

OCEAN and Partners

Event Report - Riparian Practitioner Session Held April 16, 2018

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Overview and summary of key themes

On Monday, April 16, 2018, the Oregon Conservation Education and Assistance Network (OCEAN), in partnership with the Oregon Watershed Enhancement Board (OWEB) and the Oregon Department of Agriculture (ODA), hosted a day-long session for riparian restoration practitioners from throughout Oregon. The objectives for the day included:

- Increase participants' connection to each other and the work.
- Explore key programmatic, organizational, and sector-wide issues and opportunities for riparian restoration and protection in Oregon, including:
 - ◆ Landowner communications and relationships
 - ◆ Technical skills/concerns
 - ◆ Organizational capacity
 - ◆ Ideas for evolution of the sector (for funders, policy, programs, partnerships)

Approximately 85 participants attended the session, held at the Seaside Convention Center. The event was held the day before the annual CONNECT conference. The session was facilitated by consultants Amy Stork and Allison Handler of Solid Ground Consulting.

This report summarizes the components of the day and participant responses. A large amount of data was gathered at the event, and the key ideas are highlighted in this report. Woven throughout all topics, several themes stand out:

- **Desire to connect with peers.** Evaluations indicate that the day was successful, and participants are eager to continue to gather for shared learning experiences.
- **Desire to share ideas and innovations.** Practitioners have many ideas for how to improve programs and projects, from outreach to monitoring. The opportunity to share is very valuable.
- **Potential for greater collaboration.** Whether it's practitioner to practitioner, organization to organization, or with funders and agencies, participants in this session see the potential for collaboration to improve efficiency and effectiveness in the sector.
- **Desire to focus more on landowner relationships.** Evidence, including that presented at the session, shows that trust and relationships are critical to success in engaging landowners and getting their long-term buy-in. Practitioners strongly desire funders to recognize this and enable program success by providing funds that support activities directed at building relationships with landowners.
- **Need for monitoring.** In every topic area, practitioners emphasized the need to be able to better plan for and collect data.
- **Project time scales.** Practitioners emphasize the discrepancies between funding timescales and true project time scales.



- **Sector-wide capacity needs.** Research leading into the session and feedback at the session highlight the strengths, challenges, and gaps in the voluntary conservation sector. This report closes with a discussion of the potential for a more comprehensive sector-wide capacity-building approach.

Most items in the lists of comments below highlight responses from more than one participant. In most cases, the most common responses are listed first.

Landowner outreach presentation

After introductions, the day launched with a presentation by Dr. Jon Souder, Assistant Professor at Oregon State University, Forest Watershed Extension Specialist and Watersheds Research Cooperative (WRC) Director.

Dr. Souder discussed his research and results of a practitioner survey conducted by Solid Ground Consulting in preparation for the day. The presentation focused on understanding landowner motivations, social networks in communities, and effective engagement techniques. Key elements in the presentation included:

- The theory of social diffusion of innovation, which defines categories of individuals according to their orientation to new ideas and technology. While “innovators” — those who first adopt new technology — will walk in the door and ask for services, they tend to be the newcomers to the area and often are not perceived as credible by other landowners. “Early adopters,” who are the next group to adopt new ideas and technology, are a better target for outreach because their social standing and credibility furthers the spread of the innovation. Dr. Souder suggested recognizing early adopter landowners in the area of riparian restoration by observing their adoption of other technologies and practices in their operations. The remaining categories of people are the “early majority”, the “late majority”, and finally, the “laggards”.
- The importance of riparian practitioners living in the communities they serve and actively participating in community events and activities. Trust is a critical element in landowner willingness to engage in restoration. It is helpful for practitioners to “show up” and become part of the social networks that build trust and lead to changes in behavior.
- Although practitioners may perceive community events and outreach as less effective than one-on-one referrals, these activities create a background awareness that contributes to landowner participation.

Carousel discussion

Following the presentation, participants were divided into groups, and rotated between stations where they discussed four questions. A facilitator/scribe at each station noted participants’ responses. Individual responses have been combined here to highlight the common themes.

The first two topics are grouped, as they were thematically very similar.



“In the short term, how might you personally adjust your own approach to landowner outreach based on what you’ve just heard or read?” / “What ideas to you have for how your organization’s programmatic approach should evolve based on what you’ve just heard or read?”

■ **Targeting outreach:**

- ◆ Focus outreach efforts to identify landowners that are likely to participate and can strategically help the program, and build relationships with them. As one participant said, “focus on landowners that have influence and reach to spread the work throughout their community”; another said, “find the local leaders and early adopters in the community”; “pump the brakes on working with innovators”; “look at other folks that are more ingrained in the community.”
- ◆ Learn how to identify the “laggards” who will take time with no results.
- ◆ Consider geographic priorities first—then landowners.
- ◆ Work with regulators and other partner agencies.

■ **Adjusting outreach methods and messages:**

- ◆ Get to know the public by joining more groups and attending public events, such as coffee gatherings, neighborhood meetings, and simply “hanging out in local pubs and pizza parlors, etc.... Loosen them up”; “go to where the landowners go – just go as a person”; “eat at and patronize local businesses.”
- ◆ Work more with partners including realtors (a number of people suggested this), commodity groups, electric companies, etc. to include information with other information such as invoices or marketing packets. “Utilize partnerships for leveraging resources / money and information.”
- ◆ Highlight local neighbors who have done conservation efforts. “More tours—see neighbors’ projects”; “Demo sites / reference sites to show landowner.” Get landowners to “sell” to others. Follow up with landowners with past projects. Stay to talk – “an extra hour may get you a referral.”
- ◆ Develop new materials such as a resource guide for landowners, welcome/fact sheet, videos, social media.
- ◆ Reach out to absentee landowners and operators regarding opportunities and regulations.
- ◆ Use methods that connect people to each other such as connecting urban and rural landowners.
- ◆ Develop youth programs: “Easier to engage young people in new activities.”
- ◆ Develop new outreach events such as pub talks, meet-ups, place-based gatherings.
- ◆ Get feedback and build buy-in through surveys and other opportunities for the community to engage in decision-making.



- ◆ Tailor messages to highlight both the benefits to the landowner and the broader community benefits: “Show why participation matters”; “some landowners may appreciate being part of a bigger effort.”
 - ◆ Team up for multi-agency advertising.
 - ◆ Measure effectiveness of traditional methods such as newspapers, newsletters, radio outreach, mailings: “It is often hard to know whether they’re effective.”
 - ◆ Share completion reports with landowners and in the media.
- **Adjusting direct communication with landowners:**
- ◆ Multiple approaches are needed for new landowner contacts. Make more phone calls, keep records of past contact attempts, keep checking in with current updates.
 - ◆ Consider the messenger: “Different staff personalities better / worse at landowner outreach”; “Some older landowners don’t respect young staff (esp. women staff)”; “generational gap – what are the expectations and what am I comfortable with?”
 - ◆ Acknowledge that early adopters may need to meet at off times due to their work schedules. “Make meeting us comfortable.”
 - ◆ Introduce yourself and the programs; “be honest, maintain credibility and trust.”
 - ◆ Listen and identify what is going to benefit landowner and their concerns and opinions. “First site visit is a learning opportunity, not an assessment, use it to learn the people, the land, and their goals”; “read between the lines with landowner responses”; “focus on landowner needs, not program fit.”
 - ◆ Communicate better with landowners around what is being done with the project.
 - ◆ Check back after project is implemented, and learn from past projects. Share completion reports, re-written for landowners to understand and share with others.
- **Engaging the board more:**
- ◆ Engage the board in strategizing, identifying landowners, recruiting landowners. As one participant noted, “Board—how to engage them? Not just crisis.”
 - ◆ Convince your board to work with schools, Future Farmers of America, etc., to invite them to field days, community service, meetings (“BE ASSERTIVE to work with key folks”).
 - ◆ Consider board demographics vs. community demographics.
 - ◆ Consider changing board meeting times.
- **Organizational strategies:**
- ◆ Stay engaged in past projects. Make monitoring and long-term “care and feeding” a more central part of the strategy. (Many comments to this effect). Suggestions include more



collaborative monitoring, involving landowners/neighbors in monitoring, and reporting monitoring data to landowners.

- ◆ Develop an online project database and a needs database to help with reporting and prioritization. OWRI doesn't capture non-OWEB.
- ◆ Look forward in terms of project connectivity. Take a larger watershed picture, including all entities expanding work together. Be strategic in project selection – “stop wasting time with laggards!”
- ◆ Some organizations without a tax base pick and choose to be more strategic about projects and landowners, and refer some to partners. Other organizations “don't have a programmatic approach, although some have a geographic priority for strategy.”
- ◆ Capacity is an issue in all of this, and organizations need support for staff time to follow up and continue engaging landowners. “Would be nice to do a quarterly newsletter, but we don't have the time / capacity”; “outreach not with OWEB money – hard to do now”; “larger OWEB Small Grants would be helpful to scale up a bit.”

■ Challenges:

- ◆ Temper bad information or negative views—“keep the ripples positive.”
- ◆ Reaching small landowners.
- ◆ Identifying early adopters if they don't come to us.

“Other than completed projects, what are signs of success, particularly in working with landowners?”

■ Landowners:

- ◆ Landowners “show up” to the annual dinner, stop by the office, etc.
- ◆ Landowners stay engaged in the work: Participate again, allow monitoring, engage in shared learning, problem solve together, “make creative suggestions on projects”, “come to you asking what more they can do,” continue the project on their own, expand project area, etc.
- ◆ Landowners develop trust and personal relationships with staff: Invite you over, share produce, friend you on Facebook, ask you to attend funerals or celebrations. Other examples: “Dog recognition”; “trust you with gate code”; “site visit when landowner not home”; “showing you a failure (with legal implications) to help them solve”; “bringing in a noxious weed to help ID / deal with it”; “landowner lends equipment”; “landowner expresses gratitude”; “we feel like we can call landowner for advice.”
- ◆ Landowners see change: “Landowner talks about new wildlife they're seeing”; “excited when beaver moves in”; “monitoring—they're actually looking.”



- ◆ Landowners talk about the project, are open to demonstrations and field trips, and refer and recruit others. Landowners influence a group of other landowners in the area to do projects. "Landowners ask for or willing to post project signs."
 - ◆ Landowners engage with the organization: "Landowner knows who we are and what we do, knowing and remembering names"; "brag about the district"; "run for the board"; "[staff members] recognized outside of the office as working for the district."
 - ◆ Landowners see other benefits, such as improved neighbor relations, economic gain, improved conservation / production.
 - ◆ Change in perception of regulatory partner / landowner has regulatory certainty. "Landowner lets you bring agency staff to tour site."
 - ◆ "More landowners than we have capacity to serve."
- **Other measures of success:**
- ◆ Plants survive.
 - ◆ More exposure in general: media coverage, op-eds, people asking your organization about the projects they've seen, seeing branding / swag visible in the community, more social media engagement.
 - ◆ A healthy organization, meeting needs and completing good projects, with a solid reputation and good staff morale.

"What is your WILDEST idea for how to be more successful with landowners, without limits of funding, personnel, etc.?"

- **Systemic or legal changes:**
- ◆ Tax incentives for riparian or wildlife benefit.
 - ◆ No federal/ state hoops to jump through: rules, regulations, etc.; remove / fix regulations that are barriers; "no run-around."
 - ◆ Clarification of ordinances / codes.
 - ◆ Streamline permitting / paperwork; no permits; no one-size fits all permits; one-stop shop for permits and projects.
 - ◆ Allow federal funds for marijuana grows.
 - ◆ Riparian areas publicly owned and managed.
 - ◆ De-regulate Army Corps levees.
 - ◆ Regulatory certainty; 100% regulatory compliance.
 - ◆ Lottery money for active enrolled participants.
 - ◆ 100 % landowner privacy.



- ◆ “Social consistency—conservation becomes the norm.”
- **Changes to payment structure for landowners:**
 - ◆ Rate based on ecological value, not flat rates, with long-term lease.
 - ◆ Recognize ecosystem services such as grasslands.
 - ◆ Make it easier for landowners - money for upfront costs, improved incentives, better cost share rates, or “just do it for them, at no cost.”
 - ◆ Fund the projects for 15 years.
 - ◆ Project not tied to state or federal funds.
 - ◆ Money for referrals.
- **Changes to organizational funding:**
 - ◆ Flexible funds: money to experiment and innovate with landowners, not be juggling too many projects, be able to develop projects, not feel every hour has to be billable, talk freely and develop relationships.
 - ◆ Money for continuous engagement / monitoring / stewardship.
- **Agency changes:**
 - ◆ Better partnerships and coordination among all agencies.
 - ◆ Simplify grant process.
- **Changes to project type/scale:**
 - ◆ Create more diversity of projects—not everyone “fits in the same box.”
 - ◆ Landscape-scale projects; contiguous reach, regional or county-wide economic model to help all landowners understand cost/benefit.
 - ◆ Increased large-scale projects, holistic approach, address multiple concerns
 - ◆ Work on projects that are vital but may not be “sexy”.
- **Engaging youth:**
 - ◆ Have high school students interview landowners.
 - ◆ Restoration projects at every school, students take care of them.
 - ◆ School curriculum integration.
 - ◆ Youth employment.



■ Landowner outreach and education:

- ◆ More annual meetings, site tours, workshops, relationship building, site visits, time spent with landowners on projects.
- ◆ Innovative education: Workshops with useful topics, such as succession planning; teach new ideas and help solve problems; river restoration course.
- ◆ Landowner engagement in monitoring.
- ◆ Food: Pie competition, prime rib dinners, local foods.
- ◆ Indigenous history, cultural ties to land.
- ◆ One on one interviews; videos / recordings.
- ◆ Cell phone directory.
- ◆ Long term feasibility study of cost to landowners (add transparency to front end).
- ◆ Sharing success with landowners: capacity to sum up successes, reports, photo monitoring.

■ Accomplishing the work:

- ◆ Develop a common labor pool – train in restoration and agricultural practices.
- ◆ Work with inmate work crews planting and/or growing plants.
- ◆ Dedicated on call restoration crew.
- ◆ Local nursery for product, local workforce.
- ◆ Unlimited expertise! Know how to work in multiple spaces.
- ◆ Multiple office locations; best location for the area.

■ Program ideas:

- ◆ Grass bank.
- ◆ Work upstream with forestry landowners.
- ◆ Buddy System: “Mentoring” – new CREP landowner with existing CREP landowner.
- ◆ More work on public land.
- ◆ Community driven projects.
- ◆ More tribal engagement in CONNECT and local natural resource committees.
- ◆ Engagement with missing stakeholders, e.g. homeless folks.
- ◆ More time to work in urban settings.
- ◆ Water conservation in urban areas.



- **Data / metrics:**
 - ◆ Statewide / regional riparian condition report – show results with data.
 - ◆ Easily accessible / readable data.
 - ◆ More tools to determine success. Have different pools of money, use metrics to determine priority.
 - ◆ Capacity for project planning and metrics.
 - ◆ Capacity to determine outcomes and tell story.

- **Technology:**
 - ◆ Use drone / plane to showcase habitat fragmentation, create video for outreach, visualize the work, show success.

Technical issues and adaptations in riparian restoration

Participants had the opportunity to choose three out of eight discussion questions. A facilitator and scribe stayed at each station. Below is a summary of the primary areas of discussion.

Planting strategies

- **Plant selection:**
 - ◆ Peer to peer; partner organizations / native plant nurseries.
 - ◆ Multi-agency CHaMP (Columbia Habitat Monitoring Program, www.champmonitoring.org).
 - ◆ Oregon Coast riparian silviculture document (“Silviculture practices for riparian forests in the Oregon Coast Range” <https://ir.library.oregonstate.edu/downloads/m326m624s>).
 - ◆ NRCS Oregon Plant Materials Center (www.nrcs.usda.gov/wps/portal/nrcs/main/plantmaterials/pmc/west/orpmc).

- **Planting techniques:**
 - ◆ 2-3 years site prep sometimes.
 - ◆ Planting with climate change in mind; southern or drier species.
 - ◆ Use experienced contractors.
 - ◆ Plant one species at a time (to get it in the “right” place), then the next species.
 - ◆ Plant many, then when 5 + years old, add cages.
 - ◆ Depends on site; landowner interests; some landowners want to “see the creek.”
 - ◆ Third option—many plants + lots of care = lots of resources.
 - ◆ Dense planting maintenance? Free to grow? What happens in the future?



- ◆ Trees first, then shrubs; or shrub clusters established, then add trees.
- ◆ Planting strategy is site-specific, enclosures and cages vs. not is done per OWEB costs.
- ◆ Larger plants in smaller area (1 gallon), especially Eastern Oregon.
- **Wildlife:**
 - ◆ Elk exclosures: 8-foot fences. Hunting pressures are lowering the number of elk.
 - ◆ Deer don't like "fuzzy" plants (certain species: 9-bark, thimbleberry, Oregon grape); plant grass between trees, deer will eat the grass (though the grass competes with the shrubs). Deer cages. Deer repellent spray.
 - ◆ Beavers: Use cages/tubes, when needed; newspaper, aluminum sheets with zip ties. Beavers come in after blackberry removal. Beavers prefer some species over others. If space allows, plan for beavers and get their benefits; encourage beaver dams in specific locations. Establish beaver feeding stations with cut willows. "On the east side, we want the beavers: water!" Do beaver dams before a CREP project (or a permit needed).
 - ◆ Voles—scalp the ground around plants.
- **Landowner involvement:**
 - ◆ Work with landowners to grow native plant stock as a hobby, particularly sacrificial plants for beavers or elk.

Planting crews – contractor, in-house, etc.

- Capacity gap (Rogue). Only one big contractor.
- Liability concerns around contracting out for site prep with herbicide.
- Rapid turnover of volunteers.
- Projects are too small to attract contractors.
- Consistent training to ensure quality of work (SOP; digital apps [Fulcrum]).

Herbicides and their role in riparian restoration

- **Talking with landowners about herbicides:**
 - ◆ Location dependent - urban vs. rural; new landowner vs. existing long-term landowner.
 - ◆ Some landowners are just very resistant, it is part of belief system to paint all chemicals with the same issues. Practitioners need to help them understand the why, how, and it takes a lot of time.
 - ◆ Encourage landowner questions. Understand what they think the risk is.



- ◆ Be empathetic—get them from irrational to rational state.
 - ◆ Develop a plan to deal with their issue.
 - ◆ Describe mechanics of invasive species. Lay out the time it takes for manual, mechanical control, effect on project success.
 - ◆ Explain that the end goal is not to use long-term, but the longer you wait, the more it will take.
 - ◆ Use examples, pictures, success, failure, before and after, outreach resources.
 - ◆ Talk about who will do the work and their professionalism.
 - ◆ Point to other success with herbicides—e.g. The Freshwater Trust.
 - ◆ Discuss alternatives; present herbicides as a tool. Show them all the tools. Relate to them.
 - ◆ Empower the landowner to do it themselves, and learn from this rather than “winging it” with the chemicals lying around.
 - ◆ Set realistic expectation—what the site will look like in short and long term.
 - ◆ Understand the fine line on recommendations and potential liability issues.
 - ◆ Know the history of your place. Look at the whole system—each weed in its place.
 - ◆ “We often don’t work with landowners who are not willing to use herbicides.”
- **Other issues and challenges:**
- ◆ Upstream landowner issues.
 - ◆ Liability issues.
 - ◆ Downstream issues.
 - ◆ Social issues.
 - ◆ Competing agreements on uses—what should guide us?
- **Other topics and questions:**
- ◆ Questions on compounds, build-up over time.
 - ◆ Other options—grazing, ecological balance.
 - ◆ Use multiple tools for success, which includes: Control long-term maintenance; achieve change in plant community; patch reduction; improved form and function.
 - ◆ Need for BMPs for specific weeds.
 - ◆ Soil scraping.
 - ◆ Permitting issues with DSL; ODA guidance is vague.



Effectiveness monitoring

■ **What to measure:**

- ◆ Many types of questions, simple to complex, including are customers happy; and social, ecological, economic measures.
- ◆ Agency-based monitoring requirements as our base.
- ◆ Surrogates (songbirds, etc.) that landowners can look for.
- ◆ Metrics tying project with water quality parameters.

■ **How to measure:**

- ◆ Collaborative, with partners / landowners / citizen science to help gather long-term data.
- ◆ Share project summaries with landowners.
- ◆ Basin-scale organization using same protocols, clearinghouse.
- ◆ Shared database (mentioned several times).

■ **Issues/challenges:**

- ◆ Identifying monitoring questions, framing the monitoring effort, developing a monitoring plan.
- ◆ Understanding protocols.
- ◆ Need strategy for sampling numerous sites.
- ◆ Need baseline data.
- ◆ Pulling together data / information that has been gathered by multiple people/protocols.
- ◆ Data gaps – projects have been completed and now trying to piece together past data.
- ◆ Interpreting data: Same data but different story based on who reviews.
- ◆ Hard to measure outcomes; “noise”.
- ◆ Hard to extrapolate learning to more than local or regional.
- ◆ Insufficient funds for monitoring, particularly beyond a few years, within which change may not occur.

■ **Resources:**

- ◆ Funder-provided protocols / expectations for monitoring.
- ◆ Examples from councils / SWCDs.
- ◆ PNW Aquatic Monitoring Partnership–data sharing, monitoring protocols. www.pnamp.org.



Positioning landowners for post-project success

■ **Setting expectations:**

- ◆ Assess the capacity of the landowner to maintain the work.
- ◆ Involve the landowner heavily in the planning process up front.
- ◆ Landowner agreement that sets long term expectations, without scaring them away. Requires balance. When is the project “done”? Never.
- ◆ Things to be wary of: Particularly tough weeds, paperwork, permitting, over-complication, scale becomes an issue for how well a project is maintained.
- ◆ Break the project into manageable pieces.
- ◆ Casual conversation about what is going to happen.
- ◆ Follow up with email / written as well.
- ◆ Provide positive reinforcement from past projects.
- ◆ Offer to accompany landowner on initial maintenance tasks.
- ◆ Not sugar-coating to get the project.
- ◆ Help with paperwork: Get partners to help with permitting paperwork; prep paperwork for the landowner; be present with landowners for permitting and paperwork.

■ **Handing off the project:**

- ◆ Get projects to a more natural transition point (free to grow, etc.). Provide a packet of documents to give them what they need post-project.
- ◆ Find resources to give them outside your organization (e.g. weed board; contractor list) and resources / education to tackle tough restoration issues. Teach them how to get the most from those resources. (Mentioned frequently.)
- ◆ List of reference sites to show them what the look of a project should be (visually powerful).
- ◆ Regular communication post-project: 6-month/annual.
- ◆ Graduated engagement to get landowner off on right foot and taper off, e.g. doing maintenance with landowner for first few cycles.
- ◆ Provide a record-keeping manual to have them checking on the project and documenting maintenance details, timelines.

■ **Keeping landowners engaged:**

- ◆ Supporting landowners to monitor their own sites gets them invested.
- ◆ Send out monitoring info annually.
- ◆ Have neighbor gathering to facilitate long term relationships.



- ◆ Ask them to participate as demo project.
 - ◆ Multiple projects over a long time.
 - ◆ Offer opportunities to enhance or further refine their project.
- **Dealing with issues:**
- ◆ Adaptive management: flexibility through adversity, finding creative ways to help out.
 - ◆ Difficult to pay for help for landowner to deal with unexpected change, e.g. beavers, fire.

Successfully managing / supporting landowners with “Do It Yourself” restoration

- **Up-front conversations:**
- ◆ On-the-ground site assessment with landowner.
 - ◆ Provide information, e.g. Jackson SWCD “Riparian Rebate Program” condensed planning process packet with plant list, timing, permits, etc. (Mentioned multiple times.)
 - ◆ Ask a lot of questions and help them set realistic expectations: What equipment do they have? What time do they have? (Mentioned multiple times.)
 - ◆ Provide a comparison of real costs of DIY vs. contractor, including both time and money. Template to plug in for each project.
 - ◆ Advise to start small: 200 vs. 2,000 plants.
 - ◆ Help develop a phased plan. (Mentioned multiple times.)
 - ◆ Provide non-preferential list of contractor contacts (Question: Is this okay for us to do?).
 - ◆ Provide a list of “Top 10 questions you should ask your contractor”.
 - ◆ Have permits listed in the plan.
 - ◆ Plan for and talk to landowners opposed to herbicide (see other topic).
 - ◆ Help them understand regulations and permitting, including ESA and Cultural Resources.
 - ◆ Build trust with landowners so they can ask us questions when uncertain.
- **Implementation:**
- ◆ Provide planting oversight and technical assistance.
 - ◆ Participate in field visits with agencies.
 - ◆ Hold their hands through invoicing, time-keeping—things that allow them to get their FSA payment.
 - ◆ Provide a spreadsheet for tracking, reminders.



- ◆ Follow up with landowner at the appropriate time. Help them track their projects.
 - Outlook calendar can be used.
 - Postcards at certain times of the year, e.g. bird nesting ended—go mow; blackberry season; reseed.
- **Other ideas/questions:**
 - ◆ Need clear points of contact at each regulatory agency that can answer questions and are friendly.
 - ◆ Need clear guidelines on codes and ordinances; tool to help navigate regulatory compliance and translate for landowners. (Mentioned multiple times)
 - ◆ How can we better support the “innovators” with limited capacity and no specific project funding? Can we include TA for a number of DIYers each year?

Leveraging project-specific partnerships

- **Planting crew partnership possibilities:**
 - ◆ Coordination within your basin; or look for partnerships with entities that don't have overlapping planting season.
 - ◆ City and county roads departments as partners.
- **Strategic partnerships:**
 - ◆ Understand scale / unit of focus, e.g. ODA Ag Water Quality Plan, Strategic Action Plan / Coho business plan, etc.
 - ◆ Engage big players; bring partners together to discuss needs and who does what. All in one room. Develop a common vision; no assumptions.
 - ◆ Develop unified strategy; watershed-scale approaches.
 - ◆ Focused vs. opportunistic.
 - ◆ Develop projects list – understand priority within the project list.
 - ◆ Identify partner strengths and niches.
 - ◆ Package projects to match funding source.
 - ◆ Reduce competition with partners for same funding, different projects; schedule the asks and tell the funders.
 - ◆ Important to diversify partners to source other funds, e.g., other agencies non-profits, etc.



- **Examples of other partnerships:**
 - ◆ ODFW riparian fencing program (connected to BPA); robust support for landowners, good match, good to complement CREP.
 - ◆ Tribes are growing native plants and will soon begin installing. Free plants can be used as match.
 - ◆ SWCD as fiscal sponsor for watershed councils, increased capacity.
 - ◆ CREP + instream habitat: Landowners support salmon (more than CREP); CREP provides partial match for OWEB large grants.
 - ◆ Harvesting willows on a property owned by a local land trust.
 - ◆ US Fish and Wildlife for pollinator plantings; can connect to education programs.
 - ◆ Sharing staff capacity with specialized expertise, e.g., engineers, etc., facilitation services; co-location helps.

- **Other questions / ideas:**
 - ◆ Partnerships for community programs.

Participant networking

After lunch, facilitators set up participants to network with each other, with a focus on connecting more and less experienced practitioners. Participants were given sample conversation-starter questions including:

- What advice would you give your younger self if you could go back in time?
- What do you hope to be able to say about your career twenty years from today?
- What strengths and attributes have helped support your success in your career?
- What do you do for fun?
- What has been the most challenging aspect of your current job?
- What has been the most rewarding aspect of your current job?
- If you could change one thing about your job, what would that be?
- Wild card! (your own burning question!).

The facilitators also reminded participants to fill out BINGO cards designed to help them meet other participants.

Organizational capacity

Participants divided up according to the size/type/geography of their organizations: SWCDs with more than 10 staff with a tax base; SWCDs with fewer than 10 staff with a tax base; SWCDs with no tax base;



Watershed Councils (East side); Watershed Councils (West side); and agency staff. Key themes included:

How can we build institutional knowledge?

- **Documentation of relationships:** Meeting notes, call logs for each landowner with standardized fields, emails to landowner, reports to the board.
- **Documentation of resources:** Develop a resource database of technical assistance info, “so you don’t have to be an expert.” Collect examples of different methods and outcomes, before and after.
- **File systems:** Make sure things are organized and easy to find, both electronic and hard copies.
- Manuals for positions.
- Introduce all staff to landowners and agency contacts; team approach to services.
- Take lots of pictures.
- Succession planning.
- Develop yearly protocols with cycles of deadlines.
- Merge councils.

How can we attract and retain the right staff?

- **Recruitment:** Texas A&M job board, Mac’s list, OSU are resources. Invite high school students to learn our work. Use word of mouth.
- **Compensation:** Long-term funding, salary, benefits, health insurance.
- **Organizational culture:** New employee orientation and training. Opportunities for growth and training. Control workload. Good management. Build loyalty and stability. Everyone feels heard and is an equal part. A positive atmosphere. Consistent staff meetings. Respect and recognition. Listen to fresh ideas.
- **Flexibility:** Allow staff to say no or refer client to another agency, allow flexibility of time.
- **Improve management:** Clear roles and responsibilities, performance planning, accountability. Establish goals, sub tasks, process, and time commitments. Have quarterly check-ins. Be less hierarchical. Ask the new person’s goals at hire.
- **Build a team:** Varied and complimentary skills.
- **Examine qualifications:** “Having to get staff with conservation planning and NRCS experience really limits the pool. Should we evaluate the need?”



How can our board evolve?

- **Build more connection between board and staff:** Invite staff to do presentations. Invite board to visit projects. Have board understand why staff leave. Have annual events with board and staff together.
- **Build board culture:** Improve food at meetings. Invite innovative practitioners to present at board meetings. Help board understand importance of meetings.
- **Board as ambassadors:** Increase board public involvement as reps of the district / organization.
- **Training and development:** Deepen board understanding of funding sources, projects, etc. Hold board retreats. Establish committees.
- **Recruit the right board:** Many are producers are too busy. Diversify race and gender on the board. Seek fundraising ability.

How else can we best serve our community?

- **Serve and educate urban areas:** Work with renters, homeowners' associations.
- **Serve more diverse clientele:** Have Spanish-speaking staff. Work on diversity and inclusion. Work with faith based groups. Have a higher cost share for low income residents.
- **Be strategic:** Hold focus groups –ask, don't make assumptions. Don't dilute your niche, stay focused. Develop partnerships (e.g. with breweries). More region-wide, larger scale access across tax lots.
- **Outreach:** Build social media presence, update website. Develop volunteer and workforce opportunities.

Big picture ideas for evolution of the sector

Participants were given time to write down their answers to several questions about the evolution of the sector. There was a short full-group debrief; 28 individual written responses were collected as well. Below is a summary of key themes.

What can funders, agencies, and partners to support success and innovation?

- **Funders:**
 - ◆ Clear application process and clearer goals.
 - ◆ Lighten paperwork, reporting and bureaucracy load.
 - ◆ Fund capacity building, strategic planning.
 - ◆ Highlight successes, e.g. "create successes documents to disperse to watershed councils."



- ◆ Incorporate more resources and technical assistance towards effectiveness and maintenance of past projects. “Money for replanting animal damage control, catastrophic damage, e.g., from flooding or drought.”
 - ◆ Fund monitoring: “Can't figure out trends without data; nobody wants to pay for data.”
 - ◆ Fund innovation: projects of different design implementation or monitoring metrics, new technologies, new methods to increase organizational efficiency, R&D.
 - ◆ Make funding timelines related to project needs, not bienniums set by bureaucracy.
 - ◆ Stabilize funding streams; make funding long-term. Find ways to encourage maintenance and retention of staff.
 - ◆ Fund the relationship-building and adult education that lead to successful projects.
 - ◆ Support community engagement: volunteer / citizen science monitoring; education (“get OWEB education grants back”), more flexible outreach grants, website development, diversity and inclusion.
- **Agencies:**
- ◆ More training and connection; more conventions, bi-yearly program-specific training for each program: “New staff suffer from lack of understanding job tasks and other districts are too busy with heavy workload to help.”
 - ◆ Create easy access to information. E.g., an information point person; an Operator, an “agency queen,” an agency navigator.
 - ◆ Create best practices documents; permitting documents for project types.
 - ◆ Clear regulatory information, enforce riparian ordinances and weed rules. “Let the district / watershed / NRCS team be the “good guys” with voluntary solutions, but use the stick.”
 - ◆ Don’t work in silos.
 - ◆ Don’t be so narrowly focused on single goals (like shade).
 - ◆ Create programs based on input from people on the ground, so they are easy to implement to meet the overall goals.
 - ◆ Streamline, e.g. CREP agreement that makes pairing grants with the program easier (Clean Water Services ECREP Agreement).
 - ◆ Be flexible: agency / practitioner collaboration to not let regulations hold up good projects. “Recognize that the agency agenda may not be the total solution to the problem.”
 - ◆ “Realize that success is built on trust and relationships with individual landowners; all landowners are different, and those relationships evolve differently; we can't address every resource concern with every landowner at once; make progress on concerns when we can, and try to address more complex concerns as the relationship evolves.”



■ **Partners:**

- ◆ Communicate, share ideas, and be creative together—including funders, agencies, staff, landowners. “Look for new niches and opportunities - instead of wondering why the old ways aren't working, do things a different way.”
- ◆ Become better partners: share staff, assess capabilities to remove redundancy, share staff trainings, form local work groups, come to all the meetings, plan and fund regionally but act locally. “Communicate; reach out; enable each other.”
- ◆ Publicize success—common and individual.
- ◆ Share data, literature regarding restoration trials, successes.
- ◆ Don't stick to one criterion of success; innovate by finding a way to make you current clients decision-makers.
- ◆ “Bake cookies and share them; don't be barriers as partners.”

What programmatic and policy improvements would increase impact and efficiency?

Respondents made many of the same points as were made above. Additional ideas included:

- Better coordination between state and federal agencies, to reduce permitting conflicts and difficulties.
- Minimum project acreage to initiate a project.
- Define success, and value partial success.
- Collaborate across state borders.
- Emphasize that councils and SWCDs are there to help landowners better manage their natural resources, not to enforce regulatory requirements.
- Coordination and involvement with state education curriculum.
- SWCDs achieve tax bases.
- Loosen permit requirements; speed up cultural resource reviews.
- NRCS develop Conservation Implementation Strategies exceptions; “eliminate or reduce impact of NRCS CIS approach.”
- Make easements more fundable for long-term protection.

How can we balance reactive / opportunistic projects with the need to be proactive / strategic?

- Strategize target audience first; then outreach to them specifically. Make a plan, then implement. For example, “prep for changing focus areas and do outreach ahead of time, so once working in new focus area, landowners are already informed and interested.”



- Change the funding structure. "Proactive / strategic projects take much more time and resources to plan, solicit landowner cooperation, and implement; we need to build the capacity to accomplish this; this involves more funding."
- Be selective and strategic about opportunistic projects. Don't work with landowners who are unlikely to be successful. Use opportunistic projects as a strategic opportunity to showcase something, then leverage that into the targeted, pro-active goal. Develop "filter" criteria to help determine when an opportunistic project warrants time and energy. Leverage partnerships to handle opportunistic projects efficiently.
- Balance: have a strategic plan for focus area and target funding there, e.g., with full funding, but reserve some funds and staff time for motivated landowners elsewhere. "75% focused, 25% reactive."
- Align with/complement focus areas.
- Align district goals with county / city goals.
- Focus on an industry or population instead of area.
- Better outreach and public education.

What would be needed to support riparian protection efforts, rather than only do riparian restoration?

- Long-term funding.
- Capacity funds to develop relationships.
- Community education on the benefits of riparian protection, leading to cultural buy-in. Field trips, public recognition of landowners doing protection even if not in our programs; engaging key landowners. "Peer pressure has not been used enough."
- Incentivize easements for protection the same way we do restoration. Tax credits/incentives for riparian buffers, shade, wetland mitigation, etc.
- Partnerships with land trusts.
- More monitoring and follow-up to show success of efforts.
- More recognition of the importance of upland practices and their impacts on riparian protection, e.g. rotational grazing, irrigation improvement. "Recognize that 'a river runs through it' at all times."
- Partnerships between agencies could target a broader audience of landowners and stakeholders.
- Funding easements should be a state priority, and we should make conservation easements easier / less onerous.
- Adaptive management: e.g. allow grazing in CREP project areas.



Participant evaluations

Fifty-seven participants filled out evaluations. Key themes included:

Highlights

- There was general appreciation for the opportunity to be together, and for the active, energetic approach to the day.
- Participants valued the presentation by Dr. Souder, and indicated that they will use the information they learned.
- Many people enjoyed the format of the small group discussions after the presentation, and the “practitioner speed dating” after lunch.

Critiques

- Many people would like more technical topics / more time on each. One suggested having experts facilitate technical topics.
- The capacity building and “big ideas” sections were not as effective / exciting. One participant made the point that many in attendance are not in management roles and might not find capacity conversations very interesting or helpful.
- The day was a bit too long, folks were tired by the end and the last segments were not as well received.

Facilitator comments and recommendations

The strong energy and passion in the riparian practitioner group is evidenced by participation from throughout the state and by the positive evaluations. We believe that programming that is responsive to the needs of the group will continue to be well-received. Below we offer ideas for both near-term and more comprehensive approaches to building capacity for these practitioners specifically, and more generally for all organizations working on voluntary conservation on private lands.

Immediate follow up from April 2018 event

- Send this report to the full group.
- Consider sending a “funder/agency response” that acknowledges the value of the input, and indicates how funders and agencies will process the ideas that were presented.
- Consider selecting a few ideas generated at the session (such as a follow-up training that was suggested or changes to how small grants can be used) and implementing rapidly.

Future trainings

Based on our experience and feedback from participants, the following ideas may be worth consideration.



- **Narrower focus.** More narrowly define the desired outcomes for the training in order to effectively select topics and structure the exercises.
- **Responsive topic selection.** Seek feedback on which technical topics would warrant more in-depth discussion. We observed particular interest in: planting strategies, herbicides, monitoring, and landowner “DIY”.
- **Inclusion of experts.** Recruit experts or experienced practitioners to present on key topics, then host discussions of those topics, similar to the format of the morning presentation followed by carousel discussion.
- **Small-group discussions.** Prepare small-group facilitators with advance training and discussion questions.
- **Refined networking opportunities.** While many found the networking at this event valuable, it could have been shorter and more targeted to connect people who would learn most from each other.
- **Regional events.** Evaluations indicate that participants valued interaction with folks in their regions to build connection. Some technical topics may be best suited for regional gatherings.
- **Management training track.** Managers may find capacity-building, fundraising, and big-picture conversations helpful, while field practitioners need more hands-on information.
- **Shorter training day.** With travel time and the intensity of the content and interpersonal contact, many found the day to be slightly too long. A six-hour session may be more appropriate.
- **Event fee.** A nominal charge that covers participant food costs will help encourage participant commitment.
- **Removing barriers.** Holding these trainings adjacent to a longer conference may facilitate attendance for some organizations traveling a long distance; however the additional lodging and food costs may deter others. Consider offering a scholarship to defray costs for those without resources to attend otherwise.

Sector-wide capacity-building ideas

The organizers of the Riparian Practitioner Session may also wish to consider developing a comprehensive approach to building the capacity of the sector working on voluntary conservation on private lands. Such an approach could consist of several distinct steps:

- **Understand the desired outcomes.** Organizing entities will need to discuss shared goals for building the capacity of this sector, and develop a set of strategic priorities to guide the work.
- **Conduct a needs analysis.** A needs analysis would begin with a review of existing data sets that document the capacity needs of the sector, such as the survey conducted for this project, Dr. Jon Souder’s research, and previous surveys. Should this review reveal specific areas where more information is needed, additional surveys and interviews can inform a more detailed analysis.



- **Develop a capacity-building program.** Based on the needs analysis, a program could be designed to enhance organizational and individual capacity for impact, through a combination of trainings, targeted assistance, or other methods. Examples of potential capacity-building investments include:
 - ◆ One-day trainings similar to the recent session.
 - ◆ In-depth trainings in topics such as leadership, management, fundraising, communications, marketing, advocacy, or identified technical topics. Trainings often combine skill-building with the development of formal or informal peer networks. Training formats could be in-person or online, and they could range in length from one hour to a full day or more.
 - ◆ Intensive in-person trainings may be followed by a series of cohort-based phone conferences to deepen the learning and solidify peer relationships.
 - ◆ Formation and facilitation of collaboration cohorts by geography, organization type/size, programmatic concerns, etc., possibly leading to formal or informal collaboration agreements.
 - ◆ Development of an online resource library.
 - ◆ Targeted assistance to individual organizations for organizational assessment, strategic planning, business planning (e.g. regarding fee-for-service offerings), or other capacity-building projects.

Such a program could include a small-scale pilot to test preliminary ideas with a small number of organizations, before launching a more comprehensive program sector-wide.

- **Evaluate.** Using the strategic priorities as a baseline, evaluate the effectiveness of the work and plan for any next steps.

