PART THREE

Partnership Learning Project

A REPORT FOR Oregon Watershed Enhancement Board

In collaboration with Bonneville Environmental Foundation

PREPARED BY

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RECIPROCITY CONSULTING, LLC

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Acknowledgements

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The findings presented here were made possible through the generous and thoughtful reflections of participating partners, in alphabetical order:

Ashland Forest All-Lands Restoration Partnership
Baker Sage-Grouse Local Implementation Team
Clackamas Partnership
Deschutes Basin Partnership
East Cascades Oak Partnership
Grande Ronde Restoration Partnership
Harney Basin Wetland Collaborative
Hood River Basin Partnership
John Day Basin Partnership
Klamath Siskiyou Oak Network
Oregon Central Coast Estuary Collaborative
Oregon Model to Protect Sage-Grouse
Partners of the North Santiam
Pure Water Partners
Rogue Basin Partnership
Rogue Forest Partners
Salmon SuperHwy
Siskiyou Coast Estuaries Partnership, formerly Wild Coast Estuaries Partnership
Siuslaw Coho Partnership
Upper Willamette Stewardship Network
Umpqua Basin Partnership
Wallowa Fish Habitat Restoration Partnership
Warner Basin Aquatic Habitat Partnership
Willamette Mainstem Anchor Habitat Working Group

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Thank you to everyone who shared your experiences and insights. We hope this report will support your continued success. We will recognize you in any publications resulting from this work.

FRONT COVER Willamette Mainstem Anchor Habitat Working Group. Early winter weather adds frost to the project at Green Island.
STEVE SMITH PHOTOGRAPHY

BACK COVER Willamette Mainstem Anchor Habitat Working Group. An aerial view of the FIP III project at Green Island.
STEVE SMITH PHOTOGRAPHY

REPORT DESIGN & GRAPHICS CASEY DAVIS

Ongoing dialogue with OWEB staff was foundational to this project. The following staff took findings to heart, reflected on their own learning and pushed forward meaningful program changes, even over the course of this study (in alphabetical order):

Lisa Charpilloz Hanson, Executive Director
Ken Fetcho, Effectiveness Monitoring Coordinator
Miriam Forney, Land Acquisitions Coordinator
Eric Hartstein, Board and Legislative Policy Coordinator
Audrey Hatch, Conservation Outcomes Coordinator
Denise Hoffert, Partnership Coordinator
Jillian McCarthy, Partnership Coordinator
Stephanie Page, Deputy Director
Courtney Schaff, Monitoring and Reporting Manager
Eric Williams, Grant Programs Manager

We also honor the late ***Andrew Dutterer,*** former OWEB Partnership Coordinator, who was a champion of OWEB's partnership-focused investments throughout the early years of the program.

The recommendations in this report were refined through collaboration with the Bonneville Environmental Foundation team, including two subconsultants, who collectively have been working with OWEB over the past seven years to support the evolution of the FIP program, including direct support to many of the FIP partnerships:

Robert Warren, Bonneville Environmental Foundation
Lauren Mork, Upper Deschutes Watershed Council and
Ann Moote, Mamut Consulting, LLC

RECIPROCITY CONSULTING

ABOUT RECIPROCITY CONSULTING

Reciprocity Consulting, LLC is a women-owned small business based in Tacoma, Washington that provides customized support to strengthen organizations, engage communities and build resilient, collaborative partnerships emphasizing equity, diversity and inclusion.

Founder Jennifer S. Arnold, Ph.D. has over 20 years of experience in research, facilitation, and training focused on engaging diverse people in collaborative learning and decision-making to have lasting positive impacts in our communities and our environment.

PART THREE

Partnership Learning Project

A THREE-PART REPORT

1 **PART ONE** explores what it takes to initiate or formalize a partnership and work through the growing pains of planning and governance, synthesizing learning from eight partnerships that received P-TA grants.

2 **PART TWO** explores the dynamic nature of partnerships and the resources, support and guidance from funders that can build resiliency and boost impact, synthesizing learning from six partnerships that received FIP grants.

3 **PART THREE** develops a refined framework to understand partnership performance and resilience and examines four specific strategies to enhance performance, synthesizing learning from twenty-four partnerships that received FIP and/or P-TA grants.

Common Terms in OWEB Programs

The Oregon Watershed Enhancement Board (OWEB) is a state agency that provides grants to help Oregonians take care of local streams, rivers, wetlands and natural areas. OWEB grants are funded from the Oregon Lottery, federal dollars, and salmon license plate revenue. The agency is led by a 17-member citizen board drawn from the public at large, tribes, and federal and state natural resource agency boards and commissions.

Focused Investment Partnership (FIP) Grant is a six-year OWEB grant of up to $12 million that is awarded to high-performing partnerships with a strategic action plan and a formalized decision-making process to implement on-the-ground restoration projects addressing ecological priorities, which are defined by the OWEB Board. Although the goal is to allocate all funding within the six-year timeframe, most partnerships will take longer to implement the funded projects.

A FIP Restoration Initiative refers to the work that will be completed with the FIP grant.

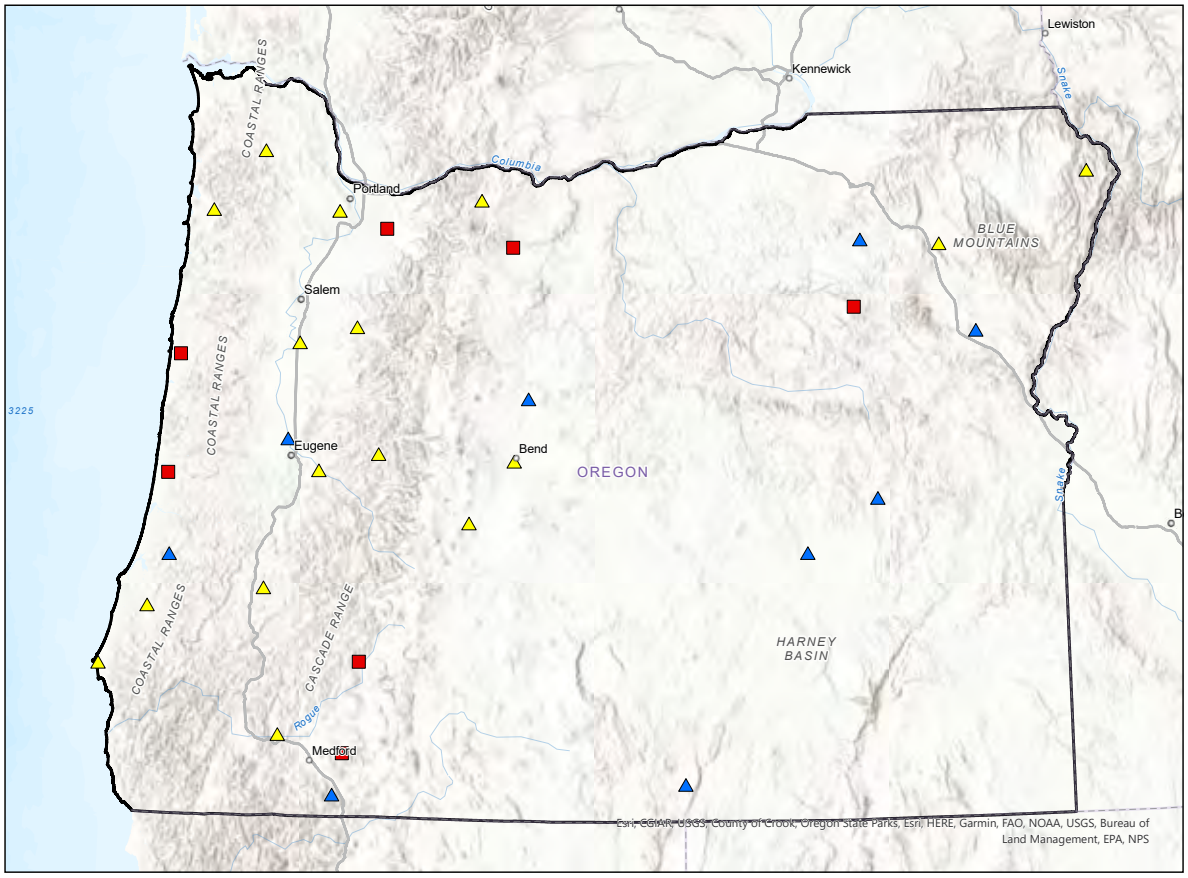
Board-identified Priorities for FIP Investments

- Aquatic Habitat for Native Fish Species
- Closed Lakes Basin Wetland Habitat
- Coastal Estuaries
- Coho Habitat and Populations along the Coast
- Dry-Type Forest Habitat
- Oak Woodland and Prairie Habitat
- Sagebrush / Sage-Steppe Habitat

FIP funding categories include partnership coordination, stakeholder engagement, technical assistance, restoration, land and water acquisition and monitoring. Partnerships awarded a FIP grant submit project-level grant applications in these categories at least once a biennium.

For the FIP Project-Level Technical Review, OWEB facilitates a team of technical experts to review project applications with the goal of fine-tuning project design. Because the FIP grants include a list of approved projects for six years, reviewers are not asked to approve or reject projects, but if significant changes are needed, reviewers can ask applicants to make revisions and resubmit.

A Partnership Technical Assistance (P-TA) Grant is an OWEB grant of up to $150,000 for up to three years that is awarded to partnerships to i) develop or update a strategic action plan, ii) strengthen their governance and decision-making and/or iii) support ongoing coordination of a partnership. This was formerly called a Capacity Building FIP grant and a Development FIP grant.



Partnerships awarded P-TA grants and/or FIP grants (2015 - 2022)

- Partnerships awarded a P-TA grant only
- Partnerships awarded a FIP grant only
- Partnerships awarded a P-TA grant, then a FIP grant
- Oregon Boundary

Note: Partnerships work in large geographic areas. The points, shown here in the center of their work area, give a sense for their geographic distribution.

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Common Terms Found in this Report

Accountability refers to a shared responsibility to check-in on performance or follow-through with respect to informal or formal agreements.

Capacity refers to the time, energy, resources and/or skills needed to undertake an action or activity. In the context of funders and non-profit organizations, capacity often refers to the funding needed for to pay for people's time to do work.

Expanding the circle refers to the intentional effort of including new people, organizations, government agencies and/or tribes in some aspect of a partnership's work, sometimes with a focus on including new partners.

A partnership refers to two or more organizations voluntarily working together to advance goals that cannot be accomplished independently. Non-voluntary partnerships, created through statute, have different structures and mechanisms of accountability and are not the focus of this study.

Performance refers to the ability of a partnership to achieve their goals and make an impact.

Resilience refers to the capacity of a partnership to withstand stressors and undergo change, while maintaining the integrity of the partnership's vision, identity and focus (adapted for partnerships from Walker et al. 2004).

A theory of change describes the rationale and underlying assumptions for how strategies and actions are expected to lead to short-term, intermediate and long-term goals.

Underrepresented groups refers to demographic groups or types of organizations that are have less involvement or influence than you would expect given their presence in an area. Special considerations are given to groups potentially impacted or able to contribute to an effort. Groups can be underrepresented because of historical patterns that restrict their power and influence – or because their interests do not easily align or overlap with the effort among other reasons.

Imnaha River. PHOTO / OWEB

OWEB aims to accelerate the pace and scale of restoration across the state by investing in and supporting **high-performing partnerships.**

A Partnership refers to two or more organizations voluntarily working together to advance goals that cannot be accomplished independently.

OREGON WATERSHED ENHANCEMENT BOARD'S

THEORY *of* CHANGE *for* PARTNERSHIP INVESTMENTS

Why partnerships?

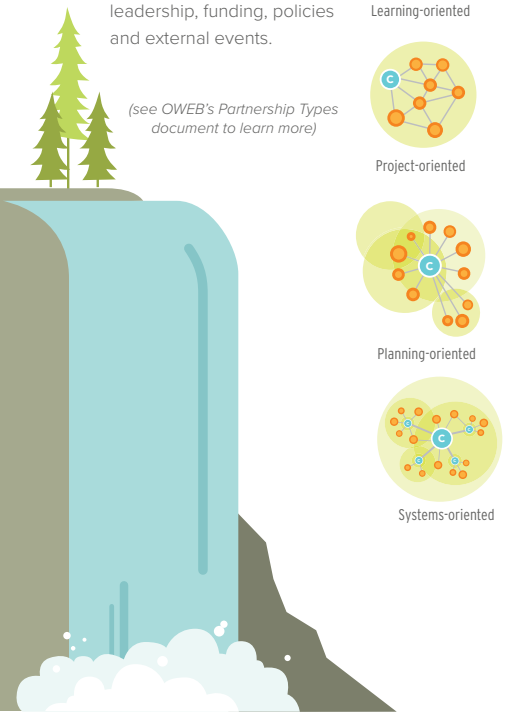
High-performing partnerships bring together the skills, capacities, perspectives and relationships from different organizations and individuals. Partners learn together, plan together and in many contexts act together to advance ecological restoration at larger scales and in more complex landscapes.

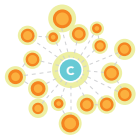
Building up Partnerships

Partnerships across Oregon

- Partnerships across the state work together to plan for and implement restoration at different scales, geographies and focus areas.
- Each has a unique structure and function, which may change over time as their work evolves and as they respond to changes in leadership, funding, policies and external events.

(see OWEB's Partnership Types document to learn more)





OWEB Investments in Partnerships

OWEB invests in the following **resources and funding opportunities** to boost partnership performance and resilience alongside ecological and social benefits:

- **Resource Guides**
  Self-guided resources accessible to all partnerships:
  - Strategic Action Planning
  - Monitoring
  - Adaptive Management
  - Partnership Governance
- **Partnership Technical Assistance (P-TA) grants**
  - Competitive grants open to all partnerships across the state
  - Funding to support planning, improved governance and/or coordination of a partnership
- **Focused Investment Partnership (FIP) grants**
  - Highly competitive grants open to partnerships that address ecological priorities identified by the OWEB board *(see list below)*
  - Multi-million dollar funding over a longer time frame to implement projects and accelerate restoration
- **Grantee forums for peer learning, training and networking**

FIP Ecological Priorities

- Aquatic Habitat for Native Fish Species
- Closed Lakes Basin Wetland Habitat
- Coastal Estuaries
- Coho Habitat and Populations along the Coast
- Dry-Type Forest Habitat
- Oak Woodland and Prairie Habitat
- Sagebrush/Sage-Steppe Habitat

Impact of Partnerships

Increased Partnership Performance & Resilience

- With these investments, partnerships will attract new funders, compete well for grants and secure funds over the timescales needed to achieve restoration goals.

We expect partnerships will be:

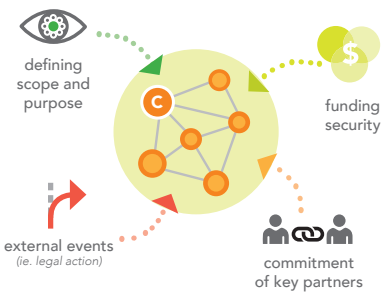
- Better coordinated, drawing on partners' strengths and reducing duplication
- Better able to engage diverse constituencies
- Better able to work through challenges, including scaling up and working in complex landscapes
- Better able to secure resources
- Better able to incorporate best available science and collective learning, and
- More likely to achieve their goals and sustain their impact.

Ecological & Social Benefits

- High performing partnerships working across the state are able to advance restoration at larger scales and sustain benefits in terms of:
  - Healthy, resilient watersheds *(Ecological)*
  - Healthy people and communities *(Quality of Life)*
  - Knowledge of how to restore watersheds *(Learning)*
  - Broad care and stewardship of watersheds by Oregonians *(Social)*
  - Adaptive capacity of communities to support their watersheds *(Community)*
  - Strengthened economies emerging from healthy watersheds *(Economic)*

Partnerships are dynamic

They take on different forms over time in response to funding, commitment of key partners, external events and how the purpose and scope are defined.



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Executive Summary

When OWEB first started their partnership-focused investments in the 2015-17 biennium, they recognized that they needed to learn more about how partnerships functioned and how OWEB, as a funder, could best support partnership success and the likelihood for impact.

OWEB contracted with independent social scientist Jennifer Arnold, Ph.D. for the Partnership Learning Project Parts 1 and 2 to confidentially hear from grantees and understand what it takes to initiate a partnership and how funders can support performance and resilience. OWEB took those lessons learned to evolve the program. Now five years later, they initiated Part 3 to develop a refined framework for understanding partnership resilience and performance.

Willamette Mainstem Anchor Habitat Working Group – CFWWC Projects Manager repairing Western Bluebird Boxes at Native Oaks Ridge.
PHOTO / COAST FORK WILLAMETTE WATERSHED COUNCIL

OWEB's partnership-focused investments:

P-TA
Partnership Technical Assistance grants[1]
support planning and coordination for up to three years

FIP
Focused Investment Partnership grants[2]
focus on implementing strategic actions to address a Board-identified ecological priority over a six-year timeframe.

[1] *P-TA grants were formerly called Development FIP and Capacity Building FIP grants and originally provided funding for up to two years.*

[2] *Focused Investment Partnership (FIP) grants were formerly called Implementation FIP grants.*

Guiding Questions

Working closely with OWEB, we developed the following guiding questions to more deeply explore partnership structure, resilience and four specific aspects of performance:

Partnership types
What aspects of partnership structure, function and context promote greater understanding and clearer expectations for performance among partners and funders?

Partnership Resilience
What elements of resilience help partnerships withstand changes, such as changes in funding, changes in leadership and other disruptive events?

Partnership Performance
What does high performance look like for partnerships?

Strategies to Enhance Accountability and Performance
How do partnerships maintain accountability and a high level of performance?

Specifically looking at:

1. Trust among partners to work through challenging questions together
2. External technical review at the project level for FIP grantees
3. Expanding the circle of people involved in a partnership's work, and
4. Tracking progress and telling the story of impact.

Oregon Model to Protect Sage-Grouse – Working with landowners.
PHOTO / LAKE COUNTY SWCD

Deschutes Basin Partnership PHOTO / CROOKED RIVER WATERSHED COUNCIL

Methods

In October 2022, Jennifer reached out to 31 funded partnerships inviting participation through confidential interviews, group discussions and an online survey emphasizing that this was a voluntary study and not a requirement or expectation associated with grant funding. Partnerships with at least two people participating received a $250 stipend.

Between October 2022 and June 2023, 72 people representing 24 partnerships participated in the survey, individual interviews and/or group discussions, including 21 partnerships that provided enough detail to estimate their partnership type.

The data were analyzed using a 'grounded theory' approach (Charmaz 2006) to identify patterns relevant to the guiding questions. Findings were further developed with iterative rounds of feedback and opportunities for dialogue with partnerships and separately with OWEB staff. Findings from partnerships are paired alongside insights and reflections from OWEB, shown as green speech bubbles throughout.

Findings

Reflecting on the foundational assumptions of OWEB's partnership-focused investments, this study found many examples of partnerships accomplishing more complex restoration work and at larger scales than would be possible with organizations working independently.

Partnership types as a tool for setting expectations

As people in this study more deeply considered the structure and function of the partnerships they participated in, their reflections informed a revised typology, or description of partnership types. Partnerships embraced the value of this tool for reflection and setting expectations internally and with funders. Some partnerships could clearly trace their evolution from one partnership type to another, while other partnerships described different layers to their partnership's work seeing themselves simultaneously operating as multiple partnership types.

OWEB affirmed that they would like the FIP and P-TA grants to support a diversity of partnership types. The P-TA grant could be a good fit for any of the partnership types. The FIP grant, with its emphasis on implementing projects together, could be a good fit for all but the least interdependent partnership type, called a learning-oriented partnership.

Partnership resilience

Echoing findings from Part 2, funding was found to be a consistent driver of partnership commitment and performance. When other aspects of performance were going well and partners wanted to work more collaboratively, more funding enabled them to prioritize shared work, solidify their commitments and boost their collective performance. The FIP grant was like "rocket fuel" in the words of one partnership. In that sense, there was consistent evidence that the FIP program boosted partnership resilience, as expected in OWEB's theory of change.

Partnerships that were not able to secure funding to operate their partnership as planned were found to follow a few trajectories:

- Maintain their structure for a period of time with lower levels of activity,
- Shift to a less resource-intensive structure,
- Reorganize as a new partnership with a shifted scope, geography and/or core partners, or
- Dissolve fairly quickly with partners advancing their work independently.

Many partnerships described overcoming severe stressors, most commonly loss of a key leader or coordinator, and emerging with a greater sense of trust and pride in shared accomplishments. In a few cases, the stressors led to instability and a reorganization or dissolution of the partnership.

"Funding has driven change. A lack of funding for a long time meant that we were [only] able to accomplish goals that had funding associated with them, or were directed by funders. Now that the partnership has received a FIP, I'm hopeful that we will be able to properly staff and support the partnership to achieve the lofty goals laid out in our Strategic Action Plan."

Several elements or 'threads' of partnership resilience emerged from this study that individually or collectively contribute to a partnership's ability to withstand stressors and maintain its integrity and focus:

- **Camaraderie** among partners
- **Success** that creates opportunities for more success
- **Formalized commitments** in the form of plans, agreements and governance documents
- **Consistent funding** especially for coordination
- **Organizational anchors** that provide stability for the partnership and mentoring for smaller organizations
- **Shared leadership** that represents the partnership over individual interests
- **Openness** to learning and change, and
- **External relationships** with people and organizations who can introduce new perspectives and resources.

Greater awareness and focus on these elements will help partnerships prepare for and navigate the challenges that come up.

Warner Basin Aquatic Habitat Partnership – A partnership meeting at the Honey Creek Town Diversion. PHOTO / GRACE HASKINS

High-performing partnerships

Considering what it takes to perform well, four categories of performance emerged from the data: 1) Clarity and Direction, 2) Action, 3) Learning and 4) Alignment. Clarity and Direction were important to all partnership types, while the other categories were more or less important for a particular partnership type to perform well overall.

Defining performance in this way relative to partnership types provides a tool for partnerships and funders to have deeper conversations about how a partnership is structured and why – along with realistic expectations for performance and funding associated with a particular structure. These conceptual tools are designed to be used in dialogue to help set expectations together, rather than as a formula for partnerships to follow.

Strategies to enhance performance and accountability

Fundamental to OWEB's theory of change is that the FIP and P-TA programs are structured in ways that boost partnership performance and accountability.

For this study with a focus on continuous improvement, OWEB was particularly interested in:

1. **trust among partners** to ask challenging questions,
2. **external technical review** of FIP projects,
3. **expanding the circle** of people involved in a partnership and
4. **tracking progress** and telling the story of impact.

The survey questions and interview guides (See Appendix) were structured to illicit partnerships' experiences and suggestions for OWEB in these areas. Detailed findings for each of these sections are included in the full report, including steps OWEB is already taking to implement recommendations.

Synthesis - OWEB's Role in Supporting Partnership Performance and Resilience

Partnerships have been eager to participate in the FIP program because the scale of funding over six years allows them to tackle more ambitious projects over larger landscapes. However, there was evidence that this hard push for implementation has sometimes kept them from pausing to check-in on trust, reflect on whether projects are meeting strategic priorities and consider opportunities to expand their circle. Yet, there were also many examples of partnerships effectively scaling up their work, while still dedicating time to reflection and strategic thinking. Overall, there is evidence that the supportive culture within OWEB mitigates for this tension to perform at an accelerated pace and that benefits for performance and resilience outweigh the costs and stressors.

Overall, OWEB's investments in partnership planning, governance, coordination, project implementation and monitoring have been found to be well-positioned to support high performance and resilience. This study finds that the biggest near-term change that OWEB could make to support partnership resilience would be streamlining administrative burdens from the FIP program so that partnerships could dedicate more of their time to the operation of their partnership – specifically, streamlining project applications, technical review, reporting guidelines for monitoring and use of the online application portal and grants database. OWEB is working on integrating some of the recommendations from this study, while others like the database are not possible at this time.

Further investments in institutional support for monitoring, such as near-term investments in peer learning opportunities and training workshops, were also identified as a high priority for investment to support resilience. Monitoring is especially important since partnerships who can learn from their efforts and tell the story of their success have been better positioned for success and additional funding. OWEB holds a gathering for FIP and/or P-TA grantees every biennium, and OWEB staff are interested in more frequent peer learning or peer mentoring opportunities. However, they are considering what is possible given their staff capacity. Over the long-term, support for partnerships to expand their circle, including an emphasis on underrepresented groups, has the potential to boost resilience by tapping into the creative potential of broader constituencies and more diverse funding sources.

OWEB-BEF retreat, January 2023. PHOTO / JENNIFER ARNOLD

Conclusion

Overall, most of the assumptions of OWEB's partnership-focused investments have held true with some fine-tuning of assumptions about performance and resilience. OWEB's effort is striking in its long-term commitment to invest in a breadth of partnerships working in different ecosystems across the state, its openness to learn alongside partners and its commitment to continually evolve the program to have the greatest impact possible.

However, program innovations must fit within the funding OWEB has for staff and infrastructure such as the online application portal and grants database – funding which is decided through the legislative budget process and relatively modest compared with their large funding portfolio. Program innovations must also fit within the statutes that govern the use of lottery funds for the benefit of water quality, watershed function, native fish, wildlife, plants and ecosystems. As OWEB continues to clarify their values and commitment to equity and environmental justice and as they learn from ongoing innovation led by partnerships and tribes, the interpretation of these statutes may play a key role in the future evolution of their partnership-focused investments.

OWEB's focused commitment to learning and adaptation in support of high performing partnerships has yielded many insights and practical tools that will be of use to partnerships and funders working in restoration and across sectors.

Salmon SuperHwy – Fish salvage for Clear Creek with multiple partners present: ODFW, USFS,Tillamook County Public Works.
PHOTO / JUSTIN BAILIE

John Day Basin Partnership - Members and agency partners tour a process-based restoration project funded by the FIP in the Thirtymile Watershed, May 2023.
PHOTO / HERB WINTERS

Warner Basin Aquatic Habitat Partnership – ODFW Fish Biologist Justin Miles doing fish salvage before Relict Diversion Construction. PHOTO / BRANDI NEIDER

Introduction

In the 2015-2017 biennium, the OWEB Board dedicated a portion of their spending plan to invest in restoration work carried out by high-performing partnerships with the belief that partnerships can work at a larger scale and more effectively tackle complex restoration challenges than individual organizations. They created two grant offerings: a multi-million dollar Focused Investment Partnership (FIP) grant focused on implementing their strategic action plan in a specific geography over a six-year grant period and a Partnership Technical Assistance (P-TA)[3] grant for partnerships to develop a strategic action plan or improve their governance.

When the first grants were awarded, OWEB recognized that this was a new area for their grantmaking and they wanted to learn more to inform the evolution of their programs. Their organizational culture is marked by openness to learning, responsiveness to feedback, commitment to continuous improvement and care for the relationships they have with partners and grantees throughout the state. They have an impressive funding portfolio with long-term dedicated funds from Measure 76 state lottery revenue, which gives them financial stability from which to evolve their programs. And yet their staffing and infrastructure is funded through the state legislative budgeting process, which is modest compared with the size of their funding portfolio. The evolution of their grant programs must also fit within the Oregon statutes that define how lottery funds can be spent for the benefit of water quality, watershed function, native fish, wildlife, plants and ecosystems.

[3] *Formerly called a Development FIP grant and a Capacity Building FIP grant.*

Background

In 2017 and 2018, OWEB contracted with independent social scientist Jennifer Arnold, Ph.D. of Reciprocity Consulting, LLC to conduct the Partnership Learning Project Parts I and II with the guiding questions:

- **What do partnerships need to be resilient and maintain a high level of performance?**
- **How can OWEB improve and innovate their partnership-focused investments to support high-performing, resilient partnerships that can make progress toward desired ecological outcomes?**

From Fall 2016 to Spring 2018, findings were developed from meetings with 14 funded partnerships, interviews with 47 individual partners and survey responses from 137 partners. Findings helped define the diversity of partnership types and the support they need to establish and evolve. The study also illuminated misconceptions about the two granting programs among other feedback.

OWEB applied findings from this project to acknowledge that their partnership-focused investments are intended to serve a range of partnership types and that partnerships are not expected to fit just one model of success. OWEB clarified that the P-TA planning grant was not intended to directly lead to a FIP grant. They made the following program changes to differentiate the two grant programs:

- Renamed the planning grant from a Capacity Building FIP grant to a Development FIP grant to a Partnership Technical Assistance grant, now completely removing FIP from the name.
- Moved the P-TA grant administratively to a different program, and
- Expanded eligibility requirements for P-TA applicants so that they do not have to focus on a Board-identified ecological priority, which is a requirement of FIP applicants.

Siuslaw Coho Partnership - Partners gather on Waite Ranch in preparation for implementing a large-scale restoration project. PHOTO / ELIZABETH GOWARD

Oregon Model to Protect Sage-Grouse – Completed juniper and fencing projects. PHOTO / LAKE COUNTY SWCD

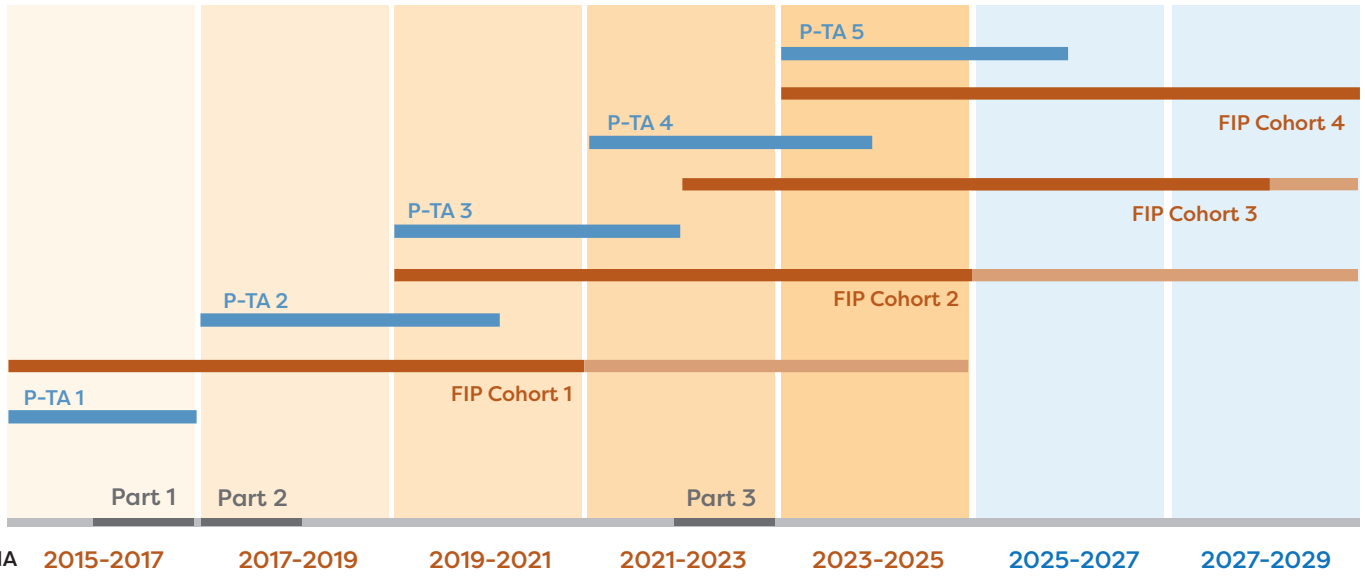
In response to the finding that capacity funding to coordinate a partnership was not covered by most funding sources, OWEB also added a new funding category to the P-TA grant offering called "partnership capacity" which could be used to fund a facilitator and/or staff time for coordination. They also allowed partnerships to apply for a P-TA grant for partnership capacity funding only, whereas previously P-TA funding needed to be used for strategic planning and/or strengthening a partnership's governance. OWEB emphasized that partnerships finishing a FIP grant could apply for a P-TA grant for partnership coordination only or to update their strategic action plan and governance documents.

In all, the Partnership Learning Project Parts I and II helped clarify program goals and assumptions, which OWEB used to provide clearer guidance for grantees and prospective applicants.

Now, more than six years after the first grants were awarded and just as the first cohort of FIP grantees are working to complete their final round of funded projects, OWEB initiated the Partnership Learning Project Part 3, again contracting with Jennifer Arnold, Ph.D., to more deeply understand partnership performance and resilience in specific areas defined by the guiding questions below. This research study was implemented with iterative cycles of reflection and feedback throughout to promote collaborative learning and growth for the benefit of both OWEB and the partnerships.

Timeline of OWEB Grant Awards with Partnership Learning Project Parts 1, 2 and 3

The dark orange line indicates the duration of a FIP grant award, but projects can take another 2-4 years after funding is awarded to complete, indicated with the lighter orange line. This means the work of a FIP initiative could extend 8-10 years in total.



Guiding Questions

- *What aspects of partnership structure, function and context are most relevant to the goals of the P-TA and FIP grant offerings?*

  What tools support greater understanding and clarity among partners and funders?

- *How do partnerships build resilience to withstand changes, such as changes in funding, changes in leadership and other disruptive events?*

  Partnership dynamics: *How do partnerships respond to sudden changes in funding or leadership? How do partnerships anticipate their structure, funding or focus may change after the current OWEB grant is complete?*

  Threads of resilience: *What are threads, or elements, that individually or together allow a partnership to more effectively respond to changes and maintain their focus?*

  Barriers to increasing resilience: *What barriers do partnerships face in building resilience? How can the P-TA and FIP grants support greater resilience?*

- *What does high performance look like for partnerships?*

  Are there differences by partnership type?
  What tools support greater understanding among partners and funders?

- *How do partnerships maintain a high level of performance and accountability?*

  1. Trust to ask challenging questions: *How do partnerships build the capacity to ask challenging questions of each other and direct their collective work where it is most likely to have the greatest impact?*
  2. External technical review: *Within the FIP Program, in what ways does OWEB's technical review process add value and support high performance? What are areas for improvement?*
  3. Expanding their circle: *To what extent are partnerships working to expand their circle to enhance their accountability, relevance and ability to implement their theory of change? Expanding the circle refers to including new partners and/or expanding the circle of people who contribute to their work or benefit from it.*
  4. Tracking progress and telling the story of impact: *To what extent are partnerships able to track progress toward their goals by measuring long-term ecological outcomes and tell the story of their impact? What successes and challenges have they experienced? What adaptations or recommendations emerge?*

Methods

To guarantee confidentiality and encourage candid feedback, OWEB contracted with independent social scientist Jennifer Arnold, Ph.D. of Reciprocity Consulting, LLC.

Coordinating with OWEB staff, we sent out an email to the coordinators of 31 partnerships who received either a P-TA grant or a FIP grant. We excluded partnerships in the third cohort of FIP recipients who did not receive a P-TA grant since they had little interaction with the grant programs at the time the study began.

Partnership coordinators were asked to encourage everyone from their partnership to participate in whichever method they preferred: an online survey, a virtual individual conversation and/or a virtual group discussion. OWEB directly communicated with partnerships that participation was not a requirement of their grant and that whatever they shared would be confidential and not linked to their name or their partnership. All partnerships who had at least two people participating received a stipend of $250 to demonstrate appreciation for their time and energy. Reminder emails were sent to encourage participation, including personal outreach to individuals suggested by other participants.

Altogether, 73 people representing 26 partnerships participated with some individuals representing more than one partnership. Twenty one partnerships provided enough detail to understand the structure and function of their partnership and estimate their partnership type, including how it has changed over time and how it relates to their performance and accomplishments.

The data were analyzed using a 'grounded theory' approach (Charmaz 2006) to identify patterns relevant to the guiding questions and develop theories about partnerships inductively from the data. Findings were further developed with iterative rounds of feedback and opportunities for dialogue with partnerships and separately with OWEB staff. Findings from partnerships

Deschutes Basin Partnership - Three Sisters Irrigation District Manager Marc Thalacker oversees canal piping, enabling flow restoration in the Creek.
PHOTO / DESCHUTES RIVER CONSERVANCY

are paired alongside insights and reflections from OWEB relative to these findings, shown as green speech bubbles throughout. OWEB has begun making some improvements even during the course of this study.

Select quotes are shown throughout the text to highlight key findings. They represent individual perspectives that are meaningful to the larger picture, but may not be representative of all partnerships. [Brackets] indicate text added or modified for clarity or to protect confidentiality and ellipses … indicate text omitted for brevity.

Some quantitative survey data are also presented throughout; however, these only represent a subset of the responses. Seven partnerships chose to participate in interviews and groups discussions only, including 29 people total. Their responses are not included in quantitative survey data, but their responses were not markedly different from the survey responses.

Preliminary findings were shared with OWEB at a January 2023 retreat focused on the evolution of the FIP and P-TA Programs in addition to discussions of findings and recommendations monthly throughout the spring and summer. Partnerships and OWEB staff had a chance to review the draft report and provide feedback, which has been incorporated into the final report.

Findings

Reflecting on the foundational assumptions of OWEB's partnership-focused investments, this study found many examples of partnerships accomplishing more complex restoration work and at larger scales than would be possible with individual organizations working independently.

"Our initial hope was that the partnership would result in a much more cost-effective program implementation for our needs. As information evolved on the required costs of implementation, it is difficult to say if cost-effectiveness was an end-result, but we know we are getting a much better product for the community and the environment. And we have program strength in having so many partners committed to the same goals and project successes than if we had gone it alone. For that, it is well worth it and we will be at the table for a long time."

Oregon Model to Protect Sage-Grouse – Landowner collaboration. PHOTO / LAKE COUNTY SWCD

Partnership Types as a Tool for Setting Expectations

A typology, or description, of different partnership types was developed to promote dialogue about realistic expectations for partnership structure and function, not as a prescription for partnerships to follow.

This typology has its origins in the Public Administration literature (Mandel and Steelman 2003; Cigler 1999), but was further developed using a 'grounded theory' analysis of the data from this study. As part of the Partnership Learning Project Parts 1 and 2, a typology of partnerships from the Public Administration literature was used that describes partnership types on a continuum from more autonomous to more interdependent (Mandell and Steelman 2003; Cigler 1999). The relative autonomy or interdependence influences the structure and function of the partnership and the level of funding needed to support operations and performance.

With greater independence and alignment, greater funding is needed to work through differences and hold each other accountable. In the Partnership Learning Project Parts 1 and 2, we developed the continuum adding details that emerged from a comparison of the data, for example describing differences in the partnership's purpose, role of the coordinator and funding needed to sustain specific parts of the structure and function (Arnold 2018).

OWEB said this description of partnership types resonated with them and they used it subsequently to talk with partnerships interested in the FIP and P-TA grants. However, OWEB shared feedback that the continuum, as a linear graphic with greater autonomy on the left and greater independence on the right, gave the impression that grantees should aspire to the partnership type on the right with the highest degree of collaboration and interdependency. However, this is not what they intended. **OWEB wants to support whatever type of partnership is best suited to advance their restoration goals.**

Pure Water Partners - Partners work to replant the Blue River Park as a part of ongoing fire response work in the McKenzie River valley. PHOTO / ELIZABETH GOWARD

Siuslaw Coho Partnership - Restoration Project Managers Kyle Terry (CTCLUSI) and Nathan LeClear (MRT) prepare to break ground at Waite Ranch, July 2023.
PHOTO / ELIZABETH GOWARD

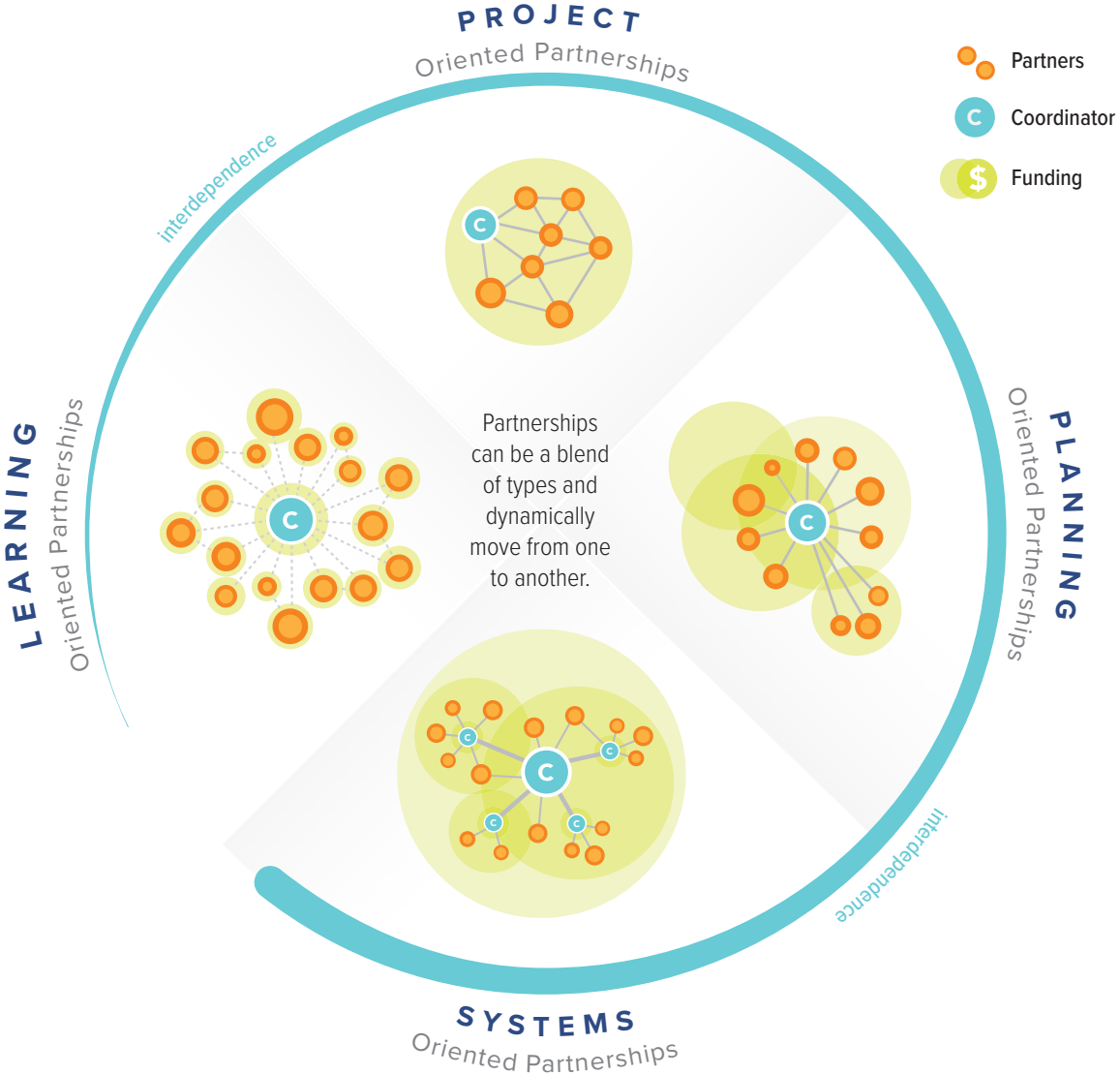
We also received consistent feedback that the partnership type names from the literature were confusing: Cooperative, coordinating and collaborative partnerships were too similar to easily remember. Also, although partnership types were described as a gradient, people often misinterpreted them as discrete types.

Incorporating this feedback, the partnership types are now described as a circular continuum with no assumed endpoint or preferred type. The types were also renamed – learning-oriented partnerships, project-oriented partnerships, planning-oriented partnerships and systems-oriented partnerships – to emphasize the focus of the collaborative work, which is correlated with the level of interdependence. Partnerships can still do various types of work, but they are named for the focus of their collaborative energy. For example, all partnership types may implement projects. A project-oriented partnership will focus their collaborative energy on coordinating and implementing projects, while a planning-oriented partnership will focus their collaborative energy achieving the goals of a long-term strategic action plan, which would include project implementation but also collaboration in fundraising, monitoring and ongoing updates to their plan. A project-oriented partnership typically engages in planning at the beginning of their collaborative work together as they define priority actions and secure funding, but partners might not be committed to working together on an ongoing basis to reach long term goals.

To maintain confidentiality and minimize the influence on any future funding decisions, partnership types are not described with reference to specific partnerships, but rather fictionalized descriptions of each type were created by merging details from different partnerships that best fit each type. Some of the details from these descriptions may not match a particular partnership, even if it fits well within that type, because there is natural variation in how partnerships operate, even within a given type.

It is important to note that some partnerships may be a blend of different partnership types and others may not fit well into any partnership type if they do not have a well-defined focus or structure or if they are struggling to operate as intended.

The partnership types below are defined by the relative autonomy or interdependence of partners. This originates from the Public Administration literature (Mandell and Steelman 2003; Cigler 1999) and was further developed inductively through 'grounded theory' analysis of data from the partnerships in this study.



OWEB's Partnership Technical Assistance grants would be suitable for any partnership type. OWEB's Focused Investment Partnership grants, with their focus on implementation, would be suitable for project-oriented, planning-oriented or systems-oriented partnerships.

A TYPOLOGY OF

Partnership Types

$ Funding for Coordination Interdependence among partners

Learning-Oriented

*Partners are **fully autonomous** with **little interdependence.***

Partners come together to tackle shared questions to improve strategies, practices or policies. Partners independently apply their learning. A coordinator serves as convenor.

Project-Oriented

*Partners are **mostly autonomous** with **some interdependence.***

Partners go through an initial period of collaborative planning and commit to a set of shared actions. Their main focus is coordinating implementation, often with each partner leading their own projects. After projects are complete, the partnership may dissolve or reorganize around a new focus. A coordinator serves as a project manager, a role which may be rotated among partners.

Planning-Oriented

*Partners are **moderately interdependent.***

Partners engage in iterative cycles of collaborative long-term planning and work together to implement shared priorities. Individual partner organizations may have to shift how they operate to align with the partnership overall. A coordinator serves as a facilitator, planning coach and project manager, a role which is usually held by a partner organization who may also contract with an independent facilitator.

Systems-Oriented

*Partners are **greatly interdependent.***

Partners engage in iterative cycles of collaborative long-term planning and establish shared standards, practices and systems to hold each other accountable to systems change. They work through differences, achieve alignment and coordinate for implementation. A coordinator serves as collaborative leader, facilitator and project manager, a role which may be held by a partner or host organization who may also contract with independent facilitators.

Learning-oriented partnerships

Partners are fully autonomous. They come together to tackle shared questions to improve strategies, practice or policies. Partners independently apply their learning, or in some cases collaborate with one or a few other partners. A coordinator serves as an a convener. A partner organization may serve this role.

A hypothetical learning-oriented partnership

- **Initiation** – A partnership forms around the desire to learn together and improve the use of a particular restoration treatment.

- **Structure** – The convenor and leadership team frame up the issues, develop a schedule for regular meetings and organize workshops, conferences or trainings that may include experts and peer learning. They secure funding for the gatherings, communicate with partners about opportunities to participate and disseminate new learning.

- **High performance** – The partnership performs well when partners ask hard questions, integrate the latest science and engage in dialogue. When learning is salient to their work, individual partners apply what they learn to their individual projects. If the learning is salient to a broader policy context, partners might coordinate to share their findings with policymakers or advocacy organizations, individually advocating for a policy change that they developed collaboratively.

- **Potential evolution** – If a subset of partners find synergies in how they want to apply their learning, they might develop a project together, secure funding and implement it together, forming a project-oriented partnership within the larger partnership.

- **Potential evolution** – If partners want to work more closely together over a longer timeframe and they develop enough interest from funders and/or political officials, the partnership can secure funding to transition to a structure with greater interdependence, potentially any one of the other three partnership types.

- **Low performance** – A learning-oriented partnership that is not performing well might be reduced to a series of meetings where partners report what they are doing, which typically does not provide enough value to stimulate learning or improvement. Learning-oriented partnerships that are not effective lag in participation and dissolve or pause until there is new energy and direction.

John Day Basin Partnership PHOTO / HERB WINTERS

John Day Basin Partnership PHOTO / HERB WINTERS

Project-oriented partnerships

Partners are somewhat interdependent. They go through an initial period of collaborative planning and commit to a set of shared goals and actions. Their main focus is coordinating implementation to maximize impact and efficiency, often with each partner leading their own projects. After projects are complete, the partnership may go through another period of planning to secure funding to work together again, they may dissolve, or they may reorganize around a new focus. A coordinator serves as a project manager, a role which may be rotated among partners.

A hypothetical project-oriented partnership

- **Initiation** – A group of partners starts with a regional restoration plan to identify a set of actions and a theory of change that they are well positioned to implement. They draw from the regional plan to develop a strategic action plan and work plan, agree on the terms of their partnership, secure funding and implement the work plan together.

- **Structure** – The partnership meets regularly to coordinate and streamline implementation. They work together to develop a database to track implementation.

- **High performance** – They trust each other that each partner is following through on the tasks they agree to. They address questions as they come up. If problems arise, they work to quickly resolve the issue, typically through compromise, so they can resume their focus on implementation.

- **Potential evolution** – After they complete their funded projects, they might seek out additional funding to continue working together or they might transition to focus on implementing projects individually. If they do not find funding to implement projects together, they are unlikely to stay together. However, they may find value in maintaining relationships and informally sharing updates.

- **Low performance** – If project partners do not communicate openly about their activities and progress with implementation, they may start to form negative judgments about each other's performance. Once mistrust flares up, partners are less likely to share information or ask questions as issues come up, which leads to more problems with implementation and coordination. The ability for the partnership to deliver on their work plan can suffer overall even though some partners are still performing well individually. With low performance, partners tend to stay together to satisfy the terms of their funded work and then part ways.

Planning-oriented partnerships

Partners are moderately interdependent. They engage in iterative cycles of collaborative long-term planning and establish work together to implement shared priorities. Individual partner organizations may have to shift how they operate to align with the partnership overall. A coordinator typically serves as facilitator, planning coach and project manager, roles which may be shared among partners or covered by a team of staff from a sponsoring organization, sometimes also contracting with independent consultants.

A hypothetical planning-oriented partnership

- **Initiation** – A group of partners come together to systematically work through a planning process, create a partnership structure and launch fundraising efforts to implement their plan. Partners identify key questions and uncertainties and a monitoring plan to track progress of the initiative overall.

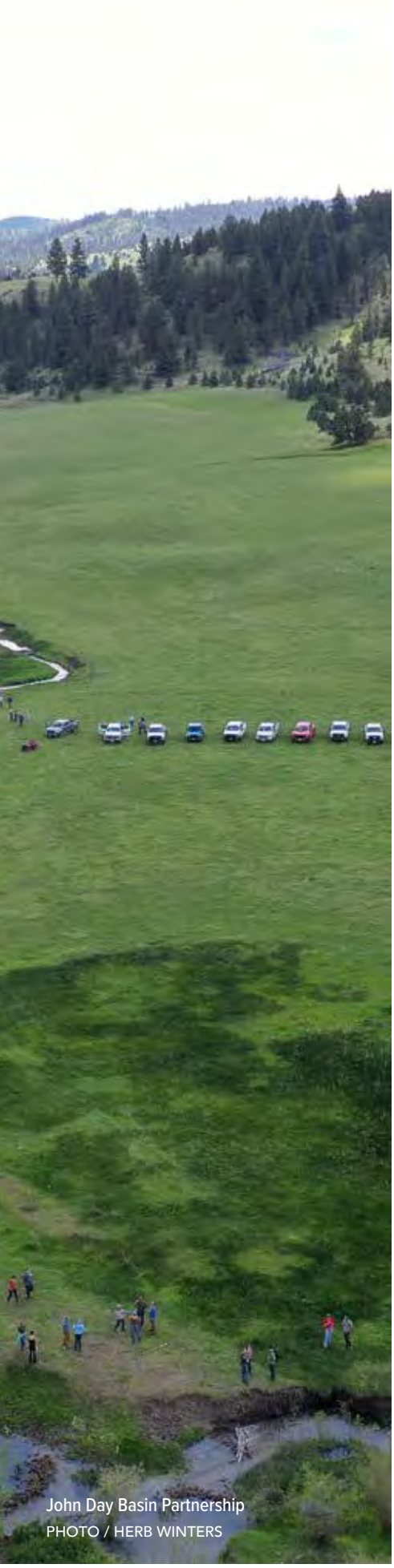
- **Structure** – They establish a partnership structure, including some kind of steering committee with representatives who are asked to make decisions in the partnership's best interest, not the interest of their individual organizations. Steering committee members rotate every few years. They raise funds to hire staff, such as a partnership coordinator, a communications lead and a monitoring coordinator.

- **High performance** – Different partners take the lead on securing funds to implement different parts of the plan, and they coordinate to ensure that work from different funding sources is aligned with the plan they collaboratively developed. Partners periodically reflect on their progress overall and what they are learning from implementation and monitoring so that they can update their plan and adjust their priority actions.

- **Potential evolution** – Their work typically spans more than a decade so they develop their partnership structure and governance practices to be resilient in the face of staff turnover, changes in funding and new learning. Their structure shifts over the years, but they can continue to operate in a similar form for many years.

- **Low performance** – A planning-oriented partnership that is not able to secure funding may stay together with low level activity implementing the plan they developed together. People's commitment may lag, and it may be difficult to follow the governance practices and maintain the structure. It may be difficult to convene partners to regroup and adjust.

John Day Basin Partnership PHOTO / HERB WINTERS



John Day Basin Partnership
PHOTO / HERB WINTERS

Systems-oriented partnerships

Partners are highly interdependent. Partners engage in iterative cycles of collaborative, long-term planning and establish shared standards, practices and systems to hold each other accountable to long-term change. They work through differences, achieve alignment and coordinate for implementation. The complexity of their work may require committees. A coordinator typically serves as a collaborative leader, facilitator, planning coach and project manager. A partner organization may take on these roles, often hiring staff and contracting with facilitators.

A hypothetical systems-oriented partnership

- **Initiation** – A group of partners is highly motivated by the potential for coordinated learning, action and systems change. They have the support of funders and/or elected officials that gives them confidence that they can invest in the infrastructure to support a more interdependent model of collaboration over a longer time frame.

- **Initiation** – As they collaboratively develop a strategic action plan, partners consolidate the latest science and best practices and develop standardized protocols and procedures for all partners to follow. They also frame up key questions and uncertainties, which they use to develop a monitoring plan to track progress.

- **Structure** – The partnership is governed by a steering committee that includes representatives from partner organizations and external members including tribes and neighboring communities. They have various committees that oversee implementation of different parts of their work, but all of the committees gather and engage in learning together once to twice a year.

- **Structure** – The partnership has centralized staff housed in one of the partner organizations that includes a partnership coordinator, a tribal liaison, a community outreach coordinator, a monitoring coordinator and part-time leads for each of the committees that serve as project managers for that section of the work plan.

- **High performance** – Centralized staff work with restoration leads, monitoring leads and researchers to track progress, tell the story of their cumulative impact and apply findings to adaptively manage their future approaches and actions.

- **Potential evolution** – As the partnership evolves, their initial investment in the partnership infrastructure pays off in terms of well-coordinated implementation of complex projects across a large geography. They build relationships with university and agency researchers to focus research on high priority questions. They secure long-term consistent funding, including congressional appropriations and/or a local bond.

- **Low performance** – Despite high initial investment in partnership infrastructure, if a partnership is overly ambitious with their goals or the complexity of their work, they may not be able to show progress with implementation fast enough to secure enough additional funding to keep the partnership operating. Because it is so expensive to operate a highly interdependent partnership, it is likely that partners will not be able to maintain the structure or processes they built. The partnership is likely to dissolve or refocus on less complex projects at a smaller scale.

Partnership focus and context

To clarify, all partnership types may implement projects or focus on learning, but the type is determined based on where the primary focus of collaborative work lies, which is closely correlated with the degree of autonomy or interdependence partners have as they work together. If a partnership's primary focus is learning, the structure, function and level of interdependence among partners will be very different from a partnership who holds annual meetings for reflection and learning but whose primary focus is working together on strategies to reach their long-term vision of restoration.

Partnership type is influenced by who is motivated and invited to join, how partners define their vision, the leadership style of core partners and the level of commitment and resources partners are willing to dedicate.

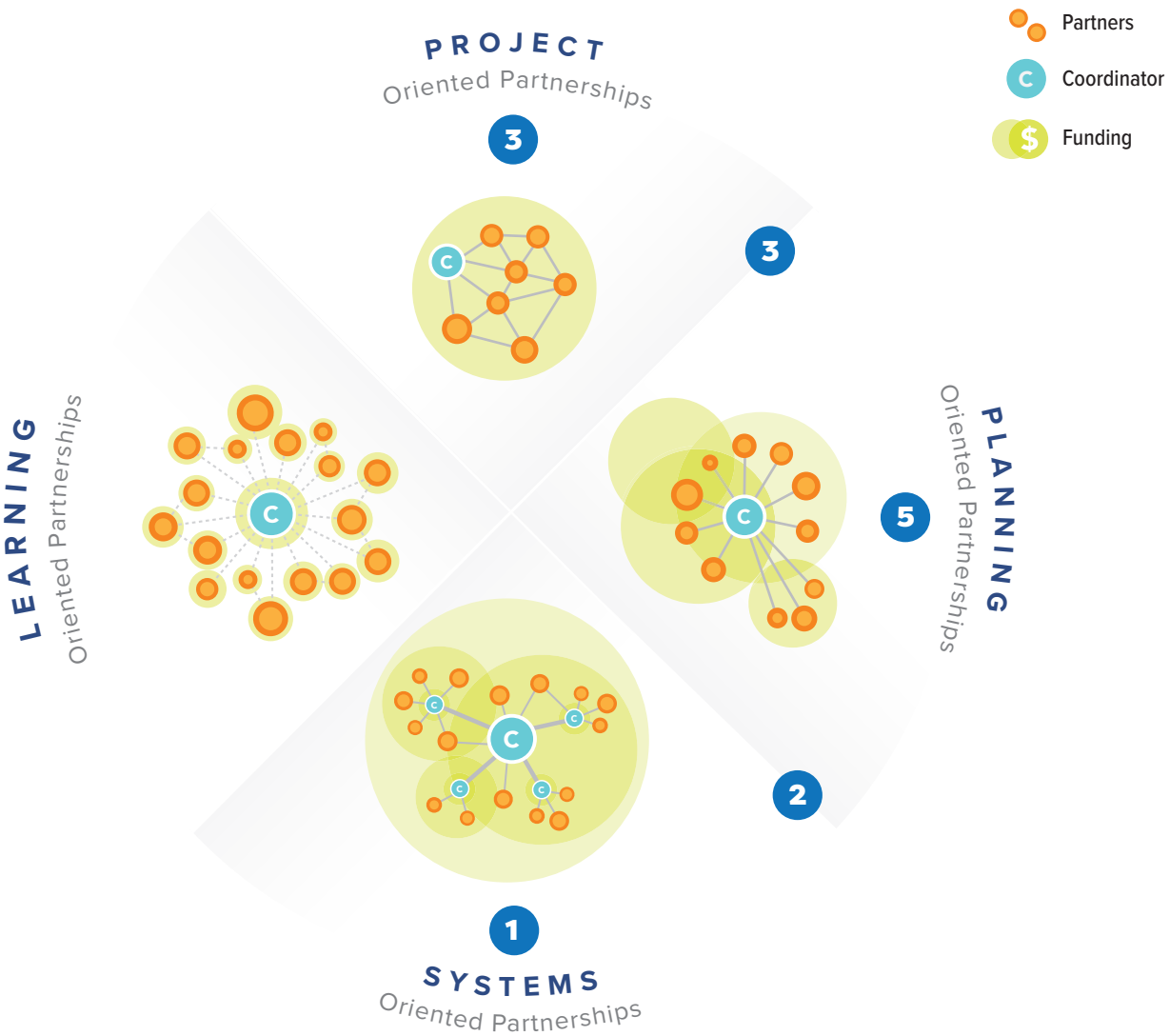
The context of a partnership's work can also shape the partnership type and what performance looks like. Partnerships working in social-ecological systems that are well-understood with well-established best practices are more often structured as project- or planning-oriented partnerships with more focus on the efficiency and coordination of actions. Partnerships working in social-ecological systems with many unknowns and little to no research to draw from require a focus on learning, which means they are more often structured as learning-oriented or systems-oriented partnerships, sometimes planning-oriented partnerships if there is a moderate level of understanding of the system.

In situations when the system is not well-understood but funders or political leaders put great importance on the issue or problem, a partnership is more likely to attract the funding and commitment needed for a systems-oriented partnership to focus resources on learning alongside action and systems of accountability. However, there is greater risk for individual partners in these situations that it may take substantial time to build the learning and capacity to determine the best course of action and then more time before results are seen. If funders or political leaders do not see progress quickly enough and reduce funding prematurely, the value in ramping up the infrastructure needed for a systems-oriented partnership may be lost if they need to transition to a lower level of commitment and infrastructure, such as a project- or learning-oriented partnership.

John Day Basin Partnership - Members and agency partners tour a process-based restoration project funded by the FIP in the Thirtymile Watershed, May 2023. PHOTO / HERB WINTERS

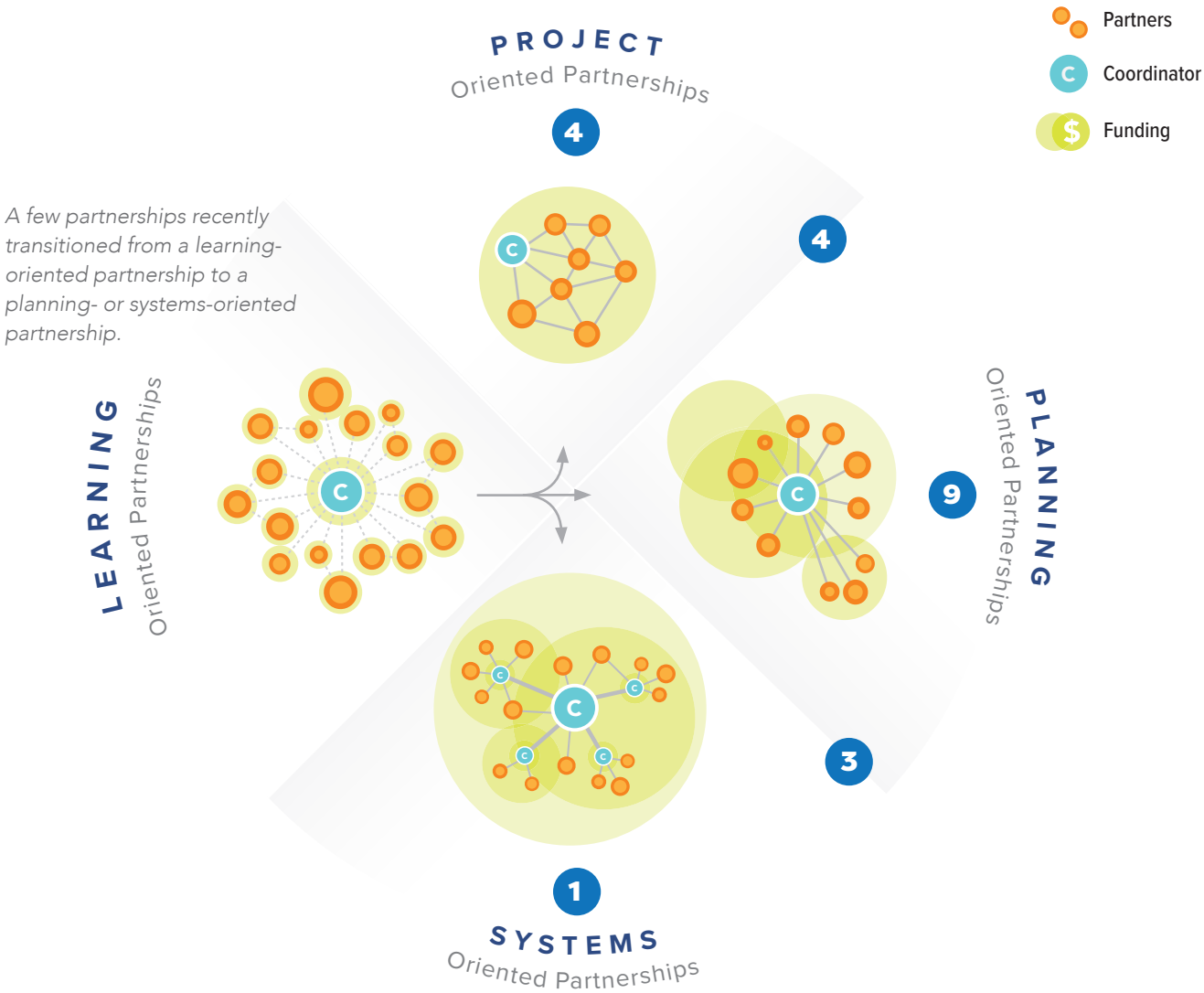
Estimation of partnership types for funded partnerships

Based on the 14 FIP partnerships that provided enough detail to estimate partnership type, FIP partnerships were mostly in the range of project-oriented to planning-oriented partnerships with a few leaning toward systems-oriented partnerships. None of the FIP partnerships fully operated as a systems-oriented partnership, and none were structured as a learning-oriented partnership.



Numbers above indicate the number of FIP partnerships associated with each partnership type or the gradient between types.

Looking at all 21 partnerships that received a FIP and/or P-TA grant and provided enough detail to estimate partnership type, they followed a similar pattern. None of the partnerships who responded are currently structured as a learning network, but several clearly had been functioning that way in the past, including two learning-oriented partnerships who later became FIP grantees operating in the range of planning-oriented to systems-oriented partnerships.



Numbers above indicate the number of FIP and/or P-TA partnerships associated with each partnership type or the gradient between types.

Reflections on partnership types

During this study, partnerships were asked to reflect which partnership type best describes how their partnership operates now, in the past and where they would like to be in the future. Many partnerships felt that this reflective exercise was helpful, especially as a group reflection.

"[The partnership types] were really helpful and eye opening for describing and thinking about our partnership.

I think this partnership will never be a systems partnership. I mean there are just too many distinctly different missions of the various partner organizations, which gives it huge strength. A huge part of the strength of the partnership is that it is so diverse [and] able to accomplish so much, [plus] the fact that the trust has been built and we have [farmers] involved so strongly."

When discussed as a group, new partners expressed how helpful and interesting it was to hear more senior members describe their partnership's history and current context. Some partners shared it with new colleagues to orient them to their partnership's context. This type of reflective activity, in which partners collectively reflect on their past, present and future, is a well-established practice for building group cohesion and revisiting governance practices (Arnold and Bartels 2014). Incorporating this tool into a reflective exercise can help support clarity in structure, function and expectations among partners and funders.

Many people responded that they could see themselves in multiple partnership types depending on which projects or activities were going on. For example, if they had a series of learning-focused meetings, a few large project-focused grants and ongoing work with their strategic action plan, they wanted to respond that they were a learning-oriented, project-oriented and planning-oriented partnership. However, with encouragement to identify which one was the focus of their collaborative energy, people were able to choose one type or a blend of different types.

"Initially, when I looked at this, I jumped right to the project-oriented partnership... [since] for the most part, we're all kind of working off that one funding pool, and individually, we all kind of have our own different opportunities for funding as well.

But the more I looked into this, I would agree that I think we're a systems-oriented partnership with a little bit of all these other partnership types tied in. There's a learning-oriented piece to our partnership with our [annual meetings, which is a] big effort to merge research and management and revisit [our strategic action plan] as information comes in.... So yeah, we've got an interesting dynamic with our partnership. Half of our programs are supported in a large way by [a couple of funding programs] and then the other half of our partnership is funded through other avenues – but what really brings us together are our common goals and objectives. That is kind of an interesting dynamic."

"I think the partners have gotten more committed over the years as the [partnership] has achieved a track record of success in securing funding and project implementation. There were initially some doubts from local partners about whether to join in the effort, or whether it would impact their own strategic priorities and funding opportunities."

A few findings emerged from people's reflections on partnership types:

- Project-oriented partnerships described going through an intensive period of collaborative planning after which they remained fairly autonomous, coordinating and tracking progress in an agreed upon format as they independently implemented projects described in their plan.

- Any partnership type may have a subgroup of partners who form a smaller project-oriented partnership, typically in response to a funding opportunity with specific tasks and timelines that are consistent with and nested within the larger partnership structure and focus.

- All partnership types may have peripheral partners who are tracking but not directly participating in partnership activities. These peripheral partners may have a very different view of the function and structure of the partnership from core partners, who are in a better position to understand and accurately describe how their partnership operates. If core partners do not see the partnership similarly, then this is an area that likely could use improvement for greater clarity and cohesion.

- As partnerships evolved toward increased interdependency, several described perceptions of increased risk and the opportunity costs associated with greater commitment. Perceptions of risk and benefits go into the internal calculations for each partner's desired level of commitment and collective negotiations to decide the structure and function of the partnership.

As an example of what this risk might look like, one partnership, during a group interview, described a somewhat intense negotiation process among partners. They were deciding which grant proposals would lead with the branding and logo of the partnership instead of a collection of logos from different partners, which had been their usual practice. One partner pointedly talked about the risk that this posed to their organization.

"We are many organizations [that make up this] partnership. As a non-profit organization, I'll speak [from my organization's] point of view, and this comes from a lot of experience. [Our organization] works in partnership with just about everything we do. It's very rare that we've got something that isn't involving some other organization or agency. We've got decades of experience with that. It is always a risk when you are working in a partnership that starts to take on its own identity, its own branding, that you suddenly get lost. As a nonprofit, who's trying to survive in this world and raise funds and be recognized, that's a risk. That can be detrimental.

For example, when people in [this area], which is the heart of our home, don't start recognizing [our organization, but] they recognize [the partnership instead], what does that mean for us? That's something that we have to constantly make sure that we're keeping in balance as we move forward in partnership."

Pure Water Partners - Volunteers work to replant a restoration area on the McKenzie River. PHOTO / BRETT ROSS

The acute pinch-point described here was most clearly felt by partnerships with a high degree of interdependence leaning toward a systems-oriented partnership type. However, these tensions may be felt for any partnership type. Some partners from different project-oriented partnerships described tensions when one or more partners shifted the energy and focus of the partnership in seemingly subtle ways that ended up causing a shift in outcomes and a reduction in the predicted benefits for one or more partners. In these situations, when these tensions were openly discussed and negotiated, the partnership maintained high levels of trust and buy-in. When the affected partners had relatively less influence within the partnership and were not able to have open conversations about their concerns and the direction of the partnership, those partners described lingering mistrust, even resentment when questions raised had no response. This type of mistrust can build up over time and impact the cohesiveness of a partnership.

Reflecting on these findings, **OWEB** felt this was an accurate description of the breadth of partnership types. They also felt that any partnership type except for the learning-oriented partnership should be eligible for the FIP grant and all partnership types should be eligible for the P-TA grant.

Currently, partnerships must have a strategic action plan or be developing one to be eligible for a P-TA grant. However, reflecting on the partnership types, **OWEB** wondered if perhaps a learning-oriented partnership did not need a fully developed strategic action plan and would be better served by some other type of planning document more appropriate to their focus and low level of interdependence.

OWEB also reflected that perhaps some of their expectations for FIP grantees may be based on unconscious assumptions that they should be operating as systems-oriented partnerships. **However, OWEB affirmed that they would like the FIP and P-TA grants to support a diversity of partnership types.** They will continue to consider these findings relative to their expectations of grantees and applicants.

Partnership Resilience to Withstand Stressors and Change

Resilience refers to the capacity of a partnership to withstand stressors and undergo change, while maintaining the integrity of the partnership's vision, identity and focus (adapted for partnerships from Walker et al. 2004). While there are many types of stressors, funding has a strong influence on the commitment of core partners and the ability to maintain the integrity of the partnership, referring to the integrity of the vision and scope even if the structure changes.

Grande Ronde Restoration Partnership - Sheep Creek, upstream mainstem near meadow. PHOTO / GRANDE RONDE MODEL WATERSHED

Resilience in the context of OWEB's theory of change

Referring back to OWEB's theory of change for partnership-focused investments, OWEB expected that P-TA grants would boost partnership performance and resilience by developing clarity around a partnership's theory of change, priority actions and governance to coordinate implementation. They expected some P-TA grantees would go on to become FIP grantees, but that most P-TA grantees, now highly competitive with their strategic action plans and strengthened governance, would find funding for implementation elsewhere, including OWEB's Open Solicitation program and other state, federal and private sources. To ensure that P-TA grantees got the most from this opportunity and developed strong plans and governance, OWEB developed resource guides on Strategic Action Planning, Monitoring, Adaptive Management and Partnership Governance, also publicly available for any partnership (referenced in OWEB's theory of change).

Most partnerships who received P-TA grants did describe this grant opportunity as a way to increase their readiness to do more complex work and position themselves to secure competitive funding.

"Our partners are invested in [our shared] goal, and it is helpful that one organization is coordinating the effort. The track record of success has built momentum, and partner commitments are likely to keep things moving. The [P-TA] funding from OWEB that enabled us to develop our [charter], strategic action plan, financial plan and communications plan has been important in building resilience. The process, though sometimes a bit painful, helped resolve many lingering disagreements or issues and got everyone on the same page. Now we have those documents to refer to and guide us."

- Quote from a P-TA grantee

As for the FIP grants, OWEB expected that dedicated implementation funding for six years would boost the performance of grantees accelerating progress toward their restoration goals, while also showcasing their successes making them highly competitive for other funding sources. OWEB never intended to fund individual partnerships on a long-term basis, but rather to invest in their performance for six years with the expectation that FIP grants would be a catalyst for greater investment and impact beyond that timeframe. Funding partnerships for six years also allows OWEB to fund different types of partnerships over time, focused on different ecological priorities in different parts of the state.

Partnerships consistently described the value of the FIP grant in terms of boosting performance like 'rocket fuel' and supporting resilience.

Several partnerships that received the FIP grant were explicit that the FIP grant didn't make or break them, but accelerated the work they were already doing. While other partnerships identified the FIP grant, and in some cases even the P-TA grant, as a primary driver of their forward momentum.

OWEB reflected that providing funding for more than six years would stretch partnerships to try to propose on-the-ground projects beyond a realistic planning horizon. Costs beyond that timeframe are also difficult to predict due to fluctuating material and labor costs, which have been especially challenging in the last few years. In OWEB's experience, some FIP partnerships struggled to put together strong project proposals in their last biennium of funding due to changing conditions and new information since they developed their FIP application. They also found it can take partnerships 2-4 years to implement projects, which means up to 8-10 years to complete all funded projects.

"The FIP funding has been a wonderful come-alongside for our partnership; our partnership does not exist because of it."

"[After the FIP funding,] we may just go our different ways unless we find another funder to keep it going."

"When our partnership was first founded, we were trying to grapple with all of the threats to [the species] and their habitat and figure out how pooling our knowledge, resources and projects could move the needle. After a number of discussions, we realized we needed a formalized [strategic action plan], which two very smart partners authored for the group. We next explored how to take action on [the plan], and one of our partners encouraged the group to apply for a FIP grant. We tried it, and I don't know how to describe what a tremendous difference it has made for our partnership to be able to fund the work we knew needed to be done – and utilize FIP grant funds to leverage other funds, expand impact with other projects, and encourage private landowners to get involved. It was like adding rocket fuel to our plan.

In all, our partnership structure, function and partner composition hasn't changed much over time, but our impact has grown so much farther than we could have done without OWEB coming alongside our vision. The funding through OWEB has allowed us to address many urgencies, and we are in place as a partnership where we are able to step back and start thinking more deeply about our next steps in order maximize investment of time and resources on a scale we couldn't imagine being at prior to the FIP grant."

Partnership dynamics after the end of a P-TA or FIP grant

As of 2022, seven out of 25 P-TA grantees went on to receive a FIP award. These partnerships reflected on the power of receiving both grants, one after another.

OWEB-BEF retreat, January 2023. PHOTO / JENNIFER ARNOLD

"In [our watershed], partnerships have been occurring for 10-20 years, but on a smaller scale than today. Once [this partnership was] formally created, the group was awarded a [P-TA grant] that led to the creation of [governance documents] and a steering committee, [which] were critical to our success. Then the hard work began to develop a strategic action plan that brought everyone to the table to start looking at the long-term planning and prioritization in the basin. [We created our plan, which] remains the backbone of the partnership's vision. A successful FIP proposal shifted the focus to project implementation with a smaller focus on planning. … There have been small hiccups along the way, but generally, the partnership has remained cohesive and highly functioning. Some key steering committee members with institutional knowledge of the effort have moved on, but these positions were quickly filled with ambitious individuals that kept the momentum going. Recently, the steering committee has begun discussing more long-term initiatives, but this is still being evaluated."

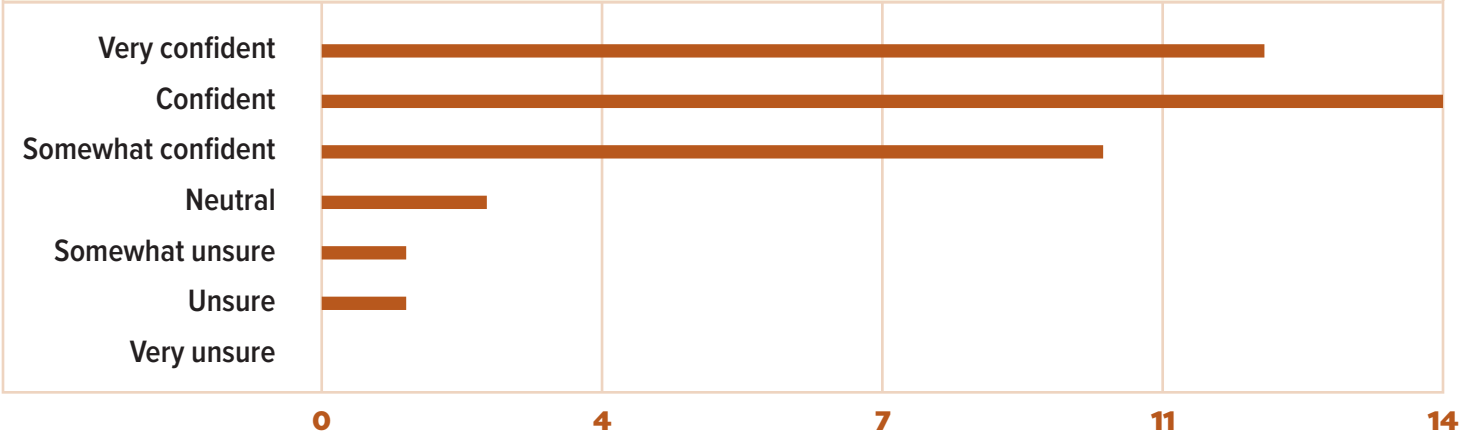
Several other P-TA grantees, who applied for a FIP but were not selected, also reported that they have been highly successful securing other funds, including OWEB's Open Solicitation grant, state, federal and local funding sources. One partnership reported that they have been so successful in raising funds that they recently declined a large federal award that had too many administrative strings attached. They were able to make this choice because they had other large grants.

When asked about their future outlook, many partnerships felt confident that they would be able to sustain their partnership's work as different funding opportunities come and go. Several partnerships expressed confidence based on their history of securing tens of millions of dollars in federal funds and/or hundreds of thousands of dollars in private funds. Two partnerships developed a steady source of funding from rate-payer fees to balance out the ups and downs of funding from grants.

Resilience to Funding Changes

To what extent do you feel confident that your partnership will be resilient and sustain its work as different funding opportunities come and go?

Note: This reflects survey responses only and not responses from interviews or group discussions.



A few of the FIP grantees anticipated that they might have to scale back their work after the FIP was over and/or rely more on federal resources, while a few considered potentially restructuring the partnership, merging with another or splitting off to focus on a different issue or geography, potentially applying for another P-TA or FIP grant. A few other partners anticipated a state of flux and uncertainty after their FIP or P-TA grants.

Oregon Model to Protect Sage-Grouse - Installing sage grouse fence markers.
PHOTO / LAKE COUNTY SWCD

"We have a diverse funding pool at this time. However, the funding commitments are linked to the timeframe of the FIP – 6 years. [We are] uncertain if funders will continue to invest after that timeframe."

"I'm confident in our [partnership] and the existing OWEB FIP support. What might come next for [us] after the FIP funding is over? I suspect that partners will lean heavily on funded government agencies to continue the work with limited and less formal wider collaboration."

However, not all P-TA grantees went on to implement the strategic action plans they developed with their P-TA funding. After the end of the P-TA grant, three partnerships described their partnership as somewhat or completely dormant until they can secure additional funds and/or re-energize a potentially new configuration of partners, which likely would also require an updated planning effort. Those partnerships that have been able to hang on until more funding is secured often rely on one or more partners who are fiscally and organizationally well-established and/or private funding sources to keep at least a minimum of communication and coordination. One partnership described a series of work groups within the partnership that "dissolved overnight" as soon as private funding for the work group coordinators ended.

One partnership described a process of dissolving a previous partnership structure and reorganizing around a new focus, after which they described being ready to respond to emergent funding opportunities. This newly structured partnership quickly launched into implementation with a sudden large funding opportunity, gaining new energy and momentum.

"[Our partnership] began largely as a group of organizations with similar goals and overlapping geography to prioritize planning and actions that worked in tandem and leveraged one another. As we worked together, we coalesced around the notion of a [partnership fund] through which partners would pool resources and facilitate partner-approved projects and priorities. As we further developed [governance documents] for working together, we focused more on the roles and strengths that each organization brings to the table in terms of Coordinator, Funder, Implementer, etc. The partnership framework paid dividends in being nimble and ready to respond to [needs that emerged suddenly in the region] and to best execute the various landowner, implementation, and oversight [tasks required with the large amounts of funding available]."

Partnership dynamics in response to other stressors

Besides changes in funding, another prominent stressor that was mentioned by at least 12 of the 26 partnerships we heard from was the loss of a coordinator and/or key leaders in the partnership. Several partnerships described the process as challenging but ultimately rewarding and positive as partners pitched in during the transition and onboarding process. Several FIP grantees reflected that it can be hard to retain a highly skilled coordinator or leader as they may be actively seeking opportunities to advance their career before the end of a big grant. This may be especially true in rural areas as hiring and retaining employees and board members overall is a challenge given smaller local populations to recruit from and limited housing for people moving to the area.

"Turnover among leaders at participating organizations has both delayed some actions and changed the nature of conversations as well as the focus – or what is considered the work that needs attention."

"Following the emergency response phase, the partnership is now trying to transition away from a task force incident command operation with its top down decision-making to collaborative system-oriented decision making – while we are still working at a pace that is not sustainable (we have not slowed down and are still running as if we are in emergency in some respects), and we are trying to scale up. [There are] a lot of inefficiencies due to growth of organizations (onboarding new people quickly), expansion of the type of work we are doing, and scaling up work with the influx of funding."

Oregon Model to Protect Sage-Grouse – Spring development trough with wildlife ramp. PHOTO / LAKE COUNTY SWCD

One partnership also discussed a natural disaster in their area as a stressor that ended up reshaping the partnership and refining their theory of change, integrating a focus on human health and wellbeing. In this case, the stressor ended up bringing more resources and activating the partnership more than ever. However, the stressor also created a partnership structure modeled after a hierarchical emergency response incident command system, and now after the emergency has passed, the partnership has had to work through tensions associated with that structure to evolve to be more transparent and collaborative. The pressures they describe from quickly ramping up their pace and scale alongside the need to take care of staff and evolve their partnership is perhaps not as intensely felt in other partnerships, but definitely a common theme when large amounts of implementation funding are suddenly available.

Threads or elements of resilience

Throughout as partners reflected on what helped get them through various stressors, several threads or elements of resilience emerged as important across partnerships and partnership types. The analogy of thread is used with the idea that each thread helps hold the integrity and focus of a partnership, and together multiple threads reinforce each other, as in strands of twine, for even greater resilience.

1 Camaraderie – People like each other and are willing to go above and beyond to help each other when there is a need or crisis, which develops a sense of pride and care for each other. They enjoy their time together and feel energized working on shared passions and interests. This was frequently highlighted by partners when asked what inspired them to invest their time and energy into the partnership.

2 Success – Success breeds more success. Demonstrated success leads to a feeling of pride and shared accomplishment which then leads to more confidence and often more opportunities and more success. Referring specifically to success with funding, several people used a variation of a common phrase: Funding begets more funding. However, people also referred to smaller successes such as an inspiring meeting that catalyzed deeper engagement and commitment.

3 Formalized Commitment – Partners document agreements and plans. Partners unite around a common vision, partnership structure and a set of strategies and practices to get there, which is collaboratively developed. They formalized it into a plan and charter with partners as signatories. The level of commitment, complexity of the partnership structure and detail needed in the plan are dependent on the partnership type and the focus and context of their work.

4 Consistent Funding – Partnership coordination is consistently funded. Dedicated, consistent, flexible funding or in-kind support helps fulfill critical needs for coordination and also grant writing that keep partners together. Consistent flexible funding can also take care of unexpected needs. Even a small amount of consistent flexible funding can contribute greatly to resilience.

Rogue Basin Partnership – First annual Network of Networks gathering, May 2023.

5 Shared leadership – Partners work together to share responsibilities and decision-making to shape the vision and direction of the partnership. When shared leadership is a part of a partnership's culture and institutionalized in their structure and processes, they are better able to transition through staff changes, promote innovation and draw on the diverse strengths of partners to respond to challenges.

6 Openness – Leaders and partners are open to learning and change. They are able to reflect on the whys behind strong opinions, consider other views and recognize unknowns in the work. This gives them space to incorporate new learning and bring in people who have different perspectives.

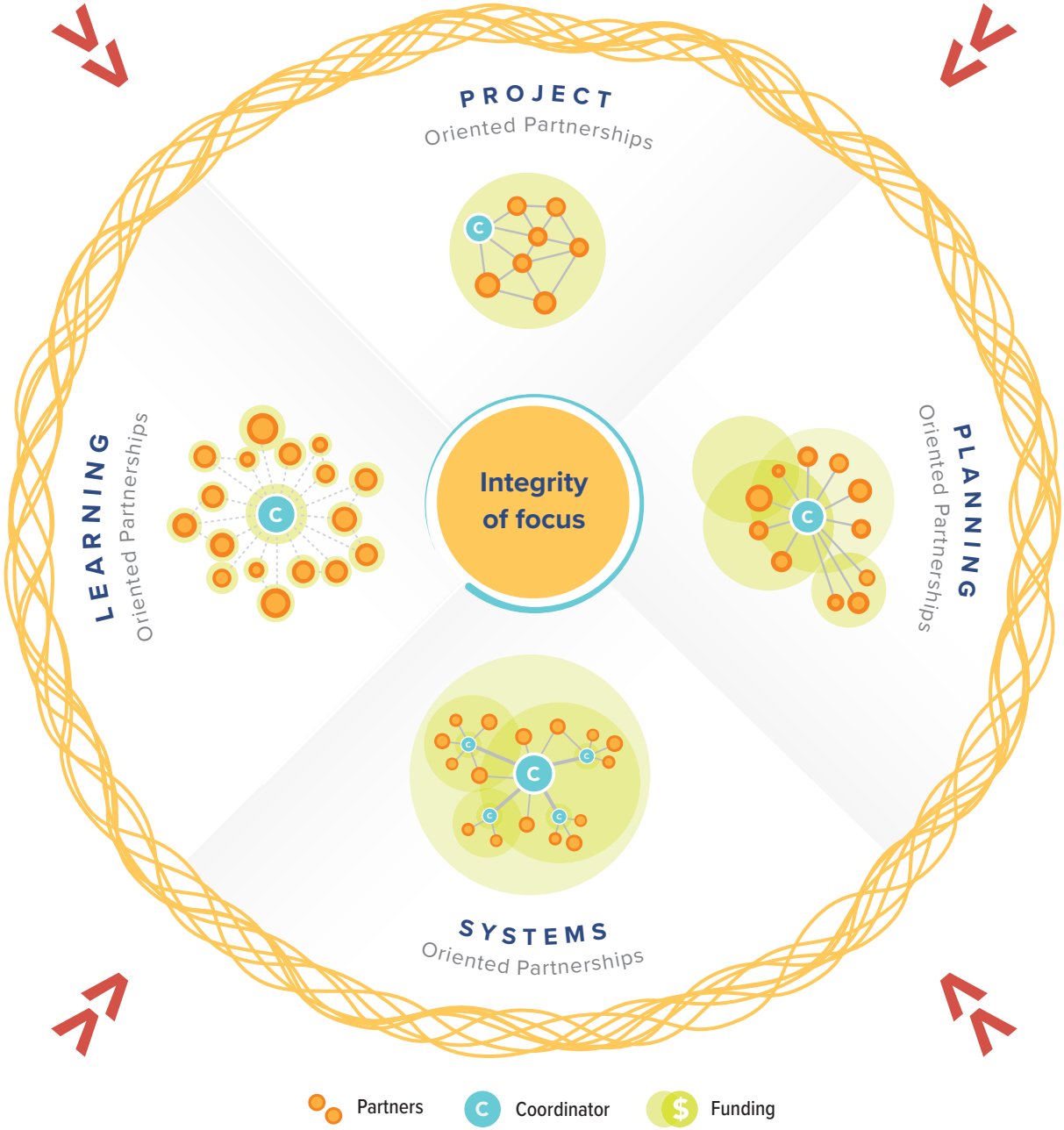
7 Organizational anchors – Fiscally strong partner organizations add stability and capacity. Partners draw from the leadership, stability and in-kind support of financially strong organizational partners to get through challenges. Strong organizational partners may lend particular expertise and experience that open up new opportunities and promote innovation. When strong organizational partners mentor and support other partners to build skills and capacity, the overall partnership becomes stronger and more resilient.

8 External Relationships – Partners have relationships with people and organizations external to the partnership who may introduce new perspectives, serve as a sounding board or help secure resources to extend the capacity, relevance and influence of a partnership.

As partnerships experience stressors, they may change from one partnership type to another while maintaining their clarity of purpose and core members - or they may dissolve, merge with another partnership or shift in purpose, scope and structure to form a new partnership.

Examples of stressors:

>> Loss of a coordinator and/or key leaders
>> Catastrophic events like fire or drought
>> Loss or gain of substantial funding
>> Inaccurate assumptions in the theory of change
>> Strong critiques and/or opposition



THREADS OF

Partnership Resilience

Resilience refers to the ability to withstand changes and stressors and still maintain the integrity of a partnership.

The following threads, or elements, contribute to a partnership's resilience with multiple threads reinforcing each other.

- **Camaraderie**
  Partners like each other and pitch in to help
- **Success**
  Success creates more opportunities for success
- **Formalized commitments**
  Partners document agreements and plans
- **Consistent funding**
  Partnership coordination is consistently funded
- **Organizational anchors**
  Fiscally strong partner organizations add stability and capacity
- **Shared leadership**
  Leadership is shared among partners, both structurally and in the culture of how partners work together.
- **Openness**
  Leaders and partners are open to learning and change
- **External relationships**
  Partners connect with individuals and organizations who can be a source for new ideas and resources

Grande Ronde Restoration Partnership - Dry Creek Pre-Implementation, 2017.
PHOTO / GRANDE RONDE MODEL WATERSHED

Quotes describing threads of resilience

Camaraderie and organizational anchor

"It feels like a family at this point, and seeing the scale of projects increase significantly is particularly rewarding. The additional security added to the smaller organizations in the partnership is also appreciated."

Camaraderie

"When we face difficulties, we face them as a team instead of pointing fingers. I think we were all worried when our coordinator left, but members, myself included, were happy to take on the tasks to ensure that the [partnership] continued to operate smoothly until the position could be filled. Our new coordinator hit the ground running through the support/assistance of members and [the outgoing coordinator] and the transition has been relatively smooth. Our group is made up of individuals who want to get things done and are happy to help others (even if is outside of their duties) when needed in order to get something done."

Shared leadership

"The relationships that have developed over time have made our partnership more resilient to changes in funding. The steering committee, outreach committee, and fundraising committee have established the structure to find additional funding through long-range planning."

Shared leadership, formalized commitment, success and openness

"I feel [our partnership] has always focused on creating diversified funding sources that are more stable and predictable, moving away from living grant to grant. … I think once we complete our transition … to collaborative governance with the tools built to support the larger more complex partnership [goals and functions from operations to prioritization and equity to database upgrade, monitoring and reporting], the collaborative will become highly functioning and will attract funding over time…plus current large funding is over 5 years. We have seen that success breeds more investment and success. Adaptive management has been the cornerstone of [our partnership] over the last 2-3 years."

Formalized commitment and consistent funding

"Our partnership built relationships over time with stable funding sources. The structure and agreements in place provide stability from several sustainable sources. … The partner composition includes sources with large funding reserves dedicated to the partnership."

Consistent funding

"What's helped with the resilience for our partnership? Funding. Just even the $10,000 level of regular, consistent, very flexible funding has been instrumental."

Openness

"In the short time I have been working with these partners, I do believe we have something different here. Along with increased community engagement, the understanding of the ecological science of [this region and ecosystem] continues to grow. I have held past positions where collaboration was not a part of the problem solving process. And because of that, projects lost momentum, partners lost their passion and frustrations grew amongst colleagues. Progress stalled. I came to [this partnership] because I wanted something different and to be a part of something that can make a difference."

Openness

"I'm incredibly proud to be part of a group who is motivated and optimistic over the years. We don't dwell on failures, instead we try to learn from them and move on in a productive manner. We celebrate our achievements, but always realize there's more to do. We continually communicate and ask questions to make sure we are moving forward in the best way possible and assessing any mistakes we may have made. It's an honest group where egos and emotions get checked at the door. It's allowed us to focus on what needs to be done and we are lucky enough to have accomplished quite a bit because of that."

Organizational anchors

"Individual organizational financial strength is a big one. Financially stronger organizations frequently carry the day on partnership work. Individual leadership abilities and availability (time) also play a role."

Organizational anchors

"Commitment to the outcome. Our partnership came together and began the work with no external resources (just what our collective agencies already had) and we will continue to do the work we can ,as we can, regardless of how the partnership is funded. Obviously, we will get much more done with funding, but the partnership will not dissolve without it."

Organizational anchors

"There has been a lot of turn over at the local levels. One watershed council has completely disbanded with no staff for about five years. [Another] watershed council is on its fourth coordinator since the inception of this partnership. The [partnership] has also had complete turnover with four staff having left over time, and all of the current staff are brand new to the watershed. [One organizational partner] has been the single binding thread at the local level to maintain continuity. Having their national program strength and expertise has been very important, and they've expanded to having two staff, now potentially moving to three. However, the imminent departure of their coordinator will be a big setback to keeping momentum. More structurally sound local capacity and a stronger local central coordinating body are big missing pieces for long-term success for restoration in general in this basin."

Grande Ronde Restoration Partnership - Dry Creek Aiwohi Restoration Project Complete, 2022. PHOTO / GRANDE RONDE MODEL WATERSHED

Relationships, success and openness

"I think having a long history of working in a basin, building trust with community members and consistently performing good work while adapting and incorporating new findings, all help to add to our resilience. Our board members are a big part of providing credibility to the work we do within the community and supporting our staff. Our reputation helps us leverage and strengthen partnerships and apply to funding sources."

External relationships

"Having these relationships just really helps move the needle forward on all of our projects. I guess you could say we all know who to pick up the phone and call for what issue and what geography because we have this partnership. And it definitely helps us just strengthen our abilities across the board."

External relationships

"The breadth of the partnership provides many avenues to funding from federal, state and private funding."

Rogue Basin Partnership – First annual Network of Networks gathering, May 2023.

"Funding for partnership coordination or facilitation is very important, as the coordinator can be the 'glue' that keeps things cohesive."

Partnerships completing their FIP appreciated the opportunity to apply for a P-TA grant to support ongoing partnership coordination and/or refine their strategic action plan.

"Aside from the large consistent funding [from the FIP], I think what OWEB has done with providing some smaller grant opportunities to bridge the gap [after a FIP is very helpful]. It allows a bit of an update to our restoration plan and [for us to] spend some time really thinking about what we've accomplished and where our next highest priorities are in the basin. Having some of those other smaller funding opportunities allows the partnership to go through those cycles, while we still continue to implement a bunch of projects. Yeah, that's been really helpful, and hopefully our partnership can get there."

Barriers and gaps to increasing partnership resilience

Considering their resilience and long term outlook, partnerships reflected on barriers or gaps that OWEB and other funders could potentially address.

Not surprisingly given the focus of this study, a strong theme was the need for long-term consistent funding that includes partnership coordination, capacity funding for partners, implementation funding and notably also funding for monitoring, including coordination of monitoring efforts. Some people suggested that partnership coordination funding as part of the P-TA grant should be extended to five or ten years.

Partnerships awarded FIPs frequently commented that the time needed to administer their grants was considerable and aspects of the program were described as time-consuming, repetitive, clunky and frustrating that took energy away from their partnership operations and project implementation. In contrast, partnerships awarded P-TA grants regularly appreciated the flexibility, support and efficient administration of P-TA grants. There were many specific suggestions for ways to streamline the FIP programs, described in the recommendations below. *(See also Findings: External Technical Review, Findings: Tracking Progress and Telling the Story)*

"In my experience with the [P-TA] grants, OWEB was very flexible. It felt like there was trust and professional credibility, and the administration of those grants was efficient and straightforward. That was all really appreciated. With other grant programs in OWEB [including FIP], people have had different experiences, and it can be a burden – to the point that we have some partners who just won't apply for OWEB funding."

Salmon SuperHwy – This new bridge on Peterson Creek restored access to over 6.2 miles of upstream habitat to ESA listed Coho Salmon as well as Chinook Salmon, Chum Salmon, Steelhead, and Cutthroat Trout. Fish were documented spawning upstream of the bridge within weeks of project completion. PHOTO / JUSTIN BAILIE

Partnerships emphasized that monitoring was central to their resilience since it helped them both understand the effectiveness of their actions and tell the story of their progress to secure funding for ongoing implementation. Several partnerships also suggested that it would be helpful if OWEB can help communicate the value of a partnership approach to restoration to amplify their own communications efforts.

As funding was identified as a prominent driver of commitment and performance, partnerships had several suggestions for how OWEB could support, including looking for opportunities for greater alignment among funders and directly linking partnerships to funders.

Partnerships applauded OWEB for the FIP and P-TA programs, which in many ways addressed the gaps they identified, while also making suggestions for further ways that OWEB can support their resilience.

"Courtney [administered our P-TA grant, and she] is a great touchstone person [for all our partners.] There have been moments [in our planning process when we] just called her up and said, "Oh, my gosh, what is going on?" ... Because [OWEB is] so dialed in with all of the other groups throughout the state, for me anyway, it really provided this sense of perspective, kind of like, "You're not alone. It's okay. Other folks are dealing with it. [Your partnership] is doing amazing work, and your reputation is still fine. This is normal." And I could go back and put one foot in front of the other again. [That support has been] important!"

Salmon SuperHwy – A new bridge over Clear Creek, a tributary to the Nestucca River, and streambed reconstruction opened the watershed up for native fish use and natural stream function. Salmon were observed upstream of the bridge weeks after project completion. PHOTO / BRETT ROSS

Recommendations for OWEB to continue

- **A culture of openness and flexibility in grant administration** where grantees feel supported to share questions, challenges and new learning.
- **FIP grants with funding for six years of implementation**, including a breadth of funding categories that can be flexibly used: partnership coordination, stakeholder engagement, restoration, land and water acquisition, monitoring and technical assistance.
- **P-TA grants with up to three years of funding** for strategic action planning, strengthening governance and/or partnership coordination, including the streamlined and flexible administration of these grants.
- **Capacity funding for partnership coordination** as part of the P-TA and FIP grants, including the option for partnerships to apply for a P-TA grant after completing a FIP.
- **Clarify that capacity funding can be used for a monitoring coordinator position,** not to collect data, but for the coordination, synthesis and flow of information, including facilitation to interpret monitoring results together.
- **Learning opportunities for FIP and P-TA grantees** to support skill-building, peer learning and networking, especially in the areas of: monitoring, tribal relations, equity and inclusion, partnership coordination, fundraising and restoration strategies.

Recommendations for OWEB for further support

- **A clearer articulation of what OWEB considers successful performance**, especially with the FIP program.
- **More streamlined FIP grant administration** to minimize the time spent on administrative tasks so that more time can be dedicated to the partnership and its work, specifically in the areas of:
    - **Clear expectations of what is required with the FIP grant** explaining everything that OWEB will ask for over the course of the grant so partnerships can plan for the staff time needed,
    - **Shorter, more concise FIP project applications and ideally ways to reduce the number of project applications** to reduce redundancy with information explained in the strategic action plan and reduce time spent managing so many separate grants,
    - **More user-friendly online application portal and grants database** to to reduce the time spent with a clunky application and reporting interface (See Findings: External Technical Review)
    - **Clearer guidance for partnerships and technical reviewers** to address the concern that some revisions are time-consuming and do not change project design or outcomes (See Findings: External Technical Review), and
    - **Clearer expectations for reporting on monitoring projects** to reduce time spent with revisions. (See Findings: Tracking Progress)
- **Introducing partnerships to other funders** in federal and state agencies to minimize the time for each partnership to track down contacts for each funding program and potentially create a mechanism to share funding opportunities.
- **Alignment among funders,** especially around goals, timing, grant requirements and reporting, for example with the Oregon Water Resources Department's Place-Based Planning Grants, but also coordinating with other state agencies to collectively lobby for federal funding and make a strong business case for increased investment, for example with the Infrastructure Investment and Jobs Act.
- **Communicating the value and uniqueness of this partnership approach** to increase the visibility of partnership work across the state, which partnerships can use to amplify their own messages.

South Coast. PHOTO / OWEB

Understanding High-Performing Partnerships

One of the goals OWEB had for this study was to develop a framework for understand high-performing partnerships and better articulate what success looks like in the FIP and P-TA programs.

Performance refers to the ability of a partnership to achieve their goals and make progress toward their vision and desired impact.

"This partnership took a 'good idea' that was extremely ambitious and turned it into an on the ground, verifiable, actual success. What this partnership has achieved, at halfway to our goal, has been monumental."

Comparing across partnerships and inductively looking for patterns, it became clear that high performance looked different for different partnership types. Several categories of partnership performance emerged - **Clarity and Direction, Action, Learning** and **Alignment.**

Clarity and Direction, which included strengths related to mobilizing people and resources and securing commitment to advance the work, was needed for all partnership types to perform well. Performance in the categories of **Action, Learning** and **Alignment** were more or less important depending on the partnership type. Performance overall for a particular partnership type was driven by one or more categories of performance. Other categories could be beneficial but were not necessary for high performance.

If the partnership type is not considered when evaluating performance, the performance of learning-oriented or project-oriented partnerships may be underestimated due widely-held assumptions that more collaboration is better (Christen and Inzeo 2015).

The categories of performance are show on the next page and described in some detail here.

Clarity and direction

Leadership, dedicated partners and funding

Leaders mobilize knowledgeable people and organizational partners with diverse skills and perspectives who understand the issues and can advance the work. Partners have good relationships with each other and people outside of the partnership that can make things happen. Together, they secure funding that crystalizes people's commitment of time and energy toward a common purpose.

Clear purpose and scope

Partners are clear about the reason they are coming together, including the scope and focus of their work, which is realistic given the people and resources they have dedicated to the work.

Clear roles and decision-making

Partners clearly understand the roles and responsibilities of themselves and others, including how someone can join the partnership, if applicable. The structure of any steering committees or technical work groups is clear, including how people are chosen for those roles. For planning-oriented or systems-oriented partnerships, partners in leadership positions make the best decisions for the partnership and not necessarily their organization. Decision-making rules are clearly written, openly discussed and shared with everyone, including attention to the details that matter most to partners.

Effective communication and coordination

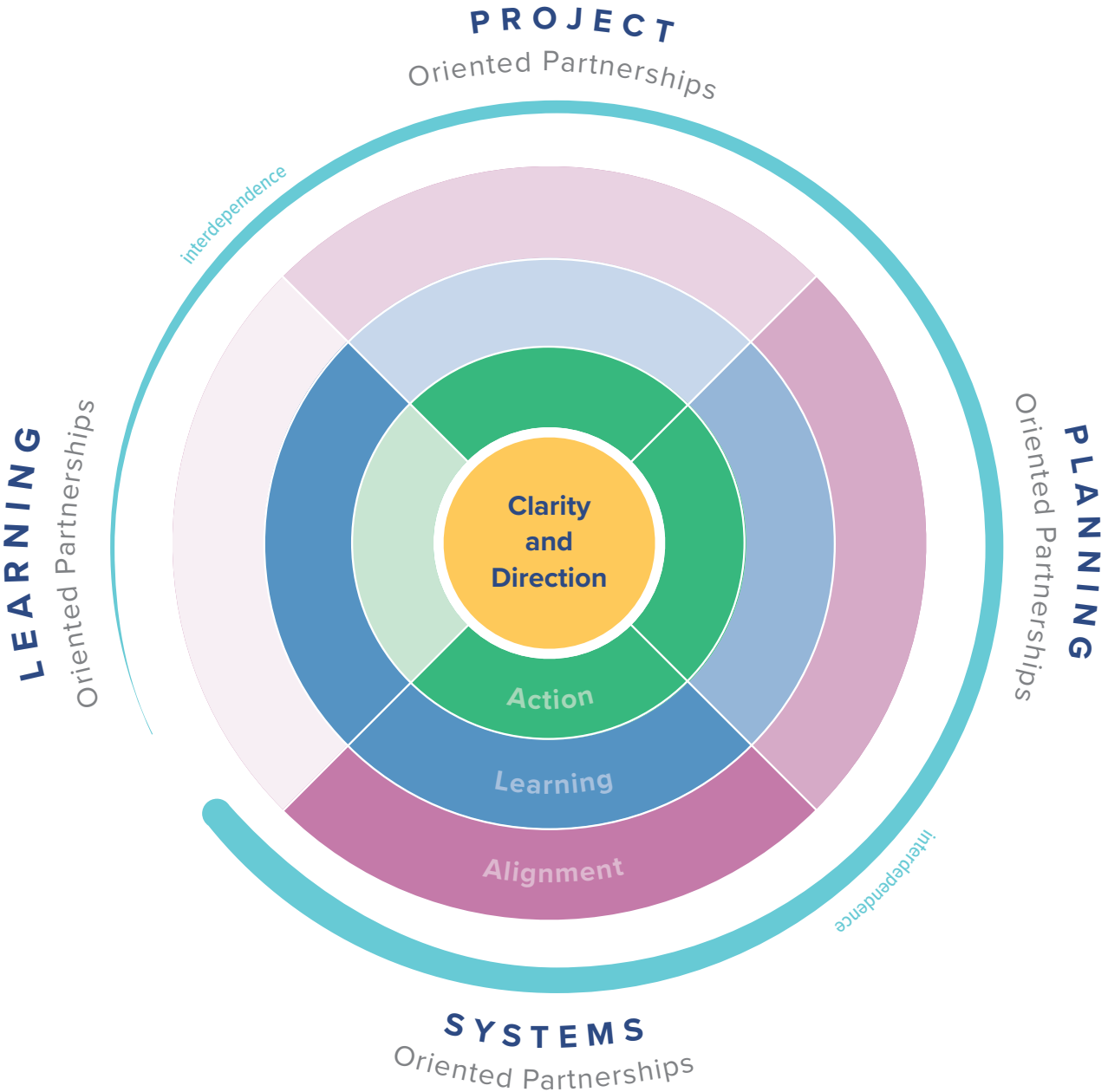
Partners share information with each other and engage in dialogue and problem-solving to build the understanding and relationships needed to advance the work. They coordinate so that their individual contributions effectively contribute to the overall goals and vision, avoid unnecessary duplication and minimize conflicts and inefficiencies. Partners who represent an organization maintain two-way communication between their organization and the partnership so that their organization's leadership is engaged and authentically supportive.

"[Our] partnership has significantly increased communication and collaboration among our local restoration partners. Due to this increased communication conveyed via email or during monthly meetings and/or site visits hosted by the lead coordinator, there has been more efficient evaluation, ranking, and prioritization of projects, as well as overall information dissemination and partner collaboration since 2016."

Performance refers to the ability of a partnership to achieve their goals and make an impact.

LOW — HIGH

High performance looks different for different partnership types. Greater color intensity below denotes categories of performance that are highly important for overall performance for each partnership type.



UNDERSTANDING

High-Performing Partnerships

The following categories of performance were inductively developed from the data.

Clarity and Direction
- Leadership, dedicated partners, and funding
- Clear purpose and scope
- Clear roles and decision-making
- Effective communication and coordination

Action
- Strategic plan with prioritized actions
- Well-executed actions
- Ability to track progress and make improvements

Learning
- Trust to work through hard questions
- Incorporation of new learning and latest science
- Dissemination of learning

Alignment
- Standardized practices and norms
- Systems for feedback and accountability
- Ability to tell the story of learning and impact

Clarity and Direction are important for all partnership types to perform well, while other categories may be more or less important for overall performance depending on the partnership type (See Partnership Types). Partnerships can be a blend of different types and dynamically move from one to another.

Action

A strategic action plan with prioritized actions

Partnership actions are directed by a strategic action plan that explains the partnership's vision, long-term goals and context alongside strategies and prioritized actions. They have a clear theory of change that explains how their work is expected to lead to desired impacts over a specified timeframe.

- Project-oriented partnerships: Emphasis on prioritizing actions in a specific geography and timeframe after an initial planning effort, often based on an existing regional plan
- Planning-oriented partnerships: Emphasis on collaboratively developing a strategic action plan and prioritized actions and updating it together periodically
- Systems-oriented partnerships: Emphasis on identifying questions and uncertainties together as the strategic action plan is developed, implementing actions to test questions, reflecting on outcomes and incorporating learning into plan updates

Well-executed actions

Partnerships have a track record of well-executed actions with evidence that outcomes will be reached in time.

- Project-oriented partnerships: Emphasis on efficiency, scaling up and/or proof of concept
- Planning-oriented partnerships: Emphasis on implementation of a sequence of actions that together will yield a cumulative impact greater than individual actions
- Systems-oriented partnerships: Emphasis on learning so that well-executed actions lead to improved understanding of the system and standardization of strategies and practices that have the greatest likelihood for impact

Ability to track progress and make improvements

Partners have a framework for tracking progress based on their theory of change. They are able to collect data or evidence to learn from mistakes and improve as they plan future projects.

- Project-oriented partnerships: Often increasing the efficiency or effectiveness of projects
- Planning-oriented partnerships: Often increasing efficiency or effectiveness and/or re-prioritizing actions as conditions change or new learning emerges to have a greater chance of impact
- Systems-oriented partnerships: Often increasing efficiency or effectiveness and developing best practices, reprioritizing actions and/or revising the theory of change, sometimes restructuring the partnership with new committees to address new learning

Learning

Trust to work through hard questions

Partners bring up questions or suggestions that could increase the likelihood for impact, even when it may include uncomfortable or surprising feedback for others. Partners demonstrate respect for each other and work through discomfort to promote learning and improvement. Partnerships using skilled facilitation are able to discern which hard questions or topics will move them toward their goals and which may be distracting or unhelpful.

Incorporation of new learning and latest science

Partners create forums to deepen learning, share latest science and help people incorporate it into their work.

Dissemination of learning

Partners find creative ways to articulate what they are learning and share it with others.

PHOTO / ROBERT WARREN

Alignment

Standardized practices and norms
Partners work together to standardize best practices and norms, for example related to partnership culture, conservation practices, landowner outreach and engagement, monitoring and commitments to diversity, equity and inclusion. Systems-oriented partnerships may also align themselves in fundraising approaches, for example using the partnership's branding rather than individual branding.

Systems for feedback and accountability
Partnerships institutionalize processes and structures for feedback and accountability, for example technical review, post-implementation field site review and more formally adaptive management. These processes and structures create time and space for partners to ask questions of each other, reflect on progress, invite constructive criticism and commit to changes that have a greater likelihood for impact. Systems-oriented partnerships tend to be able to justify more detailed, time-intensive processes like formal adaptive management and more explicit mechanisms for accountability among partners.

Ability to tell the story of learning and impact
Partners are able to take all the project-level success stories and tell the larger story of what they are learning together and the cumulative impact of their work over time.

"We have a circular image of our process as a feedback loop. It basically has our prioritization in one corner, our implementation in another corner and then the other half is research, monitoring and evaluation, and then we have a shortcut in the middle, and that's [our annual meeting to look at the most recent science and data], [which leads to] ultimately adaptive management.

And [at our annual meeting] this past week, we hit that diagram on the head. It was awesome, and the reason why is because, better than we have ever before, we really looked at the data that we have and the data that was new, and we asked ourselves, "How does this change what we are going to do?" and we documented it."

PHOTO / ROBERT WARREN

Four Strategies to Enhance Performance and Accountability

OWEB wanted to better understand several specific dimensions of performance and accountability with respect to what they can expect from partners and how they can best support, focusing on the following four topics with findings described in the following sections:

1. **Trust among partners to ask challenging questions** to maximize the likelihood for impact, for example during the development of budgets, prioritization of projects, internal technical review or implementation
2. **External technical review of FIP projects**
3. **Expanding the circle** of people involved either as core partners or some other role, including consideration of underrepresented groups, and
4. **Tracking progress** toward goals by measuring ecological outcomes and telling the story of impact

PHOTO / ROBERT WARREN

Performance within any organization or team is linked to systems of accountability or checks and balances. People with relevant knowledge, expertise or perspectives are positioned to review work, provide feedback, ask questions, and provide support for resolution or improvement where needed.

Voluntary partnerships like those in this study, which do not have formal lines of authority typical of of hierarchical organizations, must rely on trust to develop and enforce internal processes of accountability. External accountability in this context is shaped by funders, technical reviewers and broader constituencies.

Many FIP grantees expressed recognition that with greater investment comes a greater sense of responsibility to use the resources well and have the greatest impact.

"As [we] build all this momentum, I want to make sure it is in service to conservation outcomes and we remain responsive to partner interests and needs. It just feels like with more investment, we have got to make this matter."

"The process that we went through in the development of the FIP grant was super helpful. There was sort of this desire to see success in delivering the best possible proposal that we knew how, and in doing that it meant asking hard questions of all of our projects – and to me that's a fantastic learning benefit of the partnership."

1 Trust among partners to ask challenging questions

From Part 2 of this study, many partnerships felt that relationships were somewhat fragile. Some people described how their partners tip-toed or shied away from bringing up challenging questions about performance and how to best target their efforts for the most impact. Partnerships emphasized that building trust at this level requires substantial investment in relationships along with skilled facilitation to create the space to listen to each other and make decisions together. Some partners felt that they had the facilitation capacity and relationships to do this, while others could see what they were lacking, often without knowing how to improve. In some cases, they requested more training and support for facilitation and consensus building.

In this study, partnerships again echoed the importance of relationship building, and many partnerships described success in regularly working through challenging discussions.

With the FIP and P-TA grant programs, **OWEB** has emphasized the value of governance documents and planning tools to structure collaborative work in ways that can support trust among partners. However, they also recognize that investments in relationships building, such as spending time together at site visits, are vital to working through challenging questions and directing work toward the greatest likelihood for impact.

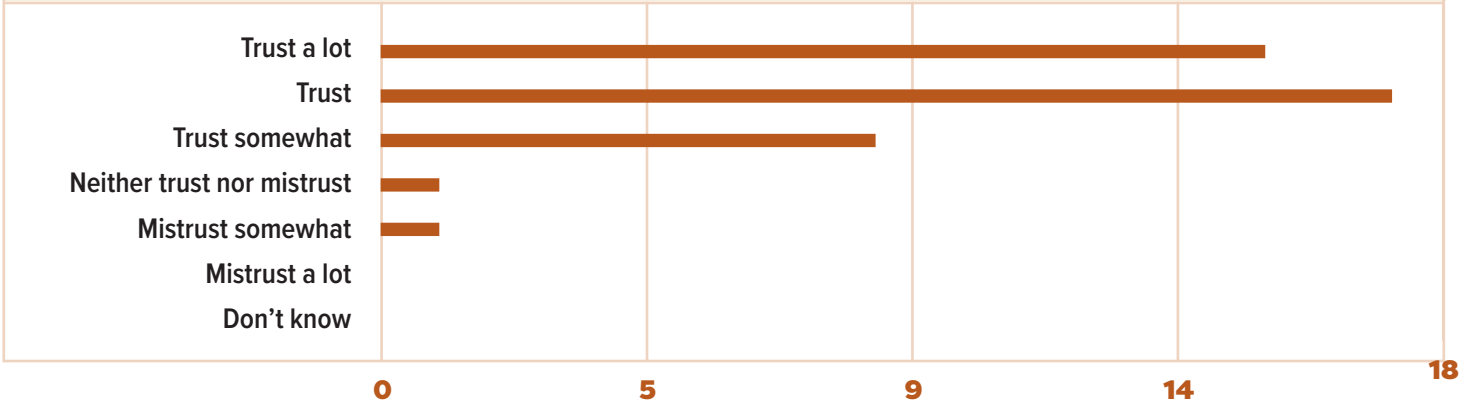
"I think the challenging questions are asked at every single internal project review meeting, and there are no hard feelings when the group is split on a decision to fund. The partners have made really great changes and clarifications to their project in response to the group's questions and sometimes criticisms of the project. The group is always careful to make it about the project, not the presenter, which helps keep trust high."

Oregon Central Coast Estuary Collaborative – Field trip, September 2023.
PHOTO / MIDCOAST WATERSHEDS COUNCIL

Current Trust Levels

To what extent do you currently trust your partnership to ask hard questions of each other so that collective decisions and actions have the greatest chance for impact?

Note: This reflects survey responses only and not responses from interviews or group discussions.



The literature on trust describes different sources of trust: i) dispositional trust, which refers to innate tendencies to trust that are shaped by a person's disposition, life history, cultural norms and social context, ii) relational trust, which refers to the investment in relationship building where people get to know and appreciate each other's strengths, weaknesses and unique characteristics, iii) rational trust, which refers to an intentional process of creating a clear track record showing follow-through on commitments and responsiveness to feedback, and iv) systems-based trust, which refers to setting up systems, procedures or rules for accountability (Robbins 2016; Stern and Baird 2015). Additionally, historical and sociopolitical forces that privilege some groups over others influence the potential for trust and power dynamics among partners (Wollenberg et al. 2005; Brouwer et al 2015). The context and these different sources of trust together shape what is possible within a partnership.

PHOTO / ROBERT WARREN

"Our partnership has been one of the highest functioning teams I've ever had the pleasure of being a part of, and I believe that is due to a high personal and organizational commitment to [restoration goals] in our specific area."

"The collective trust has increased through time, as the partnership has had lots of stability and chances for many partners to support each other through key processes."

Generally Increasing Trust

Reflecting on years of working together, most partners expressed trust in their current partnership and growing trust over time, which was often linked to collective pride in their accomplishments. Pride was described in terms of what they accomplished with their P-TA and/or FIP grants and in getting through difficult situations, for example partners going beyond their normal duties to collaboratively respond to leadership changes or natural disasters.

Sources of Trust

People from many partnerships expressed liking the people in their partnership and being inspired by their work together addressing issues they are passionate about.

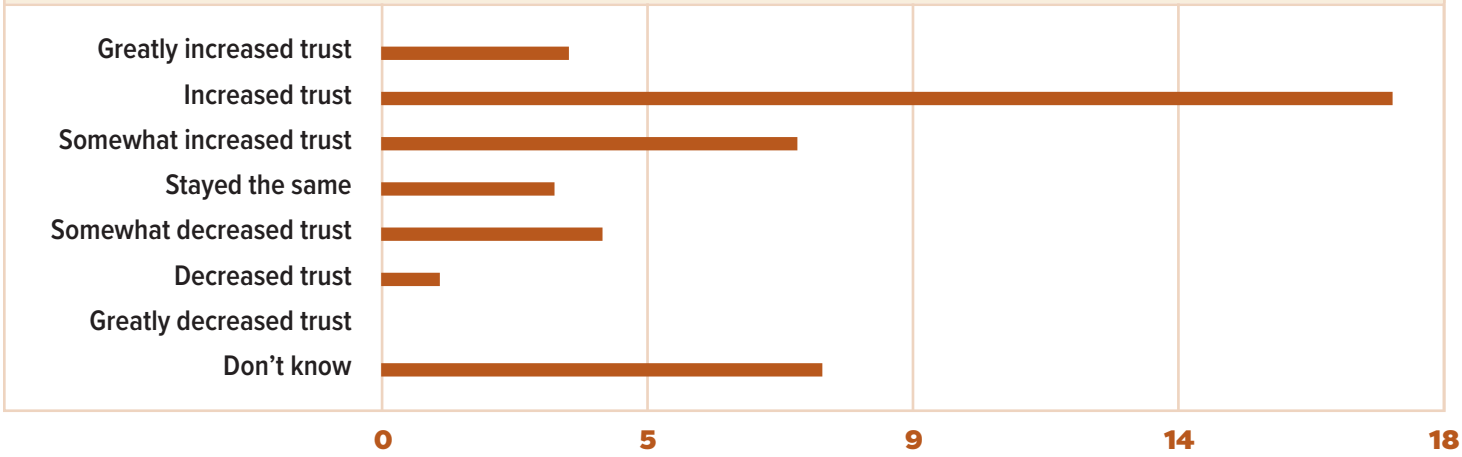
Several partnerships specifically referenced aspects of their governance, such as regular check-ins, an internal review process and a steering committee with representatives from different partnerships, that contributed to greater trust and performance.

Spending time together was highlighted frequently. One partnership reflected that sharing an office built foundational relationships that made deeper collaboration possible.

Changes in Trust

To what extent do you think that trust among partners has changed over the years, thinking about the trust needed to ask hard questions and make planning and budget decisions together to hold the bar high for performance and impact?

Note: This reflects survey responses only and not responses from interviews or group discussions.



Grande Ronde Restoration Partnership, Hall Ranch OSU Visit, 2015.
PHOTO / GRANDE RONDE MODEL WATERSHED

People from some of the rural partnerships reflected on how intertwined their professional and personal lives are. Several other partnerships reflected on the value of field trips for building trust, allowing people to talk about questions naturally as they come up and see connections between different projects.

People newer to a partnership with less understanding of its history tended to be trusting and optimistic about partnership performance. At the same time, many long-time partners who had personally experienced the ups and downs were also very trusting of their partners and some of the biggest champions of the value of their partnership.

One partnership directly referenced their culture of openness as a strength that has contributed to trust – for example openly discussing assumptions from their theory of change and recognizing when they were wrong about initial assumptions. They also appreciated that they could talk openly and honestly about their learning with OWEB, which reinforced trust in their approach.

> *"I think that's one of the strengths of what we've all learned together – admitting [when we got something wrong]. Celebrating successes also, but [admitting] maybe we should do it another way."*

OWEB has long been recognized by grantees for their open, supportive and responsive culture. Specifically, partnerships expressed gratitude to Courtney Schaff, Andrew Dutterer, Ken Fetcho, former OWEB Director Meta Loftsgaarden and former Deputy Director Renée Davis.

> *"Yeah, it's kind of fun to look back and joke with [each other] that we used to snorkel together all the time. Yeah, there are handful of us that have been around. And because we are rural and a smaller community, the connections outside of work are big. We connect on many, many levels, which is a good thing."*

Challenges related to trust

While trust is a good thing for partnerships, sometimes high levels of trust can create a sense of inflated confidence, where partners assume things will go well and place less attention on tracking each other's performance. Several partnerships described this pattern, including some which had been operating as a planning-oriented partnership but evolved into a project-oriented partnership, which makes sense since they are structured to allow each partner autonomy to accomplish their tasks with less investment in centralized processes for accountability. One partner, who shared a long list of accomplishments and examples of pulling through difficulties together, reflected that people in their partnership trust each other so much that they haven't set up a mechanism to check-in with each other. The partnership realized that regular check-ins would have been helpful when one partner experienced challenges with monitoring and it took a while for other partners to find out and offer support.

Strong opinions can also create challenges in a partnership and lead to reduced trust to ask questions for fear of strong responses. Two partnerships described experiences where key people with strong opinions closed down opportunities to work through challenging questions together. They found this inhibited trust and affected performance, where people avoided speaking up for fear of being attacked or blamed. In both cases, the strong opinions and division among partners reflected larger patterns of political divisions in the region. In both situations, things improved after the person with strong opinions left and partners made an intentional effort to improve communication and relationships. In one situation, the partnership structure remained intact, while in the other, relationships remained strained and partners openly talked about restructuring.

Lack of time and energy dedicated to reflection and open discussion was a common theme among partnerships who felt that trust has eroded somewhat, particularly those partnerships focused on implementation with ambitious goals and work plans. One partner reflected that despite all that they have accomplished as a partnership, some partners still do not share data freely, even when asked. Another partnership reflected that they used to have big heated discussions that everyone contributed to, but now over time, there are so many different funded projects that each person is more focused on their own and not as engaged in other projects or the big picture. With both of these partnerships, they described their current meetings as update round tables with little discussion.

Suggestions for partnerships

Even when performance is strong and trust is high, it is still recommended to put at least simple accountability measures in place to regularly check-in on performance. Reflective time to check-in on strategic direction is also recommended periodically to maintain partnership performance and resilience.

Recommendations for OWEB on trust

- **Continue to nurture a culture of learning,** where partnerships are encouraged to ask questions, work through challenges and celebrate new learning with each other and OWEB.
- **Encourage partnerships to use their funds for professional facilitation and/or build their own facilitation skills** to work through challenging topics, for example facilitating consensus, team building and agenda design.
- **If partners with strong opinions are impacting trust, encourage partnerships to seek professional facilitation or mediation support** to better understand and mitigate the situation.

"Larger projects have brought a much greater pressure and doubling down on getting the work done with less time to reflect and discuss. With several organizations involved in the same kind of work, there are more meetings, responsibilities and tracking responsibilities."

Grande Ronde Restoration Partnership, Sheep Creek culvert before bridge construction, May 2018. PHOTO / GRANDE RONDE MODEL WATERSHED

2 External technical review of FIP projects

FIP applicants go through an initiative level technical review as part of the selection and award process. When a partnership is awarded a FIP grant, they technically have an approved list of projects for the next six years; however, each project still needs to go through a more detailed project review to ensure that public funds are spent on well designed projects with the likelihood for impact. OWEB conducts external technical review at the project-level for FIP grantees at least once a biennium.

With this study, **OWEB** prioritized this topic to inform ongoing improvements in FIP project-level technical review. Their goal is to encourage challenging questions that keep the bar high for strong projects, while also respecting that projects have already been vetted through the FIP selection process and with some partnerships an internal technical review process.

Strengths

Overall, most partnerships felt that the FIP project-level technical review process plays an important role in developing good projects, recognizing project strengths and weaknesses and supporting stronger partnerships. Even partnerships who had their own internal technical review valued the added layer of OWEB's external technical review.

> *"I would say the presence of the technical review has been important. We've built more robust proposals because we knew they weren't just going to be taken carte blanche. It is important to have that technical review there as a motivator. And they do ask good questions."*

Partnerships consistently valued technical review for two reasons:

- Good questions that led to stronger projects and
- Transparency in how public funds are spent.

> *"I think the value is partly to improve outcomes but it also has value because it provides transparency and understanding among stakeholders."*

Important design features

Overall, partnerships consistently mentioned two important design features that made the review process meaningful:

- Local reviewers who understand local geography, local issues, project proponents and the partnership's history and track record, and
- The opportunity to discuss proposals with reviewers, in some cases even visiting field sites together.

"I appreciate that [the FIP technical review process] is more of a back and forth meeting to get questions answered, less formality. I also appreciate that we can suggest technical experts for the review. [It is] still kind of clunky but much better than how it started."

Several partnerships reflected that the FIP technical review is a stark contrast to OWEB's Open Solicitation technical review process, where regional reviewers are often not familiar with local issues and where there is no opportunity to interact. One partnership described their transition from the FIP program back into the Open Solicitation review process and noted a drastic contrast in reviewers' understanding of the context of their proposals. With the FIP project-level technical review, reviewers asked better questions because they understood the context of the strategic action plan and connections to other projects.

Siuslaw Coho Partnership - Partners gather on Waite Ranch in preparation for implementing a large-scale restoration project, 2022.
PHOTO / ELIZABETH GOWARD

Areas for improvement

The most commonly discussed area for improvement was the tedious work of filling out long project applications with repetitive questions to prepare for project-level technical review. A few people from different partnerships expressed frustration that FIP reviewers didn't always review their materials or understand the context, which they felt was related to the length of application materials. Many partnerships suggested that OWEB could do more to streamline application materials and be clearer with reviewers about their expectations. One partnership perceived that FIP staff were inconsistent in their guidance for what could and could not be included in a project application based on conversations with another FIP partnership.

Some partnerships were frustrated with the time it took to respond to minor questions that didn't change the projects or potential outcomes. Several partnerships commented that the online application portal was clunky and difficult to use. One partnership found it tedious to edit a project application to incorporate changes from multiple partners as part of the technical review process. (Currently, only one person can edit a project application at a time, and they asked OWEB if the online application portal can be changed to allow for multiple editors.)

OWEB responded that they know there are challenges associated with the online application portal and are working to streamline and update it as resources allow. They recommended that partnerships download the application template into a program that allows group editing and then, when ready, insert those responses into the online application.

Two people from one partnership described their challenges as a new OWEB grantee trying to navigate complicated rules for each of the FIP funding categories and prepare their applications with the appropriate level of detail for technical review. They described struggling to figure out what OWEB and external reviewers were

looking for. They strongly suggested that OWEB provide orientation to new FIP grantees – or even FIP applicants – so they would know what to expect twith project applications and project review. They strongly encouraged new FIP applicants to read through the detailed rules for each grant type to inform how partnerships put together the projects in their FIP application. Although these challenges were more prominently felt and openly expressed by this new FIP grantee, other FIP partnerships expressed similar comments that it took them time to figure out how to fit their work into project applications and the appropriate level of detail needed.

Another theme from the data was the emotional nature of some technical review discussions. A couple of individuals from different partnerships expressed concern that some reviewers' comments reflected personal bias or preference more than science, requesting that OWEB could play a role more effectively facilitating these situations so that reviewers explain the reasons for their concerns.

Several partnerships discussed the potential value of moving OWEB's technical review earlier in the design process – or using a two-phased review – so reviewers could comment on preliminary design ideas and have more of a chance to influence the final design. Otherwise, if significant changes were needed and only discovered later in the design process, applicants would have to make changes and resubmit in the next review cycle.

There were a few people who were skeptical about the value of the FIP project-level technical review process because they already had their own internal review process. One person felt it was sufficient that projects were already vetted through the FIP initiative level review process as part of the FIP selection process. However, the number of partnerships who valued OWEB's FIP technical review process far outweighed the few people who doubted its value.

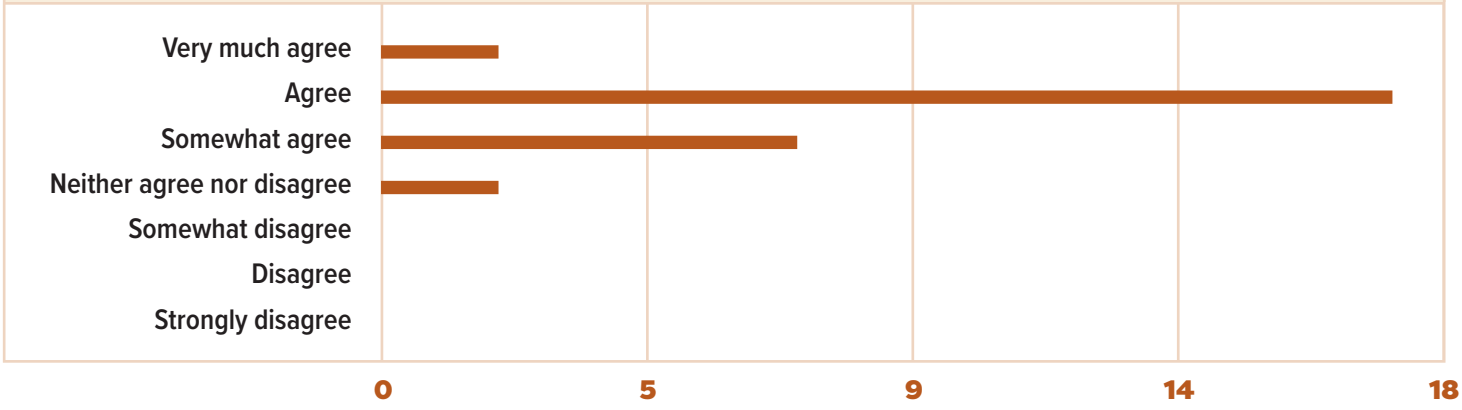
There were also concerns from two partners who valued the process and wanted it to be more comprehensive. Two people from different partnerships expressed disappointment that they felt their internal project-level review was not comprehensive enough. They wanted a strategic review to evaluate project proposals against the partnership's strategic action plan, theory of change and priority actions so that they could draw attention to projects that aren't being proposed. They expressed a desire for the OWEB's project-level technical review to make up for this strategic review that they felt was lacking in their partnership.

OWEB reflected that this more comprehensive strategic review is something that they would hope high-performing partnerships are doing. Once a FIP is awarded with its list of prioritized projects, their due diligence is clearly focused on technical review to ensure those projects, or alternates, are well-designed and likely to have the desired impact.

Value of OWEB's Technical Review

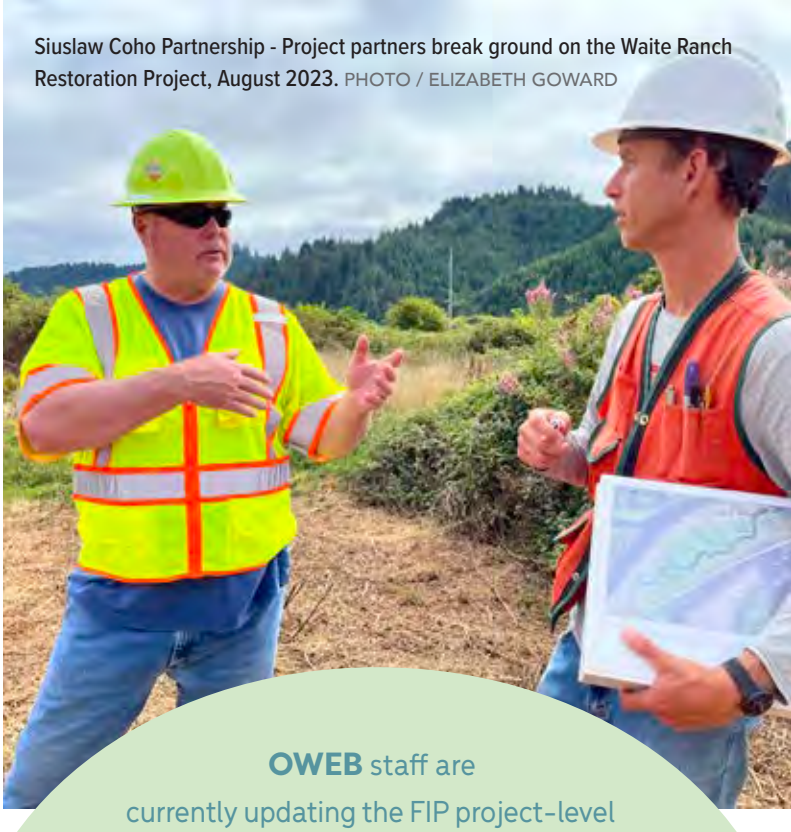
To what extent do you think OWEB's role in technical review has led to a better outcome for implementation and greater likelihood for impact?

Note: This reflects survey responses only and not responses from interviews or group discussions.



Recommendations for OWEB's technical review

- **Retain the FIP project-level technical review,** including two important design features: local reviewers and opportunities for reviewers and partners to discuss proposals.
- **Revise guidance for the FIP project-level technical review and provide an orientation for FIP grantees** to include clear explanations of roles, responsibilities and expectations for OWEB, reviewers, project applicants and the partnership as a whole. Include expectations that:
    - o Partnerships will work together to consider the technical design of each project and how well proposed projects collectively compare with the theory of change and prioritized actions before submitting it for OWEB's technical review,
    - o OWEB will facilitate a fair process where people ask challenging questions, listen to each other and consider the breadth of science and best practices above personal preference or biases, and
    - o Reviewers will read materials and come prepared to ask questions, listen and provide justification for any changes requested.
- **Provide the option, if time allows, for earlier review or a two-step review process.**
- **Continue dialogue and coordination among OWEB staff** to ensure consistency in how they advise partnerships to prepare project applications and how they facilitate technical review team meetings.
- **Strengthen the facilitation skills** and toolkit of OWEB staff facilitating technical review.



Siuslaw Coho Partnership - Project partners break ground on the Waite Ranch Restoration Project, August 2023. PHOTO / ELIZABETH GOWARD

OWEB staff are currently updating the FIP project-level technical review process and orientation for the next cohort of FIPs integrating many of the above recommendations. The project application is the same for FIP and Open Solicitation, and OWEB is streamlining some of the questions so they are not as repetitive. They are also considering to possibly create an even more simplified project application for FIP considering that all the background and context is described in their SAP.

Responding to interest in moving the technical review earlier in the design process, **OWEB** is working on an option to hold site visits with partners and technical reviewers early in the design process to discuss project proposals, well in advance of writing project applications so that reviewers have more of a chance to influence designs. OWEB still needs reviewers to evaluate project applications later in the design process, but that can be a shorter meeting, even held virtually, as a follow-up to an earlier site visit.

PHOTO / HARNEY BASIN WETLANDS COLLABORATIVE

3 Expanding the circle

Expanding the circle refers to the intentional effort of including new people, organizations and/or tribes in some aspect of a partnership's work.

- Sometimes efforts to expand the circle are directed at recruiting new partners.
- Sometimes the focus is to be more inclusive of underrepresented groups who are impacted by a partnership's work but may not have any connection to the partnership or means to participate.
- Often, but not always, efforts to expand the circle overlap with a partnership's commitments to diversity[4], equity[5], inclusion[6], and justice[7], especially when working with underrepresented or historically marginalized groups.

Some of these terms can be polarizing so care was taken in this study to encourage people to interpret this topic 'expanding the circle' as they liked and share their views freely.

Some aspects of OWEB's grant programs relate to people's ability to access grant funding, for example offering individual consultations to anyone interested in a FIP and advertising this widely. Referred to as equitable grantmaking, OWEB has contracted two studies examining their grantmaking practices with an equity lens, one specifically looking at impacts to tribes (Miller 2021) and another broader analysis (ECONorthwest in progress). They have also developed new climate-related evaluation criteria, applicable to all grants, that include an environmental justice component for "Local Communities Disproportionately Impacted by Climate Change." Some of the findings and recommendations in the Synthesis section of this report also relate to this topic.

Other aspects of OWEB grant programs relate to the rules and programs that shape what funded partnerships work on and how they work together, which influences their ability to expand their circle. OWEB provides a lot of flexibility in their rules and guidance for partnerships to decide what is right for their context and needs, for example flexibility in planning frameworks, governance structures and monitoring plans. OWEB also emphasizes dialogue with grantees, partners and tribes and is responsive to feedback, which are all core tenets of equity, and yet particular details in grant rules and programs can still have a significant impact on grantees and their extended networks. The findings and recommendations in this section provide context for these types of changes that OWEB may want to consider.

OWEB identified this topic to include in the study because they have been undergoing their own process of learning and engagement to articulate their values around diversity, inclusion, equity and environmental justice, for example through the development of the Board's equity statement.

Because of the timing of this study, **OWEB** saw this as an opportunity to listen and learn from partnerships about their approaches and experiences with expanding the circle.

[4] ***Diversity*** *is the breadth of differences in a group, in this context most often referring to differences in race, culture, language, economic stability and age.*

[5] ***Equity*** *is an approach that recognizes some groups have been systematically disadvantaged and works to mitigate those disadvantages by engaging people impacted to design systems and practices for everyone to thrive.*

[6] ***Inclusion*** *is the intentional practice of welcoming diverse people to participate meaningfully and nurturing a sense of belonging among everyone.*

[7] ***Justice*** *refers to making amends for wrongdoings and creating a fair system that provides opportunity for everyone.*

A range of perspectives

Partnerships expressed a range of perspectives on expanding their circle. Most partnerships felt it was important to expand their circle in some way to achieve their goals, while a few partnerships felt they have just the right circle of partners and participants to advance their vision without the need to expand.

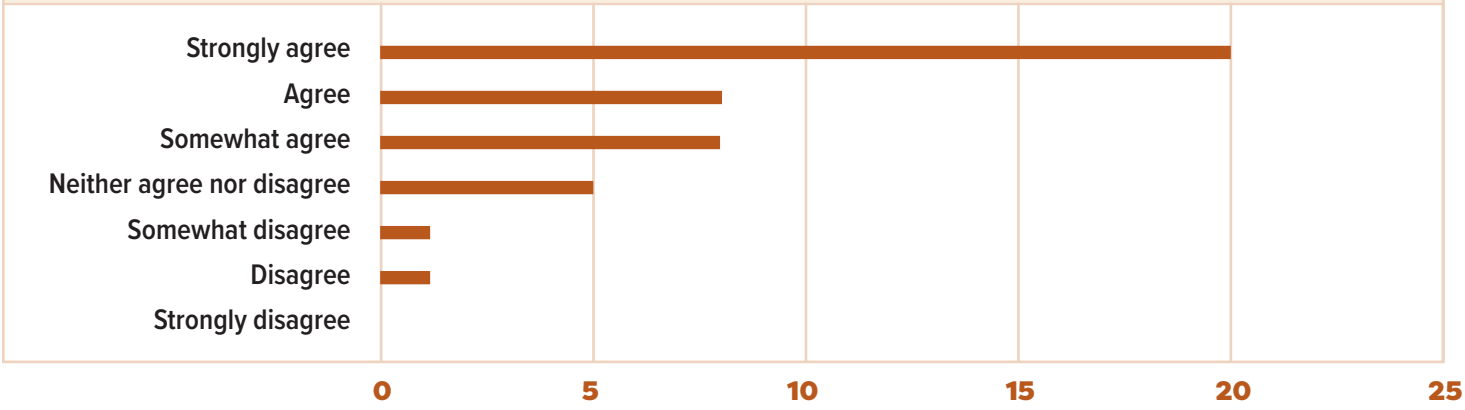
When describing who they wanted to better include, partnerships often named tribes, landowners and farmers, sometimes also researchers. A few partnerships described a clear focus on engaging low-income residents, Spanish-speaking residents and/or Spanish-speaking restoration workers.

Willamette Mainstem Anchor Habitat Working Group - Cottage Grove High School students interplanting a riparian restoration project at My Brothers' Farm.
PHOTO / COAST FORK WILLAMETTE WATERSHED COUNCIL

Belief that Expanding Your Circle Will Help Achieve Your Goals

To what degree do you feel that expanding your circle of partners and/or building relationships with underrepresented groups in your watershed will help you achieve your goals?

Note: This reflects survey responses only and not responses from interviews or group discussions.



The breadth of views among grantees about expanding their circle is not surprising since the P-TA and FIP grant offerings provide partnerships a lot of flexibility to define their partnership on their own terms, widely considered a strength of the program. OWEB does not provide specific guidance or expectations associated with expanding the circle, except that:

- Partnerships need to develop a stakeholder engagement strategy and consider tribal engagement,
- Partnerships are expected to communicate effectively with all partners, and
- Partnerships should not exclude any organization who works on the same issues and geography and wants to become a partner.

Perspectives from across the state

A few people openly talked about the politics that can come up when discussing equity and underrepresented groups, especially in the context of funding and sometimes influenced by cultural differences between urban and rural areas. They urged OWEB to think carefully about how they use these words and concepts as their words carry a lot of weight with the potential to be misunderstood or misrepresented.

East Cascade Oak Partnership. PHOTO / PALOMA AYOLA

Considering power and representation

Power refers to access to resources, opportunities, knowledge and social networks that allow a person or entity to have influence over decisions and ultimately achieve their goals.

Some groups historically have not had power and have been disproportionately impacted by environmental burdens. For example, low-income immigrants who speak limited English and live in flood-prone areas are typically underrepresented in decisions about flood risk and mitigation.

Other groups may be underrepresented because their perspectives or goals are very different from the leadership and/or direction of a partnership. For example, the goals of farmers or academic researchers may not necessarily align well with the goals of a restoration initiative – or may require listening and dialogue to develop alignment.

It is also important to consider how power has changed over time. Some groups who have had more power and influence historically than they do today may be considered underrepresented, even though they may still have power and influence.

Understanding power and representation is nuanced and not straightforward. These are a few considerations that provide context for what is meant by expanding the circle to include underrepresented groups.

As an example, a couple of people from one rural partnership felt that buzzwords like equity, inclusion and underrepresented groups were applicable in urban areas with more diverse populations but not in rural areas. They were nervous that funders like OWEB would use these terms in ways that would reduce their chances for funding. And yet separately, someone from the same partnership described their ongoing work to engage tribes, which indicates awareness of this issue within the partnership alongside nervousness about what funders expect of them.

To put this comment in context and summarize responses from across the state, partnerships in both urban and rural areas working in different ecosystems have been engaged in thinking about expanding their circle in terms of diversity, equity and inclusion and integrating it into their work. Many are focused on learning, while a few have transformed the way they work by integrating new voices and perspectives into their partnership. A few haven't discussed expanding their circle as a partnership recently or at all with partners, in many cases admitting everyone is too busy implementing projects to discuss it. Some partnerships felt they have the partners and relationships already in place to confidently implement their work. For example, some partnerships already have more landowner interest than they have capacity to work with. In a few partnerships in both Eastern and Western Oregon, tribal partners are in leadership positions and integral to the momentum and direction of the partnership. One partnership in Eastern Oregon noted that a majority of their partners are female in a professional field that has been dominated by males.

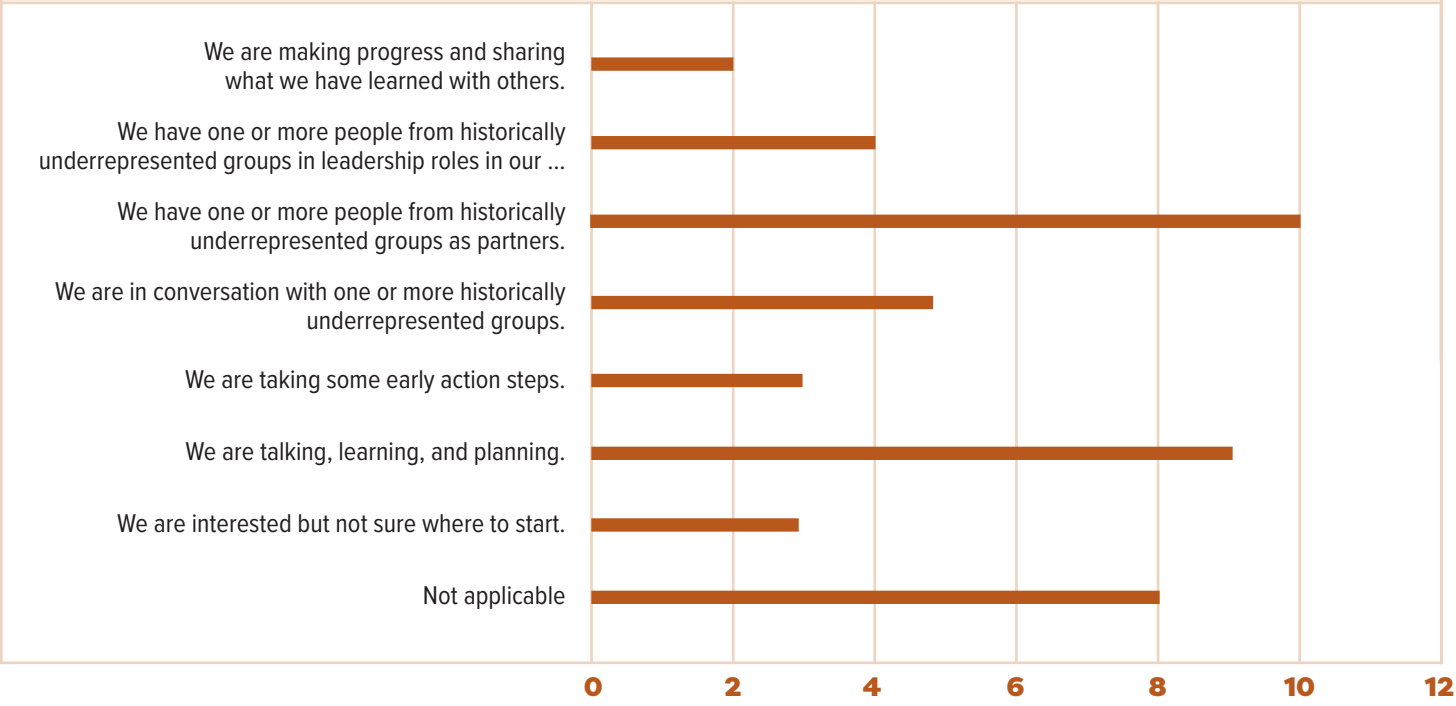
Efforts to expand the circle

Considering those that want to expand their circle, many partnerships described themselves still in the learning stages, not sure where to start or taking early action steps to expand their circle, while several other partnerships have been actively taking strides and providing a model for others.

Work to Expand Your Circle

To what degree are you working on expanding your circle of partners to include underrepresented groups?

Note: This reflects survey responses only and not responses from interviews or group discussions.



Partners described learning and early action steps to expand the circle.

"It is tough at [my agency] to work on this topic because of our mission, funding and culture, but we are thinking, learning and trying to develop plans and actions that are realistic and meaningful."

"The coast is largely white, working class folk. We have been really successful in working with our tribal partners, however there is much more work we can do in properly engaging, learning from, and being led by tribal members."

"[Our basin], as a whole, inherently lacks diversity, and the partnership has recognized this and is looking into ways to expand our circle of partners. Many [partners] have recently taken DEI training. ... This is something we could use help with."

"Our partners are working to fund tribal liaison positions to better coordinate collaborative efforts and ease the time burden on tribes to participate in conservation/restoration planning."

As partnerships engaged in deeper learning, one partner reflected on patterns of structural inequality[8] that can feel overwhelming.

South Coast. PHOTO / OWEB

"Expanding the diversity of voices heard is a difficult task in rural coastal communities, not because we haven't tried, but because the diversity is tribal and socioeconomic and the priorities of these diverse groups are different. Tribal engagement is critically important, but people available within the tribes to participate are extremely limited. Poverty issues related to housing and medical care continue to plague the small coastal towns. Bringing a range of voices to the table on restoration, conservation and natural resource issues likely feels like a 'nice to do' to most who are struggling day to day."

Addressing structural inequality is possible, but requires creative energy for relationship building and often reframing of a partnership's goals to open up new possibilities for broader engagement. As part of that reframing, several partnerships discussed the distribution of costs and benefits from restoration projects, a cornerstone of environmental justice work, observing that if this question is not considered, economic benefits will often be highest for wealthier residents who own riparian areas or large upland properties.

Oregon Central Coast Estuary Collaborative Field Trip, September 2023.
PHOTO / MIDCOAST WATERSHEDS COUNCIL

Several partnerships described how the process of reframing their goals, vision and work together took place in tandem with new partners taking leadership positions. They also discussed how their governance structures, roles and/or decision-making processes evolved through this process.

- One partner described how tribes have become pivotal partners and taken on a leadership role in several projects as the partnership has deepened their commitment to tribal interests – transforming their planning processes with benefits including protection of culturally important resources.

- Two other partnerships described how local government agency partners with missions that emphasized public health and economic stability helped shift the partnership's work to minimize or mitigate environmental burdens to low-income residents and increase benefits, for example when deciding which projects to implement first and investing in workforce development.

[8] ***Structural inequality*** *refers to a society where different groups have vastly different life outcomes and opportunities. It occurs when bias is embedded in the policies and practices of organizations and governments across sectors, such as housing, education, economic development, health care, clean water infrastructure, etc. People who experience disadvantages in one area are more likely to experience disadvantages in another, and vice versa, people experiencing advantages in one area are more likely to experience advantages in another, which structurally reinforces disparities over time.*

While leaders have a clear role to play in expanding the circle and introducing new ways of thinking, the diversity of perspectives among staff and participating partners can also be transformative in the evolution of a partnership. Several partnerships described the value of having diverse perspectives both at the leadership level and also embedded throughout the general partnership and partner organizations. One partner, who is a citizen of a tribal nation, reflected that having more people with indigenous perspectives embedded within their organization has influenced the thinking, conversations and direction of their organization and the partnership overall with transformative results.

East Cascade Oak Partnership, Wildflower Walk. PHOTO / COLUMBIA LAND TRUST

Another partnership shared how they are continually investing in conversations with tribal partners and looking for ways to create more touchpoints, knowing that it takes time to build trust and understanding, which can then lead to deeper engagement.

"Equity is layered into how we operate. We don't have a formal tribal representative on the board, but I am in a leadership role with [my organization] and a citizen of [a tribal nation.] One person on staff is a citizen of [another tribal nation.] While we are not officially representing the tribes, we bring indigenous perspectives to our work. When I bring up issues, I guess yes, I feel like my voice is being heard. A bunch of collaboration is happening with tribes and other partners also. The tribes are collaborating in ways they didn't before. This engagement is changing projects in the watershed and how we look at watershed restoration overall. Maybe not with landowners yet, but definitely within the partnership."

"Through [funded projects] and our monitoring work, we're having a lot of conversations [with our tribal partners]. I just talked with three tribal members last night about our shortages for monitoring consultants, and they said, 'Well, we have these crews that are busy for three quarters of the year, and then don't have anything to do for another quarter of the year.' There might be some opportunity for us to train them up and hire them to implement some of our monitoring for us. And you know seasonally, it might not be ideal, but it might be from an equity perspective to more deeply engage tribal members in the work that we're doing and for us to learn more from them about the things they're seeing in the landscape and the lens that they view this work through."

In addition to reframing the work, one partnership highlighted compensation for people to participate in meetings who otherwise wouldn't be able to attend – as a way to reduce barriers for engagement. OWEB provides flexibility within the P-TA and FIP grants to pay people to participate meetings, so partnerships are allowed to use this funding to reduce barriers for historically marginalized groups that otherwise couldn't attend. Some partnerships described using this funding to ensure that grant-based organizations, and especially small watershed councils, could dedicate their time, but no one spoke of specific examples where partnerships are using this funding with historically underrepresented groups.

Challenges to expanding the circle

A challenge expressed by several partnerships focused on implementation is lack of time to slow down and discuss questions like who to involve, why and how. One partner expressed frustration that there was never time on the agenda to discuss opportunities to bring in new partners who could help shape ideas for long-term planning. A lack of time or focus for these types of discussions is exacerbated even more when there is turnover among leadership or staff. Some partnerships that have been successful managing the power dynamics and interests within their existing circle were hesitant to think about including new partners because of the uncertainty and risk that it would slow them down.

"I can see problems in certain watersheds, where adding too many groups could result in less restoration. If it takes too much time to come to consensus or if certain groups do not get along, that might be more problematic than reducing the number [of groups involved] to get good restoration projects done in an effective manner."

In some partnerships, progress working with underrepresented groups has been led by one or a few partners that have many years of experience integrating equity into their programs and operations. Some examples include workforce development that includes

Grande Ronde Restoration Partnership, Hall Ranch OSU Visit, 2015.
PHOTO / GRANDE RONDE MODEL WATERSHED

recruiting from Native and Latino communities, labor representation at the highest level of the organization and healthcare benefits for restoration workers. In one or two partnerships, it appears that the partnership as a whole has been less engaged in expanding their circle because one partner has been making strides that benefit the whole partnership.

It takes a concentrated effort for people who are relatively comfortable in a given context to understand the forces that marginalize others or even see that people are marginalized at all. Several partners felt fairly confident they had the right people involved, but then emphasized that they would gladly expand their circle if it turns out they are missing anyone. Several partnerships emphasized that this is an area where learning and support are needed and that they want to be thoughtful and intentional when bringing in new partners and attempting to expand their circle.

This was a common theme that it takes time for partnerships to consider whether to expand their circle, how and why, then time to make decisions together and take steps to follow through. This is challenging for many partnerships who have a heavy workload and other complications such as turnover among leadership and staff. It is very humbling work that requires trust and openness recognizing that there is no single right way and everyone will make mistakes.

Expanding the circle in the context of OWEB grant programs

As OWEB continues to clarify their own internal values related to equity, diversity, inclusion and environmental justice, there likely will be aspects of their grant programs that they will want to clarify, change or further develop. Two examples below – land transactions and planning frameworks – illustrate how seemingly small details in program guidance can influence whether potential partners feel included or not.

Willamette Mainsteam Anchor Habitat Working Group - Public tour of project work at Snag Boat Bend, June 2017. PHOTO / LONG TOM WATERSHED COUNCIL

Land transactions – an example

The example of OWEB's land transactions and the conservation easements they include is used here to better describe how program rules – and perceptions about what is allowed or not - can restrict a partnership's efforts to expand their circle. A few partnerships expressed concern that OWEB-funded land transactions exclude tribal harvest of culturally important plants, which is a high priority issue for tribes.

In the words of one tribal partner, who urged OWEB to change their policy, OWEB's restrictions on land transactions make tribes not want to participate, which can negatively affect the momentum and direction of a partnership overall.

"The significance of restrictions on land transactions is heavy. If OWEB doesn't change the restrictions in ways that recognize and respect tribal uses and needs, tribes will struggle with land acquisitions. Tribes may prefer not to have them. I would want OWEB to add language to conservation easements that 'When this land is returned to tribes, this easement will be dissolved.' It is a recognition of tribal sovereignty."

"Stewardship for us as indigenous people is about going out on the land, using resources, observing, talking about what you see, involving young people. When we take care of the land, we harvest and gather foods, medicines and materials for baskets and other culturally important purposes. We may want a simple structure to protect us from the weather as we process materials. Sometimes we may want to have a community space to hold a ceremony before we harvest. Our elders might need parking, maybe a bathroom to make it possible to be there with us. When we are observing, protecting and teaching about our resources across the generations, we are active stewards.

OWEB needs to change this policy - for tribes that are ready, it can bring about healing."

OWEB's response to concerns about land acquisition from Tribes

When this concern was brought up to OWEB, their response was that tribal harvest of culturally important plants is allowed on lands acquired with OWEB funds as long as the harvest is consistent with the protection of conservation values for that property and is described in the management plan required by OWEB.

OWEB staff explained that the language in the conservation easement template for fee simple transactions says that vegetation removal is not allowed until either a management plan is developed that includes vegetation removal or OWEB approves vegetation removal separately in writing. From the comments received in this study and similar comments expressed directly to OWEB, it seems that this nuance has not been understood. OWEB staff also shared they have approved one management plan that includes the harvest of culturally important plants, so there is more flexibility than what people are perceiving.

OWEB's land acquisitions staff and regional staff work together to review proposed management plans for newly acquired property interests and management plan updates for prior transactions, in what they describe as a fairly straightforward process.

Land acquisitions staff emphasized they hope people pick up the phone and call if they have questions. They would be more than willing to work with tribes to include harvest of culturally important plants in OWEB-required management plans.

The question about other improvements such as a simple structure to protect people from the weather, parking, bathrooms and other infrastructure would need further discussion and would depend on the specific context of each property to determine what would be consistent with the protection of the property's conservation values. For example, some acquired properties are old farms so there might be an existing turn-around for a few cars to park and an easy spot to put a temporary port-a-potty with little risk of negative impacts. If there was a desire to have more extensive infrastructure like permanent bathrooms and shelters, or regularly host lots of people, other funding sources that align with community use of the property would be a better fit.

With respect to transferring **OWEB** -funded properties over to tribes, OWEB staff described a property that was purchased by a land trust and then transferred to the Confederated Tribes of Siletz Indians. They emphasized that OWEB uses conservation easements in all transactions including transfers because Oregon statues require that properties acquired with OWEB funds are managed in perpetuity for the conservation purposes of the grant and give the Board certain authorities regarding the sale or transfer of the property. Changing this requirement would necessitate changing the statutes, which tribes could advocate for.

Recognizing the need for more clarity on this issue, **OWEB** is already beginning to reach out to tribes to discuss concerns associated with the land acquisition grant program. They want to listen to better to understand tribal perspectives and ways they can address concerns.

Planning frameworks – an example

As another example, at least one partnership felt strongly that the Open Standards for Conservation Planning framework referenced in OWEB's Strategic Action Planning Guide with its emphasis on 'threat reduction' did not align with their values and approach. They explained that an emphasis on 'threat reduction' positions people as causing threats that need to be managed instead of partners who work together to develop a vision and plan of action.

"We approached our strategic planning a little bit differently than [other] partnerships who start with the ecological outcomes that they want to see and then threats and then figure out strategies to address those threats. We rejected the concept of 'threats' out of the box. Instead, we wanted to talk about impacts both positive and negative that people's behaviors have on ecological systems, just recognizing that we're all a part of them."

Instead, this partnership created a modified planning framework that fit their values and approach. Their planning included broad outreach interviewing more than 60 people outside of the partnership to expand the ideas and perspectives that went into development of their results chain beyond their circle of partners.

While OWEB allows partnerships flexibility to choose their own planning frameworks and tools, which is widely celebrated as a strength including in this example, their planning guidance is largely shaped by the Open Standards approach, which caused friction in this case and has been critiqued more broadly for similar reasons (Arnold and Wilson 2021). This example provides a reminder of how values are embedded in planning tools and grant guidance, which may have unintended consequences for who feels included or not in the work.

East Cascade Oak Partnership, Wasco Collaborative Tour. PHOTO / COLUMBIA LAND TRUST

Deschutes Basin Partnership - Whychus Creek near Sisters now flows year-round after historically running dry most summers, supporting reintroduced salmon and steelhead.
PHOTO / DESCHUTES RIVER CONSERVANCY

Recommendations for OWEB for expanding the circle

- Use terms such as diversity, equity, inclusion and underrepresented groups very intentionally, clearly articulating their definitions and why they are being used considering how this will be understood by different audiences.

- Continue proactively analyzing grantmaking practices and program rules to identify and eliminate barriers and increase accessibility to OWEB grant programs, especially inviting feedback from new applicants, new grantees and grantees working to include underrepresented groups.

- Consider how and when to integrate concepts of equity and environmental justice into grant programs and rules considering OWEB's strategic plan and equity statement, in development, alongside existing laws, policies and capacity to implement changes.

- Continue to provide resources and tools to grantees to support greater awareness of tribal issues, including sovereignty, treaty rights and the specific issues and cultural practices relevant to tribes in Oregon.

- Consider training or peer learning opportunities to raise awareness and share innovations related to engagement, equity, inclusion and environmental justice as they relate to restoration, for example how asking about the distribution of costs and benefits may help identify new groups to involve and/or new approaches.

- Invest in opening communication and building trust with tribes around concerns that OWEB-funded land acquisitions are not inclusive of tribal approaches to stewardship – clarify that harvest of culturally important plants is allowed and potentially other activities – and stay open to suggestions that may emerge from further dialogue.

- Confirm with grantees that they can use P-TA or FIP funds to compensate people for participating in meetings, which may reduce barriers for some underrepresented groups.

OWEB identified tracking progress and telling the story of impact as a priority topic aligned with their ongoing efforts to understand the real challenges of monitoring and tracking progress so that they can support grantees to be as successful as possible (Boulay 2021; OWEB 2018). Tracking progress is valued as a means to understand the effectiveness of actions and adaptively manage future actions to increase the likelihood for impact. Tracking progress is also valuable for showing the impacts of a partnership's work to gain public support and increase competitiveness for funding.

Since the start of the FIP Program, **OWEB** Board, staff and partnerships have shifted their thinking and expectations. They now recognize that while six years of funding is longer than most grants, the work needed to see ecological and social outcomes will take much longer. With this part of the study, OWEB hopes to elevate common challenges experienced by partnerships and any innovative strategies that all partnerships may benefit from.

4 Tracking progress and telling the story of impact

Success alongside common challenges

Overall partnerships expressed pride and confidence in their ability to track outputs and demonstrate progress toward meeting their strategic action plan's goals and objectives. Many partnerships relied on their theory of change to infer progress toward outcomes based on tracking of near-term indicators. In some cases, partnerships conducted effectiveness monitoring at the project level. However, landscape-level effectiveness and telling the larger story of impact was much more challenging.

One partner described having a thoughtful, science-based discussion within their partnership, where they determined it was neither feasible, financially or economically, nor a good use of the partnership's time and attention to focus on landscape-level ecological trends.

Another partner noting the substantial cost and complexity of monitoring change at the landscape level, encouraged creativity in telling the story of impact, for example integrating anecdotes, storytelling, traditional knowledge and observations at the ecosystem level.

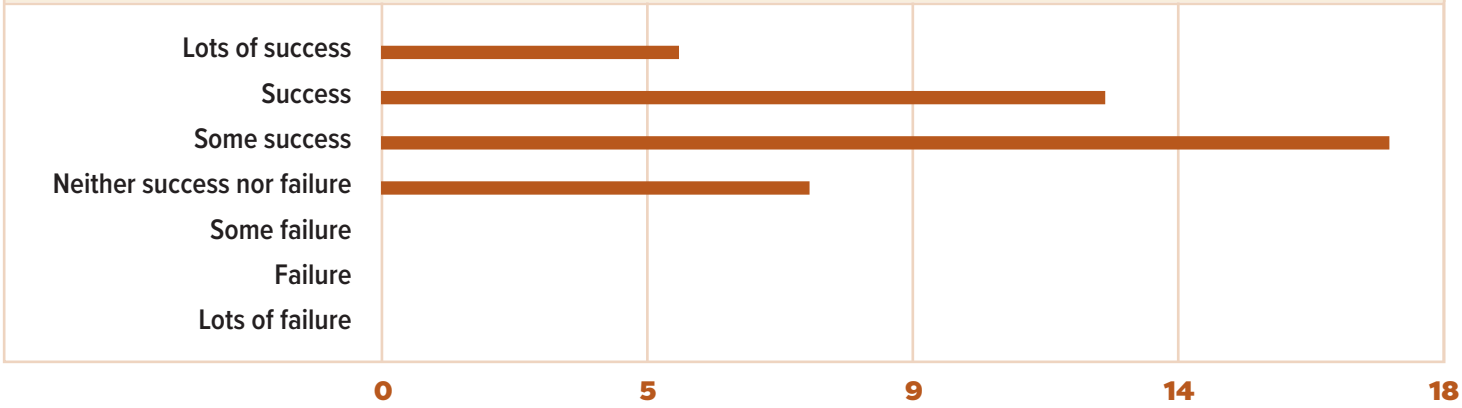
"We have a lot of project level success stories to tell…. We can't link our work directly to anything at the population level, and we struggle at the landscape level as well. But at the project level, we have a lot of good data. …

One of the landowners, when we started a project, was like, 'Hey, there's no trout in my river!' And then we built this project, and he went out and had a 20-fish morning! His response was, 'I never knew how important large pools were.' It's learning you can touch."

Success Tracking Progress

To what extent have you had success tracking progress toward your long-term goals?

Note: This reflects survey responses only and not responses from interviews or group discussions.



Common monitoring challenges

OWEB initiated this study by recognizing common challenges partnerships face with monitoring short- and long-term ecological and social outcomes:

- External changes, such as extreme flooding, catastrophic fire, economic recession, climate change, etc.
- Shifting understanding of how systems work and what we should be tracking to measure change
- Managing large complex data sets with multiple partners
- Funding for monitoring over the timeframe needed for outcomes to emerge, and
- Linking your work to the changes observed when there are other influences and unknowns.

Partnerships heartily agreed with this list – sharing examples of facing many of them at once.

Partnerships also added several more challenges to monitoring short- and long-term outcomes:

- Selecting the most relevant metrics out of all of those that interest partners and funders
- Lack of regionally standardized protocols
- Complexities of monitoring ecological and social outcomes, especially when integrating goals around diversity, equity, inclusion and justice
- Lack of historical data to establish trends
- Limited personnel with the capacity and expertise to develop monitoring plans and conduct analysis
- The time and expense to meet funders' monitoring and reporting requirements that may not align with the partnership's goals or available funding
- Limited time to turn around results and discuss together what they mean, and
- Trust to ask hard questions so what is learned from monitoring can improve future work.

"Funding opportunities for monitoring habitat at the project scale are rare or may not be practical. Monitoring that is occurring at the population level is not detecting change, likely from the lack of habitat restored compared to what has been degraded over time. Remote sensing has provided another tool for monitoring projects that may be more cost effective, however, time scales and costs could prevent timely nature of effectiveness monitoring that can be applied."

East Cascade Oak Partnership, USFS Prescription Fire Tour with Roland Rose. PHOTO / COLUMBIA LAND TRUST

Again, partnerships described experiencing many of these challenges all at once. One partnership recommended that it would be more practical to develop regionally standardized protocols that would be implemented by highly trained and funded regional monitoring crews rather than expect that each partnership or organization lead their own monitoring.

A shared need for increased monitoring infrastructure

Many partnerships expressed wanting to assess the effectiveness of their actions at a larger scale and over a longer timeframe – and yet an overwhelming theme was that more institutional support and monitoring infrastructure are needed to do so. Partnerships with monitoring expertise emphasized this point.

"With only two staff dedicated to restoration work [from our organization], we simply do not have the time, funding, training, or capacity to track/monitor short and long-term outcomes on all of our projects.

Another challenge is that even if we did have the ability 'in-house' to do so, there is generally a lack of regionally standardized protocols established to track/monitor these various projects.

If there were in fact regionally standardized protocols, it would be most efficient to have a highly trained and funded regional or perhaps county-wide monitoring crew(s) dedicated to collecting and analyzing data to determine if short and long-term goals are being met.

This would be an extremely useful form of support to the partnership."

"We all are monitoring on our own, including an incredibly robust program [that one partner is leading]. Everyone is doing a portion. All of us are putting in some of the ingredients, but the cake never actually gets baked. We are always just bringing our individual part. If you ask us, how did you change x, we can give you that answer. But telling you the whole story, that is what's hard.

[We are waiting] for that moment when you actually have the final product that everyone can look at and say, 'Okay! This is everything that we have done, and this is what's been achieved.' And we finally getting to eat the cake! I want that moment where I get to see all of it. It would be good to have a well-baked cake."

Grande Ronde Restoration Partnership, Hall Ranch OSU Visit, 2015. PHOTO / GRANDE RONDE MODEL WATERSHED

Many partnerships, including both FIP and P-TA grantees, expressed specific needs for institutional support for monitoring. Partnerships with much less capacity and expertise required more support, for example the earlier suggestion for monitoring conducted with standardized protocols and regional monitoring teams. The priority needs highlighted here were commonly identified as critical gaps by partnerships, both FIP and P-TA grantees, who have relatively high capacity and expertise in monitoring.

***Priority** needs for institutional monitoring support:*

- Systems to manage and share data,
- Expertise for analysis, especially addressing multi-scale data, and
- Support to interpret results to tell the story of progress and inform adaptive management.

Possible types of institutional support:

- An institute within the university system supported by federal funds, similar to the Southwest Ecological Restoration Institutes,
- Greater leadership by state and federal agencies,
- Contracts with private consultants, and
- Peer learning through conferences and workshops.

A prominent theme in these suggestions was the desire for more monitoring workshops or peer learning opportunities with at least seven partnerships expressing a strong interest. Some partners expressed preference toward in-person sessions that provide more targeted, directly useful guidance over written materials or virtual sessions.

> *"A widely known scientific challenge is analyzing multi-scale data. I think a watershed restoration monitoring workshop would be very helpful so that we could all learn from each other on things like: monitoring different parameters, monitoring effectiveness of different types of restoration projects, writing monitoring plans for watersheds, funding for monitoring personnel and equipment, managing monitoring data, etc."*

Several partnerships noted their disappointment that the universities haven't played a bigger role in providing expertise and capacity for training, analyses and interpretation.

Suggestions for ways to fund additional monitoring infrastructure and institutional support included partnerships:
- Lobbying state and federal agencies for funding and/or
- Advocating for a statewide bond.

> *"Looking forward, I think that OWEB and the state and federal agencies may need to look toward a high-level longer lasting institutional support [for monitoring and restoration] and lobby for the creation of something like the Ecological Restoration Institutes at Northern Arizona University, Colorado State University, and New Mexico Highlands University. This type of organization would support FIPs with science, monitoring, coordinated outreach and improved engagement by local partners." (Link to SWERI and federal authorizing legislation)*

Suggestion for partnerships

Convene partnerships to explore a unified strategy to advocate for funding from state and federal agencies and/or some kind of bond measure.

OWEB

reflected that these comments could help to reinvigorate the vision from the Oregon Plan, where the responsibility for landscape level monitoring is shared among state and federal agencies. This approach integrates two priorities from OWEB's 2018 Strategic Plan – the need to define monitoring priorities and working with agencies and private foundations to align funding for those priorities.

Feedback for OWEB on monitoring

Overall, OWEB monitoring staff were consistently recognized for their ability to understand the real challenges partnerships faced and provide meaningful, individualized support.

However, two partnerships felt that OWEB could do better providing clear guidelines or expectations for monitoring reports at the beginning of the FIP grant, especially given the limited timeframe and the complexity of the work. One partnership in particular was frustrated by the different metrics required by different funding sources that were not apparent at the beginning of the grant. OWEB responded that this issue was flagged in a 2021 assessment of granting practices (Miller 2021) and that they have been coordinating with the staff responsible for reporting on Pacific Coastal Salmon Recovery Funds to prevent this from happening again.

Partnerships consistently expressed appreciation for FIP funding that could be used to hire a monitoring coordinator and fund monitoring projects. FIP grantees further along in their workplan recommended to newer FIP partnerships that they reserve funding in the second and third biennia for monitoring since the need would grow as projects were completed. Partnerships emphasized grant writing should also be included in the second and third biennia.

Suggestion for partnerships

For FIP grantees, reserve funding in the second and third biennia for monitoring and grant writing.

Partnerships also realized that even though all grant funds would be awarded in six years, many projects might take one to four years or more to complete after the award. One partnership emphasized the value of the supplemental effectiveness monitoring funds that OWEB provided, in addition to their FIP funding, which was critical in responding to concerns by an oversight agency early in the project. The additional monitoring grant allowed them to show progress and gain the support needed to move forward with the project.

PHOTO / HARNEY BASIN WETLANDS COLLABORATIVE

"That first round of restoration was a little messier than people were used to. … And we really had to pause for several years and do monitoring and tell that story. Having that extra funding and that space to be able to tell that story [was an added] boost. We've restarted [the work] now, and it's going much better. It helped us continue with that restoration effort overall. Having the funding and space to do that was really critical."

Grande Ronde Restoration Partnership, Longley Meadows Post Construction, June 2022. PHOTO / GRANDE RONDE MODEL WATERSHED

Several partners pointed out that ongoing capacity for monitoring will be needed well beyond the FIP grant to tell the story of progress – and that they felt OWEB still has unrealistic expectations of how long it will take to observe ecological outcomes.

"It takes decades to do this work to the extent we want to do it."

"Post FIP, we will need to find a way to continue monitoring, which increases with each new project. If we are not able to find funding, it will be difficult to meet the monitoring requirements. I think that it would be helpful to have long-term funding associated with FIPs that covers monitoring expenses post-FIP."

"We're talking decades of monitoring. One brood year is 4 or 5 years out in terms of fish return. And then we need multiple generations coming back to be able to look at any trends. And then we have decadal oscillations in ocean productivity. Right now, if you look at our nice graph, we are at the bottom of yet another decadal oscillation. That's the temporal scale that we need [consistently funded] monitoring programs guaranteed. The data doesn't tell you a lot because you have to look at 50 years of data."

OWEB's grants database was another area for improvement. FIP grantees are required to describe 'lessons learned' when they enter their grant reports in OWEB's database. One partner highlighted that these lessons learned could be a source for peer learning across similar project types, except that this field in the grants database is not searchable. They recommended that OWEB update this function of the grants database or provide some type of annual summary of lessons learned by project type.

OWEB's learning around monitoring and tracking progress

OWEB recognizes the inherent challenges in monitoring and tracking progress in complex systems, and they also understand the desire for grantees to have more clarity about what they are looking for in terms of monitoring. With this in mind, OWEB staff met with the third cohort of FIP grantees individually at the start of their grant to clarify monitoring expectations. They said they expect FIP grantees to conduct some type of monitoring that can be used to track progress towards meeting ecological outcomes and inform adaptive management, as described in their theory of change.

OWEB staff emphasized that they can provide tools, resources and guidance on general principles, but the partnerships are the ones that need to decide what is most important for them to monitor relative to their goals and theory of change, ideally involving the breadth of partners in these decisions.

As for changes to the grants database, there are not funds or capacity to do so at this time, but **OWEB** emphasized that it is good to document this request for future consideration and it echoes feedback they have heard previously.

OWEB has also learned the importance of flexible resources to respond to emerging monitoring needs, for example the supplemental effectiveness monitoring grants that were available to the first two cohorts of FIP grantees. OWEB is considering ways to set aside funding for similar sorts of emerging monitoring needs in the future.

While recognizing the need for consistent, long-term funding for monitoring, OWEB clarified that the FIP program is not the vehicle to address this need. In the near term, OWEB is very interested in having partnerships report on all they accomplished with their FIP grants. They acknowledge that there were not resources budgeted for this step and that reporting at this scale requires time and collaboration among partners. With this in mind, OWEB is piloting a post-FIP reporting project with a FIP grantee from the first cohort. The purpose is to synthesize and communicate information collected during the FIP, not to collect any new data. They are looking to use what they learn from this pilot to better define post-FIP reporting.

OWEB does aim to share lessons learned across partnerships, for example sharing Project Completion Reports with a partnership's permission. They also suggested that lessons learned can be found in a FIP grantee's Progress Tracking Reports, especially in the adaptive management section.

Salmon SuperHwy - Bridge construction on Peterson Creek to allow fish passage. PHOTO / TRAV WILLIAMS

Recommendations for OWEB for tracking progress

- Clarify expectations for monitoring and reporting requirements at the start of each FIP grant in an individualized manner.
- Continue to allow flexibility in monitoring and reporting so that grantees don't have to invest energy into metrics or reporting that may be outside of the partnership's main focus.
- Invest in workshops, trainings and/or conferences to encourage peer learning and learning from experts and guest consultants, for example working through the challenges of multi-scale data including monitoring different parameters, monitoring effectiveness of different types of restoration projects, writing monitoring plans for watersheds, funding for monitoring personnel and equipment, managing monitoring data, cultural considerations, etc.
- Work with state and federal agencies to explore ways to increase investment in monitoring infrastructure, for example a restoration research institute or regional monitoring teams supported with legislative funding or a bond.
- Continue offering supplemental effectiveness monitoring grants to allow flexibility to support overarching monitoring needs identified by each partnership.
- Consider long-term funding for a monitoring coordinator through the P-TA grant.
- Given the long-term need to track progress beyond the six-year FIP grant, consider offering funding to all FIP partnerships for post-FIP reporting.
- Update OWEB's grants database to be able to search completed projects for lessons learned – or consider how to compile lessons learned and distribute to partnerships.

PHOTO / ROBERT WARREN

Synthesis – Partnership Types, Performance and Resilience

Partnerships are often fragile arrangements built on a delicate calculation that the individual roles and responsibilities that partners are willing and able to commit to add up to the collected effort needed to advance their shared vision. Ambitious work in complex systems that are not well-understood puts additional pressure on the partnership since uncertainties in the work make it harder to accurately estimate roles and responsibilities and puts a greater emphasis on learning. Resilience is centrally important in these contexts.

"Money drives commitment in a big way. However, not all project concepts evolve the way they were initially thought of, so commitments have to also evolve."

Compromise *refers to a quick resolution of differences with the goal of at least partly giving each party what they want.*

Collaboration *refers to a deeper exploration of differences, engaging in dialogue to understand the 'whys' behind what each party wants with the goal of developing more creative and inclusive solutions that address common interests and overarching goals.*

Partnerships that engaged in more straightforward work in relatively well-understood systems may experience fewer stressors and be able to perform well with less emphasis on resilience.

For many partnerships, especially project-oriented partnerships, that calculation is negotiated as the partnership is formed so that each partner, or a subset of core partners, will get some portion of the budget and will be afforded the trust that they have the professional skills and judgment to carry out high quality work. These financial expectations may be spelled out in a charter or grant agreement, but more often, they are an implicit premise that keeps everyone showing up and is foundational to the stability of the partnership. If one partner falters in their performance, the threads of resilience can help a partnership stabilize, for example camaraderie and openness to talk about problems and pitch in to resolve them, plus shared leadership to keep the overall focus on the partnership's work, rather than individual interests.

East Cascade Oak Partnership, Grass Identification.
PHOTO / COLUMBIA LAND TRUST

In the context of this delicate calculation, many partnerships are set up to compromise when issues arise about overall performance or accountability, for example which actions are most likely to have a positive impact or which partner is best suited to take on specific roles. In the ideal sense, collaboration may seem like a better approach to boost performance, where partners engage in deeper dialogue for mutual understanding and problem-solving.

However, if partnerships have a solid understanding of their socio-ecological systems, if there are best practices to address their resource concerns and if partners have the capacity and expertise to advance the work, then they may be able to operate at a high level of performance relying on compromise without the need to have deeper conversations about performance and accountability. In fact, they may be able to maximize their efficiency and performance by relying on compromise.

Further, most partnerships are not structured for this level of higher level of interdependence and accountability. Even if their intent is to be structured in this way, they may not have enough stability or resilience to do this well, in terms of that negotiated division of labor and budget that keeps everyone showing up. This may be especially true when individual partners depend on the partnership for their financial stability or reputation. If funders push partnerships too hard expecting them to hold each other accountable with performance issues and the stability and resilience isn't there, performance could suffer. For example, tensions caused by the attempt to talk about performance issues could close down communication making it harder to address concerns. Partnerships that have more threads of resilience, for example camaraderie, success, organizational anchors, shared leadership and openness, are better able to withstand the destabilizing forces of working through these types of challenging questions.

A focus on compromise instead of collaboration is common for project-oriented partnerships and to some extent planning-oriented partnerships. Compromise and 'splitting the pie,' for example splitting budgets evenly among partners, may contribute well to performance in relatively well-understood systems with straightforward work plans, especially if a number of actions are considered equally important and the roles align well to split the work.

However, **OWEB** has expressed that they do expect a higher level of collective attention on prioritizing projects and preparing projects for technical review. They explained that the FIP program provides a unique opportunity for partnerships to work together to strategically focus on actions that have the greatest potential benefit relative to their restoration goals. Splitting the budget evenly among partners could be a strategic approach to keeping partners at the table and sharing the workload, but not necessarily strategically focused on the highest priority restoration activities. OWEB believes partnerships who split the budget evenly would be a better fit in the Open Solicitation Program.

"We don't want partnerships to form and apply for the FIP simply so they each have access to a larger pot of money for projects. We want to fund partnerships that utilize their collective expertise to implement the most meaningful, priority projects in their geographies."
OWEB

Compromise may also be more common when partners work in separate geographies, for example with multiple watershed councils or Soil and Water Conservation Districts, which by definition only implement projects in their geographies respecting the territory and autonomy of their neighboring districts and councils. However, there were clear examples of partnerships with multiple watershed councils and Soil and Water Conservation Districts organized as a planning-oriented partnership where they were structured to work collectively to fund the best projects, rather than just 'split the pie.' Planning-oriented partnerships tend to emphasize shared leadership, as in a steering committee that includes representatives from different partners organizations that keeps the focus on what is best for the partnership. Partnerships that have their own internal review process often also rely on a steering committee to weigh in on proposed projects.

Systems-oriented partnerships are structured to have even greater accountability, where they collaboratively develop standards and expectations along with mechanisms to raise questions and a process to work through them to meet standards. Developing this level of infrastructure is resource intensive and requires a greater emphasis on resilience although none of the partnerships in this study were fully built out systems-oriented partnerships. Partnerships are better able to mobilize funding for this level of infrastructure when their work commands high interest and there is the potential for dedicated long-term funding. Several partnerships leaning towards a systems-oriented partnership were able to use the FIP grant as a catalyst to start to build that level of long-term funding, but the findings from this study caution not to expect such a high level of commitment without long-term consistent funding.

In contrast, learning-oriented partnerships are structured to ask challenging questions, since learning is the focus and what brings value to partners. However, they are structured to work independently, not to plan or implement projects together, and so the consequences of asking hard questions are not as destabilizing to partner reputations or finances in most cases. Each partner is responsible for securing funding to do their own work, and so the partnership can withstand partners coming and going, for example if there is a change in focus to improve performance that some partners dislike, with less risk to the partnership as a whole.

OWEB shared that they will continue to reflect on these findings to more clearly understand and articulate their vision of how successful FIP partnerships function.

East Cascade Oak Partnership, Wildflower Phenology Walk. PHOTO / COLUMBIA LAND TRUST

Synthesis – OWEB's Role in Supporting Partnership Performance and Resilience

Partnerships have been eager to participate in the FIP program because the scale of funding over six years allows them to tackle more ambitious projects over larger landscapes. However, there was evidence that this hard push for implementation has sometimes kept them from pausing to check-in on trust, reflect on whether projects are meeting strategic priorities and consider opportunities to expand their circle. Yet, there were also many examples of partnerships effectively scaling up their work, while still dedicating time to reflection, expanding their circle, and strategic thinking. **Overall, there is evidence that the supportive culture within OWEB mitigates for this tension to perform at an accelerated pace and that the benefits of the FIP and P-TA grants related to performance and resilience outweigh the costs and stressors.**

Overall, OWEB's investments in partnership planning, governance, coordination, project implementation and monitoring have been found to be well-positioned to support high performance and resilience.

"OWEB had a gathering a few years ago of funded partnerships to come and share at the Menucha Retreat Center. I thought that kind of thing is pretty helpful and would like the opportunity to do that again, to talk with other partnerships informally and get ideas. It was really useful, really great hearing [from others]. I just assumed OWEB wanted to see a perfect partnership, and I remember sitting with [another partnership] and hearing them talk about some of their [struggles]. It was just great to be like, 'Oh, good! Okay. So you can still be successful and have issues and are working through it.' And then just hearing and seeing what other people were doing, it was very reassuring for me. Yeah that was good." - *P-TA Grantee*

This study finds that the biggest near-term change that OWEB could make to support partnership resilience would be streamlining administrative burdens from the FIP program so that partnerships could dedicate more of their time to the operation of their partnership – specifically, streamlining project applications, technical review, reporting guidelines for monitoring and use of the online application portal and grants database. Some of these OWEB is working on, integrating recommendations from this study, while others like the database are not possible due to current capacity.

Further investments in institutional support for monitoring, such as near-term investments in peer learning opportunities and training workshops, were also identified as a high priority for investment to support resilience. OWEB holds a gathering for FIP and/or P-TA grantees every biennium, and OWEB staff are interested in more frequent peer learning or peer mentoring opportunities. They are considering what is possible given their staff capacity. Monitoring is especially important as partnerships who were able to learn from their efforts and tell the story of their success have been better positioned to be effective and secure ongoing funding. If OWEB can help introduce grantees to other funders, this would also contribute to resilience in terms of greater opportunity to secure ongoing funding. Over the long-term, support to help interested partnerships integrate equity into their vision and approach, including an emphasis on underrepresented groups, has the potential to boost resilience by tapping into the creative potential of broader constituencies and more diverse funding sources.

Conclusion

This in-depth, qualitative study found many examples of partnerships accomplishing more complex work at a larger scale than any one organization could do alone. Most of the assumptions from OWEB's theory of change have held up with some fine-tuning related to performance and resilience.

Partnerships emphatically described the value that the P-TA and FIP grants had to their performance, growth and resilience, including the cumulative value of these programs for partnerships that received both. FIP grants were described like 'rocket fuel' that launched partnerships into a higher level of performance, which also supported their resilience and competitiveness for future funding from other sources. P-TA grants created an opportunity for partnerships to formalize their focus, commitment and governance structure, which for most partnerships created momentum to then take advantage of large funding opportunities, including partnerships that were not selected for FIP grants. On the other hand, partnerships who weren't able to secure funding for the partnership to implement projects anticipated operating at a lower level until new funding was available, implementing the work individually or restructuring around a new focus and funding opportunity.

Thoughtful reflection on the function and structure of partnerships led to development of a series of conceptual tools describing:

- Partnership types defined by relative interdependence among partners,
- A framework for understanding high performance including categories of performance common to all partnership types and others that vary by partnership type, and
- Threads of resilience that maintain the integrity of a partnership despite stressors and change.

Gold Beach. PHOTO / OWEB

OWEB's efforts have been striking in their long-term commitment to invest in a breadth of partnerships working in different ecosystems across the state, their openness to learn alongside partners and their commitment to continually evolve the program to have the greatest impact possible.

However, program innovations must fit within the funding OWEB has for staff and infrastructure such as the online application portal and grants database – funding which is decided through the legislative budget process and relatively modest compared with their large funding portfolio. Program innovations must also fit within the statutes that govern the use of lottery funds for the benefit of water quality, watershed function, native fish, wildlife, plants and ecosystems. As OWEB continues to clarify their values and commitment to equity and environmental justice and as they learn from ongoing innovation led by partnerships and tribes, the interpretation of these statutes may play a key role in the future evolution of their partnership-focused investments.

OWEB's focused commitment to learning and adaptation in support of high performing partnerships has yielded many insights and practical tools that will be of use to partnerships and funders working in restoration and across sectors.

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Ashland Forest All-Lands Restoration Project – 2016 OWEB Board tour to the Roth Property, a private parcel that has Pacific Fisher dens. PHOTO / CITY OF ASHLAND

Appendix A

Partnerships awarded a FIP and/or P-TA grant: 2015-2022

The following partnerships were invited to participate in this study, except those with an asterisk who had only recently received funding when the study started. **Partnerships shown in bold participated in this study.** All of these partnerships are included on the map at the beginning of this report.

Partnerships awarded a FIP grant only: 2015-2022

Ashland Forest All-Lands Restoration
Baker Sage-grouse Local Implementation Team
*Coos Basin Coho Partnership
Deschutes Basin Partnership
Grande Ronde Model Watershed
Harney Basin Wetland Collaborative
Oregon Model to Protect Sage-Grouse All Counties
Warner Basin Aquatic Habitat
Willamette Mainstem Anchor Habitat Working Group

Partnerships awarded a P-TA grant only: 2015-2022

Umpqua Basin Partnership
Siskiyou Coast Estuaries Partnership, formerly Wild Rivers Coast Estuaries
Wallowa Fish Habitat Restoration Partnership
Rogue Basin Partnership
Willamette Valley Oak Prairie Collaborative
Hood River Basin Partnership
Intertwine Alliance Oak Prairie Working Group
Salmon Super Highway
Pure Water Partners
Upper Grande Ronde River Watershed Partnership
Partners of the North Santiam
Upper Deschutes Partnership
*Deschutes Basin Water Collaborative Partnership
*Nehalem Basin Partnership
*Coquille Coho Partnership
Upper Willamette Stewardship Network

Partnerships awarded a FIP grant and P-TA grant: 2015-2022

Clackamas Partnership Restoration for Native Fish Habitat
John Day Basin Fish Habitat Initiative
Rogue Forest Partners
Oregon Central Coast Estuary Collaborative
Siuslaw Coho Partnership
East Cascades Oak Partnership
Klamath Siskiyou Oak Network

Ashland Forest All-Lands Restoration Project

PHOTO / ROBERT WARREN

Appendix B

OWEB's Partnership Learning Project– Partnership Survey

Thank you for your willingness to participate!

Your thoughtful comments will contribute to a greater understanding of how partnerships grow and evolve under different circumstances. We hope this will benefit your partnership and others, while also directly informing the evolution of OWEB's Focused Investment Partnership (FIP) Program and Partnership Technical Assistance (P-TA) grants.

It is possible to complete the required questions in this survey in about 20-30 minutes. (Required questions are marked with an asterisk.) If you have more time to add comments and examples, it will contribute to a deeper understanding of partnerships and potentially more creative recommendations for OWEB.

Your responses for each page will be saved automatically each time you click on the 'next page' button. If you close your browser and have cookies enabled, you can open the survey link in the same browser and return to your responses to make changes or complete the survey.

If you would prefer an interview by phone or Zoom to share your thoughts instead of taking this survey, please reach out to the email below.

As a gesture of appreciation, each partnership that has at least two people complete the survey or participate in an interview will receive a check for $250 - which could be spent on meeting refreshments to celebrate your good work or whatever your partnership chooses.

All of your responses will be confidential and only seen by the research lead, Jennifer Arnold, Ph.D. of Reciprocity Consulting, LLC. Only aggregated summaries or anonymous quotes will be shared after all personally identifiable information is removed.

Findings will be presented to OWEB staff and board and if all goes well, we'll also develop an academic publication for a broader audience. We will recognize all of the organizations that participate.

If you include your email address, you will receive a copy of preliminary findings and be invited to share your feedback, likely sometime in early 2023. In the meantime, please reach out with any questions.

Thank you for the work you put in every day - and the opportunity to learn alongside with you!

Jennifer Arnold, Ph.D., Reciprocity Consulting, LLC
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Partnership Survey

A Few Questions about You and Your Partnership

The following questions will help track patterns in responses across partnerships and allow for individual follow-up if questions come up during analysis.

1 Which partnership(s) are you a part of? Please mark all that apply.

- ◯ Ashland Forest All-Lands
- ◯ Baker Sage-grouse Local Implementation Team
- ◯ Clackamas Basin Partnership
- ◯ Deschutes Partnership
- ◯ East Cascades Oak Partnership
- ◯ Grande Ronde Restoration Partnership
- ◯ Harney Basin Wetlands Collaborative
- ◯ Hood River Watershed
- ◯ Intertwine Alliance Oak Prairie Working Group
- ◯ John Day Basin Fish Habitat Initiative
- ◯ Klamath Siskiyou Oak Network
- ◯ McKenzie Collaborative
- ◯ Millicoma Forks Coastal Coho Restoration Partnership
- ◯ Oregon All Counties Sage Grouse
- ◯ Oregon Central Coast Estuary Collaborative
- ◯ Partners of the North Santiam Watershed
- ◯ Pure Water Partners
- ◯ Rogue Basin Partnership - Little Butte Creek Watershed TRIB Initiative
- ◯ Rogue Forest Partners
- ◯ Salmon Super Highway
- ◯ Sandy River Basin Partners
- ◯ Siuslaw Coho Partnership
- ◯ Umpqua Basin Partnership
- ◯ Upper Grande Ronde River Watershed Partnership
- ◯ Upper Willamette
- ◯ Wallowa County Annual Invasive Grass Partnership
- ◯ Wallowa Fish Habitat Restoration Partnership
- ◯ Warner Basin Aquatic Habitat
- ◯ Wild Rivers Coast Estuaries
- ◯ Willamette Mainstem Anchor Habitat Working Group
- ◯ Willamette Valley Oak Prairie Cooperative

2 If you marked more than one partnership, which one are you most involved with?

Please answer the survey questions with this one partnership in mind. In the open comment boxes throughout the survey, you are also welcome to share reflections about other partnerships you have experience with.

3 Your Name

Your name is strongly preferred but not required. None of your responses will be linked to your name, organization or partnership. Research lead, Jennifer Arnold, will be the only person who will see personally identifiable information.

4 Your Email

If you provide your email, I will share preliminary findings for your review and feedback.

5 Your Organization

6 Your position in your organization and your role within the partnership, if you have a specific role.

7 Are you interested in being contacted for a follow-up conversational interview?
I am looking to talk to people from different types of partnerships to hear more about the questions in this survey.

- ○ Yes, I would like to have a conversation.
- ○ Maybe
- ○ No

8 Do you think your partnership might be interested in participating in a facilitated discussion?
If there is interest, I can virtually attend one of your partnership meetings to listen and/or facilitate a group discussion about some of the questions from this survey.

- ○ Yes
- ○ Maybe
- ○ No

Questions or comments?

9 How long has your partnership been operating in one form or another?

- ○ 0-2 years
- ○ 3-5 years
- ○ 5-10 years ago
- ○ 10-20 years
- ○ 20+ years
- ○ Don't know
- ○ No longer operating

10 How long has your partnership been operating in one form or another?

- ○ 0-2 years
- ○ 3-5 years
- ○ 5-10 years ago
- ○ 10-20 years
- ○ 20+ years

Comments?

11 Which OWEB grant has your partnership applied for?

- ○ Partnership Technical Assistance (P-TA) grant, formerly called Development FIP and Capacity Building FIP
- ○ Focused Investment Partnership (FIP) grant

12 Which OWEB grant has your partnership received?

- ○ Partnership Technical Assistance (P-TA) grant, formerly called Development FIP and Capacity Building FIP
- ○ Focused Investment Partnership (FIP) grant
- ○ None of the above

PARTNERSHIP TYPES

Partnerships work at different scales, geographies and focus areas. Each has a unique structure, function and focus, whichmay change over time as the work evolves and in response to changes in leadership, new partners, funding, policies, external events, etc.

The next few questions will ask you to refl ect on yourpartnership with respect to the four partnership types described below, where partners have differing levels ofrelative autonomy or interdependency. The four types are also described in the questions below, but this graphic is provided for more detail. Each of these types can be high-performing and generate impact.

Partnership Types

Partnerships work at different scales and in different geographies and contexts. Each has a unique structure, function and focus, which may change over time as the work evolves and in response to changes in leadership, new partners, funding, policies, external events, etc.

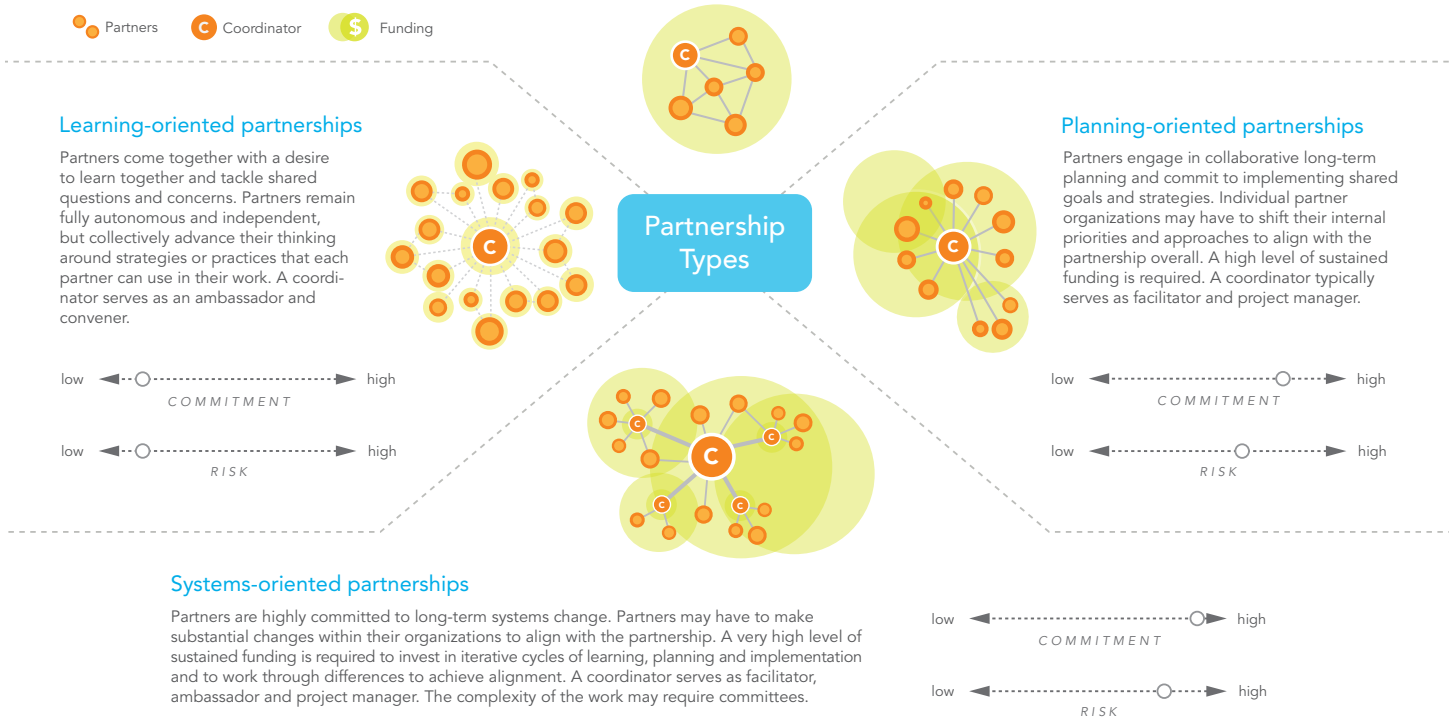
The partnership types below differ with respect to interdependency. In reality, this is a gradient, not discrete types. With more ambitious goals and greater interdependency, partners take on greater risk to meet shared commitments.

Project-oriented partnerships

Partners remain relatively autonomous and independent, but commit to a set of shared priorities and tasks, typically in response to funding opportunities. Usually there is a small number of partners. A coordinator serves as a project manager, a role which may be rotated among partners.

low ◄------► high
COMMITMENT

low ◄------► high
RISK



Learning-oriented partnerships

Partners come together with a desire to learn together and tackle shared questions and concerns. Partners remain fully autonomous and independent, but collectively advance their thinking around strategies or practices that each partner can use in their work. A coordinator serves as an ambassador and convener.

low ◄------► high
COMMITMENT

low ◄------► high
RISK

Planning-oriented partnerships

Partners engage in collaborative long-term planning and commit to implementing shared goals and strategies. Individual partner organizations may have to shift their internal priorities and approaches to align with the partnership overall. A high level of sustained funding is required. A coordinator typically serves as facilitator and project manager.

low ◄------► high
COMMITMENT

low ◄------► high
RISK

Systems-oriented partnerships

Partners are highly committed to long-term systems change. Partners may have to make substantial changes within their organizations to align with the partnership. A very high level of sustained funding is required to invest in iterative cycles of learning, planning and implementation and to work through differences to achieve alignment. A coordinator serves as facilitator, ambassador and project manager. The complexity of the work may require committees.

low ◄------► high
COMMITMENT

low ◄------► high
RISK

Draft - 2022 revised graphic based on partnership continuum from OWEB's Partnership Learning Project, 2018 - Feedback welcome **jennifer@reciprocityconsulting.com**

1 Which partnership type best describes how your partnership is currently structured?

- ○ **Learning-oriented partnership** – partners remain fully autonomous andindependent, but collectively advance their thinking
- ○ **Project-oriented partnership** - partners remain relatively autonomous andindependent, but commit to shared priorities and tasks
- ○ **Planning-oriented partnership** – partners engage in collaborative long-term planning andimplementation which may require individual partners to shift their internal priorities
- ○ **System-oriented partnership** - Partners are highly committed to long-term systems change and may have to make substantial changes within their organizations to achieve alignment
- ○ **Don't know**

2 Which partnership type best describes how your partnership has functioned in the past? *Mark all that apply.*

- ○ **Learning-oriented partnership** – partners remain fully autonomous andindependent, but collectively advance their thinking
- ○ **Project-oriented partnership** - partners remain relatively autonomous andindependent, but commit to shared priorities and tasks
- ○ **Planning-oriented partnership** – partners engage in collaborative long-term planning andimplementation which may require individual partners to shift their internal priorities
- ○ **System-oriented partnership** - Partners are highly committed to long-term systems change and may have to make substantial changes within their organizations to achieve alignment
- ○ **Don't know**

Comments?

3 Which partnership type best describes how you wouldlike your partnership to function in the future? *Mark all that apply.*

- ○ **Learning-oriented partnership** – partners remain fully autonomous andindependent, but collectively advance their thinking
- ○ **Project-oriented partnership** - partners remain relatively autonomous andindependent, but commit to shared priorities and tasks
- ○ **Planning-oriented partnership** – partners engage in collaborative long-term planning andimplementation which may require individual partners to shift their internal priorities
- ○ **System-oriented partnership** - Partners are highly committed to long-term systems change and may have to make substantial changes within theirorganizations to achieve alignment
- ○ **Don't know**

Comments?

4 Describe how your partnership has changed over the years – and share from your perspective, what are some of the influences that have driven those changes? *Consider partnership structure, function, partner composition and/or focus of your work.*

EXPANDING YOUR CIRCLE

OWEB believes that healthy watersheds are supported by people who reflect the diversity of their communities.

Increasingly, people are acknowledging that segments of the population have not been engaged in restoration efforts – and that the support and creativity from the breadth ofpeople in a watershed is important, or even necessary, forrestoring watersheds and realizing the full potential for socialand ecological benefits.

1 To what degree do you feel that expanding your circle of partners and/or building relationships with underrepresented groups in your watershed will help you achieve your goals?

- ○ Strongly agree
- ○ Agree
- ○ Somewhat agree
- ○ Neither agree nor disagree
- ○ Somewhat disagree
- ○ Disagree
- ○ Strongly disagree
- ○ Don't know

★ Please explain or provide examples.

2 To what degree are you working on expanding yourcircle of partners to include underrepresented groups? *Mark all that apply. Your name or partnership will not be linked to your answers.*

- ○ Not applicable
- ○ We are interested but not sure where to start.
- ○ We are talking, learning and planning.
- ○ We are taking some early action steps.
- ○ We are in conversation with one or more historically underrepresented groups.
- ○ We have one or more people from historically underrepresented groups aspartners.
- ○ We have one or more people from historically underrepresented groups in leadership roles in our partnership.
- ○ We are making progress and sharing what we have learned with others.

Please explain or provide examples. *If you are working to expand your circle, please share which groups or constituencies you are working with.*

PARTNERSHIP TRUST & ACCOUNTABILITY

When we spoke to OWEB-funded partnerships five years ago,some partnerships noted that trust was fragile and partners were hesitant to ask challenging questions of each otherduring project prioritization and technical review.

They recognized that holding each other accountable requires leadership and substantial investment in relationships and trust building. They also reflected that governance documents, a skilled facilitator and planning tools help too.

They wondered if it would become easier to ask challenging questions of each other over time as relationships and trust were built.

1 **To what extent do you currently trust your partnershipto ask hard questions of each other so that collective decisions and actions have the greatest chance for impact?** Your name and partnership will not be linked withyour response.

- ○ Trust a lot
- ○ Trust
- ○ Trust somewhat
- ○ Neither trust nor mistrust
- ○ Mistrust somewhat
- ○ Mistrust
- ○ Mistrust a lot
- ○ Don't know

Comments?

2 To what extent do you think that trust among partners has changed over the years, thinking about the trust needed to ask hard questions and make planning and budget decisions together to hold the bar high for performance and impact?.

- ○ Greatly increased trust
- ○ Increased trust
- ○ Somewhat increased trust
- ○ Stayed the same
- ○ Somewhat decreased trust
- ○ Decreased trust
- ○ Greatly decreased trust
- ○ Don't know

Comments?

3 If you can, please share an example of when partners asked challenging questions of each other to increase their chance for greater impact.

ACCOUNTABILITY IN THE TECHNICAL REVIEW PROCESS

Note: Only FIP grantees were asked the questions in this section.

OWEB works with partnerships in the technical review process to keep the bar high for performance and likelihood of impact. However, OWEB also appreciates each partnership's autonomy and investment in strategic planning and internal governance that was the basis for the FIP grant award.

1 To what extent do you think OWEB's role in technical review has led to a better outcome for implementation and greater likelihood for impact?

- ○ Very much agree
- ○ Agree
- ○ Somewhat agree
- ○ Neither agree nor disagree
- ○ Somewhat disagree
- ○ Disagree
- ○ Strongly disagree

2 What do you appreciate about OWEB's role in technical review and what could be improved?

TRACKING PROGRESS AND IMPACT

High performing partnerships are often very good at tracking progress with respect to implementation and outputs, such as miles of stream restored or acres of forest treated.

However, it is much more challenging to track short and long-term ecological and social outcomes, such as changes insalmon populations, the resilience of forests to extreme fi reevents or economic and human health benefits from healthy watersheds.

1 To what extent have you had success tracking progress toward your long-term goals?

- ○ Lots of success
- ○ Success
- ○ Some success
- ○ Neither success nor failure
- ○ Some failure
- ○ Failure
- ○ Lots of failure

★ Please explain and share examples.

2 The following are some examples of why it is challenging to track short and long-term ecological and social outcomes. Please mark all those that you've experienced and describe any others below.

- ○ External changes, such as extreme flooding, catastrophic fire, economic recession, climate change, etc.
- ○ Shifting understanding of how systems work and what we should be tracking to measure change
- ○ Managing large complex data sets with multiple partners
- ○ Funding for monitoring over the timeframe needed for outcomes to emerge
- ○ Linking your work to the changes observed when there are other influences and unknowns

3 Please share examples of your biggest challenges withtracking short and long-term outcomes. How have you navigated these challenges, which might include changes in staffing, technology, training, etc.? What support would be useful from OWEB or other funders?

PARTNERSHIP RESILIENCE AND FUNDING

Partnership resilience refers to the ability of partnerships towithstand stressors and changing circumstances and stilladvance their vision and goals. A partnership may change instructure, function, composition or focus over time, but it is resilient if it continues to advance its vision and goals. A partnership may face many different kinds of stressors, but inthis study, we are specifi cally looking at how partnerships respond to changes in funding.

1 To what extent do you feel confident that your partnership will be resilient and sustain its work as different funding opportunities come and go?

- ○ Very confident
- ○ Confident
- ○ Somewhat confident
- ○ Neutral
- ○ Somewhat unsure
- ○ Unsure
- ○ Very unsure

Comments?

2 From your perspective, what makes your partnership more or less resilient to changes in funding? Consider your partnership structure, governance, history, partner composition, community context, access to funders, etc.

3 Are there ways funders can better support partnership resilience, short of continuous long-term funding commitments?

4 What are you most proud of with respect to fundraising for the partnership? *Include any significant or impactful grants that you have received, not including OWEB, with amounts and funders, for example NRCS, Oregon Department of Water Resources, private foundations, etc. We would like this information to understand the range of funding sources across partnerships and get a sense for the diversification of sources. We appreciate that this is sensitive information, and these details will not be shared. If you include private foundations, please share the name of the foundation.*

FINAL THOUGHTS

1 What inspires you to continue investing your time and energy in this partnership?

2 Do you have any other comments, feedback or questions to share?

Thank you so very much for your time! Please reach out with any questions.

Jennifer
Questions: jennifer@reciprocityconsulting.com

OREGON WATERSHED ENHANCEMENT BOARD

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