over 570,000 residents, abundant natural resources, and provides a strong economic base for the State of Oregon, all of which require a dependable supply of clean water. Continued population and economic growth will continue to increase water demands. As observed during the past year’s drought conditions the current system was stressed meeting the current instream and out of stream needs. The Tualatin Basin has a long history of collaboration centered on water issues including flow release coordination, addressing environmental and endangered species regulations and future water supply issues. Building on these collaborations, water interest are ready to work together to address future water needs in anticipation of a projected doubling of its population over the next 40 years, increased multiple water demands and the environmental issues created by changing climate patterns. The Tualatin River Watershed Council (TRWC) is in a unique position to bring together its partners to develop and refine efforts to integrate water quantity, quality and ecological health into a plan. Because the Tualatin Basin includes both urban and rural as well as industry, agriculture, forestry and a growing population, it is an ideal place to test planning strategies. TRWC proposes a pilot project with a community engagement process resulting in a Tualatin Basin integrated water resources plan that align with the OWRD 2015 Draft Place-Based Planning Guidelines. We expect to highlight the potential to work collaboratively in developing solutions that include changes of policy, institutional processes, and a list of potential projects which benefit a variety of interests that include water supply, water quality,

ecological health and floodplain management.

## Inter-Agency Review Team Feedback

Letters of Interest were evaluated against a set of review factors by both OWRD and a state inter-agency team. Evaluation criteria were used to identify strengths and weaknesses of the proposed efforts in the areas of **leadership, partnerships, capacity, integration, planning needs/outcomes, and approach**. This proposal demonstrated strengths against all of the evaluation criteria. The review team also assessed **need for assistance, readiness, and likelihood of developing a plan in 2-3 years**, which is summarized below.

### Strengths

- **Leadership.** The proposed convener has diverse representation on its board, serves multiple interests and can be perceived as impartial and inclusive. The proposed convener has a demonstrated interest in and commitment to water resources planning and management.
- **Partnerships.** The Letter indicates clear support from a strong network of partners representing diverse water interests. The proposed convener has past experience with building and maintaining strong partnerships.
- **Capacity.** The proposed convener and partners have led or participated in multi-year collaborative planning efforts. Partners have pledged in-kind contributions.
- **Integration.** The proposed convener demonstrates awareness of existing groups, data and plans and it is likely that this process will likely build on and integrate with other relevant and complementary efforts. The Letter expresses an intent to address water quantity, water quality and ecological needs.
- **Needs/Outcomes.** Partners in the basin already pursue integrated and collaborative approaches to water planning, but there is a continual need to share resources, identify needs and develop integrated solutions.
- **Approach.** The proposed convener and partners were actively involved in the development of the IWRS and demonstrate a clear understanding of the IWRS and 2015 Draft Place-Based Planning Guidelines.

### Weaknesses

- **Leadership.** The proposed convener has invited OWRD to serve as a co-convener, but given the high capacity of local partners, it may be more appropriate to invite another local partner to co-convene to increase capacity and clout.
- **Capacity.** Limited staff capacity could make the day-to-day work of coordinating the planning effort challenging for the convener, especially in such a complex basin with so many diverse stakeholders.
- **Integration.** Local partners have already engaged in integrated and collaborative water planning efforts in the past. This Letter should better articulate the specific ways that place-based planning would improve integration and collaboration.
- **Needs/Outcomes.** The Letter does not emphasize the timeliness of this particular opportunity (i.e., are there opportunities lost if it does not move forward now?) This place has a unique combination of factors that may limit transferability of lessons learned.
- **Approach.** Given the complexity of the Tualatin Basin, this particular proposal could benefit from greater clarity and structure in the proposed approach.

|   |          |
|---|----------|
| <b>Need for Assistance:</b>             | Moderate |
| <b>Readiness:</b>                       | High     |
| <b>Likelihood of Completing a Plan:</b> | High     |

**Letter of Interest #: NW\_02A\_02\_WillametteHeadwaters**

**Overview of Evaluation and Funding Recommendation**

**Recommended for Funding:** Not at this time

**Grouping: Group A** Proposal demonstrates strengths against all of the criteria, has a moderate need for assistance, demonstrated readiness, and a high likelihood of completing a plan in 2-3 years.

**Summary** (see following page for more information):

- Very strong proposal with a capable local convener and a strong network of local partners who are likely to contribute to a multi-year collaborative effort.
- The Letter demonstrates a clear understanding of the IWRS and Place-Based Planning and is likely to result in a Plan that is consistent with Department expectations.
- This place has very high capacity partners and already appears to be employing integrated and collaborative approaches to water planning. This place has a unique combination of factors that may limit transferable lessons learned. Place-Based Planning would support and enhance existing efforts but may not serve as a catalyst in this community.
- This proposal clearly demonstrates readiness to undertake Place-Based Integrated Water Resources Planning in partnership with OWRD . OWRD encourages the proposed convener and partners to stay engaged during the pilot phase to inform program development and also strongly encourages partners to apply for future funding opportunities associated with place-based planning (if and when available).

**Summary Information from the Letter of Interest**

**Convener:** Lane Council of Governments

**Hydrologic unit/scale:** Three headwaters sub-basins of the Willamette River Basin (Coast Fork, Middle Fork, and McKenzie River).

**Water issues/drivers:** Need to actively maintain and improve health of the Upper Willamette watershed since lower watersheds rely on effective management of the headwaters; climate change; water quality (instream and groundwater); population growth and new demands on the resource; integration between different users.

**Funding requested:** \$269,400    **Cost-share:** \$105,120 (pending/secured cash & in-kind)

**Other support requested:** Participation in meetings, technical assistance, information/data assistance, planning assistance (stakeholder outreach, guidance).

**Executive Summary:** Our region is eager to initiate place-based planning to effectively address the unique combination of factors and interests in the Willamette River headwaters. We are ready to undertake such a process because: there is a common understanding that water is and will be a primary concern of the region; the region has a growing population, heavily water dependent economy and majority of federally held forest lands; and project participants have a proven track record of innovation and collaboration. This project initiates a dialogue and integrated planning process to understand resource complexities and address regional water resources issues. The proposed work involves a broad foundation of interested parties working towards the common purpose of maintaining healthy water resources. Current water supplies, water quality and the status of ecosystem health will be assessed and described acknowledging the interrelated nature of water resources and creating a common starting point for discussions about issues and their resolutions. Place-based planning addresses our local challenges by providing a context-specific venue through which to analyze cumulative effects and opportunities. This results in multiple objective designs across agency/stakeholder efforts achieving efficiencies and ensuring effectiveness. Stakeholders will articulate mutual interests, address issues of common concern, and identify near and long term solutions for the benefit of multiple entities and programs (drinking water, TMDL, agriculture, floodplain, etc.). The resulting Integrated Water Resources Plan will address groundwater and surface water quality, supply, wiser use, increased resiliency to climate change as well

as serve as a model for others.

## Inter-Agency Review Team Feedback

Letters of Interest were evaluated against a set of review factors by both OWRD and a state inter-agency team. Evaluation criteria were used to identify strengths and weaknesses of the proposed efforts in the areas of **leadership, partnerships, capacity, integration, planning needs/outcomes, and approach**. This proposal demonstrated strengths against all of the evaluation criteria. The review team also assessed **need for assistance, readiness, and likelihood of developing a plan in 2-3 years**, which is summarized below.

### Strengths

- **Leadership.** The proposed convener serves a broad public interest, is perceived as inclusive and impartial, and can engage with a broad representation of water interests. The proposed convener has a demonstrated interest in and extensive experience with collaborative water planning efforts.
- **Partnerships.** The Letter indicates clear support from a strong network of partners. The proposed convener has past experience with building and maintaining strong partnerships.
- **Capacity.** The proposed convener and partners have led or participated in multi-year collaborative planning efforts in the past. The proposed convener has considerable experience and expertise in regional planning efforts.
- **Integration.** The Letter communicates a clear understanding of the IWRS and place-based planning principles. The Letter indicates an awareness of existing groups, data and plans and it is likely that this process will likely build on and integrate with other relevant and complementary efforts. The proposal expresses an intent to address water quantity, water quality and ecological needs.
- **Needs/Outcomes.** The proposal clearly conveys the need to maintain and enhance the health of the Willamette headwaters and highlights the value of integrating the results of past studies with current planning efforts.
- **Approach.** The approach is very well reasoned, demonstrates a clear understanding of the IWRS principles, and describes how this process will effectively build on the 2015 Draft Place-based Planning Guidelines. The proposal identifies clear activities and outputs.

### Weaknesses

- **Partnerships.** The current list of partners emphasizes agency involvement, but has limited representation from user groups aside from municipalities (e.g., private landowners, recreational users).
- **Integration.** Local partners have already engaged in integrated and collaborative water planning efforts in the past. This proposal should better articulate the specific ways that place-based planning would improve integration and collaboration.
- **Needs/Outcomes.** The proposal does not emphasize the timeliness of this particular opportunity (i.e., are there opportunities lost if it does not move forward now?)
- **Approach.** The proposed scale is very large and there is not sufficient rationale for why this is the proposed planning area.

|   |          |
|---|----------|
| <b>Need for Assistance:</b>             | Moderate |
| <b>Readiness:</b>                       | High     |
| <b>Likelihood of Completing a Plan:</b> | High     |

**Letter of Interest: NW\_02B\_16\_Pudding**

**Overview of Evaluation and Funding Recommendation**

**Recommended for Funding:** Not at this time

**Grouping: Group B** Proposal scored well against the evaluation criteria, has emerging partnerships, a high need for assistance, demonstrated readiness, and presents interesting opportunities to test the Guidelines given its high need and desire to pursue more integrated and collaborative approaches.

**Summary** (see following page for more information):

- Strong proposal with an emerging network of partners who are likely to contribute to a multi-year collaborative effort.
- In the spirit of collaboration, the proposal was collectively written by a group of local interests and demonstrates an interest in sustaining momentum toward place-based integrated water resources planning.
- The need for assistance is clearly articulated and place-based planning presents an opportunity to foster collaboration among local partners to fully characterize water resources and identify integrated solutions for water challenges in an area with limited collaborative planning experience.
- The relatively untested nature of collaborative planning in this basin may not make it a good fit during the pilot phase.
- OWRD is encouraged by the interest that was generated around place-based planning in this area and urges the proposed conveners and partners to continue working together to characterize water resources and develop a shared vision. OWRD also encourages partners to apply for future funding opportunities associated with place-based planning (if and when available).

**Summary Information from the Letter of Interest**

|                                 |  |                    |                             |
|---------------------------------|--|--------------------|-----------------------------|
| <b>Convener:</b>                | Marion County  |                    |                             |
| <b>Co-Convener:</b>             | City of Silverton  |                    |                             |
| <b>Hydrologic unit/scale:</b>   | Pudding River Watershed covering 528 square miles in Marion and Clackamas Counties.  |                    |                             |
| <b>Water issues/drivers:</b>    | Opportunities for shared water supply between City of Silverton and City of Mount Angel; two groundwater limited areas; declining shallow and deep aquifers; water quality negatively affects drinking water supplies and instream habitat; population growth; vital agricultural sector that relies on water; climate change. |                    |                             |
| <b>Funding requested:</b>       | \$300,000  | <b>Cost-share:</b> | \$877,600 (pending in-kind) |
| <b>Other support requested:</b> | \$82,500 worth of technical and planning assistance ( <i>estimate</i> ).   |                    |                             |

**Executive Summary:** The Partners of the Pudding River Watershed Planning Group (PRWPG) are committed to working together to develop a place-based integrated water resources plan. The PRWPG was established in the Fall of 2015 in response to increasing concerns and need for collaboration on water resources in the basin. This voluntary collaborative partnership is seeking technical assistance funding from the Oregon Water Resources Department for the purpose of further defining the scope of the place-based plan, assessing water resources within the Pudding River watershed, and implementing a planning strategy with feasible solutions that achieve multiple water resources objectives. The PRWPG is a diverse collective of community organizations committed to achieving consensus solutions addressing water quantity (in-stream and out-of-stream), water quality, and ecological health. The PRWPG believes that these issues and opportunities are not mutually exclusive and through collaboration and coordination our organizations can better serve the Pudding River Watershed and its stakeholders. Individual partners offer decades of studies, plans, and programs that can be built upon in this process to better address water needs of the basin in an open collaborative venue. The Partners are eager for the next steps toward future

collaboration. As a first product of the PRWPG, the Partners have worked collaboratively to draft this Letter of Interest for place-based planning funding.

## Inter-Agency Review Team Feedback

Letters of Interest were evaluated against a set of review factors by both OWRD and a state inter-agency team. Evaluation criteria were used to identify strengths and weaknesses of the proposed efforts in the areas of **leadership, partnerships, capacity, integration, planning needs/outcomes, and approach**. This proposal performed well against all of the evaluation criteria. The review team also assessed **need for assistance, readiness, and likelihood of developing a plan in 2-3 years**, which is summarized below.

### Strengths

- **Leadership.** The proposed convener serves a broad public interest, is perceived as inclusive and impartial, and can engage with a broad representation of water interests.
- **Partnerships.** The proposal was collaboratively written by a diverse network of partners. There is momentum among partners to explore more integrated and collaborative approaches to water planning in a basin where planning has been pursued in a more distributed manner.
- **Integration.** The proposal was written collaboratively by multiple interests and expresses an intent to address water quantity, water quality and ecological needs. The proposal demonstrates awareness of existing groups, data and plans and it is likely that this process will build off of and integrate with other relevant and complementary efforts.
- **Needs/Outcomes.** The proposal conveys clear and immediate needs to address water issues in an integrated manner given current water shortages and water quality challenges. Partners have worked together on a limited basis in the past and pursuing a more collaborative approach could help identify novel solutions to long-standing issues.
- **Approach.** The proposed approach emphasizes the need to build a strong foundation for future collaboration. The need to focus on Planning Step #1 is well-reasoned.

### Weaknesses

- **Leadership.** The description of the proposed convener is limited and it is unclear how engaged the convener will be in leading the place-based planning effort. A statement from the convener would provide clarification and strengthen the proposal.
- **Partnerships.** Letters of support from current and potential partners would strengthen this proposal by demonstrating commitment and specifying likely contributions.
- **Capacity.** The proposed convener’s capacity to support the day-to-day coordination of the planning effort is unclear. If the proposed convener does not have the capacity, it is unclear which of the partners will supplement that capacity. The proposed convener and partners have limited experience with past collaborative efforts and based on the information provided it is unclear whether the partners are truly dedicated to building collaborative capacity. The estimated cost per hour for partner organizations seems high.
- **Needs/Outcomes.** The proposal does not emphasize the timeliness of this particular opportunity (i.e., are there opportunities lost if it does not move forward?)
- **Approach.** Without more collaborative history, it is difficult to determine with certainty if this is likely to result in an integrated plan. The total project cost seems high.

|   |          |
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| <b>Need for Assistance:</b>             | High     |
| <b>Readiness:</b>                       | High     |
| <b>Likelihood of Completing a Plan:</b> | Moderate |

**Letter of Interest: SW\_15\_13-14-19\_Rogue**

**Overview of Evaluation and Funding Recommendation**

**Recommended for Funding:** Not at this time

**Grouping: Group B** Proposal scored well against the evaluation criteria, has emerging partnerships, a high need for assistance, demonstrated readiness, and presents interesting opportunities to test the Guidelines given its high need and desire to pursue more integrated and collaborative approaches.

**Summary** (see following page for more information):

- Strong proposal with a capable local convener and a network of engaged local partners who are likely to contribute to a multi-year collaborative effort.
- Builds on an existing high-capacity partnership with a governance agreement and presents an opportunity to test integration with the Oregon Watershed Enhancement Board (OWEB) Strategic Action Planning process.
- The proposed convener and partners have high capacity, a solid reputation and visible support, but the proposed approach needs to be revisited and refined to be more aligned with the IWRS and the 2015 Draft Place-Based Planning Guidelines. Given the issues identified with the proposed approach, this area is not recommended for funding during the pilot phase.
- There is a lot of momentum around collaborative planning in the Rogue Basin and OWRD encourages the proposed convener and partners to stay engaged during the pilot phase to inform program development. OWRD also encourages partners to apply for future funding opportunities associated with place-based planning (if and when available).

**Summary Information from the Letter of Interest**

**Convener:** Rogue Basin Partnership

**Co-Convener:** Oregon Water Resources Department (*requested*)

**Hydrologic unit/scale:** Six priority watersheds and corridors in the Rogue Basin where flow is a key limiting factor as identified in the Rogue Restoration Action Plan, including Elk Creek-Big Butte, Little Butte, Ashland-Bear Creek, Evans Creek, Applegate and the Upper Illinois.

**Water issues/drivers:** Decreasing water availability; climate change; water quality (temperature, bacteria and nutrients); declining summer flows; over-appropriated water sources; upland forest management.

|                           |           |                    |  |
|---------------------------|-----------|--------------------|--|
| <b>Funding requested:</b> | \$175,000 | <b>Cost-match:</b> | \$65,500 (secured cash and in-kind)<br>\$16,356 (pending cash and in-kind) |
|---------------------------|-----------|--------------------|--|

**Other support requested:** Requests OWRD serve as co-convener. Planning assistance (stakeholder outreach), data/information assistance (provide and interpret monitoring data), technical assistance (water rights and water availability analyses).

**Executive Summary:** The Rogue Basin Partnership (RBP) Place-Based Planning effort would develop a consistent process of outreach and engagement in each priority watershed and corridor of the Rogue Restoration Action Plan where water resources management is a limiting factor. The priority areas will be lumped into six units: Elk Creek-Big Butte, Little Butte, Ashland-Bear Creek, Evans, Applegate, and the Upper Illinois. As part of this planning process, project partners would host community forums in each of the six priority areas for stakeholders to share their information, concerns, and offer potential solutions to water resource issues. The outcome of this place-based planning effort would be a summary plan of the integrated water resources analysis, prioritization of actions, and the list of specific implementation strategies in the priority areas. As a long-term goal, RBP will eventually expand outreach beyond the priority areas in order to encourage a broader planning field that includes key stakeholders whose jurisdictions reside outside of our priority areas. Ultimately, RBP will leverage the tools developed through this planning process to apply these implementation strategies across the entire Rogue Basin.

## Inter-Agency Review Team Feedback

Letters of Interest were evaluated against a set of review factors by both OWRD and a state inter-agency team. Evaluation criteria were used to identify strengths and weaknesses of the proposed efforts in the areas of **leadership, partnerships, capacity, integration, planning needs/outcomes, and approach**. This proposal performed well against all of the evaluation criteria. The review team also assessed **need for assistance, readiness, and likelihood of developing a plan in 2-3 years**, which is summarized below.

### Strengths

- **Leadership.** The proposed convener has diverse representation, serves multiple interests and can be perceived as impartial and inclusive. The proposed convener has a demonstrated interest in and commitment to water resources planning and management.
- **Partnerships.** The proposal indicates support from a strong network of partners representing diverse water interests. The partners have been assembled and already have a governance agreement in place to structure involvement.
- **Capacity.** The Partnership has demonstrated capacity to work collaboratively and undertake multi-year planning efforts.
- **Integration.** The proposed convener demonstrates awareness of existing groups, data and plans and it is likely that this process will build off of and integrate with other relevant and complementary efforts. This proposal provides an opportunity to test how Place-Based Planning can integrate with the Oregon Watershed Enhancement Board (OWEB) Strategic Action Planning process.
- **Needs/Outcomes.** The need to address water supply issues in flow-limited sub-basins is clearly articulated.
- **Approach.** The proposal will utilize information from and build on the existing Rogue Restoration Action Plan.

### Weaknesses

- **Leadership.** It is unclear which individual(s) from the proposed convening body will be the local champion of the process. This needs to be clarified.
- **Partnerships.** It is unclear if the existing partnership is or will be fully inclusive of the necessary interests in the proposed sub-watersheds and how the proposed convener intends to structure engagement at the sub-basin scale.
- **Integration.** The proposed effort is focused on water supply to meet instream and conservation needs. While this is a driver for integrated water planning, it is important that the effort continue to pursue planning in an integrated approach (considering out-of-stream demands).
- **Needs/Outcomes.** The proposal does not emphasize the timeliness of this particular opportunity (i.e., are there opportunities lost if it does not move forward now?)
- **Approach.** The proposed hydrologic areas are not contiguous and are distributed throughout the larger Rogue Basin. It is unclear if these would be separate plans or would inform one plan. By focusing on areas where instream flow is the limiting factor, this proposal may miss important water challenges faced by other out-of-stream water users.

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|---|----------|
| <b>Need for Assistance:</b>             | High     |
| <b>Readiness:</b>                       | High     |
| <b>Likelihood of Completing a Plan:</b> | Moderate |

**Letter of Interest: NC\_07\_05\_WallaWalla**

**Overview of Evaluation and Funding Recommendation**

**Recommended for Funding:** Not at this time

**Grouping: Group B** Proposal scored well against the evaluation criteria, has emerging partnerships, a high need for assistance, demonstrated readiness, and presents interesting opportunities to test the Guidelines given its high need and desire to pursue more integrated and collaborative approaches.

**Summary** (see following page for more information):

- Strong proposal with a capable local convener and a network of engaged local partners who are likely to contribute to a multi-year collaborative effort.
- The Walla Walla Basin is in the midst of a bi-state planning effort with Washington partners and requests additional support from Oregon. The need for and timeliness of assistance related to this effort is clearly articulated. It is unclear, however, if the Washington partners will be committed to piloting Oregon’s 2015 Draft Place-Based Planning Guidelines.
- The complexity of a bi-state planning effort may not make it a good fit during the pilot phase.
- The Walla Walla has significant experience with building past collaborative efforts and could help to inform place-based planning. OWRD encourages the proposed convener and partners to stay engaged during the pilot phase to inform program development. OWRD also encourages partners to apply for future funding opportunities associated with place-based planning (if and when available).

**Summary Information from the Letter of Interest**

**Convener:** Walla Walla Basin Watershed Council

**Hydrologic unit/scale:** Walla Walla Watershed, one 4<sup>th</sup> field hydrologic unit (HUC 8) northeast of Umatilla County, Oregon

**Water issues/drivers:** Builds on existing bi-state planning efforts to address: groundwater declines; limited stream flows that do not currently meet target flows set by regulatory agencies and tribes; need to sustain agricultural water demands through conservation efficiencies and coordinated basin-wide storage projects.

|                           |           |                    |   |
|---------------------------|-----------|--------------------|---|
| <b>Funding requested:</b> | \$135,000 | <b>Cost-share:</b> | \$40,000 (secured in-kind)<br>\$80,000 (pending cash & in-kind) |
|---------------------------|-----------|--------------------|---|

**Other support requested:** Technical assistance (analysis of deep and shallow aquifer trends, peer review of surface water/groundwater model, peer review of winter water availability for aquifer recharge that also meets ecological needs, policy/legal assistance on protecting instream flows).

**Executive Summary:** Place-Based Water Planning is urgently needed in the Walla Walla Basin to develop a Strategic Action Plan for improving stream flows and out of stream water availability. The Walla Walla Basin Watershed Council (WWBWC) has been asked by two entities (Walla Walla River Irrigation District and the Confederated Tribes of the Umatilla Indian Reservation) to lead this planning process and to secure the necessary OWRD planning funds. The WWBWC has been in existence since 1994 and has served as the convener for several Walla Walla Basin water and/or fish recovery assessment and planning efforts. For the last year and a half, the WWBWC has been the co-lead for a Bi-state Walla Walla Streamflow Improvement Study funded by the Washington State Office of Columbia River. Our Washington partner co-leading this effort is the Walla Walla Water Management Partnership. Office of Columbia River (OCR) funds have covered the costs of developing an initial action plan, assessing the fisheries, developing an integrated surface water groundwater model for the valley, assessing the feasibility of a water exchange system, designing water delivery efficiencies, and analyzing instream flow protection options. However, the OCR funds are limited, and Oregon Place-based planning funds and technical support will help us complete our needed Strategic Action Plan that will describe and prioritize the water management projects that will allow us to attain our in stream and out of stream water goals.

## Inter-Agency Review Team Feedback

Letters of Interest were evaluated against a set of review factors by both OWRD and a state inter-agency team. Evaluation criteria were used to identify strengths and weaknesses of the proposed efforts in the areas of **leadership, partnerships, capacity, integration, planning needs/outcomes, and approach**. This proposal performed well against all of the evaluation criteria. The review team also assessed **need for assistance, readiness, and likelihood of developing a plan in 2-3 years**, which is summarized below.

### Strengths

- **Leadership.** The proposed convener, is perceived as neutral and impartial, can likely engage with a broad representation of water interests, and has a demonstrated interest in water planning. The proposed convener has a history of leading and participating in multi-year collaborative planning efforts.
- **Partnerships.** A number of partners are already contributing to planning efforts and there are intent to engage additional partners representing different interests, including municipalities.
- **Capacity.** The proposed convener has a demonstrated ability to lead and manage projects in the Walla Walla Basin.
- **Integration.** The proposal demonstrates an understanding of and an intent to address water issues in an integrated manner, looking at both above and below ground water issues, water quantity, water quality and ecosystem health. This proposal provides a timely opportunity to test how Place-Based Planning can integrate bi-state planning efforts.
- **Needs/Outcomes.** The need to balance instream flows with out-of-stream demands is clearly articulated and urgent.
- **Approach.** The proposal clearly describes specific technical assistance needs that could benefit the bi-state planning effort.

### Weaknesses

- **Leadership.** It is unclear if and how the leadership role will be shared with Washington partners.
- **Partnerships.** The proposal would be strengthened by letters of support from Washington partners.
- **Capacity.** Anticipated partner commitments and contributions to the proposed planning effort are unclear.
- **Integration.** The proposal references numerous past planning efforts and documents, but does not specify how this effort will build on these efforts in a cohesive manner.
- **Needs/Outcomes.** Significant investments have been made in planning and project implementation and it is unclear what outcomes would result specifically from piloting the 2015 Draft Place-Based Planning Guidelines.
- **Approach.** It is unclear how this proposal will build on the 2015 Draft Place-Based Planning Guidelines. The proposal could benefit from a schedule and a recommended strategy for coordinating Place-Based Planning with the expectations of Washington partners.

|   |          |
|---|----------|
| <b>Need for Assistance:</b>             | Moderate |
| <b>Readiness:</b>                       | High     |
| <b>Likelihood of Completing a Plan:</b> | Moderate |

**Letter of Interest: NW\_01\_01\_NorthCoast**

**Overview of Evaluation and Funding Recommendation**

**Recommended for Funding:** Not at this time

**Grouping: Group C** Proposal demonstrates capable leadership and emerging partnerships, but did not perform as well against the criteria, and aspects of the approach need to be strengthened.

**Summary** (see following page for more information):

- This proposal includes some promising characteristics, including capable leadership and an opportunity to expand current partnerships to include new interests.
- There is visible support from many local partners and citizens, but based on the information provided, it is difficult to discern if this effort would be able to engage the necessary stakeholders.
- The proposal demonstrates a basic understanding of the IWRS and Place-Based Planning, but lacks sufficient information about how this effort will integrate diverse water interests. The proposed approach needs to be revisited and refined to be more aligned with the IWRS and the 2015 Draft Place-Based Planning Guidelines.
- OWRD encourages the proposed conveners and partners to continue assessing and building local understanding of and support for place-based planning in partnership with the Department.

**Summary Information from the Letter of Interest**

**Convener:** Oregon State Representative Gomberg

**Co-Convener:** North Coast Land Conservancy

**Hydrologic unit/scale:** North Coast Basin drinking water, surface watersheds in Clatsop and Tillamook Counties which will soon receive DEQ Source Water Assessments: Neskowin, Tierra del Mar, Beaver, Tillamook, Netarts, Oceanside/Cape Meares, Rockaway Beach, Nehalem, Manzanita, Arch Cape, Falcon Cove, Cannon Beach, Seaside, Warrenton, Youngs River, Astoria, and Wickiup.

**Water issues/drivers:** Integration with updated source water assessments; management of source water areas to address water quality and quantity issues (recharge, temperature, turbidity, sedimentation, toxins); water quality affecting habitat and drinking water; climate change.

|                           |           |                    |  |
|---------------------------|-----------|--------------------|--|
| <b>Funding requested:</b> | \$200,000 | <b>Cost-share:</b> | \$46,000 (secured cash & in-kind)<br>>\$18,000 (pending in-kind) |
|---------------------------|-----------|--------------------|--|

**Other support requested:** OWRD planning and facilitation assistance, technical assistance (coordinating technical information gathering).

**Executive Summary:** North Coast Land Conservancy is requesting \$200,000.00 from the Water Resources Department to develop place-based, integrated water resource plans that holistically address water quality and quantity issues within the North Coast Basin. Like many areas in Oregon, our watersheds support a wide range of benefits for both human uses and the environment – including water for drinking, agriculture, forestry and recreation, and are the source of essential habitat for fish and wildlife. Over time, we realized that potential solutions are not only complex but require the involvement of all water users within a basin to find equitable solutions. We have a significant opportunity to mesh the place-based water resource plans with DEQ’s pending release of Oregon Coast *Drinking Water Protection Planning: A Resource Guide* and updated Source Water Assessments. Each community will have technical data to identify water quality and quantity risks within their drinking watersheds. Despite spending millions on infrastructure, water districts in small coastal communities have not achieved needed protections of drinking water sources, as identified in the 2001 DEQ assessment. While drinking water source protection is the driver, we understand that we need to look holistically at the many issues that are affecting water quality and quantity within our basins to find lasting solutions. To secure clean, abundant drinking water, and ensure all water users of our basins may move toward water security, we intend to follow the Water Resources Department model of place-based integrated water resources planning. We will explore effective solutions that focus, through a facilitated process, on achieving

accountable, cost-effective and enforceable actions.

## Inter-Agency Review Team Feedback

Letters of Interest were evaluated against a set of review factors by both OWRD and a state inter-agency team. Evaluation criteria were used to identify strengths and weaknesses of the proposed efforts in the areas of **leadership, partnerships, capacity, integration, planning needs/outcomes, and approach**. This proposal performed well against some of the evaluation criteria. The review team also assessed **need for assistance, readiness, and likelihood of developing a plan in 2-3 years**, which is summarized below.

### Strengths

- **Leadership.** The proposed conveners serve a broad public interest, may be perceived as inclusive and impartial, and can likely engage with a broad representation of water interests. The proposed conveners would bring political clout and capacity to the planning process.
- **Partnerships.** The proposal indicates clear support from a strong network of partners and there is evidence of strong civic engagement.
- **Integration.** The proposal indicates a basic awareness of existing plans and efforts that could benefit from improved integration. The proposal presents an opportunity to test integration with source water assessments conducted by Oregon Department of Environmental Quality.
- **Needs/Outcomes.** The proposal clearly communicates the immediate need to better understand the cause and impact of water quality issues.

### Weaknesses

- **Partnerships.** As proposed, the list of partners may not be inclusive of all relevant interests. The current list of partners includes many downstream users, but it is unclear how the proposed convener will engage with upstream partners through the planning process.
- **Capacity.** Based on the information provided, is unclear if the proposed conveners or partners have led or participated in multi-year collaborative planning efforts in the past.
- **Integration.** The proposal focuses primarily on water quality and does not address other water issues, including quantity and ecosystem health. The proposal does not describe other interests within the proposed planning area and how they would be invited to participate. There is limited rationale for why an integrated approach will help to address current and future water challenges.
- **Needs/Outcomes.** The near-term needs focus almost exclusively on water quality issues and the Letter does not demonstrate an awareness of other water needs and challenges in the area. The outcomes are focused on watershed management and protection.
- **Approach.** The proposal focuses on one particular issue and potential outcomes for that issue. The proposed convener and partners need to remain open and flexible to the needs and interests of the partner organizations as they emerge through the collaborative process. The schedule does not seem appropriate given the complexity of the issues presented.

|   |          |
|---|----------|
| <b>Need for Assistance:</b>             | Moderate |
| <b>Readiness:</b>                       | Moderate |
| <b>Likelihood of Completing a Plan:</b> | Moderate |

**Letter of Interest: NW\_02B\_16\_PolkCountyWatersheds**

**Overview of Evaluation and Funding Recommendation**

**Recommended for Funding:** Not at this time

**Grouping: Group C** Proposal demonstrates capable leadership and emerging partnerships, but did not perform as well against the criteria, and aspects of the approach need to be strengthened.

**Summary** (see following page for more information):

- This proposal includes some promising characteristics, including capable leadership and an opportunity to expand current partnerships. The Letter articulates the need to engage additional water interests, but it is difficult to gauge interest, readiness and commitment of partners.
- The Letter demonstrates a basic understanding of the IWRS and Place-Based Planning, but lacks sufficient information about how this effort will integrate diverse water interests.
- The proposed conveners have high capacity and a clear interest in place-based planning, but the proposed approach needs to be revisited and refined to be more aligned with the IWRS and 2015 Draft Place-Based Planning Guidelines.
- OWRD encourages the proposed convener and partners to continue assessing and building local understanding of and support for place-based planning in partnership with the Department.

**Summary Information from the Letter of Interest**

**Convener:** Polk County Board of Commissioners

**Co-Convener:** Polk County Planning Division

**Hydrologic unit/scale:** Watersheds that span Polk County, including portions of the Upper Willamette, Middle Willamette and Yamhill hydrologic units.

**Water issues/drivers:** Optimizing water use and delivery through water sharing, conservation and storage opportunities; understanding imbalances between seasonal supply and demand; need to integrate agricultural, instream and municipal users.

|                           |           |                    |                                    |
|---------------------------|-----------|--------------------|------------------------------------|
| <b>Funding requested:</b> | \$225,000 | <b>Cost-share:</b> | \$105,240 (secured cash & in-kind) |
|---------------------------|-----------|--------------------|------------------------------------|

**Other support requested:** Not specified.

**Executive Summary:** Polk County is proposing to develop a Place-Based Integrated Water Resources Plan that would be developed in a collaborative process with State and local regulators, large and small water suppliers, a range of water users, including municipal, agricultural, tribes, and non-government environmental organizations. Polk County has been developing a plan to address future water supply and demand issues for more than a decade. The collaborative planning efforts lead by Polk County to date have identified additional potential water supplies and revealed that the projected water deficits by 2050 for many of the water providers in Polk County may be met through water conservation, transfers of water rights, and development of available water rights as an alternative to developing new supplies. The place-based planning process would allow Polk County to include agricultural and environmental interests in the planning process along with water providers, water users, and other special interests to develop a better understanding of current and future instream and out-of-stream water needs and demands. Polk County believes that the Plan would result in cooperative agreements and strategic solutions that address water issues and needs beyond 2050 and improve the ecological health of the planning area. Polk County is convinced that the proposed Place-Based Integrated Water Resources Plan fits perfectly with Polk County’s previous efforts and is a small-scale, focused approach to the place-based planning process. This effort as a pilot would allow for learning and experimentation to demonstrate how place-based planning could be implemented at a larger scale.

## Inter-Agency Review Team Feedback

Letters of Interest were evaluated against a set of review factors by both OWRD and a state inter-agency team. Evaluation criteria were used to identify strengths and weaknesses of the proposed efforts in the areas of **leadership, partnerships, capacity, integration, planning needs/outcomes, and approach**. This proposal performed well against some of the evaluation criteria. The review team also assessed **need for assistance, readiness, and likelihood of developing a plan in 2-3 years**, which is summarized below.

### Strengths

- **Leadership.** The proposed conveners serve a broad public interest, are perceived as inclusive and impartial, can likely engage with a broad representation of water interests, and have a demonstrated interest in water planning. The proposed conveners would bring political clout and capacity to the planning process.
- **Partnerships.** The proposal has a good initial list of current and potential partners representing diverse interests. Some of these partners are currently engaged in cooperative efforts.
- **Capacity.** The proposed conveners have a demonstrated ability to lead multi-year planning efforts. The proposed conveners have secured cash match to support the planning effort.
- **Integration.** The proposal indicates a desire to better integrate municipal, instream and agricultural water needs.
- **Needs/Outcomes.** The proposal indicates that there are clear opportunities to improve water sharing agreements between water providers.
- **Approach.** The proposed approach is detailed and builds on the 2015 Draft Place-Based Planning Guidelines.

### Weaknesses

- **Partnerships.** Based on the information provided, it is difficult to gauge current or future partner interest in and commitment to a multi-year collaborative planning effort. The Letter does not explicitly mention how OWRD would be involved in this planning effort.
- **Capacity.** While the capacity of the proposed conveners is considerable, it is difficult to gauge the current or potential contributions of partners. Anticipated partner commitments and contributions to the proposed planning effort are unclear. Additional letters of support and pledges of in-kind contributions could strengthen this proposal.
- **Integration.** Aside from county planning processes, there is limited mention of other local efforts or plans that this process would build upon. The proposal focuses on water quantity and makes limited mention of water quality and ecosystem health.
- **Needs/Outcomes.** The proposal is focused primarily on municipal water needs and demonstrates a limited understanding of other out-of-stream and instream needs. The outcomes are primarily focused on meeting the needs of municipal providers. The Letter does not emphasize the timeliness of this particular opportunity (i.e., are there opportunities lost if it does not move forward now?)
- **Approach.** The approach focuses on developing water sharing agreements between water providers and does not adequately consider other water interests. There is little rationale provided for the proposed planning scale.

|   |          |
|---|----------|
| <b>Need for Assistance:</b>             | Moderate |
| <b>Readiness:</b>                       | Moderate |
| <b>Likelihood of Completing a Plan:</b> | Moderate |

**Letter of Interest: NW\_02B\_16\_SouthSantiam**

**Overview of Evaluation and Funding Recommendation**

**Recommended for Funding:** Not at this time

**Grouping: Group C** Proposal demonstrates capable leadership and emerging partnerships, but did not perform as well against the criteria, and aspects of the approach need to be strengthened.

**Summary** (see following page for more information):

- This proposal includes some promising characteristics, including capable leadership and an opportunity to expand existing partnerships to include new interests.
- The proposal demonstrates a basic understanding of the IWRS and Place-Based Planning, but lacks sufficient information about how this effort will integrate diverse water interests.
- The proposed convener and partners have high capacity and a clear interest in place-based planning, but the proposed approach needs to be revisited and refined to be more aligned with the IWRS and 2015 Draft Place-Based Planning Guidelines.
- OWRD encourages the proposed convener and partners to continue assessing and building local understanding of and support for place-based planning in partnership with the Department.

**Summary Information from the Letter of Interest**

|                               |  |
|-------------------------------|--|
| <b>Convener:</b>              | South Santiam Watershed Council  |
| <b>Hydrologic unit/scale:</b> | South Santiam River Basin, one 4 <sup>th</sup> field hydrologic unit.  |
| <b>Water issues/drivers:</b>  | Increasing demand on existing water resources, which are already over-allocated; low summer flows; climate change; potential groundwater declines; stream temperature; invasive species; toxic algal blooms; high levels of arsenic in groundwater; outdated source water assessments; ecological needs for listed species; restoration of complex ecological functions. |

|                                 |   |                    |                            |
|---------------------------------|---|--------------------|----------------------------|
| <b>Funding requested:</b>       | \$150,000   | <b>Cost-share:</b> | \$56,000 (secured in-kind) |
| <b>Other support requested:</b> | \$30,000 in planning, technical and information assistance (estimated in-kind OWRD contribution). |                    |                            |

**Executive Summary:**

We want to initiate Place Based Planning because there is a need and an express interest by local communities. The South Santiam River provides drinking water to the communities of Sweet Home, Lebanon, as well as Albany and recently Sodaville (both located outside the Santiam basin). Because over 75,000 people rely on the South Santiam River for drinking water, agriculture, recreation, industry and in-stream needs, there is a strong desire to formulate a coherent and consistent plan to guide the region as demands on water resources increase. The need for a plan will become more apparent as the population of the Willamette Valley increases amid the uncertainty of the South Santiam River to meet water demands amid the scenario of a changing climate. The area is ready because several agencies, business, and local government are already collaborating on land management and livability issues in east Linn County. Encompassing water resources is a logical next step within the existing collaborative framework. Place based water resources planning will not only further collaboration amongst local partners but will 1) provide a sound basis for evaluating future water resource needs of municipalities reliant upon the South Santiam River, 2) provide a risk assessment of threats to the drinking water source and 3) provide a consistent plan in the case of a contaminant spill into the South Santiam river, reservoirs or tributaries.

## Inter-Agency Review Team Feedback

Letters of Interest were evaluated against a set of review factors by both OWRD and a state inter-agency team. Evaluation criteria were used to identify strengths and weaknesses of the proposed efforts in the areas of **leadership, partnerships, capacity, integration, planning needs/outcomes, and approach**. This proposal performed well against some of the evaluation criteria. The review team also assessed **need for assistance, readiness, and likelihood of developing a plan in 2-3 years**, which is summarized below.

### Strengths

- **Leadership.** The proposed convener is perceived as neutral and impartial, can likely engage with a broad representation of water interests, and has a demonstrated interest in water planning.
- **Partnerships.** The proposal has a good initial list of current and potential partners representing diverse interests. The partners have been assembled and already have a governance agreement in place to structure involvement.
- **Capacity.** The proposed convener and partners have led or participated in multi-year collaborative planning efforts in the past. This process would build off of an existing collaborative process.
- **Integration.** The proposal communicates an understanding of diverse water needs, including water quantity, water quality and ecosystem health. The Letter presents an opportunity to test integration with an existing collaborative process (South Santiam All Lands Collaborative).
- **Needs/Outcomes.** The proposal communicates an understanding of diverse water needs, including water quantity, water quality and ecosystem health. There is a clear need to integrate users in the South Santiam watershed.
- **Approach.** The proposed approach builds on the 2015 Draft Place-Based Planning Guidelines.

### Weaknesses

- **Partnerships.** The proposal discusses how to resolve conflict conceptually, but it is unclear how this relates to current partnerships and stakeholder engagement.
- **Capacity.** Based on the information provided, it is difficult to gauge the current or potential contributions of partners.
- **Integration.** There is limited mention of other local efforts or plans that this process would build upon. The proposal does not clearly communicate the benefits of addressing current water challenges using a more integrated approach.
- **Needs/Outcomes.** The proposal does not provide sufficient information about the out-of-stream water users and their needs. The proposal does not provide much information about the anticipated results or outcomes of a planning process and does not emphasize the timeliness of this particular opportunity (i.e., are there opportunities lost if it does not move forward now?)
- **Approach.** The proposed approach lacks detail in several places and does not have a schedule for how planning would progress.

|   |          |
|---|----------|
| <b>Need for Assistance:</b>             | Moderate |
| <b>Readiness:</b>                       | Moderate |
| <b>Likelihood of Completing a Plan:</b> | Moderate |

**Letter of Interest: NW\_02B\_16\_EolaAmityWalnutHills**

**Overview of Evaluation and Funding Recommendation**

**Recommended for Funding:** Not at this time

**Grouping: Group D** Proposal did not provide adequate information to evaluate some criteria, effort is at the early stages of initiating a collaborative effort, and aspects of the approach need to be strengthened.

**Summary** (see following page for more information):

- The proposal demonstrates a basic understanding of the IWRS and Place-Based Planning, but lacks sufficient information about how this effort will integrate diverse water interests.
- Based on the information provided, it is difficult to gauge the appropriateness of the proposed convener, strength of existing partnerships and the overall readiness of this effort.
- There is a need for collaborative and integrated water planning, but broad local support is not evident and the proposed approach needs to be strengthened.
- OWRD encourages the proposed convener and partners to continue assessing and building local understanding of and support for place-based planning in partnership with the Department.

**Summary Information from the Letter of Interest**

**Convener:** Eola-Amity Hills American Viticulture Area Association

**Co-Convener:** Open to and seeking a co-convener (*potentially OWRD*)

**Hydrologic unit/scale:** Eola-Amity Hills and Walnut Hill Groundwater Limited Areas (GLAs) in Polk and Yamhill counties.

**Water issues/drivers:** Important agricultural region; limited groundwater supply with no alternative water supply source; opportunities for conservation, recharge and storage; opportunities for more cost-effective solutions through coordination.

|                           |           |                    |                            |
|---------------------------|-----------|--------------------|----------------------------|
| <b>Funding requested:</b> | \$233,100 | <b>Cost-share:</b> | \$58,275 (pending in-kind) |
|---------------------------|-----------|--------------------|----------------------------|

**Other support requested:** Not specified.

**Executive Summary:** We propose the contiguous Eola-Amity Hills/Walnut Hill Groundwater Limited Areas as the study area. This region is seeing increased residential, agricultural and industrial development. There are three water districts primarily serving areas on the valley floor, but virtually all tax lots in the hill areas are dependent on water captured on-site. The Eola-Amity Hills are a diverse topography with ample opportunity to catch rainwater from rooftops, surface water, and a populace capable and interested in exploring the full suite of options available. The place-based planning process represents an ideal fit for approaching the dependence on limited groundwater in an integrated, inclusive way that invites all inhabitants to participate in this integrated and timely process. The Eola-Amity Hills area comprises about 230 square miles on the west side of the Willamette Valley between Salem and McMinnville, Oregon. This is the total area designated as Groundwater Limited Areas, and it is this precise geography that we propose for this study. The area is roughly equally divided between Polk County to the south and Yamhill County to the north. The total area has three relatively distinct parts of roughly equal area: the Hills, the East Plain and the West Plain. The area is largely rural, and agriculture is the principal occupation. Since 1980, a robust wine grape industry has developed in the hills leading to the creation of many wineries as well. Additionally, blueberries, hazelnuts and nursery stock have become very significant agricultural crops over essentially the same time period. In addition to berries, nuts and nursery stock, the plains still support cereal grains, grass seed, dairies, livestock and specialty seed production. All this has led to increasing irrigation pressure and when coupled with a rapidly growing human population, water has become a significant challenge for the region.

## Inter-agency Review Team Feedback

Letters of Interest were evaluated against a set of review factors by both OWRD and a state inter-agency team. Evaluation criteria were used to identify strengths and weaknesses of the proposed efforts in the areas of **leadership, partnerships, capacity, integration, planning needs/outcomes, and approach**. This proposal did not provide adequate information to evaluate some criteria. The review team also assessed **need for assistance, readiness, and likelihood of developing a plan in 2-3 years**, which is summarized below.

### Strengths

- **Leadership.** The proposed convener is committed to an inclusive and transparent process.
- **Partnerships.** The proposal has a good initial list of potential partners and the skills/resources they might be able to provide.
- **Capacity.** The proposed convener is motivated and enthusiastic about building collaborative capacity within their community.
- **Integration.** The proposal identifies the need to coordinate water users across the landscape to maximize capture, storage and recharge opportunities. This presents a unique opportunity to foster collaborative planning in groundwater limited areas, which could serve as a model for other groundwater limited areas.
- **Needs/Outcomes.** The need to address water supply issues in a groundwater limited area is clearly articulated, as well as the benefits of a more collaborative approach.
- **Approach.** The proposed planning scale is well-reasoned and compelling given the unique challenges of a groundwater limited area.

### Weaknesses

- **Leadership.** It is unclear if the proposed convener serves a broad public interest and can convene a balanced representation of water interests.
- **Partnerships.** It is difficult to gauge current or future partner interest in a multi-year collaborative planning effort.
- **Capacity.** The proposed convener and partners have limited experience initiating or undertaking a multi-year collaborative planning effort. Intended partner contributions are not evident.
- **Integration.** There is no synopsis of existing efforts, information or plans that this process would build upon. There is limited rationale for why an integrated approach will help to address current and future water challenges. The proposal is primarily focused on capture and storage opportunities.
- **Needs/Outcomes.** The proposal is focused primarily on out-of-stream water capture and storage for agricultural use.
- **Approach.** This effort is in the very initial stages and is just beginning to take shape; consequently the approach is lacking important detail.

|   |           |
|---|-----------|
| <b>Need for Assistance:</b>             | Moderate  |
| <b>Readiness:</b>                       | Uncertain |
| <b>Likelihood of Completing a Plan:</b> | Uncertain |

**Letter of Interest: SW\_17\_19\_LowerRogue**

**Overview of Evaluation and Funding Recommendation**

**Recommended for Funding:** Not at this time

**Grouping: Group D** Proposal did not provide adequate information to evaluate some criteria, effort is at the early stages of initiating a collaborative effort, and aspects of the approach need to be strengthened.

**Summary** (see following page for more information):

- The proposal demonstrates a basic understanding of the IWRS and Place-Based Planning, but lacks sufficient information about how this effort will integrate diverse water interests.
- Based on the information provided, it is difficult to gauge the appropriateness of the proposed convener, strength of existing partnerships and the overall readiness of this effort.
- There is a need for collaborative and integrated water planning, but broad local support is not evident and the proposed approach needs to be strengthened.
- OWRD encourages the proposed convener and partners to continue assessing and building local understanding of and support for place-based planning in partnership with the Department.

**Summary Information from the Letter of Interest**

**Convener:** Wild and Scenic Rivers

**Co-Convener:** Oregon Water Resources Department (*requested*)

**Hydrologic unit/scale:** South Coast Basin, Lower Rogue Basin within Curry County, including Port Orford, Gold Beach and Brookings.

**Water issues/drivers:** Water quality (bacteria, dissolved oxygen and temperature); limited data/knowledge about water quality; land use and water quality; storm water run-off; brackish drinking water.

|                           |           |                    |  |
|---------------------------|-----------|--------------------|--|
| <b>Funding requested:</b> | \$187,500 | <b>Cost-share:</b> | \$6,000 (secured in-kind)<br>\$108,000 (pending in-kind) |
|---------------------------|-----------|--------------------|--|

**Other support requested:** Requests OWRD serve as co-convener. Planning assistance (stakeholder outreach and engagement, meeting coordination), data/information assistance (provide and interpret monitoring data), technical assistance (water rights and water availability analyses).

**Executive Summary:** Wild and Scenic Rivers would like to initiate the Place- Based Planning process, as we are a water-rich area located in the South Coast and Lower Rogue Basins. Our area is geographically and socio-economically disconnected from the rest of the state. We have identified significant water-related challenges, have the capacity for long-term planning and are open to an integrative, co-convening approach with various local stakeholders in our community to articulate our needs. Our watershed basin is a key area of significant biological value in the state, a tourism mecca, and is historically overlooked by funders due to various factors. As mentioned, we have identified key areas of potential project focus due to past and present involvement in our community. Our experience running an emerging non-profit, as well as living and dwelling in the community, has made us aware of potential projects and concerns that have been articulated and initiated, but not completed. These are manageable and actionable projects that could, in turn, point to more long term solutions and invested community problem- solving. We have highlighted these in this document. We would also like to emphasize that we are committed to demonstrating an openness to process and eagerness to articulate the needs of a wide range of local voices as we move forward. We would also welcome state technical assistance as well as support from various state agencies as we progress.

**Inter-Agency Review Team Feedback**

Letters of Interest were evaluated against a set of review factors by both OWRD and a state inter-agency team. Evaluation criteria were used to identify strengths and weaknesses of the proposed efforts in the areas of

**leadership, partnerships, capacity, integration, planning needs/outcomes, and approach.** This proposal did not provide adequate information to evaluate some criteria. The review team also assessed **need for assistance, readiness, and likelihood of developing a plan in 2-3 years**, which is summarized below.

**Strengths**

- **Leadership.** The proposed convener indicates a commitment to collaboration and the intent to bring together a balanced representation of interests.
- **Partnerships.** The proposal has a good initial list of potential partners that represent diverse interests within the proposed planning area. The proposed convener indicates a commitment to maintaining an open and transparent process.
- **Capacity:** The proposed convener is motivated and enthusiastic about building collaborative capacity.
- **Integration.** The proposal indicates a basic awareness of existing plans and efforts that could benefit from improved integration.
- **Needs/Outcomes.** The proposal clearly communicates the immediate need to better understand the cause and impact of water quality issues.
- **Approach.** The proposal indicates the intent to build off of the 2015 Draft Place-Based Planning Guidelines and planning steps.

**Weaknesses**

- **Leadership.** Materials provided with the proposal indicate that the proposed convener may not be perceived as impartial. The purpose and the mission of the convening organization is unclear and it is uncertain if they have the clout and capacity necessary to convene this effort.
- **Partnerships.** It is difficult to gauge current or future partner interest in a multi-year collaborative planning effort.
- **Capacity.** Given that the convening organization appears to be newly established, it is uncertain if they have the capacity to support a multi-year collaborative effort. Intended partner contributions to the planning effort are not evident.
- **Integration.** The proposal focuses primarily on water quality and does not address other water concerns, including quantity and ecosystem health. There is limited rationale for why an integrated approach will help to address current and future water challenges. The proposal does not mention how this effort might integrate with the existing collaborative planning efforts.
- **Needs/Outcomes.** The near-term needs focus exclusively on water quality issues and the proposal does not demonstrate an awareness of other water needs and challenges in the area.
- **Approach.** The proposed planning area does not follow hydrologic boundaries. The proposal demonstrates a basic understanding of the IWRS and Place-Based Planning, but lacks sufficient information about how this effort will integrate diverse water interests.

|   |           |
|---|-----------|
| <b>Need for Assistance:</b>             | Moderate  |
| <b>Readiness:</b>                       | Uncertain |
| <b>Likelihood of Completing a Plan:</b> | Uncertain |

**Letter of Interest: E\_09\_08\_Powder**

**Overview of Evaluation and Funding Recommendation**

**Recommended for Funding:** Not at this time

**Grouping: Group D** Proposal did not provide adequate information to evaluate some criteria, effort is at the early stages of initiating a collaborative effort, and aspects of the approach need to be strengthened.

**Summary** (see following page for more information):

- The proposal demonstrates a basic understanding of the IWRS and Place-Based Planning, but lacks sufficient information about how this effort will integrate diverse water interests.
- Based on the information provided, it is difficult to gauge the appropriateness of the proposed convener, strength of existing partnerships and the overall readiness of this effort.
- There is a need for collaborative and integrated water planning, but broad local support is not clearly established and the proposed approach needs to be strengthened.
- OWRD encourages the applicant and partners to continue assessing and building local understanding of and support for place-based planning in partnership with the Department.

**Summary Information from the Letter of Interest**

**Convener:** Powder Valley Water Control District

**Co-Convener:** Baker Valley SWCD (*potential*)

**Hydrologic unit/scale:** Area to be considered is within the Powder/Brownlee watershed. Specific to the sub-basin of the North Powder, Anthony Creek, Wolf Creek and other minor drainages contained in this area.

**Water issues/drivers:** Recurring drought declarations; climate change; need to diversify water catchment and storage opportunities in the basin for social, economic and environmental benefits.

**Funding requested:** \$350,000      **Cost-share:** \$87,500 (pending in-kind)

**Other support requested:** Planning assistance (review documents), technical assistance (review documents, compile available information and assess viability of potential projects).

**Executive Summary:** Since the inception of the “District” (1968, first recorded minutes and establishment of the District) the need for better management of uncontrolled flows of water was very apparent. Excessive floods were destroying agricultural land, and also threatening dwellings, infrastructure and municipalities within our sub-basin. Also the need for an extended season of available water for economic and production agriculture, the spin-off benefit of consistent stream flows for environmental concerns were achieved by the impoundment structures of Wolf Creek and Pilcher Creek Reservoirs. The accomplishment of these projects and the vastly improved efficiency projects have greatly increased our community’s economic base, productivity, employment, and sustainability. It is a realization that these existing components can be expanded for even greater multiple use benefits for not only our local communities economy, but to further address aquatic/environmental concerns. Place-based planning presents an opportunity to address all facets of water issues within our area in an integrated fashion and we are grateful for this opportunity. In the interest of brevity, for now we will not go into a longer explanation of all the benefits this grant presents.

## Inter-Agency Review Team Feedback

Letters of Interest were evaluated against a set of review factors by both OWRD and a state inter-agency team. Evaluation criteria were used to identify strengths and weaknesses of the proposed efforts in the areas of **leadership, partnerships, capacity, integration, planning needs/outcomes, and approach**. This proposal did not provide adequate information to evaluate some criteria. The review team also assessed **need for assistance, readiness, and likelihood of developing a plan in 2-3 years**, which is summarized below.

### Strengths

- **Leadership.** The proposed convener has a demonstrated interest and commitment to water planning, including past experience with planning for and implementing water projects. Adding a potential co-convener could provide additional credibility and capacity.
- **Partnerships.** The proposal has a good initial list of potential partners.
- **Integration.** The proposal expresses an interest in addressing multiple water issues through an integrated and collaborative approach.
- **Needs/Outcomes.** The proposal expresses a need for place-based planning to address multiple water challenges.

### Weaknesses

- **Leadership.** Based on the information provided, it is unclear if the proposed convener serves a broad public interest and can convene a balanced representation of water interests. The proposal would benefit from a description of why the proposed convener is an appropriate leader of this process, including any past experience with building and sustaining collaborative efforts.
- **Partnerships.** Based on the information provided is unclear if this effort is likely to include a balanced representation of interests. The list of key partners does not appear to include any instream interests. Furthermore, it is difficult to gauge current or future partner interest in a multi-year collaborative planning effort.
- **Capacity.** Based on the information provided, it is unclear if the proposed convener or partners have the interest and capacity to sustain a multi-year collaborative planning effort. There are no visible commitments of in-kind or cash contributions.
- **Integration.** There is no synopsis of existing efforts or information that this process would build upon. There is limited rationale for why an integrated approach will help to address current and future water challenges. The proposal is primarily focused on capture and storage opportunities.
- **Needs/Outcomes.** The proposal presents a surface level understanding of multiple water needs, and only presents storage as a potential future project.
- **Approach.** It was difficult to ascertain the proposed planning scale based on the materials provided. It is unclear how this effort will build on the 2015 Draft Place-Based Planning Guidelines. The proposal and budget lack detail and clarity. The proposal demonstrates a basic understanding of the IWRS and Place-Based Planning, but lacks sufficient information about how this effort will integrate diverse water interests.

**Need for Assistance:**

Moderate

**Readiness:**

Uncertain

**Likelihood of Completing a Plan:**

Uncertain