

V2 Worksheet Feedback

V2 Worksheet Responses (updated 10/5/22)

Intro/Purpose: V2 Worksheet Feedback

Intro/Purpose	
TU	<p>TU proposes that this document be framed in the larger context of water planning. First the group should identify essential elements to successful water planning, which at a minimum must include “situational assessments” that evaluate both current supply and demand, and climate forecasted supply and demand). Then a variety of approaches might be considered to conduct water planning. Of those, place-based planning is one potential tool, but other approaches could be appropriate or preferred as well.</p>
WW	<p>The strawman has a placeholder for "why PBP is important". The group was not asked at the outset of this process whether regional planning (akin to PBP) was important or something they supported. We are working in good faith to make suggestions to make PBP better; but could not lend support. I would suggest that section simply state what the report is and leave any statements of import out. I would also suggest a qualifying statement that members of the task force are not presumed to support PBP nor are individual groups recommending funding.</p> <p>It is still unclear to me what exactly this report is. We have a statute in place, we have PBP draft guidelines in place. The PBP guidelines provide a lot of detail. My assumption is that this report does not replace the existing PBP guidelines, but rather will address some outstanding issues. . I am not sure that is everyone's assumption. Related, there is a need to address the issues in the PBP assessment. This report doesn't get at all those. So what is the interplay with all the existing work?</p>
WSC	<p>OVERALL – given the reframe from large-scale recommendations for improving “state-supported regional water planning and management” to “why moving the next generation of place-based integrated water resources planning forward is important,” the draft report language risks becoming duplicative, dilutive, and distractive of NPCC’s place-based planning evaluation.</p> <p>A summary report will need to be significantly more transparent about the process by which the workgroup narrowed its focus, including the precise consensus check question that was posed, and when. Most of the workgroup’s time has been devoted to big-picture discussion about basin planning--not what modifications to the existing PBP pilot are necessary. Specifically, the workgroup has been meeting since January 2022, with assessment interviews beginning in October 2021 that posed questions such as “how would you describe Oregon’s current approach to water planning, management and investments?” Only in late August 2022 was the following question posed: “Do you agree that continuing a program like place-based planning is desired?” Answering this question in the affirmative does not imply that place-based planning is by any means the best approach to achieve durable, predictable, replicable state-supported regional water planning and management, but merely one approach that will require major improvements if it is to continue to be deployed as a tool for basin planning (see NPCC evaluation). This context is currently lacking in the draft report.</p> <p>Additionally, this report should include as an appendix OC’s January 10, 2022, “Assessment Findings and Process Considerations” memo, which specifies a deliverable of “a findings document that evaluates pros and cons of different regional planning approaches,” and “a set of foundational principles for structuring a modernized water planning, management and investment system.” Given the reframe, it does not appear that these elements will be included in the report, so additional context setting is especially warranted.</p>

Baseline Sideboards

The HB 5006 workgroup focused its effort on developing recommendations for the next generation of place-based integrated water resources planning (referred to throughout this document as “place-based planning”). The workgroup provides their recommendations with a common understanding that their recommendations, at a minimum, are framed by the sideboards described for the place-based planning pilot, which is set to sunset July 1, 2023. In particular, these sideboards include Section 2(4) of Chapter 780 Oregon Laws 2015:

Place-based integrated water resources strategies...must:

- (a) Be developed in collaboration with a balanced representation of interests;
- (b) Balance current and future in-stream and out-of-stream needs;
- (c) Include the development of actions that are consistent with the existing state laws concerning the water resources of this state and state water resources policy;
- (d) Facilitate implementation of local solutions;
- (e) Be developed utilizing an open and transparent process that fosters public participation; and
- (f) Be developed in consultation with the department.

Consensus Check	Number of votes (n=6)	Workgroup Members
1 = Yes, I would enthusiastically support this section as written, in this iteration. No changes are needed	2	LWV; NWGAA
2 = Yes, I would support this section as written in this iteration. No changes are necessarily needed.	1	SDAO
3 = Yes, I am neutral or on the fence but would accept this section as written. I have additive ideas or friendly amendments to offer as time and interest of the group allows.	0	
4 = I have serious concerns or questions with this section as written, and will recommend specific language changes to address my concerns. If the section were to remain as written, I will voice concern but would not necessarily block it from moving forward.	1	WW
5 = No, I do not agree with this section as written and would actively block it if it doesn't change. I will recommend specific language changes to address my concerns.	2	WSC; TU

Baseline Sideboards: Suggested Revisions/Questions from v2 worksheet

WW	<p>I would reframe to: The current statutory sideboards are found in XXX.</p> <p>MOREOVER, this ignores the PBP Draft Guidelines, IWRS and other documents that currently guide the PBP. We would NOT want to lose all that. So maybe instead of saying these are the only sideboards we simply say what I recommend above (??) and other otherwise qualify as being nested in other docs.</p> <p>Also, from a process point we never actually discussed the broader recommended guiding principles. A few folks 2 meetings ago said they had questions/concerns on some and it was tagged for later discussion in that meeting. That discussion never took place. Then they appeared in the last framework. Some people commented that we never actually discussed/agreed, and then they were cut. So rather than have the conversation, they were just cut. Just noting as I thought most of them were helpful actually, and put together principals that were found elsewhere in various guiding documents.</p>
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Baseline Sideboards: V2 Worksheet Feedback

Baseline Sideboards: Suggested Revisions/Questions from v2 worksheet	
<i>LOC</i>	Should we include federal laws here as well? Clarify that "department" means OWRD
<i>WSC</i>	We spent a great deal of time on Essential Elements – what happened to those? Then it was Guiding Principles, and now those are gone?
<i>ODFW</i>	<p>I recognize that “balance” is further defined below but may be important to include the following point in the sidebar itself....Recommend (a) state balanced representation of instream and out-of-stream interests.</p> <p>Should a sidebar also include a statement that they will be developed utilizing the best available scientific information?</p>

Terms and Definitions

Consensus Check	Number of votes (n=6)	Workgroup Members
1 = Yes, I would enthusiastically support this section as written, in this iteration. No changes are needed	2	SDAO; NWGAA
2 = Yes, I would support this section as written in this iteration. No changes are necessarily needed.	1	LWV
3 = Yes, I am neutral or on the fence but would accept this section as written. I have additive ideas or friendly amendments to offer as time and interest of the group allows.	0	
4 = I have serious concerns or questions with this section as written, and will recommend specific language changes to address my concerns. If the section were to remain as written, I will voice concern but would not necessarily block it from moving forward.	0	
5 = No, I do not agree with this section as written and would actively block it if it doesn't change. I will recommend specific language changes to address my concerns.	3	WSC; TU; WW

Terms and Definitions: V2 Worksheet Feedback

Terms and Definitions: Suggested Revisions/Questions from v2 worksheet		
General		
	LWV	"Need to add Biz Oregon to the list of agencies. Maybe others"
	TU	<p>Unless there is further work by the group, I propose to delete references to implementation funding. We are not prepared to require implementation funding.</p> <p>I also think the role of the state requires further conversation. I think the state should be prioritizing basins that require water planning, and helping to identify the most appropriate planning approach. If the selected approach is place-based planning, the state must play a key role in helping to identify water needs and demands and there must be broad participation from all related agencies (not just WRD) – which is included in later recommendations.</p>
	WW	A number of 4's and 5's, please see comments for suggested resolution. Some of the 5's need to be cut; they are larger policy issues that should not be resolved via the definition section.
	WSC	Suggest deleting all, or else reproducing language as it appears in source documents and identifying as such. Several definitions included in V1 (including "community," "basin scale") have been deleted entirely? Too many of these terms and definitions include policy decisions that have not received adequate consideration in the workgroup. Whereas source documents were typically generated in the context of a pilot, this report is the product of legislation that created a workgroup, and the process has been specifically designed to deliver "recommendations that will be prepared in time for the 2023 Legislative session." As such, definitions that deviate from source documents take on a new level of intensity and importance, as deviations will be read to be the result of intentional deliberative decisions.
Section Description		
<i>These definitions provide a common understanding of terms as they are used in this report and are not intended to be translated directly into legislative language.</i>		
	WW (5)	Implies that the group might agree that they live on beyond this report. Being in the report is already beyond what we were told, which is this is simply for our own understanding (this was how it was stated to the group at least 2x at the last meeting). Also, the way it is drafted implies that there will be legislation. Any reference to legislation should be cut. While this is not up for a vote per se, I would vote 5 on the section I highlighted. (Propose deleting "and are not intended to be translated directly into legislative language")
Balanced Representation of Water Interests		
<i>Each basin is unique in terms of the actual distribution of interests and stakeholders. A balanced representation of water interests includes diverse interests representing both instream and out-of-stream water needs and ensuring that all persons potentially affected by a place-based plan are invited to have a voice in the decision-making process. This includes environmental justice communities, particularly members of minority or low-income communities, tribal communities, and those traditionally under-represented in public processes. Some groups may represent multiple stakeholder categories (e.g., a city or district may also represent the local water utility). Generally, interests in any given place may include: (list)</i>		
	TU	List of stakeholder categories - Recommend not specifying this list as it may lead to unintended consequences or imbalanced tables.
	WW (3)	"This list seems a bit unbalanced. Not sure we need to list things out. VOTE: 3" Add "Water Transaction NGOs" "River related Businesses", "Environmental Justice Communities"; separate "Anglers" and "Hunters"
	ODFW	Add bold text "Generally, interests in any given place may include, but are not limited to: "
Convener		
<i>An individual, a group of individuals, an organization or a team of organizations that bring(s) together a diverse group of people to undertake place-based planning.</i>		

Terms and Definitions: V2 Worksheet Feedback

	WW	Pg 19-20 of the PBP guidelines have best practices for a convenor. Should these be incorporated or referenced here?
Implementation		
<i>The deployment of actions and strategies identified in the planning process.</i>		
	WW (5)	"Concerns with including a definition of this given we have not resolved larger issues. VOTE: 5 Recommendation: CUT"
Place-Based		
<i>Orients knowledge, decisions, and actions around the specific context of a place in a way that recognizes the unique hydrologic characteristics of a geography, strengthens the connection between people, and place and empowers people to work together to achieve a shared vision of that place.</i>		
	WW	"Originally this term was very specific to the unique hydrological characteristics of basins across the state, where planning could address regional issues/hydrology under a state framework. Prefer a definition that sticks to that. VOTE: 3" Propose replacing with: "PLACE BASED INTEGRATED WATER RESOURCES: waters that are from sources within a single drainage basin or within an area that is a subset of a single drainage basin"
Partnership with the State/State Support:		
<i>The state works in partnership with groups engaging in place-based planning and implementation, providing support and guidance throughout the process. Below are brief examples of roles the state may play in the water system. Specific recommendations about how the state should engage and support planning groups can be found in the program recommendation section of this report. (text followed by bulleted list)</i>		
	TU	Further discussion about the role of the state and mandatory conditions and funding for planning to proceed is needed by the group.
	WW (5)	Role of the state is a big question raised in PBP assessment. Do not agree to resolving this outstanding issue via "definition". VOTE: 5 Recommendation: CUT
	ODFW	There should be some qualifying language such as "as resources permit" or "as circumstances require" to recognize that State support may not be consistent in each process without clear direction and resources to go with it. Add bold text: "Below are brief examples...in the water system, as resources permit "
State Recognition		
<i>Currently, state recognition means that an interagency team of state agency staff review a place-based integrated water resources plan and make a recommendation to the Water Resources Commission to recognize a plan if it is consistent with planning guidelines and statewide IWRS principles. This term may be better defined per the specific recommendations in this report.</i>		
	TU	Since State Recognition is being tied to implementation funding in this draft, more discussion is needed. I do not yet have enough confidence in the PBP process to mandate funding for implementation. This would be a stretch goal for the future.
	WW (4)	Again, this is a huge conversation. Cannot agree to a definition that then might change. As is (with qualifiers), VOTE is a 4. Propose cutting "This term may be better defined per the specific recommendations in this report"

Data and Technical Assistance Recommendations

Consensus Check	Number of votes (n=6)	Workgroup Members
1 = Yes, I would enthusiastically support this section as written, in this iteration. No changes are needed	3	LWV; SDAO, TU
2 = Yes, I would support this section as written in this iteration. No changes are necessarily needed.	1	NWGAA
3 = Yes, I am neutral or on the fence but would accept this section as written. I have additive ideas or friendly amendments to offer as time and interest of the group allows.		
4 = I have serious concerns or questions with this section as written, and will recommend specific language changes to address my concerns. If the section were to remain as written, I will voice concern but would not necessarily block it from moving forward.		
5 = No, I do not agree with this section as written and would actively block it if it doesn't change. I will recommend specific language changes to address my concerns.	2	WSC; WW

Data and Technical Assistance: Suggested Revisions/Questions from v2 worksheet		
General		
	<i>TU</i>	Legislatively appropriated funding from the legislature is needed for this work. The current language is unclear.
	<i>WW (5)</i>	We are a 5 if it is an unfunded mandate for state agencies ; however, if language is changed to put the onus on the legislature to fund then we are a 1 (with the qualifier if is to continue) See notes in comments. NOTE: there is a larger conversation needed about prioritizing where PBP should take place. I think situational assessments would be useful statewide; but then the state also needs to set guidelines/prioritization protocol to determine how places qualify. The state should NOT be on the hook for every community that wants to plan; there needs to be a process. I note this here because I am not comfortable agreeing in a vacuum.
	<i>LOC</i>	Support
	<i>WSC</i>	OVERALL – workgroup has consistently identified state’s lack of foundational data, analysis, and technical assistance as critical failures of the existing PBP framework. If consensus, recommend elevating Data and Technical Assistance (and funding to turbocharge and sustain) to leading/primary/top workgroup recommendation.
	<i>ODFW</i>	Separate situation assessment and other data collection recommendations. Clarify what constitutes “water data” Clarify what “robust” participation from a State agency looks like Acknowledge resource constraints in Recommendation C

Data and Technical Assistance Recommendations: V2 Worksheet Feedback

DTA Recommendation A		
<p><i>The state should commit to collecting, processing, interpreting, and distributing water data for effective water planning in Oregon. The legislature should fund “situational assessments” for basins across the state to understand the basic data (and also data gaps) in each place; this would help the state and communities understand if there is a need for PBP. The data would be useful for all sectors even if the place chose not to pursue planning.</i></p>		
	WW	Replace "state should commit to" with "Legislature should fund state agency staff/resources to..."
	WSC	Restore deleted recommendation from workgroup for inventory of available water data and data gaps. “Situational assessments” should refer back to NPCC PBP Evaluation, should include bare minimum needed for planning (current and future supply and demand by sector by basin), and should inform prioritization of state resources for potential investment in place-based planning processes.
	ODFW	These are two different recommendations. One for a situational assessment and one a broad mandate to collect, process, interpret and distribute water data. What constitutes "water data" needs definition especially given the broadness of the proposed recommendation.
DTA Recommendation B		
<p><i>The state should fund the appropriate level of agency staff needed for interagency data collection, analysis and technical support, and coordinated work-planning and budgeting to ensure robust participation from an interagency team.</i></p>		
	WW	Replace "state" with "Legislature"; add ", if PBP is to continue)
	WSC	Change to “the legislature should fund, and the Governor should direct, ...”
	ODFW	Participation can take many forms. Is this recommendation only related to the data/technical support item or does "robust" participation mean that state agencies will have a body present at the meetings etc.?
DTA Recommendation C		
<p><i>Within their mission and sideboards, state agencies should support planning groups by developing educational resources tailored to fill gaps in local capacity or knowledge/skillsets.</i></p>		
	WW	Additions in Bold: "For PBP approved by the Commission: Within their mission and sideboards, state agencies, if granted funding by the legislature for this purpose, should support planning groups by developing educational resources tailored to fill gaps in local capacity or knowledge/skill sets
	WSC	Disagree with reframing “support” as “develop educational resources.” This approach is inadequate to address scale of problems identified in PBP Evaluation.
	ODFW	“Within their mission and sideboards”: Also within their resource and funding capacity.
DTA New Proposals		
	WW	<p>V1 we suggested language that would not allow PBP absent funding of data/analysis/participation of all relevant state agencies (OWRD, ODFW, DEQ, ODA). There was a suggestion to reframe so I am offering the following:</p> <p>Agencies may elect to not provide technical assistance or other means of support to place based planning efforts if staff resources are not available.</p> <p>Other recommendations: (1) need a framework for the state to select basins for PBP, (2) any directive requiring state action should be qualified by “legislature should fund”</p>

Community Engagement Recommendations

Consensus Check	Number of votes (n=5)	Workgroup Members
1 = Yes, I would enthusiastically support this section as written, in this iteration. No changes are needed	3	LWV; SDAO; NWGAA
2 = Yes, I would support this section as written in this iteration. No changes are necessarily needed.		
3 = Yes, I am neutral or on the fence but would accept this section as written. I have additive ideas or friendly amendments to offer as time and interest of the group allows.		
4 = I have serious concerns or questions with this section as written, and will recommend specific language changes to address my concerns. If the section were to remain as written, I will voice concern but would not necessarily block it from moving forward.		
5 = No, I do not agree with this section as written and would actively block it if it doesn't change. I will recommend specific language changes to address my concerns.	2	WSC; WW

Community Engagement: Suggested Revisions/Questions from v2 worksheet		
General		
TU		Further group discussion needed based on feedback received on the Community Engagement Guide. I cannot provide a ranking until that discussion occurs.
WW		<p>I'm wondering if community engagement should fall under something broader like "building a collaborative". Then community would be part of that, but not all of that. Speaking of, what happened to OWRD's Essential Elements framework? That seems a bit more comprehensive. Community engagement is one piece of that, but not all of that</p> <p>NOTE: the policy directives of the community engagement guide need to be disentangled from that guide, in other words removed. If not, we are a 5 on B.</p> <p>NOTE: WW provided recommendations to the CE guide relating to ecosystems and ensuring that "instream and out of stream" was included. It is unclear how these will be resolved. Absent resolution there, then maybe this is the section to include those directives, as well as address the PBP assessment lessons learned #6 which is "ensuring that place based Action Plans adequately address the concerns of balanced water interests, including instream and out-of-stream, requires paying careful attention to process design upfront."</p>
LOC		If the state is funding the PBP effort and desires to include extensive community engagement, then I think they should fund and staff it appropriately and it should not be a responsibility of the applicant.
CE Recommendation A		
<i>Place-Based Planning funding should include support for meaningful community engagement, at the outset and ongoing. This would include resources for broad outreach, education, multiple channels for engagement and capacity building throughout the process.</i>		
WSC		Do not support use of term "meaningful" in this document. Vague and weighed down with assumptions.
CE Recommendation B		

Community Engagement Recommendations: V2 Worksheet Feedback

<i>Establish a clear set of standards for engagement tied to accessing state funding for regional planning, based on the high-level principles from the Community Engagement Guide. These principles should be considered criteria for grant funding.</i>		
	WW (5)	Comment for: "based on the high-level principles from the Community Engagement Guide. These principles should be considered criteria for grant funding" Depends on whether/how the CE guide is updated. Currently it decides policy issues (such as who leads planning) which is very different than strategies to get people to the table. VOTE: 5, until it is clarified if the policy directives of the community engagement guide are pulled out.
	WSC	Use term "Community Engagement" rather than "engagement." Also, without more detail or a recommendation for WHO establishes the standards, this is dangerously vague.
CE Recommendation C		
<i>Offer a best practices guide to regional planning groups to assist them in engagement efforts (see: Community Engagement Guide developed and endorsed by the HB 5006 Work Group).</i>		
	WW	The PBP guidelines have best practices for convenors (pg. 19/20) has anyone crossed walked to make sure the Community Engagement Guide includes those?
	WSC	Community Engagement guide is still in draft form and has not been endorsed by the workgroup.
CE Recommendation G		
<i>To demonstrate commitment, planning groups need to develop and memorialize (through, e.g., a Charter, MOA, Operating Protocols or other) their commitments to the planning process. This should include a clear scope and purpose of the planning effort, which must remain within the State's authority and public benefit obligations.</i>		
	WW	Isn't this already part of PBP? I know it was for JD and Harney which we were part of.
	WSC	Overbroad in relation to requirement for Charter, MOA, etc. – this is just about Community Engagement, no? Recommendation uses term "commitment" twice but unclear what intent is.
CE Recommendation H		
<i>The State should provide capacity support specifically to tribal and other under-represented or marginalized communities for meaningful engagement in place-based planning.</i>		
	LOC	In the Community Engagement Plan, can the Tribal Govt representatives and State clarify the timing of consultation and how the Tribal Govts would like to participate in the process vs consultation.
	WSC	New terms – under-represented, marginalized – what is meant by these terms in this context? What is "meaningful" and who decides if it meets that standard? Tribal engagement involves relations between sovereigns and should be recognized as having distinct legal implications.
New Proposals		
	WW	It is unclear to me why the definition of community was pulled from this section; that is a large topic deserving of deliberation/discussion. This seems pretty narrow as is. Without the definition then this section should be broadened to capture the idea of developing/engaging a "collaborative". Recommendation: Design the section so that it is about building the collaborative. The word community alone causes tensions w/l the planning groups is our experience. So, I guess the recommendation is change this section to "building a collaborative" and have "community engagement" as a sub-bullet of that (in already existing guidelines/documents). See OWRD's essential element framework document for a more comprehensive list of actions that should fall under building a collaborative.

Pathway and Process Recommendations

Consensus Check	Number of votes (n=6)	Workgroup Members
1 = Yes, I would enthusiastically support this section as written, in this iteration. No changes are needed	1	SDAO
2 = Yes, I would support this section as written in this iteration. No changes are necessarily needed.	2	LWV, NWGAA
3 = Yes, I am neutral or on the fence but would accept this section as written. I have additive ideas or friendly amendments to offer as time and interest of the group allows.		
4 = I have serious concerns or questions with this section as written, and will recommend specific language changes to address my concerns. If the section were to remain as written, I will voice concern but would not necessarily block it from moving forward.		
5 = No, I do not agree with this section as written and would actively block it if it doesn't change. I will recommend specific language changes to address my concerns.	3	WSC; WW, TU

Pathway and Process: Suggested Revisions/Questions from v2 worksheet		
General		
WW	<p>Many 5's: see comments for details/comments/rankings.</p> <p>The more I look at these, the more I think we need some sort of qualifier such as "if the state continues with place based planning"; or "if a place is selected for place based planning".</p>	
WSC	<p>What does "Pathway and Process" mean? If it comes from another source, identify it. If it's arisen from this process, I'm confused</p>	
PP Recommendation A		
<p><i>The state should provide staff support, funding, and training for communities looking to initiate the planning process. This could include things like helping to identify local leadership, developing a standard planning readiness guide, conducting an assessment of a community's social readiness and capacity to engage in the process, pre-application conferences, training webinars, and other activities that build community capacity and awareness around planning readiness.</i></p>		
TU	<p>The state should only make these investments if PBP is identified as the best tool for addressing the water needs of that geography. We should not mandate support for any interested basin.</p> <p>Delete "The state should provide staff support, funding, and training for communities looking to initiate the planning process" and reframe state role. I believe the state should prioritize investment of these funds based on level of water crisis and opportunity for success using a PBP approach. We do not have sufficient funding available for a haphazard approach to water management.</p>	

Pathway and Process Recommendations: V2 Worksheet Feedback

	WW	<p>This conflict somewhat with recommendations to do situation assessments of basins; also it seems like there should be some state prioritization of efforts; just because communities want to initiate a process does not mean it is an area that would be a priority for state funding. VOTE: 5 until we sort out sequencing., prioritization, etc.</p> <p>“local” this was added from the last draft: again, who leads is an outstanding question about leadership OBJECT to this edit.</p> <p>Replace “a community’s” with “interested parties”</p> <p>Add bolded words: “and other activities that build community and collaborative capacity and awareness around planning readiness”</p>
	WSC	<p>“conducting an assessment of a community’s social readiness and capacity to engage in the process” – so many policy decisions wrapped up in this – do NOT lump social assessment into basin assessments statewide that inventory data and gaps, and quantifies current and future water supply and demand by sector.</p>
	ODFW	<p>Identifying the need/value of PBP should also be part of the early dialogue.</p>
<h3>PP Recommendation B</h3>		
<p><i>The state should provide resources to build foundational trust with and among interested parties, planning groups, and state agencies prior to plan development and writing. This includes setting foundational norms for group engagement and developing and understanding foundational data.</i></p>		
	WSC	<p>this seems to belong in Community Engagement</p>
<h3>PP Recommendation C</h3>		
<p><i>The state should provide support to local groups to help them prepare for and execute planning. At a minimum, this includes staff capacity and/or funding for professionals to help with governance agreements, DEIJ trainings, consensus decision making, project management, water science, ecology and biology, climate science, water law, and technical plan writing.</i></p>		
	WW (4)	<p>Again, concerned with unfunded mandates. If PBP is to take place in a basin; then agree the legislature should fund this; but the language as is requires this without assurances of funding. ALSO, it is still unclear how this fits into the discussion about who leads and/or And finally this document keeps alternating between planning groups, local groups, community, etc. Recommend the word "collaborative" or "planning group". Vote 4, with edits 3.</p> <p>Edits: replace "local" groups with "regional planning" groups; replace "to help them prepare for and execute planning" with "that are selected to move forward with place based planning"</p>
	WSC	<p>Suggest restoring “facilitation” and “community engagement.” This should be reframed as “the Legislature should fund, and the Governor should direct, agencies to provide support to...”</p>
<h3>PP Recommendation D</h3>		
<p><i>The state should build on the guidance developed for the Place Based Planning Pilot, incorporating feedback and lessons learned to update guidelines and benchmarks for state recognition in Step 2: Plan Development. They should make this guidance available to the planning groups at the beginning of their planning processes.</i></p>		
	WW	<p>This seems to imply that this is replacing PBP guidelines? We would object.</p> <p>Edits: Add “If PBP is to continue,” at the beginning of the recommendation; add bold words “lessons learned outlined in the PB Assessment to update existing PBP guidelines...”; remove “Step 2: Plan Development”.</p>

Pathway and Process Recommendations: V2 Worksheet Feedback

	WSC	We still have not tackled what “state recognition” means, or should mean.
PP Recommendation E		
<i>The state should provide resources to planning groups to fund professional independent third-party facilitation.</i>		
	WW	Either agency or professional facilitation should be REQUIRED, these should be subject matter experts. Also, should require professional report writers with subject matter expertise. Edits: replace “state” with “legislature”; add bold words “third-party facilitation with subject matter expertise ”
	WSC	Add “with subject matter expertise.” Also add “Selection criteria should be developed.
PP Recommendation F		
<i>The state should support capacity for an interagency team that provides planning assistance throughout the process. At a minimum, this would include coordination and consultation with local groups along the way (e.g., offering training, participating in meetings, permit coordination, grant identification) and technical support, as described in Recommendation B of the Data and Technical Assistance above.</i> <i>Support for an interagency team could include a) support from mid and upper-level leadership in the core state agencies, b) greater vertical integration within agencies, and/or c) alignment of work plan priorities across the agencies.</i>		
	WW	Replace “state should” with “Legislature should provide funding for agency (OWRD, DEQ, ODFW, ODA) capacity to”; replace “local” with “planning groups”; remove “along the way”; remove “offering training”; remove “permit coordination”
	WSC	Why is “permit coordination” in here? This would belong in a separate “Implementation” section.
	ODFW	All subject to resources. Agencies can support ideas in concept and pursue funding but if they don’t get the funding, then expectations must be adjusted.
PP Recommendation G		
<i>The state should provide resources to fund continued engagement of local groups and state partners to move a state-recognized plan into implementation. The outcomes of this continued engagement could include:</i>		
<ul style="list-style-type: none"> • <i>Refinement and feasibility assessments of plan actions and strategies</i> • <i>Working to address any policy needs with the state</i> • <i>Preparation of projects to take advantage of implementation funding opportunities</i> • <i>Ensuring that the pursuit of strategies and actions continue to represent a balanced representation of water interests</i> 		
	TU	Balanced representation needs further refinement. This is particularly true since the status quo is highly imbalanced due to prior appropriation. Recommend removing references to implementation until further proof of concept is completed.
	WW (5)	VOTE: 5 We have not yet resolved what implementation means. Regardless, as noted in our comments on V1, we will remain a 5 if the policy change is included in this. “Preparation of projects”: What is meant by this? This seems a bit broad. If this is meant to fund projects w/o going through existing channels we are a 5. Edits: replace “state” with “legislature”; remove “working to address any policy needs with the state”; add bold words “instream and out of stream water interests”

Pathway and Process Recommendations: V2 Worksheet Feedback

	LOC	I think the state should lead this effort, since they are including extensive engagement that many applicants would not have capacity to manage.
	WSC	Very confusing to change how the "Steps" are referred to from the PBP pilot to this set of recommendations. Feasibility Studies can be funded using SB 1069 dollars and should not be lumped in here. 2nd bullet is vague, do not support. State should not be tasked with preparation of projects.
	ODFW	These need to ensure the pursuit of strategies that will result in balanced water outcomes in the near and long-term
PP Recommendation H		
<i>The state should provide resources to fund implementation of strategies and projects that were developed as part of a state-recognized integrated water resources plan and are being deployed on behalf of a collaborative planning and implementation group.</i>		
	TU (5)	We vote 5 on implementation funding at this time. Given that PBP is not being conducted on a prioritized basis substantial funding could be expended this way without actually solving key water crises.
	WW (5)	Unclear what is meant here. SB 839 already provides funding for projects. PBP don't have a requirement that all projects provide public benefits. Also, there is needed conversation on what implementation means before saying it needs to be funded. VOTE: 5 as currently drafted and absent discussion.
	WSC	May be willing to support if reframed as "The state should CONSIDER provid(ing) ADDITIONAL resources BEYOND THOSE ALREADY AVAILABLE IN EXISTING STATUTE to fund implementation..."
	ODFW	Recommend discussion on this point. Is there no other review criteria/prioritization contemplated by the State other than it's a strategy identified in a PBP?
PP Recommendation I		
<i>The state should provide resources to local planning groups to update plans every 10 years to reflect changes in local conditions and/or updates to data availability or climate change information.</i>		
	TU	This should be conditioned by success to date and need. Groups that are not functioning or not successful should not be guaranteed state funding.
	WW (5)	VOTE: 5. PBP are taking upwards of 6-7 years to complete; I do not think it's a good use of state money to then say they need to be updated every ten years. If basins feel they need an update; they could apply to the state for that.
	LOC	I think this would be good to include if requested by the local groups, but not if they don't request it or don't get funding for implementation.
	WSC	State should update basin assessments every XX years, and MAY provide resources for updating place-based plans as needed
PP Recommendation J		
<i>The state should develop a grant program for the next generation of place-based planning and implementation that funds: (1) Foundational work and plan development for communities ready to engage and invest in place-based planning; and (2) Continued engagement, implementation, and plan updates, as described in PP Recommendations G, H, & I, for groups with state recognized plans.</i>		
	WW (5)	There already exists a grant program; all that is needed is to lift the sunset. Also, this language does not in anyway direct the state to prioritize funding.....but leaves it to "communities ready to engage". And there is the continued tension of the word "communities". Communities are part of a collaborative, but not the whole. VOTE: 5

Pathway and Process Recommendations: V2 Worksheet Feedback

	WSC	How is this different than current statute? Should just be "State should extend/eliminate sunset on PBP grantmaking authority" or something to that effect.
PP Recommendation K		
<i>The state should use state recognized plans to help inform updates to the Integrated Water Resources Strategy.</i>		
	TU	This should be done through the IWRS process directly, which is public and transparent.
	WW (5)	VOTE: 5. This is something directly from HB 2251, which WW opposed. The IWRS is supposed to be the state umbrella for these plans. There are many opportunities to engage and influence the IWRS updates. This gives plans, which can range from good to lousy, a leg up on influencing state policy. It elevates local control over water to a degree not envisioned in the PBP process; which is supposed to be about addressing particular needs in a set geography. To include this could disadvantage other voices; and over all seems inequitable. Remedy: CUT
	WSC	Do not support as should; may support as "may."
PP Recommendation L		
<i>The state should be required to participate in a specified role in place-based planning processes.</i>		
	TU (5)	5, This should be deleted.
	WW (5)	VOTE; 5. This arose out of my recommendation that that we directly address state leadership of PBP. My proposal was reframed (not by WW) and voted on but in re-assessing it says basically nothing. It adds no value to the conversation and leaves all questions lingering. Remedy: CUT and allow space for conversations (actual conversations) on the role of the state. ALSO, would like confirmation that the IWRS, the guidelines, gov's 100 year vision are still the overarching framework. Those documents do signal leadership by the state; this group should not undercut past work.
	WSC	Too vague. Oppose. Suggest deletion, covered elsewhere. Or else reframe as state in leadership role, consistent with IWRS principle "Facilitation by the State"
	ODFW	More detail would be helpful as well as an acknowledgment of State resources needed to fulfill.
New Proposals		
	WW	<p>Recommendation: the group should discuss sequencing. E.g. Data, prioritizing/selection criteria for PBP, etc.</p> <p>Recommendation: If PBP is to continue, funding of the effort should include professional report writing by someone with subject matter expertise.</p> <p>Recommendation: It should be clarified that agencies are participants</p>

Sustaining and Funding Recommendations

Consensus Check	Number of votes (n=5)	Workgroup Members
1 = Yes, I would enthusiastically support this section as written, in this iteration. No changes are needed	1	NWGAA
2 = Yes, I would support this section as written in this iteration. No changes are necessarily needed.	1	SDAO
3 = Yes, I am neutral or on the fence but would accept this section as written. I have additive ideas or friendly amendments to offer as time and interest of the group allows.	2	TU, LWV
4 = I have serious concerns or questions with this section as written, and will recommend specific language changes to address my concerns. If the section were to remain as written, I will voice concern but would not necessarily block it from moving forward.		
5 = No, I do not agree with this section as written and would actively block it if it doesn't change. I will recommend specific language changes to address my concerns.	1	WW

Sustaining and Funding: Suggested Revisions/Questions from v2 worksheet		
General		
LWV	"I have a concern about finding an alternate funding source. Would need significant discussion before supporting that part."	
SF Recommendation A		
<i>The state should create a fund for regional integrated water resources planning and implementation that provides consistent and sufficient funding to local groups throughout the planning and implementation process.</i>		
WW (5)	VOTE: 5 as currently drafted. This is super broad. Needs discussion. Also, this is limited to funding to "local groups" not state agencies. And, as noted, does not address prioritization, etc. This seems somewhat repetitive. Also, it begs the question of whether PBP should continue. This seems to be a predetermined assumption that I'm not sure all participants share.	
LOC	This recommendation seems a little redundant to the ones above. Either incorporate with PBP funding requests or explain the difference in this funding recommendation.	
WSC	Do not support use of term "local groups" – perpetuates exclusionary framework that allowed certain entities to be excluded during place-based planning pilot phase. Reframe to "place based planning groups" or something along those lines.	
SF Recommendation B		
<i>Given the nature and scale of investment required by regional integrated water resources planning and implementation, the legislature should create a workgroup to explore alternative revenue sources that would allow the state to make this significant, high priority investment.</i>		
TU	Delete "high priority"	

Sustaining and Funding Recommendations: V2 Worksheet Feedback

Sustaining and Funding: Suggested Revisions/Questions from v2 worksheet		
	WW (5)	VOTE: 5 as currently drafted. WW does not agree this is a priority for the state; there are many more actions needed to address water issues/management across the state. While this is one tool; it is not a "significant high priority investment" in our minds.
	WSC	NOT A WORKGROUP. Start with a third-party assessment of current framework, with recommendations that incorporate/build on successful approaches used in other states. Use assessment to guide TASK FORCE. But no task force/workgroup unless balanced membership, clear and fair decision making framework that aligns with IWRS, and robust dedicated support of agency experts and resources.
New Proposals		
	TU	The state should assess and develop a full suite of water planning tools and identify which tools or approaches will lead to the most successful outcomes in various basins given geography, community, hydrology, and magnitude of water crisis.