



MEMORANDUM

TO: Water Resources Commission

FROM: Harmony Burrig, Planning Coordinator
Steven Parrett, Planning Coordinator

SUBJECT: Agenda Item J, June 24, 2020
Water Resources Commission Meeting

Water Resource Planning Assessment Scope of Work

I. Introduction

This informational report provides an overview of the purpose, goals, and scope of work for conducting a water resource planning assessment that will include an evaluation of the pilot phase of place-based integrated water resources planning.

II. Background

Undertaking place-based integrated water resources planning (place-based water planning) is Recommended Action 9.A of Oregon's Integrated Water Resources Strategy (IWRS). With support from the legislature, the Department initiated a pilot phase of place-based water planning in 2016 by hiring two planning coordinators and investing in four places to work through the five planning steps outlined in the [2015 Draft Place-Based Planning Guidelines](#) (Guidelines). Attachment 1 provides an overview of the five planning steps and the status of each planning group. The first plan is likely to be submitted to the Department for state recognition in early 2021. Numerous stakeholders have expressed the need for an evaluation of the pilot-phase before launching another phase. In 2019, the legislature provided funding to support the four pilot-phase planning groups as well as funding for an assessment.

Prior to place-based water planning, the Department engaged in other forms of water resources planning. The Department wants to ensure that any future planning work is informed by the lessons learned from past approaches, respond to the water planning needs across the state, and take into account agency capacity. Therefore, the Department is embarking on a broad assessment of water resource planning.

III. Five Major Elements of the Water Resource Planning Assessment

During 2020-2021, the Department will assess water planning across the state as outlined in the five elements below. The assessment is designed to help determine how we can structure and support future planning to equip places and communities to meet instream and out-of-stream water needs and strategically guide state investments. A cornerstone of the assessment is an

evaluation of the pilot phase of place-based water planning. The purpose of each assessment element is briefly described below. Additional detail is included in Attachment 2, which includes the work products, approach, resources, and approximate timelines for each element.

Element A: Review the statewide framework and OWRD's role and responsibilities related to water resources planning. The purpose of this element is to ensure the scope of the assessment and our future planning approach are consistent with and informed by existing responsibility and authority in statutes, rules, plans, and other guiding documents.

Element B: Learn from others within and outside of Oregon with relevant water resources planning experience. We will also gain a better understanding of what others in Oregon are doing around water planning to prevent duplication.

Element C: Evaluate the Department's past and current approaches to water planning. The purpose of this element is to learn from our previous experiences with water planning. This will include an in-depth evaluation of the pilot-phase of place-based water planning through an independent evaluation and a guided self-study. The evaluation will include engagement of the planning groups as well as a broad spectrum of state and place-based stakeholders.

Element D: Assess the planning status, assets, and needs of the state and places across Oregon. This work will help ensure our future approach honors current water supply planning efforts across Oregon, builds on current strengths, is responsive to actual needs, and is grounded in reality.

Element E: Informed by the results of elements A-D, the Department will work with statewide and place-based stakeholders to chart a path forward. The findings from elements A-D will provide the information needed by decision-makers to pursue approaches to water planning that will lead to a more secure water future for Oregon's environment, communities, and economy.

IV. Conclusion

In 2020 and 2021, the Department will review its role in water planning, learn from water planning experiences including place-based water planning, assess the needs for water planning across Oregon, and work with a broad group of stakeholders to chart a path forward.

Attachments:

1. Summary of Place-Based Water Planning Steps and Planning Group Status
2. Summary of the Water Resource Planning Assessment Scope of Work

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Water Resources Planning Assessment

Guiding Future Approaches and Support for Water Resources Planning

The State of Oregon's [Integrated Water Resources Strategy](#) (IWRS) contains numerous recommended actions specific to water planning (5B, 5.5A-C, 6A, 9A, 9B, 13C) and the Oregon Water Resources Department (OWRD) [2019-2024 Strategic Plan](#) prioritizes actions that will equip basins to plan for their water future. As recognized in the [100-Year Water Vision](#), planning is an essential step in developing, investing in, and implementing water projects. Since 2016, state agencies have partnered with four places in a pilot phase of [Place-Based Integrated Water Resources Planning](#) and many more places across the state are asking for help.

Given the importance of planning, how can we structure and support future planning to meet instream and out-of-stream water needs and strategically guide investments?

To answer this question, OWRD will work with diverse water partners to conduct an assessment and develop recommendations for future water resources planning. In 2020-2021, we will focus on the following areas of investigation:

- A. Review the statewide framework and OWRD's role and responsibilities related to water resources planning.
- B. Learn from others within and outside of Oregon with relevant water resources planning experience.
- C. Evaluate OWRD's past and current approaches to water resources planning, including the pilot phase of place-based integrated water resources planning.
- D. Assess the planning status, assets, and needs of the state and places across Oregon.
- E. Together with partners, chart a path forward with specific recommended actions for future water resources planning in Oregon based on information gathered in areas A-D.

The assessment will provide the information needed by decision-makers to pursue the approaches and support needed for water planning that will lead to a more secure water future for Oregon's environment, communities, and economy.

To receive updates or share information relevant to the assessment, please contact Harmony Burright or Steve Parrett at wrd_dl_placebasedplanning@oregon.gov or 503-986-0913.



Planned Activities (A-D)

- Review **guiding documents**, including statutes, rules, strategies, and plans.
- Conduct a **literature review** to identify factors that enable or limit successful water planning.
- Develop **case stories** with lessons learned from comparable efforts inside and outside of Oregon.
- Conduct a **comparative analysis** of past and current approaches to planning.
- Update the 2014 **discussion paper** with a compilation of lessons learned and best practices.
- Hire an external entity to do an **independent evaluation** of place-based water planning along with a **guided self-evaluation** with the state and places.
- Conduct a **rapid assessment** of the status, assets, interest and needs of places and the state, including a **survey of places**.
- **Share progress and findings** with statewide and place-based stakeholders via emails, presentations, and conversations.

Gather information and learn together

	A. Review OWRD's role and responsibilities related to planning	B. Learn from others within and outside of Oregon	C. Evaluate past and current approaches to water resources planning	D. Assess status, assets, and needs of the state and places across Oregon
Purpose	<ul style="list-style-type: none"> Design a future approach that is consistent with our role and responsibilities contained in guiding documents and is informed by our specific niche in Oregon 	<ul style="list-style-type: none"> Design a future approach that is informed by learning and innovation within and outside of Oregon by drawing upon the experience and expertise of others 	<ul style="list-style-type: none"> Design a future approach that is informed by learning from past and current water resources planning efforts, including the pilot phase of place-based water planning 	<ul style="list-style-type: none"> Design a future approach that honors current water resources planning efforts across Oregon, meets places where they are at, builds on current strengths, is responsive to actual needs, and is grounded in reality
Approach	<ul style="list-style-type: none"> Use available information (statute, rules, agency plans, etc) to develop visual frameworks and groundtruth that framework through internal and external conversations 	<ul style="list-style-type: none"> Conduct a literature review and develop case stories to identify factors that enable or limit successful water planning 	<ul style="list-style-type: none"> Hire external experts to conduct an independent evaluation and guided self-study of place-based planning Use available information and interviews to compare past planning 	<ul style="list-style-type: none"> Conduct a stakeholder assessment Use available information and interviews to rapidly assess the state and basins Hire experts to design and execute a statewide survey
Outputs	<ul style="list-style-type: none"> A visual framework/summary that shows OWRD's role and responsibilities for planning, as well as OWRD's niche related to water planning 	<ul style="list-style-type: none"> Updated 2014 white paper, including new case stories Summary of findings from literature review 	<ul style="list-style-type: none"> Comparative analysis of OWRD planning efforts Independent report with findings from place-based planning evaluation 	<ul style="list-style-type: none"> Summary status of water resources planning efforts, assets, and needs in each OWRD basin Summary of state assets and needs
Timing	Mid- 2020	Mid- to Late 2020	Mid- 2020 – Early 2021	Mid- 2020 – Early 2021

E. Work Together to Design a Future Approach and Chart a Path Forward

Mid-Late 2021

Place-Based Water Planning Updates July – December 2019

Program and Place-Based Updates

- OWRD began scoping a project to assess water planning needs across Oregon and evaluate the place-based planning approach
- Learning Partnership gathering, supported by the Ford Family Foundation, held in September in Newport to support peer-to-peer learning between the four planning groups.
- Planning Step 5 Guidance presented to the Water Resources Commission for their review.
- [Second webinar](#) on the Northwest Climate Toolbox hosted by the Climate Impacts Research Consortium (CIRC).
- Places invited to present at Water Vision community conversations and participate in interviews.



Harney Basin

Conveners: Harney County Court & Watershed Council
 OWRD Grant: \$300,000 Other Funding (to-date): \$581,963

Planning
Steps
2/3/4

- Meetings of the Collaborative held in July, August, September, October, November and December.
- New project manager hired.
- One consensus decision reached to pursue funding for smart meters.
- Results from OSU survey to domestic well owners (574 responses = 47% response rate) completed.
- Continued progress reviewing and refining proposed Step 4 strategies.
- Two work groups met to improve draft summaries of water data/information – 4 meetings in total.

More information: Contact Holly Mondo at 805-801-6013 || holly@hcwatershedcouncil.com

Upper Grande Ronde Sub-Basin

Convener: Union County
 OWRD Grant: \$242,000 Other Funding (to-date): \$10,000

Planning
Step 4

- Stakeholder meetings held in July, September, November, and December.
- Continued work to solicit input and feedback on Step 4 strategies and solutions.
- Outreach to the Union County Farm Bureau and the Grand Ronde Model Watershed at their annual meetings.

More information: Contact Scott Hartell at 541-963-1014 || shartell@union-county.org
WEB: <http://union-county.org/planning/place-based-integrated-water-resources-planning/>

Lower John Day Sub-Basin

Convener: Gilliam SWCD & Wheeler SWCD
 OWRD Grant: \$239,000 Other Funding (to-date): \$10,000

Planning
Step 3/4

- Meetings held in August, September, October, and December.
- Public comment opportunity for the draft of Step 3 *Integrated Water Resource Needs and Vulnerabilities Report*. Public comments reviewed and incorporated.
- Continued work to refine understanding of critical issues and goals from Steps 2 and 3.
- Initial brainstorming of strategies and solutions for Step 4.

More information: Contact Herb Winters at 541-384-2672 x110 || gilliamswcd@gmail.com
WEB: <https://www.lowerjohndaypbbp.com/>

Mid-Coast Region

Conveners: City of Newport, OWRD, Seal Rock Water District, Gibson Farms
 OWRD Grant: \$300,000 Other Funding (to-date): \$405,000

Planning
Step 3

- Partnership meeting, hosted by the Confederated Tribes of the Siletz Indians, held in September.
- Field tour of the Beaver Creek watershed held in August. See the video [here](#).
- Local Planning Coordinator hired.
- Work by three working groups (municipal/district supplied, self-supplied, instream/ecology) to develop and refine problem/issue statements based on Steps 2 and 3.

More information: Contact Alexandria Scott at 541-961-5313 || alexandria@midcoastwaterpartners.com
WEB: www.midcoastwaterpartners.com



Helping Oregonians plan for their current and future instream and out-of-stream water needs

Place-based integrated water resources planning is one of the recommended actions from the 2012 and 2017 [Integrated Water Resources Strategy \(IWRS\)](#). It provides an opportunity for places to work collaboratively, in partnership with the state, to understand their water resources challenges and needs, and identify potential solutions to meet those needs. The [DRAFT planning guidelines](#) describe the five steps and key planning principles central to any place-based integrated water resources planning effort.

Planning Step 1

Build a collaborative and inclusive process – Conveners assemble partners representing a balance of interests, including state agencies and work with partners to: create a governance agreement that describes how the partners will collaborate and make decisions using consensus; develop a communication and outreach strategy to ensure an open and inclusive process that fosters public participation; and develop a work plan outlining how they will execute Planning Steps 2-5.

Planning Step 2

Gather information to develop a shared understanding of current water resources and identify gaps – The planning group assesses and describes water resources in the planning area, looking at water quantity, quality, and ecology. This effort includes collecting and synthesizing existing information, identifying any gaps in knowledge, and developing strategies to fill these gaps.

Planning Step 3

Examine current and future water needs/demands and vulnerabilities for people, the economy, and the environment – The group identifies and prioritizes current and future instream and out-of-stream water needs/demands using an integrated approach. Groups also examine water challenges and vulnerabilities, such as how climate change may affect water resources and the ability to meet water needs.

Planning Step 4

Identify and prioritize strategic, integrated solutions to meet multiple water needs – The group collaboratively identifies a long-term strategy and near-term recommended actions to address the instream and out-of-stream issues and needs identified in Steps 2-3. Consensus-based strategies and actions are captured in a plan.

Planning Step 5

Approve and implement a place-based integrated water resources plan – The group approves the plan and develops more detailed strategies to implement actions. The Water Resources Commission and other agencies will have an opportunity to formally recognize the plan, based on whether it is consistent with the IWRS, the guidelines, and state water policy.

Key Planning Principles

- Locally-initiated and led collaborative effort
- Voluntary, non-regulatory process
- Includes a balanced representation of water interests
- Conducted in partnership with the state
- Balances current and future instream and out-of-stream needs
- Looks at water quantity, quality and ecosystem needs in an integrated approach
- Utilizes an open and transparent process that fosters public participation
- Builds on and integrates existing studies and plans
- Does not infringe on existing water rights
- Adheres to IWRS principles and state laws

Learn More!

Visit the web page: <https://go.usa.gov/xV5f4> Email: wrd_dl_placebasedplanning@oregon.gov
Contact Planning Coordinators [Harmony Burrignt](#) (503-986-0913) or [Steven Parrett](#) (503-986-0914)