New Coordinator Handbook:
A Reference for Oregon's Watershed Council Coordinators

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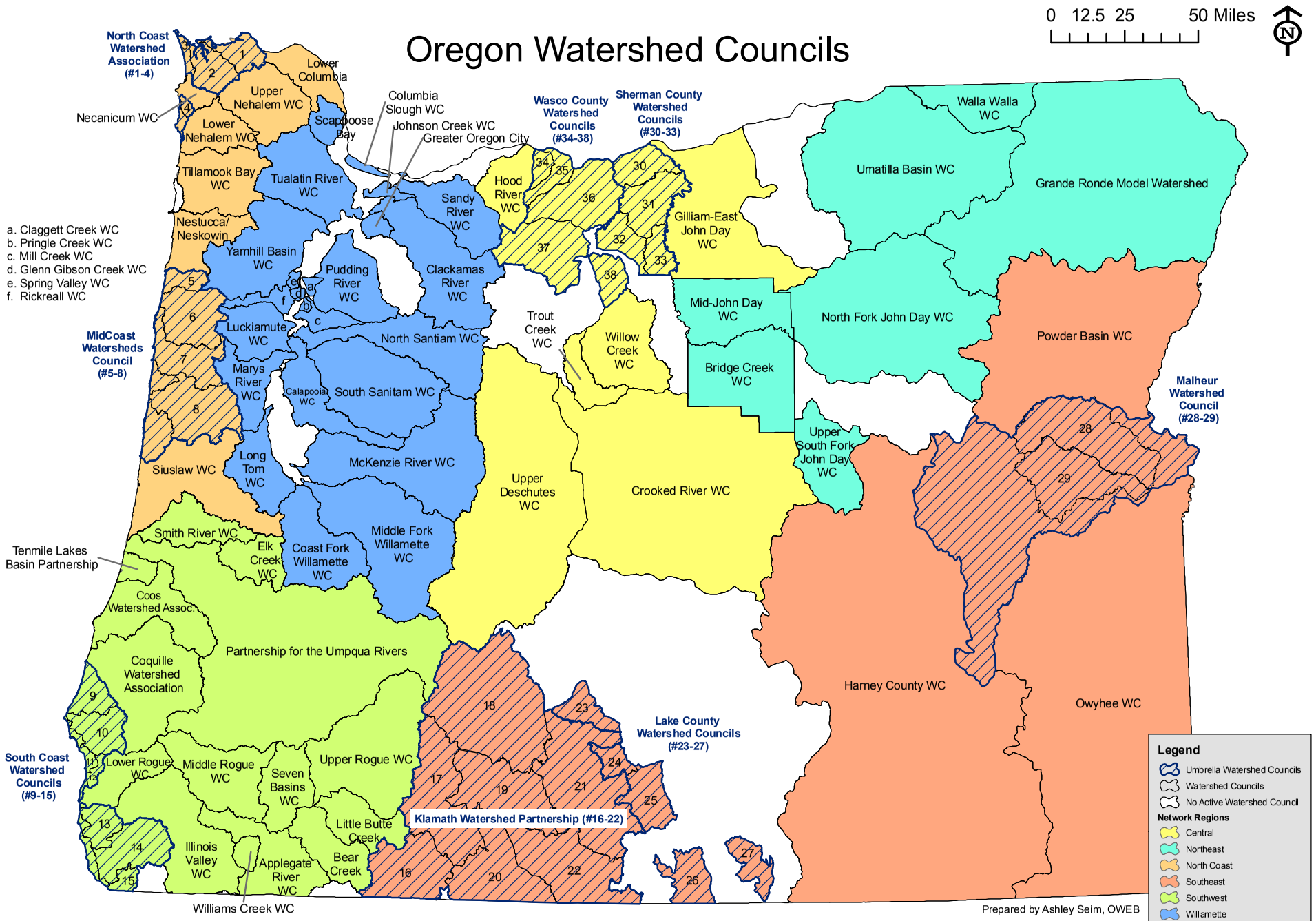

Councils under Umbrellas

North Coast WA
1. Nicolai/Wickiup WC
2. Youngs Bay WC
3. Skipanon WC
4. Ecola Creek WC

MidCoast WC
5. Salmon-Drift WC
6. Siletz Watershed Group
7. Yaquina Basin Planning Team
8. Alsea Basin Council

South Coast WC
9. Floras Cr./New River WC
10. Elk/Sixes River WC
11. Port Orford WC
12. Euchre Creek WC
13. Hunter Cr./Pistol River WC
14. Chetco WC
15. Winchuck WC

Klamath Partnership
16. Upper Klamath River
17. Upper Klamath Lake
18. Upper Williamson River
19. Lower Sprague/Williamson
20. Lower Lost River
21. Upper Sprague
22. Upper Lost River

Lake County WC
23. Silver Lake
24. Upper Sycan
25. Upper Chewaucan
26. Goose Lake
27. Warner Valley

Malheur WC
28. Lower Willow Creek Working Group
29. Bully Creek Watershed Coalition

Sherman County WC
30. North Sherman WC
31. Grass Valley Canyon WC
32. South Sherman WC
33. Pine Hollow/Jackknife WC

Wasco County WC
34. Mosier WC
35. The Dalles WC
36. Fifteenmile WC
37. White River WC
38. Bakeoven WC

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Questions? Comments? Like to order a copy of this publication?
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Without the keen eyes, attention to detail, excellent suggestions, and empathy for newly hired coordinators demonstrated by our contributors and reviewers, this handbook wouldn't be the resource we hope it is! What's missing or unclear is the authors' responsibility alone. We hope the handbook will continue to improve and evolve as a resource over time.

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2009 New Coordinator Workshop Participants
Denise Hoffert-Hay
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Erika Lang
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Frances Oyung
Tara Putney

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Introduction

Welcome to the world of watershed councils! Oregon's watershed councils and their partners are on the cutting edge of community-based, voluntary conservation. Councils are leading the way with innovative approaches to ecological restoration that result in healthier ecosystems, stronger local economies, and more engaged citizens. You've chosen to join this exciting effort, and we're glad you did.

It's easy to underestimate the complexity and challenges inherent in the position of watershed council coordinator. By definition, watershed councils are composed of a wide variety of community voices: agriculture, timber, conservation, tribal, government agency, urban dweller, academic, and more. Each stakeholder in the watershed brings his or her perspective and interests to the council, while also bringing a willingness to work together toward collaboration. As coordinator, you are responsible for helping this diverse group to coalesce around actions that will benefit the watershed.

This is no easy task. Your council may be a 501(c)(3) nonprofit organization, or it may be working with a fiscal agent such as a soil and water conservation district. Either way, you are responsible for managing the business of your council. You are responsible for the financial well-being of the organization, as well as carrying out the strategic direction set by your council. If you're the only employee or contractor for the council, you will find yourself learning and completing a tremendously diverse list of organizational tasks. If you are one of several staff, you'll be supervising others as they complete those duties. Again, in either case, you're being asked to manage an extraordinary array of responsibilities that go far beyond ecological restoration.

Clearly, there is no course of study or specific training that can fully prepare you for being a watershed council coordinator. Likewise, no handbook can do justice to the subject, unless it were a monstrous volume more suited to propping open a barn door than inviting a look. We've chosen an alternative. The following pages are meant to serve as a first-step reference; something to turn to for initial direction and suggestions for getting more information. It won't answer all of your questions, but we hope it will provide a good starting point on a number of subjects new coordinators struggle with.

From there, we encourage you to call us at the Network, send an email to the Coordinator Listserv, or contact directly one of your colleagues at another council. During the past 12-15 years, watershed council staff and members have developed tremendous restoration and organizational expertise. Add your questions to the mix; add your wisdom to the pool. The New Coordinator Handbook is our first effort at providing this introductory information. Please send us feedback and suggestions for improvement. Above all, enjoy your new position and don't forget to breathe!

Acronyms

BEF:	Bonneville Environmental Foundation
BPA:	Bonneville Power Administration
BLM:	US Bureau of Land Management
BoD:	Board of Directors
BoR:	US Bureau of Reclamation
CREP:	Conservation Reserve Enhancement Program
CREST:	Columbia River Estuary Study Taskforce
CRITFC:	Columbia River Intertribal Fish Commission
CSG:	OWEB Council Support Grant
DEQ:	Oregon Department of Environmental Quality
DOE:	US Department of Energy
DOGAMI:	Oregon Department of Geology and Mineral Industries
DSL:	Oregon Department of State Lands
EPA:	US Environmental Protection Agency
ESA:	Endangered Species Act
FAQ:	Frequently Asked Questions
LCREP:	Lower Columbia River Estuary Partnership
LOI:	Letter of Interest or Inquiry
MOU:	Memorandum of Understanding
NOAA:	National Oceanic and Atmospheric Administration
NOWC:	Network of Oregon Watershed Councils
NRCS:	US Natural Resource Conservation Service
OACD:	Oregon Association of Conservation Districts
ODA:	Oregon Department of Agriculture
ODF:	Oregon Department of Forestry
ODFW:	Oregon Department of Fish and Wildlife
ODLCD:	Oregon Department of Land Conservation and Development
ODOT:	Oregon Department of Transportation
OEC:	Oregon Environmental Council
OHS:	Oregon Historical Society
OMV:	Oregon State Marine Board
OPRD:	Oregon Parks and Recreation Department
ORS:	Oregon Revised Statutes
OSU:	Oregon State University
OWEB:	Oregon Watershed Enhancement Board
OWRD:	Oregon Water Resources Department
PCSRF:	Pacific Coast Salmon Recovery Fund
PSMFC:	Pacific States Marine Fisheries Commission
PUD:	Public Utility District
RFP:	Request for Proposals
RFQ:	Request for Qualifications
RPR:	OWEB Regional Program Representative
SWCD:	Soil & Water Conservation District
TMDL:	Total Maximum Daily Load
TNC:	The Nature Conservancy
USGS:	US Geological Survey
USFWS:	US Fish and Wildlife Service
USACE:	US Army Corps of Engineers
USFS:	US Forest Service

Chapter 1: Getting Started

Welcome to your new position! In your first weeks on the job, there's a lot to learn, no matter what the job is. Many new council coordinators don't have the benefit of being "trained" by their predecessors, or having other staff members to help them learn the ropes. If you are on your own in the first month, here are some suggestions to help you get on your feet. If the previous coordinator is still available to help with your orientation, or there are other staff members who can help you get settled, they are the best people to talk with first. This introduction to council work can help you determine the right questions to ask. Either way, remember, this list is not exhaustive—you may well need to direct your attention to something else specific to your council but not included below. Nor should you consider this a list of tasks you simply *must* accomplish in your first 30 days on the job; instead, think of this as a way to get started if you're not sure where to begin. Above all, remember to breathe, and feel free to call on the Network of Oregon Watershed Councils if you have questions.

The Council

- **Get to know the council and its work**
    - Find out what documents pertaining to the council are available for your review. Some possibilities include:
        - Governing documents. These might include organizational bylaws, employee and/or council policies and procedures, a board manual, IRS 990 forms (if the council is a 501c3 non-profit organization), and council audits, among others.
        - Watershed or basin assessments
        - Work plan—ask to see the previous coordinator's work plan, if one exists, or any organizational work planning documents
        - Strategic planning documents
        - Current, previous, and pending grant applications (especially the most recent OWEB Council Support Grant application)
        - Current and previous contracts and/or landowner agreements
        - Any informational material your council has produced. This might include pamphlets, flyers, or annual reports.
        - Anything previously published/reported about your council by local media, such as press releases, announcements, informational pieces, etc.
        - Information regarding volunteers/volunteer events
    - Request a watershed tour from the Chair or a board member you feel comfortable communicating with—the quick, fun and dirty way to learn more about your new territory. Watershed enthusiasts love showing newcomers around and it will allow you to complement the assessment documents with local knowledge of the landscape and stream.
    - Who are the council's officers (i.e.: President/Chair; Treasurer; etc.)?
    - What is the council structure? Is it a 501c3 non-profit? How many members does the council have? What is its typical decision making process?
    - How often does the council meet? How are those meetings typically run? For example, some councils have large, public meetings that feature a guest speaker; other councils have small meetings primarily intended to attend to council business.
    - What committees, work teams, or other purposeful groupings of council members exist? What role does the coordinator play in interacting with each of these?
    - How are new council members identified and recruited? Will any of the council's current members be completing their tenure with the council (or leaving the council for other reasons) within the next several months?
    - Where does the council focus its energy: Restoration projects? Education and outreach? Invasive management? Riparian plantings?
    - Does the council use a fiscal agent or sponsor? Does a member of your council keep the books and manage the organization's budget?

        - If someone other than you is responsible for all or part of the financial management of the council, meet with that person.
            - What does he or she require from you in order to complete his or her tasks? Is there a particular format to which information should conform? Are there key dates for information submittal of which you need to be aware?
- **Get to know your council members**. Remember, there are many perspectives. Listen carefully to as many people as possible before drawing conclusions.
    - Meet with council members one-on-one prior to your first scheduled council meeting. If they live close enough, consider inviting them out for a cup of coffee.
        - Ask council members open-ended questions that will help you understand their positions, interests, history with, and opinions about the council and its work. For example:
            - What does the council member see as his or her role on the council? What does she enjoy most about working with the council? What challenges does he feel the council faces? What is working (or not working) in terms of council function and organization?
            - Is there an existing dynamic that you should be aware of prior to facilitating your first meeting (for example: is there one person on the council who tends to monopolize the meeting if permitted? One person in particular who will be helpful, should you need support during the meeting?) While you probably won't want to ask this question directly, try to read between the lines to get a feel for how your council works together.
            - Why did he or she become involved with the council? What particular types of tasks or activities does he or she most enjoy when working with the council? The answers to these questions may give you an idea of the skills the council member brings to the table—skills that you can call upon when needed.
        - Ask long-term members about the history of the council
            - When was the council founded? Are any of the founding members still active with the council?
            - What has the council accomplished since its founding? How has the council changed? How have strategic priorities of the council changed since its founding?

Council Partners

- **Get to know your council's partners**
    - The Oregon Watershed Enhancement Board (OWEB) http://www.oregon.gov/OWEB/
        - This is one of the key partners for watershed councils across the state. OWEB grant programs provide an important source of funding for watershed councils. Their programs include watershed council support grants, restoration, acquisition, technical assistance, education & outreach, monitoring, and assessment grants. Learn more about these grant programs at http://www.oregon.gov/OWEB/GRANTS/index.shtml.
        - OWEB divides the state into six geographic regions; each region has a locally-based Regional Program Representative (RPR)—you can find yours at http://www.oregon.gov/OWEB/WSHEDS/offices.shtml. Get in touch with your RPR as soon as you are able. He or she can direct you to necessary information, answer questions about your council and your region, and help you identify resources to make your first weeks on the job less stressful and chaotic. Ask to meet with your RPR at his or her earliest convenience so that you become acquainted.
        - OWEB holds a statewide watershed restoration conference during the fall of even-numbered years.
    - State and federal natural resource agencies. Many of these agencies (particularly the state agencies) have biologists and other staff who may be familiar with your local watershed. Some of these agencies may have

        - Oregon Department of Forestry (ODF)
        - Oregon Department of Environmental Quality (DEQ)
        - Oregon Water Resources Department (OWRD)
        - Oregon Department of Agriculture (ODA)
        - US Forest Service (USFS)
        - US Fish and Wildlife Service (USFWS)
        - US Bureau of Land Management (BLM)
        - US Army Corps of Engineers (USACE)
    - The Network of Oregon Watershed Councils (NOWC) http://www.oregonwatersheds.org/
        - The Network of Oregon Watershed Councils is a support organization, created for and by Oregon's watershed councils. WE'RE HERE TO HELP! You'll probably receive a phone call from either the Network's Executive Director or Education and Training Coordinator within your first couple of weeks in your new position. If you don't, or if you'd like assistance from us prior to receiving a call, don't hesitate to call us! The Network's Executive Director can be reached at (541) 682-8323; the Education and Training Coordinator can be reached at (541) 682-8481.
            - The Network maintains an extensive list of resources on our website, on topics ranging from Organizational Development to Project Management. Check out our Resources for Councils page: http://www.oregonwatersheds.org/resourcesforcouncils.
            - Sign up to receive emails on the Network-maintained Coordinators Listserv. To do so, call our Program Associate at (541) 682.8365. There is also a regional listserv specifically for coordinators in the Willamette Valley. Once you're on the listserv, you can sign up on Google Groups to view archived posts spanning dozens of topics of interest to coordinators. Again, if you need assistance with this process, contact the Network!
            - The Network hosts a New Coordinator Workshop once or twice annually (depending on the needs of councils across the state). To find out when and where the next New Coordinator Workshop will be held, check the Network's website or contact the Education and Training Coordinator.
            - Other trainings: the Network hosts trainings on a variety of topics in various locations around the state throughout the year, and is the host of a biennial Watershed Council Gathering during the fall of odd-numbered years. The Gathering includes several days of workshop sessions, project tours, and networking opportunities.
    - Neighboring watershed council coordinators
        - If you have a specific question, you can always call a neighboring coordinator. If they've been on the job for a while, they may well be able to help out. Contact information for all coordinators is available on the homepage of the Network website: http://www.oregonwatersheds.org/.
    - Other councils, organizations, agencies, soil and water conservation districts (SWCDs), or municipalities your council may work with on a regular basis
        - Talk with these partners in the early days in your new position. They are often able to give you valuable information about the work they were doing with the previous coordinator, upcoming expectations, or other support and assistance.

Council Projects

- **What projects are currently underway**?
    - Talk to the project manager, board members, or contractors on the job about the status of the project(s), the work remaining, and the timeline for completion. Ask what role the previous coordinator played in the project(s), and what expectations the project manager or contractor has of you as the current coordinator.
    - If possible, tour projects in progress or recently completed. Meet with landowners to discuss projects in progress.
        - Ask what expectations landowners have for projects—what do they expect of the council? Of you?

  - If applicable, what are the projects' permitting timelines? What permits have been secured? Applications submitted? Are there necessary permits for which applications have not been submitted?
  - Review previously completed projects
  - Project reports
    - Check OWEB's site and their Oregon Grant Management System (OGMS) to see if your council has any outstanding project or financial reports due on OWEB grants.
    - Check the council files and ask board members if there are any other grant or financial reports due in the near future.

Council Funding

- **What funding is currently secured for the council**?
  - What are the important dates attached to that funding (e.g.: what are the start and end dates of the grant cycle? When are interim or final reports due?)
  - What progress has been made toward meeting the requirements of funding (the grant deliverables)? What still needs to be accomplished?
- **What pending applications for funding exist**?
  - Are there items on which you must take action to secure pending funding?
  - What deliverable(s) will be required if pending funding is received?
  - Is there a plan in place for alternative funding sources for projects that don't receive the pending funding being sought?

Breathe!

- This is a big job, and you are not expected be an expert in every field. It can take years to learn all the nuances of the watershed and the coordinator's job—that's okay!
- Ask lots of questions and don't hesitate to ask for help when you need it.
- Do your best to listen well.
- Call the Network if you have a question and can't find an answer locally. If we don't have an answer, we'll help you look for it.
- Most importantly, have fun with your new job! You're doing important work.

Chapter 2: Council Meetings

Effective, well run meetings are an important feature of a healthy watershed council. As the new coordinator, you have an essential role to play in your council meetings. While the watershed council president, steering committee chair, or other volunteer council leader will most likely facilitate your meetings, you are a key player in organizing an efficient, productive event. You will work with the chair to develop a good agenda, prepare informational materials for the council in advance of the meeting, and work with the facilitator to help the meeting run smoothly.

We have all experienced poorly run meetings and felt that they were not a wise use of our valuable (and limited) time. Knowing how to plan, prepare for, and conduct an efficient and effective watershed council meeting are essential skills for coordinators.

By the way, you may also be involved in a number of other council-related meetings. These may include:

- Steering Committee or Executive Committee
- Technical Team
- Project Committees
- Outreach Committee

No matter what the meeting, the following suggestions should help participants feel their time was respected and well-spent.

Agenda Development

Although agendas are intended to keep meetings moving to ensure that all items are accomplished, they should always be considered guidelines, not laws. Flexibility is essential to ensure that topics are resolved or tasks accomplished in the best manner, which is not always possible on a tight time table. Know ahead of time which items must be resolved in the current session and which can be tabled for the next meeting. Recognize when a task cannot be completed; make arrangements to address it at a later time and move on to the next agenda item.

The Value of an Agenda

- Clarifies which tasks and issues need to be addressed
- Identifies who is responsible for each agenda item
- Puts these into logical order for discussion
- Helps identify how much time will be needed for a meeting
- Helps to keep meetings moving in order to accomplish the tasks at hand
- Provides an outline for writing a report or summary after the meeting

Writing the Agenda

- Review the meeting minutes, agenda, and other documents from previous council meetings. These will serve as your template for developing your meeting agenda.
- Work with members of the council who will have an active role in the meeting; these will probably include the Chair, committee chairs, and project leads, and may include others such as project partners or other staff members.
- Identify the tasks that need to be accomplished in this meeting. These are your objectives and will become your agenda items.
- What issues need to be discussed? These are discussion items on the agenda.

- Do any of those issues need to be resolved at this meeting? These are decision items on your agenda.

Administrative and Logistical Details

- Will the appropriate people be present to finalize decisions or ensure that commitments can be made and that the decisions will be carried out? You may want to contact these key people directly to see if they will be at the meeting and remind them if they have an active role to play.
- Who is the contact person for the meeting location? Is there anyone else you need to contact about logistical arrangements? Make these arrangements as far in advance as you are able and confirm them at least a week prior to the meeting.
- If your council always uses the same location, check in periodically with council members to make sure it is still the most appropriate location for meeting attendees. Is it a location to which most watershed residents can reasonably travel?
- Be well prepared: is there any additional equipment needed? Computer, projector, extension cords, maps, flipcharts, markers, and it never hurts to have a role of tape handy!.
- Have arrangements been made for food and beverages?

Meeting Facilitation

Time limits are an essential part of well-run meetings. Participants will appreciate starting and ending on time, and will be more likely to attend future council meetings if they feel their time was well spent.

Strategies for Managing Time

- Begin with a well written agenda! Give a specific, adequate amount of time for each agenda item (it is often helpful to work with council leadership to prepare the agenda).
- Establish time limits for speakers and discussion.
- Empower the meeting facilitator (or someone else) to act as timekeeper and stop people when their time is up. Be sure to give people ample warning before they are cut off so they can wrap up their point.
- Have a clock in the room that is visible to all meeting attendees.
- Keep flexibility in mind when planning and setting the agenda.

Another way to increase the efficiency of your council meetings is to assign roles to your council or board members. The coordinator does not have to be the only responsible party when it comes to council meeting preparation. Meeting participants will be more likely to stay on task if they are aware of the meeting expectations and/or have a role in helping the group reach those expectations.

Meeting Roles

- Facilitator: The facilitator moves the meeting along and keeps it focused. This is a good role for the Board/Council Chair. When the chair is not available the Vice Chair or Board Vice President can fill in.
- Project/Topic Leaders: The project or topic leaders are content experts. While the facilitator leads the entire meeting, these content experts are responsible for updating the council on project status and relevant background information. List the names of these content experts next to each agenda item, and check in with them before each meeting to find out how much time they will need to adequately address their project. It is not uncommon for the coordinator to be the content expert on many of the agenda items. Subcommittee Chairs or project partners can also fill this role.

- Recorder: It's important to have accurate meeting notes available for council members or partners that are not able to attend your council meetings in person. The role of recorder is often filled by the coordinator; however it can be challenging to take careful meeting notes and participate in project discussions at the same time. If possible have one of the council members take notes during the meeting, even if you, the coordinator, end up being the one who types up and distributes the notes after the meeting.
- Greeter: The Greeter welcomes new meeting attendees and talks to them during meeting breaks. Meeting regulars tend to speak in codes (acronyms, slang for upcoming projects, use of names without explanation of their role) which can make meeting newcomers feel alienated and out of the loop. The Greeter should sit next to new attendees and quietly provide further explanation in the event the new meeting attendee is asking questions and taking up a lot of the meeting time. The Greeter may offer to stay after the meeting to provide further explanations. This role can be filled by any regular meeting attendee. As coordinator you should introduce yourself to new meeting attendees and ask them if they have any specific interests about the watershed or the work the council is doing. Collect their contact information and ask them if they'd like to receive council updates and future meeting announcements.

Council meetings offer a great opportunity to share information with members of the community and complete the business of the organization. By planning in advance with your council leaders, you can clarify your objectives for each meeting, build an effective agenda, and create an enjoyable meeting experience for all participants.

Chapter 3: Board Development and Leadership

Depending on whether your council has 501(c)3 non-profit status, your watershed council may be officially referred to as a board of directors; in other cases a subset of your council, such as the executive or steering committee, will run the business side of things. The beauty of Oregon's watershed councils is in the unique, highly localized and flexible nature of their arrangement. So, whether you call it a board, an executive committee, "the council," or something else entirely, this chapter is about working with the decision making arm of your council (for simplicity's sake, we'll call it the board for the remainder of this chapter). Similarly, *your* title might be Coordinator, or Executive Director, or something else entirely (again for simplicity, we'll call you the coordinator). Together, the board and the coordinator make up the council's leadership team. Working together, the leadership team makes the decisions that affect the council (mostly the board) and implements them (mostly the coordinator).

Whatever your tax status or organizational capacity, your council's representation and incorporation of a broad range of stakeholders is essential to its success. Diversity is important to ensure that your council remains connected to the many different communities and interests present in your watershed. The trick is to be as inclusive as possible without spreading the council too thin. Not everyone will be interested in serving but stakeholder groups should have the opportunity to be represented.

> "Council culture is very different from other non-profit boards and council board members really need to be educated for councils-as-organizations to be successful. The board needs to provide strength to the organization, not just do on the ground projects. Many people get involved with councils for the restoration work, but board members need to look at a higher level for the health of the organization."
>
> —Frances Oyung, Coordinator
> Bear Creek Watershed Council

Board Function

There are five functions every board performs for their organization; how they perform them varies enormously! The board, by virtue of its place at the top of the internal organizational chart, and as the decision-making part of the leadership team is accountable for each of these functions:

- **Leadership:** Ensuring the council is leading the charge to create as much impact as possible, on behalf of the watershed community served by the council.
- **Legal oversight:** Ensuring the council is complying with all of its legal obligations.
- **Fiduciary oversight:** Ensuring the council is complying with its financial obligations.
- **Project oversight:** Ensuring the council's work is being done ethically and legally, and that projects forward the strategic goals of the council.
- **Board mechanics:** The day-to-day work of what it takes to be a successful board (recruitment, policy-setting, supervision of the coordinator, and so on).

As the other half of the leadership team, the coordinator also has primary functions to perform for the council:

- **Leadership:** Supervise any other staff and oversee the work of contractors working for the council and assist the board in developing the council's strategic direction.
- **Implementation:** Work with the board to implement the council's strategic direction effectively and efficiently.
- **Organizational oversight:** Develop action plans to implement board decisions, create work plans for the organization and staff, and manage the day-to-day operations of the council.
- **Board mechanics:** Schedule council meetings and events; provide information to the board in a timely manner and in a useful format (one that makes sense and is useful in making decisions).

Characteristics of Good Leaders

The preceding information should give you an idea of the functions of the council leadership team, and the role that you will play as part of that team. While you and the board have different roles and responsibilities, both necessary to effective leadership of your council, the characteristics that make a good leader are universal. We asked more than 50 Oregon watershed council coordinators and members to tell us what makes a good leader; while the answers we received varied almost as much as the state's councils, there were some characteristics of good leaders that every council recognized as important. Based on those results, effective council leaders share these characteristics:

- *Respect*: effective leaders respect each other and the mission of the organization
- *Communication and Transparency*: a part of good communication *is* transparency; it is important to know you're working from good information and everyone is clear on what that information is, so everyone is working on the same page.
- The *ability to learn from conflict and debate*: councils, perhaps more than any other organization, have demonstrated an ability to overcome and learn from conflict and debate. In fact, that's almost a key piece of how councils have evolved over time, where people have come in with very different opinions and experiences and *have* learned to work together toward a common goal, which takes a huge commitment.
- *Knowing when to lead and when to follow*: good leaders know when to step aside and let others have the floor.
- *Listening*: actively listening to the many opinions and views of council members, partners, and the general community makes it possible for the council to make decisions that work for everyone who will be affected by watershed council work.
- *Asking for help*: no coordinator is an island! One key to being an effective leader is knowing when it is possible to accomplish a task on your own and when it's better to ask for help.
- *Taking initiative*: sometimes the only way to get things done is to move forward despite difficulties.
- *Attention to detail:* everyone misses things on occasion, but a good leader keeps tabs on important details.
- *A positive attitude in the face of adversity*: good leaders know that negativity will only delay a group's ability to accept and recover from less-than-perfect outcomes.

Board Orientation

As a new coordinator, you are probably well aware of the value of a good job description and access to current, pertinent information about the organization for which you are working. While council board members are volunteers rather than employees, they have the same need for useful information about the work they will do, and the expectations you and the council have of them. One way to provide that information is through a board orientation/information packet (or board manual). Your council may already have a similar set of documents that is distributed to new council members; if so, reviewing this information will provide you with valuable insight into the roles, responsibilities, and tasks that board members are expected to complete. If your council doesn't have a board manual, you may want to consider creating one when new members are chosen. The checklist we've included here will help you decide what to include if you have to create a new manual, or allow you to identify missing pieces in your board's manual if one already exists. Examples of many of these document types are available on the Network's website, under the Resources for Councils tab. If there are types that you would like to see that are not available at that site, contact the Network's Education and Training Coordinator at (541) 682-8481 or post an inquiry to the Coordinators Listserv (for information on joining the list, see Chapter 1: Getting Started).

Checklist: Sample Contents of a Board Member Manual

- ☐ Mission Statement
- ☐ Articles of Incorporation (for 501c3 organizations)
- ☐ Bylaws
- ☐ Program or project descriptions
- ☐ Current Budget
- ☐ Last financial statements (especially any recently audited statements)
- ☐ Current list of board members and their contact information
- ☐ Lists of committee and staff assignments
- ☐ Organizational chart
- ☐ Operating policies of the board
- ☐ A description of Roles and Responsibilities for board members (board member job description)
- ☐ A copy of the Board Member Agreement
- ☐ Confidentiality statement
- ☐ A copy of the council's strategic plan, including goals, objectives, and committee and staff work plans
- ☐ Declarations/descriptive documents for any insurance carried by the council
- ☐ Summaries of the previous year's grant applications/other council funding information
- ☐ Copies of the previous year's meeting minutes
- ☐ Reports from previous organizational assessments or operational audits
- ☐ Previous year's annual report
- ☐ Staff job descriptions (brief outline form)
- ☐ A copy of the Oregon Plan (available from OWEB's website)
- ☐ Any literature you regularly circulate to the public, such as pamphlets, booklets, or publications
- ☐ A brief history of the council
- ☐ A calendar of meeting dates, important events, etc.

Board Roles and Responsibilities

An important part of the board orientation manual is the Roles and Responsibilities of the Board of Directors. If your council does not already have a formal list of board roles and responsibilities, you should work together to create one. Working with the board to create this document will ensure that board members are comfortable with, and willing to abide by, the finished document. We've included an example of such a list (see Box 1), created by the Scappoose Bay Watershed Council during an annual board retreat. (As with the Scappoose, you don't have to start from scratch; there are some great templates to use as a basis for your discussion.)

Individual Directors' Roles and Responsibilities

In addition to their responsibilities as a board of directors, individual board members have responsibilities to fulfill *as* board members. Many councils and other organizations incorporate these individual responsibilities into their board orientation packet as a Board Member Agreement. It's not necessary to formalize these expectations to that degree, but you may want to find an alternative way to assure that your council members (new members in particular) are aware of these individual responsibilities. When your board is aware of the expectations that you have for them, they're much more likely to meet them!

- Support the mission and goals of the organization.
- When acting on behalf of the council, give priority to its interests, mission and values.
- Exercise reasonable care in the decision-making process.
- Attend meetings regularly and serve on committees effectively.
- Assist with raising general operating and council support resources.
- Participate in activities and events sponsored by the council, and encourage participation by others.

- Support the council financially, through donations or through fundraising efforts.
- Assist in the recruitment of new council members and supporters.
- When requested, serve as a spokesperson for the council.

In short, your board is one of the most valuable assets of your council. Work with them to ensure they feel supported by you and, in turn, are able to provide you with the support and assistance you need to fulfill your role well.

Box 1: Example of Board Roles and Responsibilities

Roles and Responsibilities of the Board of Directors

1. **Determine the Council's Mission and Purpose**
   - Create and regularly review the council's mission statement to ensure its continuing accuracy and validity.
   - Articulate the council's goals, means, and primary constituencies served.
   - Demonstrate a clear understanding and working knowledge of the council's mission and philosophy.
2. **Select the Executive Director/Coordinator**
   - Reach consensus on the chief executive's job description.
   - Undertake a careful search process to find the most qualified individual for the position.
3. **Support the Coordinator and Review His/Her Performance**
   - Provide moral and professional support for the chief executive and ensure that she/he has the resources needed to further the mission and goals of the organization.
   - Work with the coordinator to decide upon a periodic performance evaluation.
   - Plan for and execute a thoughtful and comprehensive performance evaluation of the coordinator.
4. **Ensure Effective Organizational Planning**
   - Ensure that the council engages in regular and appropriate planning and evaluation activities.
   - Actively participate in these processes.
   - Assist in implementing organizational goals arrived at through the planning process.
5. **Ensure Adequate Resources to Carry Out Purpose and Mission**
   - Ensure adequate resources for the council to fulfill its mission.
   - Work in partnership with the coordinator, development staff, and other appropriate partners to raise funds.
6. **Manage Resources Effectively**
   - Ensure that the council remains accountable to all donors and the general public.
   - Ensure that proper financial management systems and controls are in place.
   - Assist in developing the council's annual budget and clearly identifying sources of actual and potential revenue.
7. **Determine and Monitor the Council's Programs and Services**
   - Ensure that the council's programs and services are consistent with the mission.
   - Monitor the effectiveness of all programs and services and see that appropriate changes are made as necessary, according to changes in the industry and the council.
8. **Enhance the Council's Public Image**
   - Act as ambassadors to the community, oversee the council's public relations strategy.
   - Clearly articulate the council's mission, accomplishments, and goals to the public.
   - Garner support from important members of the community who can help to enhance the council's public image and further the mission.
   - Oversee the council's public relations strategy.
9. **Ensure Legal/Ethical Integrity and Maintain Accountability**
   - Delegate the hiring and managing of employees to the chief executive and serve as a "court of appeal" for appropriate personnel matters and grievances.
   - Ensure that there are clear policies and procedures to address personnel issues and grievances.
10. **Recruit and Orient New Board Members and Assess Board's Performance**
    - Ensure that there is a process for regularly evaluating the board's performance.
    - Achieve consensus on areas where the board needs improvement and determine how to make the improvements.
    - Ensure that there is a process for regularly recognizing the board's and the organization's accomplishments.

Chapter 4: Outreach and Engagement

Community Outreach and Engagement

There are many definitions for community engagement; one from the Tamarack Institute reads:

> "People working collaboratively, through inspired action and learning, to create and realize bold visions for their common future."

Watershed councils are built on the premise of local community engagement in restoration. The public's attitudes, perceptions, beliefs, and knowledge can have a profound effect on the success of watershed management. While science can serve as a rational foundation for management, in many cases it is those groups impacted by watershed management decisions that decide how acceptable a decision is and influence how effective the management decision implementation will be. Engaging your watershed community in management decisions early and often can help ensure your council's success.

Who are the stakeholders, or people, in your watershed who you need to engage?

- People who live, work, play, or worship in your watershed
- People interested in the watershed, its users, its use, its non-use
- People interested in the processes used to make decisions
- People who pay the bills
- People who represent citizens or are legally responsible for public resources

In a sense, the stakeholders in your watershed can be anybody who wants to be! A basic form of community involvement is attendance at your watershed council meetings. Invite community members, landowners, teachers, and others to attend your meetings. In addition to inviting people from other groups to your public meetings, offer to speak at theirs—demonstrating flexibility and willingness to consider their point-of-view can help you gain support for, and involvement in, your council's work.

"I think engaging the community is a key component to a council's success. For example, the community provides volunteers for project implementation and monitoring. Community stakeholders also provide direction for the council (a council is made up of stakeholders from all over the community). On the other hand, people can quickly become nay-sayers and slow down a project if they don't know what is going on. Be proactive and involve people early on."

-- *Erika Lang,* Outreach Coordinator
Calapooia, North Santiam, and
South Santiam Watershed Councils

Initial Questions for Landowners:

- What is the history of use on this property?
- What resource challenges do you have?
- What would you like to do when it comes to addressing those challenges and the stream (water quality, etc.)?
- How much time can you put toward a project (explain how much match you need and that it can be cash or in-kind)?
- Can you do the work or will a contractor need to do it?
- What other info would you like about your property or this project opportunity?
- What other information would you like about the council or its previous projects?

Landowner Outreach and Engagement

While all community outreach is important, landowner outreach can make or break some restoration projects. When approaching landowners about working with your council, keep in mind that they most likely want the same things the council wants— to make decisions that positively impact their quality of life and improve their land.

The first step to landowner outreach is to get the door open. Many councils send out a letter to introduce the council and invite a landowner to

icipation by others.

get involved in a project. If you send a letter to landowners as an initial contact, be sure to include general information about the council and a brief description of the project you have in mind for their land. Also, don't forget to personalize it; no one likes form letters! Use the letter as an opportunity to request a face to face meeting to discuss things further (i.e. a site visit).

An initial outreach letter is generally followed up by a phone call (to generate interest if the landowner didn't respond to the first letter, or to provide more information and set up a meeting if he or she did show interest). During your first meeting, mention other projects going on in the area that his or her neighbors have worked on with the council.

Remember that councils and landowners have similar goals, so find your common ground (you may have to meet in the middle and may not achieve 100% of what the Council would like to achieve), be professional and be well prepared for landowner meetings.

The first meeting:

- If possible and acceptable to the landowner, bring the friend or fellow landowner that introduced you.
- Ask key questions to learn their interests, especially related to the proposed project: "What role does the creek play on your property?"
- Prepare a few key points that you would like to get across.
- Listen much more than you talk…and don't interrupt. Remember: people like to tell their stories.
- Use open-ended questions. You might ask, for example, "What are your long term plans for this wooded section?"
- Use the personal information you've gathered to build a connection and tailor the benefits of watershed protection to their situation.
- Non-verbal cues are important, pay attention to how receptive the landowner seems.
- Depart with agreed upon next steps and leave copies of all handouts (such as maps, grants, or project descriptions) that are relevant to the proposed project.

After the meeting:

- Write up your notes as soon as possible.
- Send a thank you note or email and follow-up on any promises.
- Be mindful of confidential information.
- Do some research to see if the landowner might qualify for a federal incentive program like the USDA's CREP, which could provide funds for a restoration project on their land. This is a great way to secure "match" funds for a project. (http://www.fsa.usda.gov/FSA/webapp?area=home&subject=copr&topic=cep)

Additional tips for landowner outreach:

- Maps are worth a thousand words.
- Point out the importance of key wildlife species that rely, even in part, on a landowner's property. Understand, however, that different people may react in different ways to such information.
- Consider conservation on the scale of the landscape. Explain how a landowner's property relates to other conserved lands or other conservation initiatives.
- Leverage is often a key to success. There are often opportunities to leverage the land protection project or funding to achieve more than the protection of the primary property; if you are able to generate interest with multiple people or identify a sub-basin and a string of projects the council prioritizes, you may be able to wrap the projects together for funding requests.
- Try the neighborhood approach: Neighborhood gatherings (also called coffee klatches or house meetings) can be used to:

  - Inform and educate local landowners about a project
  - Obtain feedback on project plans
  - Celebrate success stories
- If project funders require cooperative agreements between the Council and landowner, it is better to introduce this concept sooner than later (for example, at the first site visit). OWEB requires such agreements. Landowners should understand that the project is an investment and the agreement protects the investment for all partners involved.

Outreach to the media

It's easy to think that working with the media is a matter of sending out a well written, well timed press release. And then, voila!, your story ends up on the front page of the local paper. It's simple to say you have a good story, but making sure the story that actually gets told is the one you wanted to communicate can sometimes be a bit tricky.

- If you write a press release, make sure it *is* well written and well timed. Keep the wording concise, include how the story relates to the readership, submit the press release at least 2 weeks before you want your story to run, and above all, include your contact information!
- If you want the story to be reported correctly, make it easy! Include fact sheets and project background information in your press release. If you're being interviewed, bring copies of these things with you. Detailed, correct information makes the reporter's job easier and increases the chances that it will be printed accurately.
- Whenever possible, show; don't tell. Offer to accompany the press to a project site.
- Know your message and stay on it! Write down talking points before an interview and rehearse them until repeating them is second nature.
- If you include a landowner or council member in a press event, prepare them beforehand to ensure you are presenting a consistent message. It confuses the public when the council doesn't appear united on an issue or topic.
- Unless you're being interviewed for breaking news, know your story may run later than expected, or get bumped completely for other more time sensitive news. Don't be offended or give up, just try again.
- If photos are being taken, always offer to write down names and other information for the press to ensure the captions contain correct spellings and other important details including the date and location.
- Keep in mind there is no "off-the-record." If you don't want to see it in print, don't say it!

Outreach to Local Decision Makers

Communicating the accomplishments and value of your council's work to local decision makers can be a challenge. It can also be rewarding and important to the success of your council. County commissioners and municipal elected officials can be key partners in local restoration work, so it is essential that they learn about the work your council does. You may also have an opportunity to communicate the challenges your council faces, and the needs you have. Officials may be able to assist. In fact, for most councils, the county commission is the local governing body that authorized the watershed council. Both formal and informal communication can be valuable for building relationships and informing commissioners and other elected officials.

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Decision makers are generally extremely busy people and may not be able to spare time for lengthy interviews or informational meetings, so it is important that you put thought into how you will engage a particular decision maker.

Communicating with County Commissioners and Municipal Officials

- ***Maintain relationships*:** Regular communication allows you to build and maintain a relationship with your local officials. Being aware of the watershed council work that is occurring in their jurisdiction and being informed about the value of that work will help decision makers to remember your council when making decisions that may affect it.
- ***Keep decision makers informed:*** Some public officials will have an assistant or staff member who handles their communications and scheduling; find out who this person is and regularly send them council meeting and event announcements/reminders. You never know if an official's schedule will suddenly open up—putting dates on their calendar gives them the opportunity to fill their time by attending your meeting or event.
- ***Highlight on-the-ground work:*** Communicate with decision makers to let them know the importance of the work you are doing on the ground.
- ***Highlight benefits/economics*:**
    - Highlight the economic impact of the council, especially the value of what the council brings to the community.
    - Highlight the benefits of the council to the county as well as telling them what the council has to offer.
    - Educate city and county staff that councils can be a resource and can offer specialized services to the city and county (e.g. advice on riparian planting).

Giving an Annual Update to County Commissioners

- Schedule as far in advance as possible, but be ready if a staff person says they'd love to have you come in next week
- Create a PowerPoint presentation with photos (keep it short; 10 slides, max!)
- Feature a couple of high profile or high impact projects
- Highlight emerging programs (i.e. sustainable food, sustainable forestry)
- Highlight economics—money brought into jurisdiction; people put to work, etc.
- Thank them
- Make them look good: "Thank you for supporting us, here's what you have to be proud of as a result"
- Expect the unexpected when they ask questions
- Connect with their values:
    - *Work:* Councils put people in the community to work
    - *Local approach*: Local folks doing it their own way
    - *Support*: Recognize how commissioners have helped

• Involve board members:

Communicating with local officials is about building relationships and working with people. This is a task that can be fulfilled by the entire board, not just the coordinator. Some of your board members may already be acquainted with local officials through their own social or professional networks. Reinforce the idea that communicating with decision makers is not always about going to Salem to testify in front of a committee. Encourage your board members to speak to local officials regarding the council as formal and informal opportunities present themselves.

Communicating with State Legislators

At some point in your career as a council coordinator, you may be called on to communicate with legislators at the State level, in addition to the regular communication you do with local decision makers. When that time comes, your fellow coordinators will have advice and tips, and the Network of Oregon Watershed Councils will help with the rest! One of the Network's primary purposes is to promote public awareness of watersheds and watershed

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councils. Contact the Network Program Associate at (541) 682-8365 for assistance setting meetings, developing materials, and to answer any questions you might have about talking with state legislators about the work that you and your council do.

Table 1: Outreach Methods

Method Audience	Advantages	Limitations
Field Trip (or Restoration Tour) Audience: **All stakeholders (especially landowners, decision makers, and elected officials)**	• Often allows for personal interaction and team-building • Helps participants gain better understanding of resources and issues • Allows landowners to see what a project will look like (restoration isn't pretty and it takes time!) • Allows landowners to see the implementation process (before, during and after)	• Size of participant group is typically limited • Site location and condition may put limitations on those that can access it
Neighborhood Gathering (Coffee Klatch, House Meeting) Audience: **Landowners**	• The social, laid-back, non-threatening atmosphere allows people to speak freely and share thoughts or concerns on proposed projects. • Small groups can allow for meaningful discussions	• Need to find a trusted landowner to host neighbors • Many small group meetings can be time consuming for staff involved
Internet Audience: **All stakeholders**	• Allows widespread access to resources • Information can be geared for each major stakeholder group; pages for youth, landowners, urban and rural residents, etc.	• Not everyone has Internet access • Training may be required to use some technologies (GIS) • Technology may be unreliable • Technology is constantly developing
Regular Council Meetings Audience: **All stakeholders**	• Provides great interaction despite group size • Participants know what to expect ahead of time, thanks to the agenda • Provides a venue for regular communication and interaction with stakeholders	• Doesn't allow for much side discussion, often agenda driven.
Large Community Event (booth or table) Audience: **All stakeholders**	• Can serve as a way to introduce your council to a very broad audience • Can reach a high number of individuals in a relatively short amount of time • Great way to give your volunteers an important, interesting job	• Limited encounter may not be enough to fully deliver your message • Public opinion will be based on short encounter. • Table or booth display must be both eye-catching and informative to be effective. • Events are often time-consuming and can take more time than they're worth if your message isn't relevant to the event and vice-versa.
Open House Audience: **All stakeholders**	• Allows one-on-one interaction between council and stakeholders • Event design is highly flexible and can be made formal or informal.	• Participants may be members of "the Choir" • Without an interesting topic to discuss, an open house may not

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Table 1: Outreach Methods, continued...

	• Council can choose a time of year (i.e. have a regularly scheduled annual event) that this occurs and it will be remembered by people	have a hook to pull the public in.
Poll or Survey Audience: **All stakeholders**	• Helps to assess opinions of broader public • Can serve as a way to introduce your council, or project, to a larger audience	• Only provides results for a particular moment in time-results may change in near future • Potentially high cost • Requires trained staff to conduct process
Workshop Audience: **All stakeholders**	• Effective for introducing new technologies or best management practices • Often allows for personal interaction between trainees • May pull in people not familiar with the watershed council • Will most likely generate future projects as most people who attend are usually ready to do something on-the-ground. • Offers an opportunity for Council to organize a workshop in partnership with another organization (like an SWCD, the Network, or an OSU Extension office)	• Can be challenging to find workshop instructor(s) who are knowledgeable about your specific issue, inexpensive, and available • Time consuming to coordinate • Time consuming to follow-up with landowners to see if they are interested or if they implemented any practices
Community Presentation **Audience:** **Specific stakeholders**	• Effective for introducing yourself to a group of specific stakeholders • Effective for building partnerships with other groups interested in your work • May generate volunteers for your Council and future projects	• Can become time consuming unless you prioritize which groups to work with.
Media articles (press release, watershed column) **Audience:** **All stakeholders**	• Press releases allow you to publicize an event or provide an update on a project • Submitting a monthly or quarterly watershed column allows you to talk about a watershed/resource topic and offer tips on how stakeholders can address concern • Remind stakeholders and community members of upcoming meetings (often included at the bottom of the column)	• Time consuming • Papers can get information wrong if article results from an interview
Mailings (letters, brochures) **Audience:** **Specific stakeholders**	• Allows you to reach a prioritized list of stakeholders • Allows you to personally invite someone to participate in an event • A brochure may be eye-catching and allow you to present information in a clear and concise manner with pictures • You can prepare a brochure that is specific to a sub-basin and the people who live there	• Letters do not always result in obtaining feedback or generating interest • Letters often require Council follow-up as people are reluctant to respond, forget to respond, or are just busy • Mailing are often expensive • Brochures may be time consuming

Chapter 5: Volunteer Management

A watershed council's workload often exceeds what any one person can handle. Council capacity is frequently limited to only one or two paid staff and a volunteer board. The council coordinator commonly takes responsibility for recruiting and retaining volunteers to support a variety of not-so glamorous but organizationally vital tasks. As you read through this chapter, you may find yourself thinking the information under recruitment could also fit under retention—and vice versa. You'd be right! As the two crucial pieces of volunteer management, recruitment and retention require similar skills and attitudes, though the tasks on which their completion depends may vary considerably.

Recruitment

Volunteer recruitment can be very time consuming. For some organizations volunteer recruitment, retention, and management is a full-time job. Consult your council and use your professional judgment to determine how much time should be spent on this task.

> "I have found it to be a difficult balance to strike as council members want me to bring in volunteers but my workload as a single staff person is already so high that incorporating a volunteer program is really, really tough… Especially if I want to do it well. I focus on a few volunteer events or activities each year, and that's about all I can do."
>
> -Denise Lofman, Coordinator
> Tillamook Bay Watershed Council

Recruiting volunteers is a process very similar to conducting a search for new employees—some opportunities will be right for many potential volunteers, some require more skills or qualifications. The first step, just as in conducting an employee search, is to know what you are looking for.

- Define the job. Are you looking for 100 volunteers to help with a river clean-up or 2 volunteers to help with administrative tasks in your council office? Obviously, these two possibilities would have very different job descriptions and require very different skills. Knowing what you are looking for will help you find the right person for the right job. A volunteer job description – much like you would create for a staffed position – is a useful tool to help you focus on the needed tasks and skills, and to provide your prospective volunteer with helpful information.
- Decide where to start your search. Where to recruit volunteers will vary in each watershed. Talk to your board for recommendations and don't count any group out, including private businesses. Some franchises and local businesses allow their employees a small amount of annual paid volunteer leave in exchange for public recognition of their company at your event. Many high schools and some colleges (including community colleges) require students complete a minimum number of hours as volunteers on a community project or as interns.
- Stay organized. Keep a running list of potential volunteers—include people who have volunteered in the past and others who have expressed interest in being active with your organization. Include notes on any special skills they possess (for example: web design, heavy equipment operator, database expert). Additionally, keep a list of potential volunteer projects, including a summary of the task, necessary skills, and deadlines. Some organizations compile and store these in a 3-ring binder so if an interested individuals comes knocking, you can have them peruse the possibilities.

- Why recruit alone? Involve all of your active volunteers, council members, and partners in the recruiting process. Ask them to think of ideas for recruiting. Write down ALL responses—you never know when a kooky idea will save the day! The best recruiters are volunteers who are happy about their work with your organization—ask your volunteers to talk with others (formally or informally) about volunteering.
- Conduct interviews. Not all volunteer opportunities require this step (i.e., clean-ups and such), but if you are seeking to fill a longer-term position (e.g., Silent Auction Coordinator), take the time to meet the individual, review the job description and discuss their interests and availability. Don't assume that an accountant wants to volunteer to do accounting – it may be the very thing they want to get away from!
- Be enthusiastic! Communicate to potential volunteers that you don't want them to miss a marvelous opportunity to participate in an important project!
- Provide volunteer support. Volunteers may be "free labor" – but they are not labor free. Define and describe the training, supervision, and support the volunteer will have. Many people are understandably cautious about being left to sink or swim. If they know they are going to get help while they learn the ropes, they'll be more likely to give volunteering a try. Make sure you schedule the necessary time to provide management and oversight.
- Recognize volunteer efforts. Saying "thanks" goes a long way! "Thank You" cards are a nice way to follow up with volunteers after an event. Personalized cards or letters are best, but if you're short on time a group email is better than nothing. If your council produces a regular newsletter (or has a webpage) think about highlighting outstanding volunteers in each edition. People like to be recognized.

Retention

Recruiting volunteers effectively is only half the battle. After they are "in the door," it's important to ensure their experience is worthwhile and fulfilling enough for them to want to come back. The issue of retention is one that all volunteer-dependent organizations face. Psychological research points to six basic laws of effectively getting things done when dependent on the work of others:

Appreciation: People like those who like them. Not surprisingly, multiple studies show people are more apt to give up their time (and money) when they like the person or organization that approaches them, and when they feel liked and appreciated for their contributions.

- In the *Journal of Experimental Social Psychology* (J. Cooper) a study found that men felt greatest regard for another who flattered them—even if the comments were untrue! (Not that we're suggesting you be dishonest, but remember that people like to be appreciated.)
- Find something positive about your volunteer(s) and express it:
  - "Your attention to detail will be a great asset when we pull together our next invasive weed removal event!"
  - "Our board president heard you give a speech on this topic and raved about it. I was hoping you'd accept our invitation to present similar material at our next council meeting."
  - "I love your photos! Would you be interested in taking pictures at our next event?"

Reciprocity: People repay. In general, people feel compelled to give after they have received. This is true even if what they receive (for example: a small gift, a favor, recognition, or training) is of significantly lower value than what they're asked to give.

- After the Disabled American Veterans began including a small gift in their fund raising letter their fund raising efforts doubled from 18% to 35%.
- No money for gifts? Be creative about what you contribute.
  - "I'm happy to help with your club's plant sale—I know I can count on you when we need help with our next riparian planting. How many others from your club may be able to help?"

Social proof: People follow their peers, or "hop on the bandwagon." The bandwagon effect is well-documented; conduct spreads as more people come to believe in or act on something.

- In a 1982 *Journal of Applied Psychology* (H.J. Arnold) experiment, a group went door-to-door asking for money for charity and showed a listing of people in the neighborhood who had already donated. The longer the list, the more likely people were to donate.
- Let volunteers or supporters know who else is helping and how:
  - "I'm forming a team to spearhead our stream assessment; ODFW, the Home Owner's Association, and DEQ are all on board. Would you like to join the team?"
  - "The local fly fishers group and the local sporting goods store will be giving free fly tying lessons at our next riverside event; will you volunteer to guide a boat?"

Consistency: People align with public commitments. We're prone to stand by our word, especially if that word, or pledge, was shared publicly.

- 1982 research in *Personality and Social Psychology Bulletin* (L. Singer) revealed contributions nearly doubled when people were asked to sign a petition supporting a cause two weeks before they were asked for contributions. Their publicly shared commitment to the cause increased their likelihood to support it.
- If a commitment is forced, coerced, or imposed from the outside, it's an unwelcome burden. Studies show people forced to make a commitment will often act in the opposite way just to express resentment.
- Get others to make commitments that are active, public, and voluntary!
  - "Thanks for giving me the opportunity to present our council's upcoming projects to your organization. Here's a sign-up sheet with our volunteer needs. Please sign-up during the break!"
  - "Let the minutes reflect that Mary, Jonas, and Stephen volunteered to take over water quality monitoring on the main stem for the next 9 months. Thanks!"

Authority: People believe experts. If you are having a hard time getting land owners, council members, or the general public to get on board with the latest project, get someone with trusted credentials to help explain the need.

- In 1987, *American Political Science Review* (J. Wright) found when an expert's views were aired, public opinion shifted. "Four out of five dentists recommend. . ."
- Give people proof, when possible, that their contribution to your organization is vital and necessary, or that a proposed activity will accomplish a necessary end.
  - To your council: "I'd like to welcome, Dr. Snow, an expert in salmonid habitat, who is here to discuss our upcoming stream restoration project."
  - To a landowner: "Ms. Brown, NOAA recently published a study that shows these practices can improve stream function, and the latest economic analysis from PSU shows that this will eventually reduce your annual maintenance costs."

Scarcity: Less can be good. Have you ever been motivated to sign-up for something because of a "limited time offer?" Scarcity of an opportunity or a resource can motivate people to take action.

- Highlight unique benefits and exclusive resources:
  - "I have one more opening on my committee. Can I get your commitment before the next council meeting?"
  - "This species is endemic in only our watershed; your participation in our habitat restoration efforts would greatly increase its ability to thrive."

Motivation = Retention

Understanding what motivates your volunteers is quite possibly the most critical step in volunteer retention.

Psychology may give us tools to appeal to, or motivate, volunteers to take action. Legitimate expertise, genuine obligations, authentic similarities, real social validation, and freely made commitments help to produce volunteer relationships, which are likely to be of mutual benefit to your volunteers and your council. To be a successful volunteer coordinator you will need to figure out what motivates each individual or group you're working with—public recognition, feeling like a member of a group or cause, positively impacting their watershed—and provide this for your volunteer as often as possible to keep them engaged and coming back. When you're ready to tackle this topic in greater depth, River Network's publication, *River Voices*, has an issue devoted to all things volunteer. You can download it for free at https://www.rivernetwork.org/files/rv/rv2000v11n1.pdf.

Chapter 6: Budgets for Watershed Councils

Are you among the lucky few who love the thought of creating a budget? Congratulations! You may not find much of interest in this chapter. However, if you are like many of us, the idea of having to create any kind of budget just plain freaks you out. If that's the case, take a breath and read on. This chapter doesn't try to offer the details of budget building, but it should remove a bit of the mystery.

What is a budget?

More than anything else, a budget is a planning tool. Whether you are figuring out your family finances, a complex restoration project, or how much you have to spend on new work boots, you are calculating a budget. The trick is in formalizing that process and making that tool as useful as possible. This brief introduction to budgeting will look at two important types of budgets for watershed councils: project budgets and annual organizational budgets. The former is an exercise in making an accurate estimate of project implementation costs so you know how much to ask for in a grant application; the latter is an estimate of *all* operating costs for your council in the coming year, based on your planned activities. It helps you figure out what revenue you will need to raise from all sources (OWEB grants, local match, council support, private donations, etc.) in order to complete those activities. Knowing how to build an accurate project budget is absolutely essential to developing project grant proposals and to successful project implementation. Developing a workable budget for the entire watershed council each year provides an excellent planning tool for you and your council members.

> "Although many of us didn't choose this profession because of our passion for budgeting, the reality is that well managed budgets are critical to successful organizations. Small, grant-funded organizations like watershed councils can really only be successful when they have a mastery of their budget at various levels – the project, the program and the organization as a whole."
>
> - Ryan Houston, Executive Director
> Upper Deschutes Watershed Council

Project budgets

In essence, a project budget is an informed, researched projection of the actual costs involved in completing a restoration, monitoring, technical assistance, or education and outreach project. The best way to build a project budget is to use prior budgets as a guide. If your council has completed similar projects in the past, begin your new budget by mining the old one for information (after you determine that it was fairly accurate). Remember, a budget is a prediction. It doesn't have to be perfect. However, when preparing a grant proposal, you don't want to *under*-budget the project. That would leave you without sufficient funds to complete the project. So, don't be too conservative in estimating costs. At the same time, you don't want to inflate your budget so that it is unreasonable and doesn't reflect the true cost of the work—reviewers have a pretty good eye for that, too. It is better to build a budget that is a little too large and return some of the funds at the end of the project than not to have enough to complete it.

Research

Check your council's records of previous grants first to see if you can find a similar project budget to use as a template. If you don't have a previous budget to draw from, ask around. It's likely that another council has done a similar project and may be able to share a previous budget with you. The reason for using these existing budgets

(continued next page)

is not to determine the actual quantity and costs of each item, but rather to take the first step in being sure you are identifying all of the items for which you will need funding to complete the project (see Table 2 for an example of a project budget, used by the South Santiam Watershed Council for a large wood placement project application that received funding from OWEB). Key to accurate project cost estimation is inclusion of all "items"—these may include project management (personnel) costs, archeological survey costs, permit costs, engineering costs, log costs, transportation costs, placement costs, administrative costs, and more (and each of these items may have a lot of details associated). The point is to create an accurate and exhaustive list of every person, activity, and material necessary to successfully complete the project. The next step is figuring out how much of everything you need—how much time, how many logs, how many miles of transportation, and so on.

Again, take advantage of existing information to help determine these quantities, but remember that each project has special circumstances that affect the calculations. If you're not familiar enough with project design, you may want to work with a contractor to help you develop these budget numbers (another cost that needs to be paid for with other funding—maybe technical assistance grant funds). If the project is not too complex, you may be able to find assistance from another council coordinator or a board member who has been involved in previous, similar projects.

Cost determination

At this point, a cost must be assigned to each "unit" of each item required to complete the project. In the case of personnel (project manager, for example), the unit is generally hours and the cost per hour should accurately reflect the true cost of that employee or contractor—wage, taxes, workers compensation insurance, benefits, and any other costs. (See Box 2 for an example of a worksheet that can be used to determine personnel costs.) Unit costs for logs, miles of transportation, hours of excavator time, etc. will have to be researched from other sources and updated or adjusted for local conditions.

Cost Allocation

Finally, who will pay for what? Which partners will donate which items? That is your "match" component for all donations other than the entity to which you are applying for the grant. For example, in the case of an OWEB

Box 2: Personnel Costs Worksheet

(Adapted from *The Oregon Nonprofit Corporation handbook* by Cynthia Cumfer and Kay Sohl)

Personnel Costs

Position Title	FTE Salary	% of FTE	#of Positions	TOTAL
_____	_____	_____	_____	$_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Employer Taxes

FICA rate ____% x taxable wage _____ =	_____
Unemployment rate ____% x taxable wage _____ =	_____
Worker's comp rate ____ % x taxable wage _____ =	_____
TOTAL EMPLOYER TAX	_____

Fringe Benefits

Health Insurance	_____
Dental Insurance	_____
Other	_____
TOTAL FRINGE BENEFITS	_____
Total Personnel Costs	$_____

grant application, you will need to demonstrate that other sources (e.g.: DEQ, Forest Service, a local timber company, a landowner) is contributing at least 25% of the total project cost. These contributions can be cash or "in-kind," meaning a donated material or service other than cash. You'll need to start talking with potential partners early in the process to determine who will offer what. Once you know what costs will be contributed by other partners, you can subtract that from the total project cost to determine how much you need to ask for from your potential funder.

Table 2: Example Project Budget
(Courtesy of the South Santiam Watershed Council)

Itemize projected costs under each of the following categories.	**Unit Number** (e.g., # of hours)	**Unit Cost** (e.g., hourly rate)	**In-Kind Match**	**Cash Match Funds**	**OWEB Funds**	**Total Costs** (add columns C, D, E)
PRE-IMPLEMENTATION. Must occur *after* the OWEB grant agreement has been fully executed, unless it is a city or county charge for processing the Land Use form. OWEB funds will be disbursed only upon receipt of all required permits and licenses.						
Baseline monitoring	60	$20/hr		$1,200		$1200
USFS design/tree selection	320	$29/hr	$7,680	$1,620		$9300
USFS wildlife biologist	40	$34/hr		$1,400		$1400
USFS NEPA	224	$34/hr		$7,600		$7600
PROJECT MANAGEMENT. Includes *staff or contractors* who coordinate project implementation. Line items should identify who will be responsible for project management and their affiliation.						
South Santiam Watershed Council - Project Coordinator	80	$30/hr			$2,400	$2400
USFS fish biologist – project management	320	$29/hr		$9,300		$9300
CONTRACTED SERVICES. Labor, supplies, and materials to be provided by non-*staff* for project implementation.						
Helicopter	5 hours	$9,000/hr		$24,250	$20,750	$45,000
Helicopter mobilization/move in	1	$20,000			$20,000	$20,000
Tree Tipping mobilization/move in	1	$2000			$2,000	$2,000
Tree Tipping	10 trees	$1000/tree			$10,000	$10,000
Support Crew USFS – Road Closures, etc	16	$20/hr			$400	$400
2 FTE Fisheries technicians for 5 weeks – project implementation, cross sectional and longitudinal profile surveys, layout, snorkel surveys, tree falling	400	$20/hr			$8,000	$8000
TRAVEL. Mileage, per diem, lodging, etc. Must use current State of Oregon rate.						
SUPPLIES/MATERIALS. Refers to items that typically are "used up" in the course of the project. Costs to OWEB must be directly related to on-the-ground work. Group similar supplies and materials (e.g., boulders and logs, or trees and shrubs) on the same line.						
Mature Conifer Trees	65	$1,100	$71,500			$71,500
Misc materials, flagging, safety equipment				$2,350		$2,850
EDUCATION/OUTREACH. Refers to informational and promotional activities associated with the project. Interpretive signage is an eligible cost to OWEB under this category only.						

(Table continued next page)

Table 2: Example Project Budget, continued...

Itemize projected costs under each of the following categories.	**Unit Number** (e.g., # of hours)	**Unit Cost** (e.g., hourly rate)	**In-Kind Match**	**Cash Match Funds**	**OWEB Funds**	**Total Costs** (add columns C, D, E)
EQUIPMENT. Refers to items with a useful life of generally 2 years or more. List only equipment costing **$250 or more per unit**.						
Digital camera					$500	$500
Video camera				$500		
SUBTOTALS			$79,180	$48,220	$64,050	$190,950
EFFECTIVENESS MONITORING. Eligible costs include those associated with producing reports, data gathering, analysis, etc., as required by OWEB.						
Habitat enhancement monitoring in years 1,3, & 7 1 week each summer, 1 FS person, 1 SSWC person	240 hrs	$30/hr	$3,600		$3,600	$7,200
POST-IMPLEMENTATION STATUS REPORTING. Costs associate with Exhibit D reporting requirements.						
	200/yr				$600	$600
FISCAL ADMINISTRATION. Not to exceed 10% of Subtotal of OWEB Funds. Costs associated with accounting; auditing (fiscal management); contract management (complying with the terms and conditions of the grant agreement); and fiscal reporting expenses for the OWEB project, including final report expenses (Exhibit C) for the grant.				$4,225	$6,405	$11,050
TOTALS			$82,780	$52,445	$74,655	$209,880

Annual council budget

An annual organizational budget is a tremendous tool to help the council figure out just how much money (revenue) it is going to have to raise in order to complete all of the activities planned for the year (expenses). Once you have determined all of the activities you want to achieve and estimated the cost of each of those activities, you work on identifying all of the potential funding sources to meet those costs. Of course, in the nonprofit world (whether your council is an "official" 501c3 nonprofit or not) you have to be aware of any restrictions placed on the funding sources you identify. For example, it is not appropriate to use grant funds secured for a restoration project to pay the postage on a fundraising letter to council members. See Table 3 for a sample annual budget.

The annual budget is similar to a project budget, but a little more complicated and a bit more prone to estimation. It's a challenge to predict all of your costs a year in advance. Doing it accurately requires a good action plan that clearly outlines your activities for the year in all aspects of the council—projects, education & outreach, monitoring, assessment, accounting/administration, travel, training for staff, office costs, and so on. It's helpful to categorize these costs in terms of programs (i.e. Restoration, Education & Outreach, Monitoring); fundraising costs; and administration costs. That way, you can be sure that the funding sources you find are appropriate for each type of cost.

Once you've accurately estimated all of your expenses in each category, you can take a look at your potential, pending, and secured funding sources. For example, you may already know that you have funds remaining in an OWEB grant for a project that began the previous year. That would be carried forward into the current year, and is available as a secured source of revenue. Likewise, if you have already been informed that you will receive a DEQ 319 grant for a specific project, that amount is a secured funding source. On the other hand, if you've received funding from a local timber company in the past, but you haven't asked them yet for the coming year, you should include that amount as revenue in your budget, but you should note that it is "pending" or "likely." If you're considering applying to a new foundation with which you've never worked before, you should include that amount as "unsecured" revenue, and you may even want to note your best guess at the likelihood of receiving the grant (likely, possible, unlikely). Eventually, you will have a budget table that indicates your expenses for all planned council activities and expected revenue from all sources. Ideally, revenues are greater than expenses. If not, you need to find more revenue or cut some expenses.

By noting which revenue is secure, which is pending, and the likelihood of receiving certain funding, you've provided a great tool for you board and you to look at your planned activities with a sense of what is truly possible. You may discover you just can't raise the revenue necessary to complete an outreach project you hoped to launch. Or, you may have to prioritize one staff training over another. But, remember, the budget is *only* a tool. It is an estimate. It is not set in stone. It can be modified as the year progresses.

So, take a breath and take the plunge…you may find that budgeting helps more than it hurts!

Table 3: Example Annual Budget

Program	Restoration						Education			Subtotal
Project	Big River		Little Creek			Other Creek	Big River		Some Creek	
Funding Source	OWEB	NFWF	OWEB	CTWS	CWP	OWEB	NFWF	Rich Man	DRC	
Status	Secured	Secured	Secured	Secured	Pending	Secured	Secured	Pending	Secured	
Revenue + Carryover										
Grants	22,100	46,000	5,000	84,000	91,000	64,000	60,000		15,000	387,100
Earned Income										0
Other Contributions								12,000		12,000
Carryover from FY 2008				16,000						16,000
Total Revenue + Carryover	**22,100**	**46,000**	**5,000**	**100,000**	**91,000**	**64,000**	**60,000**	**12,000**	**15,000**	**415,100**
Expenses										
Administration										
Bookkeeping Service	800	2,000	400	2,500	1,500	3,500	3,000	1,000	2,300	17,000
Operations										
Supplies/Materials	3,000	20,000	1,000	25,000	25,000	36,000	25,000	5,000	5,000	145,000
Contracted Services	11,800	15,000	2,500	31,500	51,400	12,000	5,000	1,000	1,500	131,700
Printing/Publications	500			2,000	1,500	5,000	1,500	1,000	1,500	13,000
Occupancy									200	200
Travel			100	1,500	600	1,500	1,500	2,500	1,000	8,700
Personnel										
Executive Director	5,000	4,000	1,000	8,500	6,000	3,500	7,500	1,500	2,500	39,500
Project Manager	1,000	3,000		8,000	5,000	2,500			1,000	20,500
Subtotal Expenses	22,100	44,000	5,000	79,000	91,000	64,000	43,500	12,000	15,000	375,600
Carryover to FY 2010		2,000		21,000			16,500			39,500
TOTAL NET EXPENSES	22,100	44,000	5,000	79,000	91,000	64,000	43,500	12,000	15,000	375,600
NET INCOME		0		0			0			415,100

Chapter 7: Grants

Funding Sources

For the majority of watershed councils it is the coordinator's job to lead the search for grant funds. OWEB is the go-to source for councils, distributing millions of dollars each year to fund restoration work, land and water acquisition, watershed assessments and monitoring, technical assistance, education and outreach, and general council support. Some councils may be inclined to stop the search for funding here. However, it is important to diversify your council's funding sources for a number of reasons. First, OWEB requires a minimum of 25% match for all grant proposals. Second, OWEB simply cannot fund everything. Establishing local partnerships with other state and federal agencies, natural resource industries and other interested corporations, and private foundations will go a long way to ensure long-term success for your council.

OWEB Grants

We provide this section to help you with your OWEB grant applications because OWEB is the major funder for restoration work in Oregon. It is a good idea to establish a working relationship with OWEB's regional program representative for your area (http://www.oregon.gov/OWEB/GRANTS/offices.shtml); they not only administer your grants, but can provide a wealth of information to help you with a range of grant issues.

- Grant application deadlines are set by OWEB annually, and typically fall in late April and October (Council Support Grant applications are accepted biennially and are generally due in January of odd-numbered years). The following information is meant to serve as a general guideline, and may vary from cycle to cycle.
- OWEB grants are available by type:
    - Restoration
    - Land Acquisition (fee simple title and conservation easements)
    - Water Acquisition (in-stream water leases and transfers)
    - Monitoring
    - Assessment
    - Education/Outreach
    - Technical Assistance
    - Watershed Council Support
    - Small Grants (<$10,000)
- Restoration and Acquisition grant applications are currently considered twice a year. Education/Outreach**,** Monitoring, Assessment**,** and Technical Assistance grant applications are considered at grant cycles established by the Board. Watershed Council Support applications are considered once a biennium.
- Application Requirements: All applications must be received in OWEB's office by the posted deadline and must be submitted using the most current application form prescribed by the Board (available on OWEB's Grants Page: http://www.oregon.gov/OWEB/GRANTS/grant_app_materials.shtml);
- **Match funding**: all applicants must demonstrate that *at least 25% match*—based on total Board grant request—is being sought at the time of application (for additional information, see the OWEB Allowable Match explanation at http://www.oregon.gov/OWEB/GRANTS/docs/allowed_Match_0507.pdf). Secured match does not need to be documented until a first payment request, after the grant award.
- **Fiscal administration costs** may not exceed 10% of the total amount requested from OWEB (not including the administration cost itself).
- The **grant review process**:
    - OWEB staff review applications for completeness and compliance with eligibility rules.

- Copies of the application are distributed to the board and regional review team(s).
  - Restoration and acquisition grant applications are sent to a regional review team.
  - Education and outreach grant application are sent to the appropriate regional review team and the Oregon Plan Outreach Team, which includes representatives from state natural resource agencies and ODOT, as well as representatives from the BLM, NOAA Fisheries, NRCS, USFWS, and the USFS.
  - Monitoring and assessment grant applications are sent to the appropriate regional review team and the Oregon Plan Monitoring Team, which includes representatives from state and federal natural resource agencies and the OSU Extension Service.
  - Review team members evaluate applications individually and then meet to discuss the merits of each and to determine which projects to recommend for funding. Staff then recommends these projects to the Board based on the availability of funds. The Board receives an overall recommendation for program funding, together with a summary of each project with review team evaluation comments.
  - The Board makes all final decisions regarding recommendations for funding and award amounts.
- More information about OWEB application requirements can be found in OWEB's administrative rules (http://arcweb.sos.state.or.us/rules/OARS_600/OAR_695/695_005.html).

Understanding OWEB "capital" vs. "non-capital" funding

Thanks to Ballot Measure 66, passed by Oregon voters in 1998, OWEB is constitutionally authorized to distribute a portion of Oregon Lottery funds through its grant programs. The same constitutional amendment restricts how OWEB can disburse the money. 65% of Lottery funds are limited to use on "capital" expenditures, which include restoration and acquisition projects. The remaining 35% of Lottery funds are directed toward "non-capital" expenditures, which include Monitoring and Assessment, Technical Assistance, Education and Outreach, and Council Support. These non-capital funds also support watershed restoration-related work undertaken by other state natural resource agencies. When economic times are tough, "watershed-related work" can be defined quite broadly, resulting in more non-capital funds going to support other agency needs. However, capital funding definitions are very narrow, so these funds cannot easily be diverted; however, it also means there is very little flexibility in their use for watershed council project work.

Identifying Additional Grant Sources

When it comes to funding sources for your council it can be tough to find the perfect fit; however, when you begin searching you may be surprised how many grants sources actually exist. This section gives you some tips on how to determine appropriate funding sources and points you in the direction of a few online grant resources. Keep in mind, this is by no means an exhaustive list.

Develop a list of possible funders, keeping in mind the following search criteria or questions.

Does the funder award grants:

- In your geographical area?
- At the level of funding or amount of money you are requesting?
- For the type of support you seek (e.g., education and outreach, restoration, general operating support)?
- To an organization with your tax status (i.e. do you have 501c3 tax exempt status)?
- With match or partnership requirements that are appropriate for your council?

Once you have identified possible funding sources, you may wish to contact their program officers by phone or brief letter/email to make sure your proposed projects falls within their current interests. Be prepared when you make this initial contact—have a brief description of the project for which you are seeking funding ready and be prepared to answer general questions about the project budget, goals, and how it might fit with the funder's mission.

Additional Grant Resources

Oregon Foundations
This list includes a variety of links to foundation websites serving Oregon. You will still have to visit each site to determine their funding priorities.
http://www.foundationdatabook.com/Pages/or/orlinks.html

The Foundation Center
Established in 1956, and today supported by more than 600 foundations, the Foundation Center is a leading authority on philanthropy, connecting nonprofits and grantmakers to tools and information. The Center also operates research, education, and training programs. http://foundationcenter.org/

FundsNet Online Services
A comprehensive website dedicated to providing nonprofit organizations, colleges, and Universities with information on financial resources available on the Internet. http://www.fundsnetservices.com/

Grants.gov
Grants.gov is the online source to find and apply for Federal government grants. There are over 1,000 grant programs offered by Federal grant making agencies. All discretionary grants offered by the 26 Federal grant-making agencies and access to approximately $400 billion in annual awards can be found on Grants.gov. You do not have to register with Grants.gov to find grant opportunities. However, once you are ready to apply for a grant, you will need to register. This process takes 3-5 business days.
http://grants.gov/

Writing a Strong Proposal

There are **three keys** to successful grant writing:

1. **Preparation is vital!** Adequate time spent planning and researching before writing will simplify the writing process and allow you to focus on the content of your proposal. Make sure you clearly understand the grant-making institution's application guidelines and submission protocols, and you follow them meticulously.

2. **Pay attention to detail**, but don't lose sight of the "big picture." Be sure you are answering the questions that are asked (rather than the questions you *want* to answer) and your answers forward your proposed program/project and your organization's goals. Once you've completed a first draft, you can go back into the document and insert the information you wanted to insert, where appropriate. Each point you make in answer to an application question should be clearly linked to the overall goals for the program/project being proposed and should reflect a well-reasoned approach to forward the goals and mission of the grant-making institution.

3. **Spend time developing your budget proposal**. Verify that the amount you are requesting is reasonable for the institution to which you are applying and it is reasonable when compared with other funding requests for similar work.

Anatomy of a Proposal

Many funding agencies (including OWEB) specify guidelines or provide applications to be used for proposal preparation. The application and guidelines should be obtained directly from the granting agency for each grant cycle. It is not uncommon for agencies to make changes to grant applications between grant cycles. Ask for a new form each cycle and avoid basing your proposal on an outdated template. If proposal guidelines are not provided by the funding agency (as is the case with some private foundations), you can follow this outline to ensure you include all of the pertinent information.

The basic elements of a proposal include the following:

- Cover Page (including project title, primary contact, council mailing address, proposed project start and end dates, dollar amount requested)
- Abstract
- Table of Contents
- Introduction
- Statement of Need/Statement of Problem
- Objectives/Research Questions
- Project Activities/Methods
- Budget and Budget Narrative
- Current and Pending Support
- Project Personnel
- Appendices—project maps, letters of support, etc.

Tips for successful grant writing

Before you begin:

- Read the current guidelines, application instructions, FAQs, and any other available information pertaining to the grant for which you are applying. Make sure you **comply with all requirements and restrictions and provide all requested information**.
- Collect samples of successful grant applications to use as models or templates for your proposal. Review the foundation's/agency's list of funded organizations; contact those organizations with missions similar to yours and ask if they will share their successful applications.
- Communicate your ideas and funding needs to your partners. Many proposals require match funding and/or letters of support from your stakeholders. If your partners are aware of your plans early, they will not be caught off-guard when asked to provide support letters or in-kind contributions to the project.

What to include:

- **Less is more!** Reviewing stacks of proposals is a difficult job; be concise and exact. Wherever possible, be short and to the point—too much detail and technical language might show that you know what you're talking about, but it probably won't be read!
- Use the same terms in your proposal that the foundation used to describe what they want to fund; these **"buzz words" resonate** with funders and help to show reviewers how your project aligns with the funder's mission/goals.
- **The "abstract" or "brief description" section is among the most important in your application**. This paragraph should express, as simply and compellingly as possible, what you plan to do with the funder's money. If the grant reviewer has a good idea of the direction of your proposal from reading the abstract, it creates an important first impression that you do indeed know what you want to accomplish, with whom, at what cost, and specifically how.

- If you or others in your area or discipline have completed similar projects, reference those projects in your application and note how your proposed project increases the effectiveness, builds on, or furthers the work of the earlier projects.
- Describe any partnerships you have established to support your proposed projects. **Be as specific as possible** about what you and your partner(s) will provide and how the partnership will increase your project's potential for success.
- If applicable, **discuss the sustainability of your organization and/or project**—show the reviewer your organization and programs will be sustained after completion of the project(s) for which funding is being sought.
- Demonstrate your project has **measurable outcomes;** discuss how these will be measured, what use will be made of information/outcomes from the project, and what follow-up (if any) will be required after completion of the funded project.
- Discuss how you will **evaluate your project** as specifically as possible—a realistic set of evaluation criteria demonstrates you know what you need to accomplish to consider your project a success.
- If possible, describe how your project can be replicated by others and how it functions as a model for future action.

What to watch out for:

- Be careful not to promise more than you can deliver with the funding available. Enthusiasm to offer a lot of deliverables for a bargain price may lead to heartburn during implementation of the project!
- It is inappropriate to submit the same grant to multiple funders and ask each to fund the same things; however, it is perfectly fine to submit the same grant and ask different funders to fund different aspects of a project.
- Avoid the temptation to "chase funding." Just because you think your chances of securing a particular grant are high doesn't mean the grant—or the deliverables you must meet if you secure the grant—is right for your council. Be sure you develop proposals that are well-aligned with your council's mission and goals, rather than designed to secure funding that may not be appropriate.
- Remember, much of grant funding success—and all fundraising—is based on establishing good relationships. The proposal is just one part of the process.

Having a variety of grant funds secured will help your council become a dynamic organization. However, much like one grant source is not enough to sustain your council, relying solely on grant funds may also impede some aspects of your council's work. At some point your council may want to tap into 'unrestricted funds' (money not tied to any grant deliverables or spending restrictions). The only way to do that is through raising funds from other sources than foundations and agencies. While fundraising isn't typically the reason folks join councils, you and your council can be successful fundraisers—see the next chapter for some help getting started!

Chapter 8: Fundraising

No matter how your watershed council is organized, one thing every council must do is bring in enough revenue to do watershed council work. Some councils survive on grants alone, but if your council wants to expand its impact, programs, or staff, it may need to increase revenue accordingly. Council members may not like the idea of fundraising—mental images of door-to-door canvassers, big-budget gala events, or mailing hundreds of postcards might cause clenched teeth and a sinking feeling in the pit of the stomach—but fundraising doesn't have to be painful! What's important to note is that not all fundraising has to be done in the traditional "non-profit organization, big ask, big event, direct mail" mode. It is possible to develop a fundraising strategy that works FOR your council by working WITH your council.

Planning for fundraising

Don't be alarmed…fundraising planning doesn't have to begin during your first weeks on the job! We've included this information so you have a place to turn when you feel ready to explore additional funding sources. You'll see that effective fundraising depends upon having other organizational pieces in place (for example a strategic plan and a budget), so it may not be one of the first steps you take.

- Involve the entire council in fundraising planning. If the council creates the plan, they'll be more likely to be comfortable and motivated to implement it. Create a planning committee or team willing to do the research and legwork to get the information your council will need to develop a fundraising plan.
    - Evaluate your council's strategic plan, prioritization documents, work plan(s), or any other documents that guide the work that your council does.
    - Review your council's current budget, previous years' budgets, and any information you have about future finances for your council.
    - Interview council members—find out:
        - What experience members have had with fundraising in the past (either as fundraisers or as donors)? What skills or opportunities does each member think he or she can bring to the endeavor?
        - What feedback do council members get about the watershed council from the community? What do they think people know about the group?
        - What opportunities and/or challenges do members see for the council to raise additional funds?
    - Be realistic in estimating the cost of increasing your fundraising efforts—will you need extra funds for outreach around an event? Additional money for supplies?—and incorporate this information into the fundraising plan.
- Be strategic.
    - Plan a retreat or devote a council meeting to discussing what the council intends to accomplish by fundraising. Do you want to increase funds for in-stream project work, raise money to hire additional staff, or bring in more funding for your public education program? What you plan to do with funds can impact how you go about raising them.
    - Consider how the activities you already do can be incorporated into your fundraising plan; for example, do you have a huge turnout at your annual river clean-up that can increase your list of potential financial supporters? Can you increase community awareness of one of your recent accomplishments? Do you have existing partnerships that can be expanded to include fundraising opportunities?

  - Remember that positive regard in the community is money in the bank—people give to organizations that they recognize and respect. Community awareness of the council and its accomplishments and a good reputation are absolute prerequisites for fundraising. Every successful fundraising plan begins and ends with outreach.
- Put it in writing. Set specific, quantifiable fundraising goals for your council. For example, "The Council will increase the number of individual donors from 50 to 55 in one year, 65 in two years, and 75 over five years," or "In the next year, the Council will increase the number of community engagement events it conducts from one per year to three per year."
  - Determine how to achieve each of your fundraising goals and incorporate necessary tasks into council/staff work-planning efforts or documents.
  - Assign specific responsibilities to specific individuals (with their consent, of course!) that are to be completed within a predetermined amount of time.
  - Create a system or protocol for tracking to-dos and accomplishments—who does what, when, with whom, for how long, and for what impact? This information is useful in evaluating your program's strengths and weaknesses and can help to ensure best use of limited resources.
- Evaluate often. Revise when needed.
  - Make sure the plan, and its implementation, continues to work for your council. Check in with council members about how they feel the effort is going and their comfort with tasks for which they have responsibility. Thank council members for their efforts. Thank them again.
  - Track progress toward your goals and report it to the council often. Work together to identify what aspects of the plan are working, what needs improvement, and how improvements will be implemented.
  - Be aware of the impact of your fundraising efforts on community awareness and approval of the council. Successful fundraising should increase both.

The Ladder of Effectiveness

This list, adapted from *Fundamentals of Fundraising* by Susan Schwartz for River Network, puts strategies for donation seeking in order from the most effective methods for securing donations—individual or corporate, large or small—to the least effective.

1. Personal: face to face ask
   a. Two people working together (ideally two board members or one board member and one staff member)
   b. One person (ideally a board member or the organization's executive director/coordinator)
2. Personal letter (put it on personal stationary, not the organization's letterhead)
   a. With follow-up in person or by phone
   b. Without follow-up
3. Personal telephone call
   a. With letter follow-up
   b. Without letter follow-up
4. Letter on organization's letterhead
5. Impersonal letter (such as a direct mail or form letter)
6. Special events
7. Door-to-door solicitation
8. Media/advertising

"The Ask:" Engage the emotions by telling the story

- Open your case in terms of benefits to people, not rewards for giving
- Talking about acres, costs, and contracts are all features of a conversation that make it a business transaction; talking about how a place impacts a life makes donating an emotional and moral call to action
- People give to change lives, change the world, and feel good about themselves; frame your "case" for donations around these emotional goals to increase success

Chapter 9: Work Planning and Prioritizing

Work Planning for Restoration Projects

Even for a relatively small watershed, project planning is a significant undertaking. It requires detective work to track down useful information, an understanding of how the watershed functions, sensitivity to existing land uses and private property rights, inclusion of people who could be affected, and incorporation of local knowledge and values.

Strategic planning before taking on large scale projects is very helpful, but you may discover you don't have the luxury if your council already has projects underway. In any case, it is important to have a watershed assessment or other study to provide context for project prioritization and implementation.

It is understandable that as a new coordinator you may be anxious to take on your first projects. Start small. As you may discover, it's easy to take on a project before you are really prepared. A small project with less complexity and risk can be a good learning opportunity, but tackling larger projects can be problematic. To help avoid unforeseen problems, draw as many people into the planning process as possible. Make sure your council or board is committed and willing to lend support along the way.

For large, high-visibility projects, you may want to conduct public meetings during the early stages of the planning process to make sure your council has broad stakeholder support and involvement during the early stages. This process might take 6 months, a year, or more; however, it will be immediately clear that some projects are desirable, feasible, and address real problems that everyone agrees need attention. Start working on these projects as soon as possible. Early success in implementing actions or projects helps build and maintain community support.

> "I have found that in order to keep the council's budget solid, I need to be planning for projects at least three years out. This allows time for planning, writing grants, doing the engineering, and getting the funds for restoration. It really reduces my stress level when I know I have several projects in the pipeline that are in different stages [of development] over the next 3-4 years."
>
> - Denise Lofman, Coordinator
> Tillamook Bay Watershed Council

Watershed Action Planning Steps

Watershed action planning is a significant undertaking, and not something you need to consider on your own or in the first few months of beginning your job. Many councils work closely with their Technical Teams, Steering Committees, and hired consultants to complete watershed assessments, goal-setting, prioritization, and project planning. Your council may already have completed many of these steps, with the expectation that you will help lead them through implementation. We include this information as a brief reference, not an exhaustive guide for action planning.

1. **Watershed assessment.** Assess the conditions and health of your watershed ecosystems and resources.
   - What were the historical extents, conditions, processes, and functions of watershed ecosystems and resources?
   - What are the current extents, conditions, processes, and functions of watershed ecosystems and resources? How have things changed over time?

- What are the principal ecological problems and foreseeable threats to watershed health?
- What are the social and economic conditions of the watershed?
- For more information on watershed assessments, see the *Oregon Watershed Assessment Manual*, developed by and available from OWEB. To download a copy go to:

  http://www.oweb.state.or.us/publications/index.shtml

2. **Set goals and priorities** for watershed restoration, enhancement, and other issues.
   - What are the long-term and short-term watershed goals and priorities for protection, restoration, enhancement, management, research, monitoring, and public and decision-maker education?
   - When developing goals and priorities, consider current and historical conditions; present ecological problems and threats?
3. **Identify potential watershed projects** and priorities.
   - Considering the results from steps 1 and 2, what actions or projects will do the most to accomplish watershed goals? What actions or projects fit into short-term versus long-term priorities?
   - What kinds of restoration and enhancement activities address factors that limit salmonid production or populations of other critical species?
   - What other key habitat restoration needs could be addressed through in-stream, riparian, or upland restoration work?
4. **Screen potential projects and actions** for constraints and feasibility.
   - Which projects and actions are realistic, cost effective, and achievable in the short and long term?
   - Consider possible constraints such as land-use conflicts, property ownership, willingness of landowners to participate, and public and private costs.
5. **Synthesize planning results**, write an action plan, and begin work. Begin this process early and let the written plan evolve.
   - What are the overall vision, goals, and priorities for watershed protection, restoration, enhancement, management, research, monitoring, and public decision-maker education?
   - Commit the plan to writing and illustrate it clearly with maps and drawings.
   - Begin implementation project by project.
   - Monitor progress and periodically reevaluate priorities. Remember that goals and constraints might change over time.

Planning Resources

The project planning and prioritization process begins with choosing the projects that are right for your council and your watershed. There are a variety of planning resources that can help you and your council identify projects that meet those basic criteria. As noted earlier, your council may already have a number of planning documents including watershed assessments, existing action plans, work plans, watershed maps, and even a comprehensive strategic plan. Begin by working with your council to determine what planning documents already exist. Depending on what you discover, your work over the next several years may center on project prioritization, planning, and implementation. Make the most of the human and technical resources you have available. Creating a project implementation plan based on research and mapping of the watershed can provide some guidance in prioritizing possible projects in your watershed.

Map and survey data

When you're ready to start planning, you'll need to collect a good deal of information. Thankfully, there are already a number of excellent sources for watershed-level GIS and survey data; those included here are just the tip of the iceberg!

- Oregon Department of Fish and Wildlife (ODFW) Habitat Surveys, the Oregon Plan for Salmon and Watersheds, and the Fish Health Management Policy. Information regarding these resources is available from the ODFW website: http://www.dfw.state.or.us/fish/.
- Oregon Explorer: http://oregonexplorer.info/
- State of Oregon Wildlife Conservation Strategy: http://www.dfw.state.or.us/conservationstrategy/
- Geographic Information Systems (GIS) analysis can produce maps that are useful in determining strategic priorities for watershed restoration projects.
    - Some sources of GIS data include OWEB, ODFW, USGS, BPA, and StreamNet (http://www.streamnet.org/about.html). OWEB has watershed-level shapefiles for use in GIS programs available for download: http://www.oregon.gov/OWEB/WSHEDS/images/CouncilBoundaries.zip
    - Assistance conducting mapping and analysis for your watershed can often be obtained from agency partners, city or county governments, or OSU Extension offices; GIS work may also be completed by a contractor.

Technical teams

Many councils develop technical teams to provide advice and expertise on complex projects. Working with a team that possesses a vast amount of watershed knowledge will be important in your early planning stages. Particularly in projects that will require state and/or federal permits, gaining support for a project early in its development can save considerable time and difficultly later in the process.

Some benefits of creating a technical team include:

- Technical input during the development of project goals and objectives
- Assistance with data collection and analysis (i.e., agency reports, data sets, GIS)
- Help in the development of materials for, and process of hiring a project engineer and other contractor(s)
- May provide technical review and comment on project design options
- Members can provide support and advice during the permitting process
- Experienced participants can help you develop implementation plans

Some general advice for recruiting members of a technical team:

- Recruit permitting agency team members for the design development phase of the project whenever possible. Representatives from permitting agencies will often be the members of your team who are most pressed for time, so plan meetings and locations to best allow for their participation.
- Recruit fisheries specialists if your project involves ESA issues. NOAA and ODFW support for the project will be critical for receiving permits.
- In addition to state and federal agency representatives, recruit potential technical team members from: OSU Extension (some areas of the state have very active OSU Extension support), county government (road master or county engineer, fish passage program representative), local city government (if the project(s) will occur within an urban growth boundary), and community representative(s).

Landowner/local knowledge

It is important to recognize and include the community in developing project plans. Involving key landowners early in the planning and prioritization process can help in gathering information by increasing access to potential project sites, providing historical information about the watershed not available elsewhere, and easing additional outreach during project implementation.

Prioritizing

Watershed councils prioritize restoration activities for a variety of interrelated reasons. For example, because financial resources are limited, it isn't possible to implement all possible restoration projects. When deciding how to use limited resources, it is ideal to undertake the most ecologically important projects first and then move down the list. On the other hand, you may have several ecologically high priority projects identified, but need to prioritize them according to the council's capacity to implement. No matter how you do it, you will need to set priorities. Many approaches to priority setting rely on comparing alternatives to a set of criteria and ranking them on how well they achieve each criterion. Below are some examples of criteria you might use to decide what actions should be given priority. This is not an exhaustive list, and may not be appropriate for all projects.

Sample criteria for prioritization

- Ability to achieve objectives: Choose alternatives that clearly contribute to the achievement of your goals and ecological, social and economic objectives.
- Ability to influence change: Make sure the alternative is within your group's sphere of influence and your ability to influence change. For example, a particular large landowner might not want to cooperate with the watershed council in improving the riparian area along this stream at present, so the council would be better off putting its efforts into other stream reaches.
- Delay between actions and results: Some alternatives lead to short-term changes, whereas others take a long time to show results. Your council needs to decide what level of delay is acceptable. For example, planting conifers in a shrub-dominated riparian area will take a very long time (more than 100 years) to improve salmon-rearing habitat by increasing the amount of large woody debris in the stream. Although this might be the best long-term solution, you also might need to choose other ways to improve habitat in the short term.
- Cost versus benefits: Do the costs outweigh the benefits, or do the benefits outweigh the costs? It can be difficult to put a monetary value on the benefits of a project, but the costs usually can be calculated. One way to do a cost/benefit analysis is to compare the costs of alternative ways of achieving a given benefit.
- Landowner participation: Watershed councils depend on landowner cooperation. Is the landowner with whom you're hoping to work already on board with the council's goals and objectives? Can this project serve as an example and encourage additional landowners to undertake projects?
- Educational value: Community support and landowner participation can be amplified through education. High visibility projects that serve as demonstrations can help increase the public's understanding of watershed function and their level of support for future watershed projects.
- Risk management: Is the level of risk involved in the project reasonable for the ecological, social and economic benefits the project would produce?

Your council Project Committee or Technical Team may want to decide which criteria are most important for a particular project and give those the most "weight." Then you can rank alternatives by how well they achieve criteria. Next, use budget information and other constraints to decide how many of the ranked alternatives your group can achieve in a given period of time.

One final note: Sometimes a variety of circumstances conspire to elevate a non-priority project to the top of the list (for instance, a willing landowner and available funding). Don't dismiss such opportunities out of hand. On occasion, such an "opportunistic" project may pave the way for a priority project on a neighbor's land or elsewhere with the same landowner. As you settle into your role with the council, try to view project planning and prioritization as tools to assist your work, rather than hurdles to overcome.

Chapter 10: Project Management

One of the most important and challenging tasks of watershed council coordinators is project management, whether they're restoration, education, or outreach projects (or a combination of all three!). We offer this information with the understanding that each council has a different level of project activity and the coordinator's role varies with different projects. As you begin work with your council, it is important to gain an understanding of your role on any projects that are already underway, as well as to understand where each project is in terms of implementation.

Project management varies with each project your council chooses to implement. It will vary based on:

- the type and complexity of the project;
- the type of landownership (private or public);
- the partners involved;
- the roles of the various partners; and,
- the funding sources.

Due to this tremendous variability, it simply isn't possible to concisely address the broad topic of project management in a meaningful way. Instead, we've tried to provide some ideas for you to keep in mind as you settle into your coordinator role. Most likely, you will have some type of project management responsibilities that will vary with each project. For example, you may be the project manager on a riparian re-vegetation project, responsible for directing all aspects of the project. At the same time, you may be responsible for hiring a professional consultant to manage a complex culvert replacement project elsewhere, but not have responsibility for day to day management of the project itself.

This chapter considers a number of project management-related issues you should keep in mind as you begin your work as a coordinator. As you think about each issue or question, you may choose to seek out more focused assistance. State and federal natural resource agency staff, SWCD technical staff, OWEB regional program representatives, and other council coordinators may all be able to provide you with support.

Information Gathering

- When you were hired, was it clear that one of your roles would be to assume responsibility of ongoing council restoration projects? If so, an important initial step is to research each project the council currently has underway to understand:
    - Your role
    - The participants (including landowner(s), agencies, contractors, and other partners)
    - The support you have available to assist you (such as technical teams, OWEB RPR, or agency biologist)
    - The timeline (what stage the project(s) are in)
    - The funding (secured, pending, spent, remaining)
    - What reports may be due (project updates and/or financial)
- Did your council hire you with the expectation that you will develop new restoration projects in the watershed? If so, you may need to consider the following:
    - Does the council have a prioritized list of restoration needs and locations?
    - Does the council have an established approach for recruiting landowners and/or land managers (federal, state or local agencies) for restoration work in priority areas?
    - What resources does the council have to undertake such recruitment outreach?

- What capacity (funding, staff, outside expertise) does the council have to take on additional projects (in addition to existing projects)?
- How will you involve the council's decision makers (steering committee, executive committee, leadership team, technical team) in project development? Does your council have an existing technical team? Was the team developed to work on a particular project or are they an ongoing working group?

Project Components that Benefit from Technical Team Input

- Decision making process for choosing projects to implement
- Development of project goals and objectives
- Development of monitoring plans
- Data collection (i.e., agency reports, data sets, data analysis)
- Development of materials for hiring the project engineer
- Participate in hiring process for engineering firm and construction firm
- Review and comment on project design options
- Support or advice on permitting process
- Support or advice on project implementation

- When you have a good sense of how to answer many of these questions, there is an excellent resource available for moving through the detailed steps of project management, from concept to completion and monitoring: http://www.oregonwatersheds.org/workshoppresenations/projectmanagement.

Process Outline

A basic outline of the project management process includes the following steps. Experienced coordinators, agency technical experts, and board members may all serve as important resources to carry out these steps.

- Conduct initial site visits. With landowner permission, invite technical team members or other experts.
- Assess the project complexity. Determine which project elements will be necessary for completion of the project:
  - Surveys, designs, and specifications: what information is available "off the shelf"? What level of customization will be required?
  - Permits: Know the timeline for project permitting requirements. Identify all the regulatory requirements at the beginning of your project. Make sure you understand every permit your project will require. Schedule a pre-submittal meeting with all your project's permitting agencies in attendance so you can outline a permit strategy. If everyone is in the room together, you may find some ways to work through some of the permitting tangles that would not happen if you had to play phone tag with several agencies. When conducting projects with ESA species, having a pre-submittal permit planning meeting with the USACE and NOAA is very important. See *Chapter 13, Permit Basics* for more information regarding water-related permits and the activities that are generally associated with each.
- Seek technical team input. Technical teams are often used by watershed councils to gain input, advice and expertise from agency staff on complex projects outside the experience level of the council. Formation of a technical team varies and agency staff in different regions of the state have varying levels of flexibility to be able to commit to these projects. Most projects will require state and federal permits. Gaining support for your project is much easier to do in person rather than over the course of emails and individual phone conversations.
- Develop a preliminary project timeline in consultation with your technical team and/or agency partners; share the timeline with the landowner.
- Scope potential funding sources; be aware of application requirements and deadlines.

Once you've completed the scoping process, you're ready to start project implementation. Depending on the complexity of your project, you may require technical assistance from hydrologists, geologists, engineers, and/or biologists. (See *Chapter 12, Working with Contractors* for some basics related to contracting.) For a simple project, basic conceptual designs may be all that are required. For more complex projects, such as those including irrigation diversions, culvert replacements or construction, engineering drawings, construction specifications, cost estimates, and contracts may be required.

Chapter 11: Risk management

Risk management is a topic that no watershed council can afford to ignore. While no activity is without some risk, it is possible to control and decrease the risks your council faces by accurately assessing risk at each phase of a project or program, avoiding unacceptable risks, diverting liability for some risks to other entities when possible, and planning for risks that cannot be avoided. Two important tools to use in risk management planning are contract language and insurance—both can limit your council's liability to the risks inherent in watershed council work.

Insurance

In this day, we're all fairly familiar with insurance—auto insurance and health insurance are two types that many of us have (or wish we did!). While no policy can ameliorate all risks, insurance can provide assurance that your council's actions, decisions, or mistakes in any given situation won't end up bankrupting the council or its members. All councils automatically receive OWEB's Council Self-Insurance, which is described further in Table 4: Types of Insurance, below. Since the coverage provided by Council Self-Insurance is relatively low, and doesn't provide Directors and Officers or Workers Compensation coverage, many councils elect to purchase additional insurance coverage. When additional insurance is purchased, it applies *above and beyond* the limits of the Council Self-Insurance.

For more information about Council Self-Insurance and to see the Watershed Council Self Insurance Certificate for General Liability, Uninsured Motorists, and Personal Injury Protection (Auto), see the OWEB website: http://www.oregon.gov/OWEB/WSHEDS/wshed_council_forms.shtml. No insurance will cover every risk, and the information in Table 4 provides only the basic descriptions of several types of insurance commonly carried by watershed councils. For more information about the benefits and coverage provided by each of these types of insurance, speak to a licensed insurance broker or agent.

Table 4: Types of Insurance

Types of Insurance	
OWEB (Council Self-Insurance)	Available at no charge to all watershed councils by the State of Oregon; this coverage is in excess over other insurance policies • No coverage for Directors & Officers • No coverage for Workers' Compensation • $50,000 for damage to property, any one claim • $100,000 for General Liability to any one claimant per single accident • $200,000 for General Liability to any number of claimants per single accident Auto Liability at same limits as above; secondary over personal auto liability. Coverage requires that state minimum auto liability limits be carried by the individual or organization.
General Liability	General Liability will pay legal costs for any lawsuit brought against your council for any covered reason. Generally, this includes bodily injury, property damage, and personal injury. Bodily damage typically refers to "slip and fall" incidents, and any other type of injury that does not involve a truck or other auto (which would be covered under auto insurance). In addition to legal fees, the insurance carrier would also pay any compensatory or general damages, up to available liability limits. If punitive damages are assessed, these are not covered by any insurance, and must be paid by the defendant.

(Table continued next page)

Table 4: Types of Insurance, continued...

Types of Insurance	
Directors and Officers Liability Coverage	Coverage when a director or officer commits a negligent act or omission, or misstatement or misleading statement, and a successful libel suit is brought against the company as a result. Usually a large deductible is required. The policy provides coverage for directors' and officers' liability exposure if they are sued as individuals. Coverage is also provided for the costs of defense such as legal fees and other court costs.
Auto Liability **Bodily Injury Liability** **Property Damage Liability**	Protects watershed councils from claims arising from auto related accident, injury, and property damage. *Bodily Injury Liability* coverage helps protect you from bills that can include: • Emergency aid at the scene • Medical expenses for bodily injury • Medical services for sickness or disease • Compensation for loss of income • Funeral expenses • Legal defense fees and/or bail bonds for anyone listed on your policy • Other expenses not listed here *Property Damage Liability* is active if another driver's property is damaged in an accident that's your fault, Property Damage can help pay for: • Structural damage to homes, barns, etc. • Repair or replacement costs for other stationary objects • Vehicle repair or replacement costs
Non-owned Auto Liability	Protects watershed councils for claims arising from auto related accident, injury, and property damage when the auto is not owned by the organization.

Legal Protections

In addition to insurance and contract language, legal protections for councils and their partners exist at the state and federal level. In Oregon, state legal statute ORS 65.357 (full text available at http://www.leg.state.or.us/ors/065.html) limits the liability of council members and the council's agents (employees and volunteers), providing immunity from liability if they are acting in accord with the legal duties of council governance. Similarly, ORS 65.369 (full text available at http://www.leg.state.or.us/ors/065.html) protects council members and agents against civil liability unless they act with gross negligence or intentional misconduct. At the Federal level, USC 14501-14505, the Federal Volunteer Protection Act (for an abridged version of this text, see *NOWC Risk Management for Watershed Councils Handbook*, page 39 http://oregonwatersheds.org/resourcesforcouncils/riskmanagmentseminarsmarch09; the full text is available at http://www4.law.cornell.edu/uscode/uscode42/usc_sup_01_42_10_139.html) makes volunteers (including watershed council board members) immune from civil liability except for cases of gross negligence, civil rights violations, and when motor vehicles are involved. Finally, landowners with whom the council works or on whose property the council is implementing projects have another layer of legal protections. ORS 496.270 states that landowners have no liability for personal injury, death, or property damage for use of land by volunteers doing fish and wildlife habitat improvement or who are acting as participants in a state or federally funded watershed or stream restoration or enhancement program. (Full text of the statute is available at http://www.leg.state.or.us/99orlaws/sess0800.dir/0863ses.html.) That statute further limits property damage liability for fish and wildlife habitat improvement projects being conducted in partnership with OWEB or ODFW or that provide woody debris for fish habitat and water quality. In both cases, exceptions exist if landowners act with willful misconduct or gross negligence.

> Many years ago when I operated a least-toxic pest management company, we would assure clients that their carpenter ant problem didn't become more urgent the day we identified it. The ants don't suddenly start causing damage faster than they did the day before. Thus, there is no need to make a hasty, panicked, expensive decision about addressing the problem. The same holds true for risk management: Just because you've identified some potentially unaddressed risks to the council, doesn't mean they are more urgent or riskier than they were *before* you identified them. Don't panic. Talk and think things through with your board. Make rational decisions that make sense for the council.
>
> - John Moriarty, Executive Director
> Network of Oregon Watershed Councils

Assessing Risk

Everyone assesses risk every day. From deciding to "go for it" on a rafting trip, to choosing the brand of toothpaste your family will use, each of us weighs the risks and benefits of dozens—or even hundreds—of possible choices each day; every choice we make is a form of risk management. We decide which risks are worth taking by considering what could go wrong, how negative outcomes could be avoided or prepared for in advance, and what we'll potentially gain by taking a particular risk. The same set of criteria can be used to make decisions with your council. By considering possible risks in advance of decision making—assessing the risk—it is possible to make decisions without exposing your council to unacceptable levels of risk. *Table 5: Assessing Risk* provides a situation-by-situation look at a variety of circumstances in which watershed councils should consider risk; the list is nowhere near comprehensive, as councils face risk in other activities that aren't included here. One way to start assessing your council's risk is by asking the following questions about council activities:

- What are the risks associated with this activity or program?
- Can we conduct this activity or program safely?
- Is there someone who can conduct this activity with us or for us, and assume the risk so the council doesn't have to?
- Is there an alternative activity or program that will meet our objective without exposing us to unacceptable risk?
- What resources or actions do we need to take to ensure the safety of our council members, staff, and the general public?

There are some very basic steps that you can implement to control and manage your council's risk. These include:

- **Discuss and plan for potential risks** before the start of all projects
- **Know what OWEB Coverage provides and excludes** and consider other options to transfer risk, if appropriate
- **Transfer risk to another agency or nonprofit** with the capacity to handle it—this may include a fiscal sponsor with an MOU or Agreement
- **Verify** all contractors with whom you work have appropriate and acceptable insurance. This can not be strongly enough stressed! Ask contractors to supply you with copies of declarations or certificates of insurance.

- **Consider purchasing** Directors & Officers Coverage, as your council can be held liable for actions of Board Members, employees and volunteers
- **Properly classify contractors and employees** and prepare and negotiate a contract for each contractor to transfer risk, detail duties, and request proof of insurance

When you're ready to deal with more advanced aspects of risk management, or you find that the information included here is not enough, check out the Risk Management resources available on NOWC's website at http://www.oregonwatersheds.org/resourcesforcouncils/riskman. Above all else, remember: becoming aware that risk exists for your council DOES NOT make that risk any more threatening than it was yesterday! Discovering a risk doesn't mean you should panic or make hasty decisions. Instead, look at a newly recognized risk as another piece of information that can help you make the best possible decisions for your council and yourself.

Table 5: Assessing Risk

Assess the risk	Potential risks	Tools to address risk	References to review
Landowner recruitment and project planning	• Potential wrongdoing by council to landowner • Potential employee injury • Individuals driving to site	• Landowner Agreement • Verify others have insurance • Verify personal auto coverage of employees and volunteers • Limit access to the site • Other insurance programs	• OWEB Landowner Agreement (NOWC Risk Management handbook: http://www.oregonwatersheds.org/resourcesforcouncils/resourcesforcouncils/riskmanagmentseminarsmarch09
Classification of staff: independent contractor or employee?	• Employer is liable for acts of employees • "On-the-job" injury • Council could be liable for acts of contractors if misclassified • Staff liable if contractor	• Employee Handbook and Policies • Workers Compensation Coverage • Contract language with contractors, project managers, etc. • Verify insurance coverage of all contractors based on set standard insurance requirements	NOWC Risk Management for Watershed Councils • 20-factor IRS control test for Independent Contractor Standard, page 31 • Template Independent Contractor Agreement, pages 32-36 • See example Employee Policies: www.oregonwatersheds.org/resourcesforcouncils/personnel
Decision process: council approves projects and pursues grants	• Third party unhappy with decision • Lack of capacity to perform grant requirements • Miscommunication between parties	• Policy and Procedures for Council grant review • Create process for clear communication between landowners, fiscal sponsors, etc. and the council • Fiscal Sponsorship Agreement • Directors & Officers coverage provides coverage for errors in decision making	• Fiscal Sponsorship Agreement sample language, NOWC Risk Management for Watershed Councils, pages 40-41
Managing Funds: Fiscal Sponsor	• Theft, embezzlement, or mistakes • Noncompliance with reporting and disclosure laws • Noncompliance with grant requirements • Separation of controls	• Selection of Fiscal Sponsor-check multiple references • Fiscal Sponsorship Agreement • Insurance: crime coverage, property coverage, fiduciary liability	• Fiscal Sponsorship Agreement sample language, NOWC Risk Management for Watershed Councils, pages 40-41

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Table 5: Assessing Risk, continued...

Assess the risk	Potential risks	Tools to address risk	References to review
Managing Funds: Fiscal In-house	• Theft or embezzlement or mistakes • Noncompliance with grant requirements • Noncompliance with reporting and disclosure laws	• Selection process of employees and volunteers • Separation of internal controls--identify who will be handling funds • Checklist of internal controls; financial policies and procedures • Clearly defined policies in Employee Handbook	• Example fiscal policy: www.oregonwatersheds.oor/resourcesforcouncils/Fiscalmanagement • Examples of Employee Policies: www.oregonwatersheds.org/resourcesforcouncils/personnel
Project Design: projects are designed by staff, agency partner, or contracted consultants	• Design may be faulty • Completed project may not meet landowner's expectations	• Contracts and MOU prior to start of project • Verify standard insurance requirements for all contractors (some may require professional liability coverage--check policy for Subcontractor Warranty provision • Standard Procedures	• Example contracts on NOWC website: www.oregonwatersheds.org/resourcesforcouncils/projectmanagement/projresources NOWC Risk Management for Watershed Councils: • Policies and procedures, page 42 • Contract review checklist, page 43
Permits: typically have requirements associated with protecting resources	• Permits not properly obtained by the Council, the contractor, or the engineer • Permits not properly implemented, resulting in liability and fines	• Make sure contractors and engineers have professional liability coverage • Language in contract or MOU identifies responsible party	• OWEB Guide to Oregon Permits: http://www.oregon.gov/OWEB/docs/pubs/permitguide.pdf
Project Implementation: by contractors, staff, volunteer(s), or council member(s)	• Contractors' negligence causing financial loss • Council can be held liable for a volunteer's actions • Board Members can be held liable for their decisions and actions	• Verify Landowner and Contractor have General Liability coverage • Watershed Council should be named as "additional insured" for General Liability • Write contracts specific to duties—include safety equipment, condition of land, etc. • Volunteer Agreement	• NOWC Risk Management for Watershed Councils, pages 48-55 • Example contracts: www.oregonwatersheds.org/resourcesforcouncils/contracting

(Table continued next page)

Table 5: Assessing Risk, continued...

Assess the risk	Potential risks	Tools to address risk	References to review
Volunteer event	• Potential for injury to volunteers, students, and/or adults • Volunteer may cause bodily injury to a third party or damage property owned by others • Volunteers use of personal auto while conducting business for the council may result in accident or injury	• Waivers signed by all volunteers; if minors, parents must sign waiver • Clear instruction and supervision of volunteers while on the project site • Volunteer policies (e.g.: proper attire for project assignment) • Limited use of personal autos by volunteers • Volunteers provide proof of auto liability insurance; can include on waiver form • Federal Volunteer Protection Act • OWEB Coverage considers volunteers your "agents" and so provides some coverage and bodily injury or property damage to third party caused by volunteer negligence	• Federal Volunteer Protection Act http://frwebgate.access.gpo.gov/cgi-bin/getdoc.cgi?dbname=105_cong_public_laws&docid=f:publ19.105.pdf NOWC Risk Management for Watershed Councils: • Example volunteer waiver agreement, pages 56-59 • Example auto liability policy provisions and other information, pages 60-69
Tours or other public involvement events	• Potential visitor injury to council member or landowner • Council members and board driving to site could result in accident or injury • Bus rental for group transportation: liability for passengers and property	• Verify others have insurance, including landowner • Verify auto liability insurance of bus rental firm, school district, etc. • Communicate clearly to visitors (proper clothing/ footwear, expected on-site behavior, etc.) • Verify personal auto coverage of employees, board members, others driving to or from site • Limit access to site • Non-owned Auto Liability Coverage	• NOWC Risk Management Handbook

Chapter 12: Working with Contractors

If your council works on technically sophisticated restoration projects, you may need to work with consultants or contractors. Whether or not a particular project requires an outside contractor will depend not only on your own skills and expertise and those of your council members, but also on the amount of time you are able to devote to the project. More complex, long-term projects may require that you hire a contractor even if you have the skills necessary to proceed without one.

How you go about choosing a contractor will vary considerably, depending on the complexity of the project, the level of skill required of the contractor, your timeline for implementation, and any requirements you may have from project funding sources.

Hiring a contractor

The first step in hiring a contractor for your project is deciding what type of service you will require. There are two primary types of service: design-build and design-bid-build. A design-build service means that the contractor you hire to design the project will also implement it. With a design-bid-build service, you select a contractor to complete the design process and prepare bid documents; the project then goes out for bidding and you hire a contractor to implement the project. The design-bid-build option adds complexity to the process, but also more provides leeway and decision making authority for the council. Some federal funding sources will require that you use the design-bid-build process, so review your grant before choosing which process to implement!

RFPs and RFQs

Once you have chosen the type of service that is appropriate to your project, you will need to prepare either a Request for Proposals (RFP) or a Request for Qualifications (RFQ). In an RFP, you are requesting that prospective firms prepare a proposed solution for your project. In order to develop such proposals, firms or contractors need a good deal of accurate data about your watershed, the project site, project goals and objectives, and any constrictions or limitations to the scope of the proposed solution. The more accurate information you are able to provide, the more comprehensive the proposals you receive will be. In an RFQ, you are not requesting firms to prepare a proposed approach to your project; rather, you are asking for submission of their qualifications to undertake the project. This approach is generally used when projects are not very complex, or when you have already decided on an approach and simply need a contractor to design or carry out your preferred solution.

Circulating the Request

Once you put out your RFP or RFQ, you will receive calls and questions from prospective firms, so be prepared to address these. If there are clarifications or additions to the RFP/RFQ in response to questions from prospective firms, send out an addendum so *everyone submitting or potentially submitting has the same project information*. It is important that everyone to whom you originally submitted the RFP/RFQ receives any updates to the information so they can prepare their submittal as completely and accurately as possible.

- **Word of mouth:** Talk to other watershed councils, SWCDs, etc to find firms who have successfully implemented projects similar to yours and have a good professional and ethical reputation. Your technical team may also provide names of prospective firms. If this is not your council's first project, you can probably obtain information about contractors with whom your council has worked in the past—talk to your council or technical team about their experiences with contractors.

Table 6: RFP or RFQ?

RFP	RFQ
An RFP is a request for prospective firms or contractors to prepare a detailed project proposal that includes: • How they will meet the project goals and objectives • A detailed project budget • Their qualifications to complete the project, including identification and description of similar projects completed in the past • References and résumés of the project team • Proof of liability coverage, as necessary	An RFQ is a request for firms or contractors to submit their qualifications to undertake a project—without asking for a formal project proposal or detailed budget—that includes: • Their qualifications to complete the project, including identification and description of similar projects completed in the past • References and résumés of the project team • Proof of liability coverage, as necessary
Information to include in RFPs and RFQs: • A detailed description of the project, its background, goals, and objectives • A summary of existing data and known data gaps • An outline of the permit process, if available • A description of the role of the consultant and the Project Manager/Technical Team • A final submission date and a total page limit for submissions • A timeline for review of proposals and selection criteria describing how the hiring decision will be made	

- **Hold an open house** for all prospective firms. Include the invitation to this event in your RFP or RFQ. Request RSVPs. Make it clear in your RFP/RFQ that attendance at the Open House is not mandatory to submit statements of qualifications or proposals.
- **Conduct a group site tour** for prospective firms—either as part of the Open House or as a stand-alone event. Include stops at the project site, potential equipment access areas, and walk upstream and downstream of the project site so that the group can see the interactions of the areas.

After you receive proposals or Statements of Qualifications from prospective contractors/firms, you will need to screen them and interview potential candidates. Some steps to take when deciding who to hire include:

- Ask what specific services are offered for the project components you need (i.e., engineering and design, survey, wetland delineation, permit application, site restoration design, and construction). Do they have staff to complete all of these tasks or do they subcontract the work? Who is responsible for finding the subcontractors (you or the engineering firm?)
- Find out how busy the firm is and if your project will receive adequate attention, especially if your project is on a tight timeline due to funding constraints, in-water work window timing, landowner restrictions, or other constraints.
- Talk to references about the firm's performance with respect to work quality, staying within budget, innovation, meeting deadlines, communication throughout the project and follow-through on agency or client requests and requirements

The Contract

Contracts contain the legal language that sets out the requirements and expectations for both the contractor and the watershed council, including determining who will carry liability for the project, the work to be completed, the cost of that work, and the timeline for its completion. Below are some tips for contracting; for more information on contracts, and sample contracts and templates, see… (continued on next page)

http://www.oregonwatersheds.org/resourcesforcouncils/contracting and NOWC's Risk Management for Watershed Councils (http://www.oregonwatersheds.org/resourcesforcouncils/riskman). **It is vital that you seek qualified legal counsel for contract review!**

- If you hire a firm, they may have standard contract forms. You may choose to use the firm's contract but it is important to have it reviewed by your own legal counsel prior to signing.
- If key individuals are hired for the design or construction phase of your project, you may want to provide language in the contract specifying those individuals will be involved throughout the life of the project, or a mutually satisfactory substitute will be agreed upon.
- Look at the hourly rates. Make sure the Scope of Work prepared by the engineering firm ties hours/payment to the delivery of products and/or project benchmarks.
- If your grant sources require a percent holdback on fund releases until approval of the final report, make sure the contract includes language that spells this out.
- Make sure the contract does not have a fee clause for late payments because your grant sources will not pay them. Due to timing and availability of grant funds, sometimes payments may be delayed, and your engineering firm has to be informed of that possibility and be willing to accommodate those circumstances.
- If there are any final reports or other project documentation required, spell out what the engineering firm will provide versus what your council's project manager will provide.

Scope of Work and Project Timeline

Once you have hired a contractor, you will need to work together to complete a scope of work and a project timeline.

- The scope of work describes your project's goals, objectives and how those will be met. It is attached to the engineering firm's contract and provides the specifics about how your project will be carried out. It describes the work and who is responsible for achieving it as well as a timeline for implementation.
    - Utilize input from key members of your technical team in developing this document. Plan carefully to include all the tasks and potential tasks that will need to be accomplished to create the design and obtain permits.
    - At the outset, provide the contractor with all pertinent information about the site and the project.
- The project timeline lays out the elements of the Scope of Work along with the anticipated time required to complete each step.
    - Be sure you are aware of any timing constraints on your project including: funding sources, in-water work window, and permit timing. The design process, public meetings or permitting may take longer than you anticipate, especially if any previously unknown issues are revealed during the design process (e.g., historic artifacts, wetlands, unhappy adjacent landowners).
    - Keep an eye on the project timeline throughout your project. This may be one of a dozen or more projects your contractors are working on. Make them aware of any timeline constraints.
    - Request meetings at the 30, 60 and 90 percent design level to check in and assess the project designs with input from your technical team, permitting agency staff, or others.
    - If deliverables are not being met on time, request a meeting right away to assess any changes necessary to keep the project on schedule.

As with any new task, if you haven't worked with contractors before, particularly in a supervisory or lead role, this can be a daunting subject. To serve as the point of contact or the lead for a contractor that your council hires requires a delicate balance between providing oversight and respecting the boundaries of an independent entity. Respectful, open, and transparent communication with your contractor is the best way to find that balance. Don't be afraid to ask questions, request explanations, or ask for regular updates.

Chapter 13: Permit Basics

At some point in your position as a council coordinator, you will almost certainly encounter the state and federal permitting process as it relates to watershed restoration. You may not need to deal with this process in your first months on the job. Or, you may find that your council already has projects underway with permit requirements and you need to jump right in. The permitting process is one of the most challenging aspects of council work. It is the place where the voluntary, stakeholder-based approach of watershed councils intersects with the regulatory framework of state and federal permitting requirements. Agency representatives are often among the busiest people you will work with, and obtaining the permit or permits you need to proceed with a project can often be a time-consuming process. The information included in this chapter is only the tip of the permit iceberg, and only includes the most basic of information about the permits you're most likely to require for a typical in-stream project. It is important to remember that the permitting process can add time to your project schedule, and could delay implementation if not included in planning from the outset. If your council takes on complex restoration projects (for example, culvert replacement, floodplain reconnection, stream re-meander, dam removal), you may need to be prepared to hire design and implementation consultants who can also lead you through the permitting process.

The most important permitting task is to identify all the applicable regulatory requirements and the right players at each agency at the beginning of your project. Make sure you are aware of all permits your project will require, including local, state, and federal permits. Ask questions; obtaining accurate and comprehensive information about the permits required for a particular project, the timeline on which you will have to work, and the requirements you will have to meet is the best way to avoid stress headaches during project implementation! The best source of information about permits is the agency that issues a particular permit; other good sources of information include DSL's "Introduction to Water-Related Permits and Reviews Issued by Oregon State Agencies (http://www.oregonstatelands.us/DSL/PERMITS/docs/WRPPIT_guide_2008_lms.doc), and other council coordinators. Don't hesitate to call another coordinator if you have questions, or you can post your inquiry to the Coordinators Listserv maintained by the Network of Oregon Watershed Councils (for information on joining the listserv, see Chapter 1: Getting Started).

Federal Permits

Whether or not you will have to obtain federal permits for council projects will depend on the type, scale, and scope of projects on which your council works, as well as whether your watershed is home to plants or animals listed as threatened or endangered under the Endangered Species Act. Consult your Regulatory Permit Project Manager at the Army Corps early in your project development to outline a permitting approach. There is a lot of room for interpretation in the federal process and you will need their assistance to understand what will be required for your project. The Network of Oregon Watershed Councils has several PowerPoint presentations on-line from previous years' Gatherings of Watershed Councils. These presentations provide graphics and background information on the federal permit process. They are a good resource for becoming familiar with the terminology used by agencies and the agency process in general. You can access these presentations here: http://www.oregonwatersheds.org/resourcesforcouncils/permittingpresentations.

Table 7: State Permit Basics

(Adapted from "An Introduction to Water-Related Permits and Reviews Issued by Oregon State Agencies" by Department of State Lands; used with permission)

Agency	Permit	Description	Examples of Activities that might require the permit
DSL	Removal-Fill Permit	A removal-fill permit is typically required for projects involving 50 cubic yards or more of alteration of streambed, streambanks, or in wetlands. For projects located in designated essential salmon habitat waterways http://www.oregonstatelands.us/DSL/PERMITS/esshabitat.shtml or state scenic waterways http://www.oregonstatelands.us/DSL/PERMITS/scenicwaterways.shtml, any quantity of alteration requires a removal-fill permit. There are three forms of removal-fill authorizations: Individual Permit (120-day process): Applies to projects with potentially significant impacts to waters. General Authorization (40-day process): Provides expedited review process for certain categories of small projects including most habitat restoration activities. Emergency Authorization: May be issued in very limited circumstances where there is an immediate threat to public health, safety, or substantial property.	Stream bank stabilization, small-scale recreational placer mining, bridges and culverts, wetland fills & excavations, piling projects, wetland restoration, stream restoration, navigational maintenance dredging, water diversions, dams and impoundments.
DEQ	Storm-water Permit	A 1200-C Construction Stormwater National Pollutant Discharge Elimination System (NPDES) Permit regulates stormwater runoff from construction activities that disturb one or more acres of land in Oregon. The Federal Clean Water Act requires regulation of stormwater runoff from construction activities. The 1200-C permit requires permit holders prepare an Erosion and Sediment Control Plan and incorporate Best Management Practices into their construction work. Best management practices are used to prevent erosion and control sediment runoff from the site.	Construction activities including clearing, grading, excavation, and stockpiling that will disturb one or more acres and may discharge to surface waters or conveyance systems leading to surface waters of the state. Activities that disturb less than one acre that are part of a common plan of development or sale if the larger common plan of development or sale will ultimately disturb one acre or more and may discharge to surface waters or conveyance systems leading to surface waters of the state. This may include: bridges and culverts, wetland fills & excavations, wetland restoration, and stream restoration.
DEQ	Water Quality Certifi-cation	A 401 Water Quality Certification (WQC) is required as a component of any federal action that has the potential to result in a discharge of material to waters of the state. In Oregon, these federal actions are typically Federal Energy Regulatory Commission (FERC) hydropower projects, U.S. Coast Guard (USCG) projects, or U.S. Army Corps of Engineers (Corps) Section 404 of Section 10 permits which authorize activities altering waters of the U.S., and which may also require state removal-fill permits issued by the Department of State Lands (DSL).	Stream bank stabilization, bridges and culverts, wetland fills & excavations, piling projects, wetland restoration, stream restoration, navigational maintenance dredging, water diversions, dams and impoundments.
OPRD	Ocean Shore Permit	Under the 1967 Beach Bill, the public has the free and uninterrupted use of the beaches along the Oregon coast. OPRD is charged with the protection and preservation of the recreational, scenic, and natural resource values found on Oregon's ocean shore. Proposed alterations on the ocean shore require an Ocean Shore Permit issued by OPRD.	Shoreline protective structures, beach access ways, dune grading, and other sand alterations, pipelines and cable beneath the shore, marine algae collection, and natural products removal. Some other specific examples include: streambank stabilization, bridges and culverts, piling projects, wetland restoration, stream restoration, navigational maintenance dredging, water diversions, dams and impoundments.
ODFW	Scientific Take Permit	A Scientific Take Permit (STP) from the Fish Division is required for the taking of freshwater fish, marine fish, marine invertebrates, and shellfish for scientific or educational purposes. "Take" includes activities that kill or obtain possession of fish, shellfish, or marine invertebrates. To qualify for an Oregon STP, a project must have scientific research or educational merit. Additional federal permits or approvals may be required for activities in certain locations or affecting certain species.	Academic research, education, management/applied research, monitoring, public display, public interpretive programs, and rescue/salvage associated with stream bank stabilization, bridges and culverts, wetland restoration, stream restoration, water diversions, dams and impoundments.

Table 7: State Permit Basics, continued...

Agency	Permit	Description	Examples of Activities that might require the permit
ODFW	Fish Passage Require-ments	The owner or operator of an artificial obstruction located in waters in which native migratory fish are currently or were historically present must address fish passage requirements ***prior to*** certain trigger events. Artificial obstructions include dams, diversions, roads, culverts, tide gates, dikes, levees, berms, or any other human-made device placed in the waters of this state that precludes or prevents the migration of native migratory fish including native salmon, trout, lamprey, sturgeon, and suckers, and others. It is ODFW's responsibility to determine the current or historical presence of native migratory fish at the site, although if an owner or operator assumes their presence then they may proceed with the fish passage process without obtaining this specific documentation, from ODFW.	Bridges and culverts, water diversions, wetland and stream restoration, and damns and impounds.
ODFW	In-water timing guidelines	The guidelines are based on ODFW district fish biologists' recommendations. Primary considerations are given to important fish species including anadromous and other game fish and threatened, endangered, or sensitive species. Time periods are established for in-water work to avoid the vulnerable life stages of these fish including migration, spawning, and rearing. The guidelines provide the public a way of planning in-water work during periods of time that would have the least impact on important fish, wildlife, and habitat resources. ODFW uses the guidelines as a basis for commenting on other agencies' planning and permitting processes. Other state and federal agencies typically incorporate the timing guidelines as conditions of their permits for work in water. The guidelines are not a requirement of law until or unless they are incorporated into a permit or authorization. See http://www.dfw.state.or.us/lands/0600_inwtrguide.pdf.	Streambank stabilization, small-scale recreational placer mining, bridges and culverts, piling projects, navigational maintenance dredging, water diversions, dams and impoundments.
ODFW	In-water Blasting Permit	An in-water blasting permit is required whenever explosives are used in the course of removing obstructions in any waters of the state, in constructing foundations for dams, bridges, or other structures, or in carrying on trade or business.	Bridges and culverts, wetland or stream restoration, navigational maintenance dredging, utility lines and outfalls, dams and impoundments.
OWRD	Water Use Permit	Water rights are obtained in a three-step process. The applicant first must apply to the department for a permit to use water. Once a permit is granted, the applicant must construct a water system and begin using water. After water is applied, in most circumstances, the permit holder must hire a certified water right examiner to complete a survey of water use and submit to the department a map and a report detailing how and where water is being applied. If water has been used according to the provisions of the permit, a water right certificate is issued based upon the report findings. Many types of exemptions exist for both surface and ground water.	Most appropriations and beneficial uses of surface water or ground water, for example, wetland restoration, stream restoration, water diversions, dams and impoundments.
SHPO	Review of Water-related Permits	Any state water-related permit must consider the effects of the applicant's activities on historic properties and cultural resources. When a state agency permits an activity that may affect cultural resources, the agency must consult with SHPO. SHPO Archaeological Services´ staff assists state agencies and their applicants in protecting historic properties in Oregon, a consideration process that involves a series of steps that include: first, to identify if any historic properties or cultural resources exist within the project area; if so, then second, to evaluate the eligibility of the historic properties and determine the effects the proposed project will have on those properties; and third, if the project will have a negative impact on a significant historic property, the applicant and SHPO will explore alternatives to avoid, minimize, or mitigate the effects.	Activities requiring permits from the Department of State Lands and/or the U.S. Army Corps of Engineers including but not limited to: stream bank stabilization, bridges and culverts, wetland fills & excavations, piling projects, wetland restoration, stream restoration, navigational maintenance dredging, water diversions, dams and impoundments

Appendix 1: Agencies, Organizations, & Tribes

State Partners

Oregon Department of Agriculture (ODA): http://www.oregon.gov/ODA/index.shtml
ODA has three primary program areas: Food Safety and Consumer Protection, Natural Resources, and Agriculture Marketing and Development. Each of these areas functions independently but they are connected through their shared perception of interdependence. The mission of the agency is 1) to ensure food safety and provide consumer protection; 2) to protect the natural resource base for present and future generations of farmers and ranchers, and 3) to promote economic development and expand market opportunities for Oregon agricultural products.

Oregon Department of Environmental Quality (DEQ): http://www.oregon.gov/DEQ/
DEQ is responsible for protecting and enhancing Oregon's water and air quality, cleaning up spills and releases of hazardous materials, managing the proper disposal of hazardous and solid wastes, and enforcing Oregon's environmental laws. In addition to local programs, the US Environmental Protection Agency (EPA) delegates authority to DEQ to operate federal environmental programs within the state such as the Federal Clean Air, Clean Water, and Resource Conservation and Recovery Acts.

Oregon Department of Fish and Wildlife (ODFW): http://www.dfw.state.or.us/
ODFW's mission is to protect and enhance Oregon's fish and wildlife and their habitats for use and enjoyment by present and future generations. Many watershed councils across the state work closely with ODFW representatives, share meeting space, and develop and implement projects together.

Oregon Department of Forestry (ODF): http://egov.oregon.gov/ODF/
The mission of ODF is to serve the people of Oregon by protecting, managing, and promoting stewardship of Oregon's forests to enhance environmental, economic, and community sustainability. One of ODF's core visions is to create healthy forests providing a sustainable flow of environmental, economic, and social outputs and benefits for Oregon. ODF's major program areas include: protection from wildland fire, technical assistance and education to private foresters, management of state forests, and providing help to Oregon communities in planting, caring for, and managing urban forests.

Oregon Department of Geology and Mineral Industries (DOGAMI): http://www.oregongeology.org/sub/default.htm
This state department has evolved from its early focus on mining to become Oregon's major source of information to help Oregonians understand and prepare for the vast array of natural hazards that accompany the state's spectacular geology. Mapping the state's varied geology and natural hazards is a primary function of the agency. These hazards include earthquakes, tsunamis, landslides and coastal erosion. The department also regulates surface mining, in addition to oil, gas and geothermal resource exploration. DOGAMI's Mineral Land Reclamation Program regulates Oregon's mining industry to ensure that mine operators protect the environment while mining and return the land to beneficial use after mines are closed.

Oregon Department of Land Conservation and Development (DLCD): http://www.lcd.state.or.us/
The Department of Land Conservation and Development (DLCD) administers Oregon's land use planning program. The mission of the Oregon DLCD is to support their partners in creating and implementing comprehensive plans that reflect and balance the statewide planning goals, the vision of citizens, and the interests of local, state, federal and tribal governments. DLCD is split into five divisions: Community Services, Planning Services, Ocean and Coastal Services, Measure 49 Development Services, and Operations Services.

Oregon Department of State Lands (DSL): http://www.oregonstatelands.us/
DSL is the administrative agency of the State Land Board; the mission of the agency is to ensure a legacy for Oregonians and their public schools through sound stewardship of lands, wetlands, waterways, unclaimed property, estates and the Common School Fund. Councils often work with DSL as a landowner and through permitting processes at the State level.

Oregon Parks and Recreation Department—State Historic Preservation Office (SHPO): http://www.oregon.gov/OPRD/HCD/SHPO/ The Oregon SHPO was established in 1967 to manage and administer programs for the protection of the state's historic and cultural resources. When these resources disappear, communities not only can lose the tangible and educational assets that contribute directly to Oregon's heritage, opportunities for local economic development can also be lost. SHPO works with city planners and other officials, property owners, watershed councils, and preservation groups to protect and preserve valued historic and cultural resources for the future.

Oregon State Marine Board (OMB): http://www.boatoregon.com/
The Marine Board is dedicated to making the state's waterways safe, accessible, and enjoyable for all types of boaters and water enthusiasts. The agency provides facility improvements and access, marine law enforcement, boating safety education, and boat titling and registration.

Oregon State University (OSU) Extension Service: http://extension.oregonstate.edu/
The Extension Service leads Oregon State University's outreach mission by engaging with Oregon's people and communities to have positive impacts on community livability, economic vitality, natural resources sustainability, and the health and wellbeing of people. The OSU Extension Service has a presence in every Oregon county. While specific programs vary county to county, OSU Extension has five core program areas: 4-H Youth Development, Agriculture, Family and Community Development, Forestry, and the Marine Science/Sea Grant Program. Other Extension activities include: Master Gardeners, Master Food Preservers, Master Woodland Managers, and Master Watershed Stewardship programs; the Sustainable Living Program; Oregon Small Farms Program; and 4-H projects such as the Oregon Outreach and Global Education programs.

Oregon Watershed Enhancement Board (OWEB): http://www.oregon.gov/OWEB/index.shtml
OWEB is a critical funding partner for the Network of Oregon Watershed Councils and for individual councils, as well as many other organizations engaged in watershed restoration throughout Oregon. OWEB's mission is to help create and maintain healthy watersheds and natural habitats that support thriving communities and strong economies. OWEB's Regional Program Representatives (RPRs) work closely with watershed councils in their regions. Contact information for the RPRs is available via OWEB's website at http://www.oregon.gov/OWEB/WSHEDS/wshed_council_RPRs.shtml.

Oregon Water Resources Department (OWRD): http://www.wrd.state.or.us/OWRD/index.shtml
The Department's mission is to serve the public by practicing and promoting responsible water management through two key goals: first, to directly address Oregon's water supply needs, and second, to restore and protect stream flows and watersheds in order to ensure the long-term sustainability of Oregon's ecosystems, economy, and quality of life.

Federal Partners

National Oceanic and Atmospheric Administration (NOAA): http://www.noaa.gov/

NOAA's mission is to understand and predict changes in the Earth's environment and to conserve, protect, and manage coastal, marine, and Great Lakes' resources to meet our nation's economic, social, and environmental needs. Offices in Oregon include the National Ocean Service (NOS) offices, offices of Oceanic and Atmospheric Research (OAR), the National Marine Fisheries Service (NMFS), and the National Weather Service (NWS).

US Army Corps of Engineers (USACE): http://www.usace.army.mil/Pages/Default.aspx

The US Army Corps of Engineers' mission is to provide vital public engineering services in peace and war to strengthen our Nation's security, energize the economy, and reduce risks from disasters. The Corps dredges America's waterways to support the movement of critical commodities and provide recreation opportunities at campgrounds, lakes and marinas. The Corps also cleans sites contaminated with hazardous, toxic or radioactive waste and material in an effort to sustain the environment and devises hurricane and storm damage reduction infrastructure.

US Bureau of Land Management (BLM): http://www.blm.gov/wo/st/en.html

BLM is an agency under the U.S. Department of the Interior. They are responsible for managing a large spectrum of natural resource values. The BLM's mission is to sustain the health, diversity, and productivity of public lands for the use and enjoyment of present and future generations. In Oregon, the BLM is divided into nine regions; Salem, Eugene, Roseburg, Coos Bay, Medford, Lakeview, Prineville, Burns, and Vale.

US Bureau of Reclamation (BoR): http://www.usbr.gov/

The Bureau of Reclamation is a contemporary water management agency with a strategic plan outlining numerous programs, initiatives and activities that will help the Western States, Native American Tribes and others meet new water needs and balance the multitude of competing uses of water in the West. The mission of the Bureau is to assist in meeting the increasing water demands of the West while protecting the environment and the public's investment in these structures.

US Department of Energy—Bonneville Power Administration (BPA): http://www.bpa.gov/corporate/

BPA serves the Pacific Northwest through operating an extensive electricity transmission system and marketing wholesale electrical power at cost from federal dams, one non-federal nuclear plant and other nonfederal hydroelectric and wind energy generation facilities. BPA aims to be a national leader in providing high reliability, low rates consistent with sound business principles, responsible environmental stewardship and accountability to the region. BPA works with watershed councils to provide funding for salmon recovery and watershed restoration work.

US Environmental Protection Agency (USEPA): http://www.epa.gov/

EPA leads the nation's environmental science, research, education and assessment efforts. The mission of the Environmental Protection Agency is to protect human health and the environment. Since 1970, EPA has been working for a cleaner, healthier environment for the American people. The EPA has an extensive list of watershed-level programs, references, and resources (most available via their website).

US Fish and Wildlife Service (USFWS): http://www.fws.gov/

The US Fish and Wildlife Service is the premier government agency dedicated to the conservation, protection, and enhancement of fish, wildlife, plants, and their habitats. It is the only agency in the federal government whose primary responsibility is management of these important natural resources for the American public. USFWS is responsible for implementing and enforcing some of our Nation's most important environmental laws, such as the Endangered Species Act, Migratory Bird Treaty Act, and the Marine Mammal Protection Act.

US Forest Service (USFS): http://www.fs.fed.us/

The Forest Service is an agency of the U.S. Department of Agriculture. The Forest Service manages public lands in national forests and grasslands, which encompass 193 million acres in the United States. In Oregon, the US Forest Service oversees one National Grassland (Crooked River) and thirteen National Forests (Deschutes, Fremont, Malheur, Mount Hood, Ochoco, Rogue River, Siskiyou, Siuslaw, Umatilla, Umpqua, Wallowa-Whitman, Willamette, and Winema). As of 2009, their three major areas of emphasis are: climate change, water issues, and the loss of a connection to nature, especially for kids.

US Natural Resource Conservation Service (NRCS): http://www.nrcs.usda.gov/

NRCS is an agency in the US Department of Agriculture. They provide leadership in a partnership effort to help America's private land owners and managers conserve their soil, water, and other natural resources. NRCS employees provide technical assistance based on sound science that is suited to a customer's specific needs. NRCS provides financial assistance for many conservation activities (for example, the Conservation and Restoration Enhancement Project). Participation in all NRCS programs is voluntary. In Oregon, NRCS agents are often housed in local Soil and Water Conservation District offices.

Non-Profit Organizations

Center for Watershed Protection (CWP): http://www.cwp.org/

The Center for Watershed Protection works to protect, restore, and enhance our streams, rivers, lakes, wetlands, and bays. The organization works to create viable solutions and partnerships for responsible land and water management so that every community has clean water and healthy natural resources to sustain diverse life. The Center works with other organizations to provide workshops and training opportunities, to develop partnerships that work toward stream restoration and habitat protection at the watershed level, and assists in developing watershed restoration and enhancement plans.

The Freshwater Trust: http://www.thefreshwatertrust.org/

The Freshwater Trust is a not-for-profit organization that actively works to preserve and restore our freshwater ecosystems. The Freshwater Trust is composed of four programs: 1. StreamBank, a web-based tool that brings needed efficiencies to restoration work. 2. Oregon Trout, which provides long-term protection to native fish, such as salmon and trout, through river and stream restoration. 3. Healthy Waters Institute, HWI gets students out of the classroom to connect them to the natural world; and, 4. Oregon Water Trust, which improves the health of fish habitat and water quality by keeping more water in our rivers and streams.

Network of Oregon Watershed Councils (NOWC): http://www.oregonwatersheds.org/

The Network of Oregon Watershed Councils is dedicated to supporting the work of watershed councils throughout the state. The organization was created by watershed councils to help build watershed council capacity through training, information sharing, funding, and internal communication. NOWC works to improve key relationships with watershed council partners such as OWEB, OACD, Oregon Plan Liaisons, River Network, OSU Extension and other organizations in the state. The organization's website contains an extensive list of resources for councils and hosts a variety of training opportunities throughout the year and around the state.

Oregon Association of Conservation Districts (OACD): http://www.oacd.org/

The Oregon Association of Conservation Districts (OACD) is a statewide membership organization serving Oregon's Soil and Water Conservation Districts. One of OACD's main purposes is to promote the conservation and wise use of the natural resources of the state of Oregon by serving as the state association of member soil and water conservation districts and water control districts. Soil and Water Conservation Districts (SWCDs) are, for the most part, separated by county boundaries, and in some cases by basin. Check the OACD website to find out which SWCD(s) your watershed is in.

Oregon Environmental Council (OEC): http://www.oeconline.org/
The Oregon Environmental Council strives to safeguard what Oregonians love about Oregon – clean air and water, an unpolluted landscape, and healthy food produced by local farmers. OEC works to create innovative change on three levels: helping individuals live green; helping businesses, farmers and health providers thrive with sustainable practices; and helping elected officials create practical policy. OEC's vision for Oregon includes solving global warming, protecting kids from toxins, cleaning up our rivers, building sustainable economies, and ensuring healthy food and local farms.

The Nature Conservancy (TNC), Oregon Chapter:
http://www.nature.org/wherewework/northamerica/states/oregon/
The Nature Conservancy (TNC) is one of the leading conservation organizations working around the world to protect ecologically important lands and waters for nature and people. In Oregon, The Nature Conservancy owns or manages 46 nature preserves and has helped protect over 500,000 acres of important habitat. The Oregon TNC Chapter's major focus areas include: invasive species early detection and rapid response, freshwaters conversations, wetland restoration, and protection of Oregon's rugged coastline.

The Pacific States Marine Fisheries Commission (PSMFC): http://www.psmfc.org/
The PSMFC Compact states that its purpose shall be "to promote the better utilization of fisheries – marine, shell, and anadromous, which are of mutual concern, and to develop a joint program of protection and prevention of physical waste of such fisheries in all of those areas of the Pacific Ocean over which the compacting states jointly or separately now have or may hereafter acquire jurisdiction. PSMFC helps resource agencies and the fishing industry sustainably manage our valuable Pacific Ocean resources in a five-state region.

River Network: http://www.rivernetwork.org
River Network is a national organization supporting river and watershed advocates at the local, state, and regional levels. It makes amazing amounts of important information available to its partners, including: an annual directory of funding sources for grassroots river and watershed groups, how-to references for grant-writing and other activities, information on training courses for grant-writing and other fundraising activities, quarterly "River Fundraising Alerts" with helpful information on different aspects of fundraising along with a list of upcoming deadlines for funders with an interest in river and watershed efforts. For more information on River Network and its partnership program, you can call (503) 241-3506 or visit River Network's website.

TACS: http://www.tacs.org/
This organization, formerly known as Technical Assistance for Community Services, is a nonprofit support organization that serves organizations throughout the Pacific Northwest, providing training, consulting and resources to help strengthen non-profit organizations. TACS works with organizations—staff, board members and volunteers—to develop skills and tools that enable organizations to provide the services communities depend on. Programs and services include public trainings, consulting services, one-on-one or specialized trainings, the Nonprofit Association of Oregon, and Oregon Involved. Some organizations may qualify for financial or legal assistance to access TACS programs and services.

Wild Salmon Center: http://www.wildsalmoncenter.org/
The mission of the Wild Salmon Center is to identify, understand and protect the best wild salmon ecosystems of the Pacific Rim. We devise and implement practical strategies, based on the best science, to protect forever these extraordinary places and their biodiversity. This organization works with scientists, government agencies, businesses, and local communities to identify and conserve remaining salmon strongholds in the United States Pacific Coast region.

Oregon Native American Tribes

This list was obtained from http://500nations.com/Oregon_Tribes.asp.

Burns Paiute Tribe:
http://www.burnspaiute-nsn.gov/
Burns Paiute Tribe
100 Pasigo St
Burns, OR 97720
(503) 573-2088

Clatsop-Nehalem Confederated Tribes:
http://www.clatsop-nehalem.com/
PO Box 190
Seaside, OR 97138
Tribal office # 503-717-4535

Confederated Tribes of Coos, Lower Umpqua & Siuslaw Indians:
http://www.ctclusi.org/CTCLUSINEW/
455 S. 4th Street
Coos Bay, OR 97420- 1570
(503) 267-5454

Confederated Tribe of the Grand Ronde:
http://www.grandronde.org/
9615 Grand Ronde Road
Grand Ronde, OR 97347- 0038
(503) 879-5211 or 800-422-0232

Confederated Tribes of the Siletz Indians of Oregon:
http://ctsi.nsn.us/
201 SE Swan Ave.
Siletz, OR 97380- 0549
(503) 444-2532

Confederated Tribes of the Umatilla Indian Reservation:
http://www.umatilla.nsn.us/
(Cayuse, Umatilla and Walla Walla)
Post Office Box 638
Pendleton, OR 97801-0638
(503) 276-3165

Confederated Tribes of the Warm Springs Reservation:
http://www.warmsprings.com/
(Warm Springs, Wasco & Paiute)
1233 Veteran Street
Warm Springs, OR 97761
(503) 553-1161

Coquille Indian Tribe:
http://www.coquilletribe.org/
3201 Tremont
North Bend, OR 97459
(503) 756-0663

Cow Creek Band of Umpqua Indians:
http://www.cowcreek.com/
2400 Stewart Parkway, Suite 300
Roseburg, OR 97470-2027
(503) 672-9405

Klamath General Council:
http://www.klamathtribes.org/
(Klamath, Modoc & Yahooskin)
P.O. Box 436
Chiloquin, OR 97624
(503) 783-2219

Appendix 2: Additional References

Print Resources

Burke, J. and C. A. Prater. *I'll Grant You That.* Portsmouth, NH: Heinemann, 2000. This book provides a "step-by-step guide to finding funds, designing winning projects, and writing powerful grant proposals." The work outlines the critical aspects of the grant-writing process from strategic organizational and goal assessment through the submission process. It contains excellent advice for organizing applications and self-evaluating your drafts. An additional resource available in the text is a "Workshops" section that provides information and exercises on topics ranging from being creative to managing change in an organization. Finally, a series of appendices provides samples and examples, and an interactive CD-ROM walks the reader through the entire grant writing process.

Cone, J*. Expand your View; Insights for public communications from behavioral research*. Oregon Sea Grant, 2008. Expand Your View was written for professionals who work in universities, government, nongovernmental organizations, and similar organizations and institutions and who communicate with the public about ideas (as opposed to marketers of products). Short essays offer insights on the following topics: (1) understanding and addressing psychological barriers: persuasion research; (2) building on an ethical foundation: "nonpersuasive communication;" (3) embracing the voluntary: the perspective of free-choice learning; (4) seeing the whole range of influence: the "people and places" framework; and (5) fomenting social change: community-based marketing and tipping points. Publication No**.:** ORESU-H-08-006, $3 per copy. For a complete list of Oregon Sea Grant publications, http://seagrant.oregonstate.edu/sgpubs

Conway, F., D. Godwin, T. Nierenberg, etc. *Watershed Stewardship: A Learning Guide.* EM 8714. Revised Edition. Corvallis, OR: Oregon State University Extension Service, 2002. This reference provides "core knowledge" to assist in understanding the complexity of watershed systems and making sound decisions to benefit your watershed. The book is arranged in a standardized format in which each chapter provides an introduction to the topic, the most important aspects of each topic, a summary, exercises, resources for further information, and a "next steps" guide to putting the lesson in question into action. The work also contains a useful glossary and acronym guide.

Cumfer, C. and K. Sohl. *The Oregon Nonprofit Corporation Handbook.* 4th ed. Portland, OR: Technical Assistance for Community Services, 2005. From filing the right forms to working as a member of a volunteer board of directors, and from writing bylaws to building staff, this book is the ultimate reference for all nonprofit organizations in the state. Cumfer and Sohl provide the reader with both broad sweeps of overview information and a detailed examination of many aspects of nonprofit development, management, and evaluation. Appendices to this edition include a long list of sample forms, several subject-specific reference lists, example communications, and explanations of key legal positions.

Dement, P. *River Talk! Communicating a Watershed Message*; Portland, OR: River Network, 1998. This work provides a concise but comprehensive guide to developing and delivering your watershed message, conducting targeted community outreach. Chapters include guidance on developing a communications plan, identifying audiences, creating messages, and putting messages to work, among others. Appendices to the volume include an annotated bibliography of readings in attitudes toward watershed related topics and a list of sources and references.

Dropkin, M. and B. LaTouche. *The Budget-Building Book for Nonprofits: A Step-by-Step Guide for Managers and Boards;* in the Jossey-Bass Nonprofit & Public Management Series. San Francisco: Jossey-Bass (A Wiley Imprint), 1998. Dropkin and LaTouche provide concise, easy to read and understand information to use in building, evaluating, and maintaining an organizational budget. The final section of the work is arranged into "Resources" and includes examples, worksheets, and checklists to use when developing organizational budgets and fiscal reports.

Klein, K., ed. *Grassroots Fundraising Journal.* Oakland, CA: Grassroots Institute for Fundraising Training. This bimonthly publication is a low-cost way to keep up with fundraising strategies and statistics for non-profits. The organization also maintains a website providing multiple fundraising tools and references. Particularly useful is the extensive topical list of articles for download (most are $3.00 per article). (http://www.grassrootsfundraising.org/mm5/merchant.mvc?Screen=CTGY&Store_Code=G&Category_Code=article_downloads).

Light, D. and D. Moon, eds. *The Water Report: Water Rights, Water Quality, and Water Solutions in the West.* Eugene, OR: Envirotech Publications. Each edition of this monthly publication contains three or four detailed articles on water rights and water quality issues that go into great depth on their subjects. The "Water Briefs" section of the newsletter covers current events/litigation and provides contacts for additional information. The back of each issue provides a calendar of upcoming water-related education events and conferences.

NOAA Coastal Services Center. *Introduction to Stakeholder Participation.* 2007 "Introduction to Stakeholder Participation" is the second in a series of publications developed to bring information to coastal management professionals about the use of social science tools in their field of work. For additional information about social science tools and applications, please visit *www.csc.noaa.gov/cms/human_dimenstions/focus_socialsci.html*

NOAA Coastal Services Center. *Introduction to Survey Design and Deliver.* 2007 "Introduction to Survey Design and Delivery" is the first in a series of publications developed to bring information to coastal management professionals about the use of social science tools in their field of work. For additional information about social science tools and applications, please visit *www.csc.noaa.gov/cms/human_dimenstions/focus_socialsci.html*

NOAA Coastal Services Center. *Navigating in Rough Seas: Public Issues and Conflict Management.* This training manual helps to increase reader's ability to design, conduct and control meetings in public forums. The manual contents are aimed at giving the reader a better understanding of how to use collaborative processes in resolving coastal and marine-related issues in a public forum, how to use meeting management skills, knowledge and competencies to plan for and conduct effective meetings in a public forum and how to deal effectively with the media in the public issues management process.

NOAA Coastal Services Center. *Project Design and Evaluation.* This training manual helps to increase reader's ability to design, conduct and control meetings in public forums. The manual contents are aimed at giving the reader a better understanding of how to use collaborative processes in resolving coastal and marine-related issues in a public forum, how to use meeting management skills, knowledge and competencies to plan for and conduct effective meetings in a public forum, and how to deal effectively with the media in the public issues management process.

State of Oregon, Office of the Attorney General. *A Guide to Nonprofit Board Service in Oregon.* This pamphlet-length handbook, available free from the Office of the Attorney General (call 971.673.1880 or download a copy at http://www.doj.state.or.us/charigroup/tipsbrd.shtml), details the legal roles and responsibilities of non-profit board of directors. The guide provides reference to the specific legal statutes that govern and protect individual board members and includes information regarding individual personal liability in connection with board service.

State of Oregon, Oregon Department of Agriculture, and Oregon Association of Conservation Districts. *Oregon Soil and Water Conservation District Guidebook—A Guide to Operations and Management ,* Salem, OR: 2002 (http://oregon.gov/ODA/SWCD/guidebook.shtml). This publication provides information and directions to assist SWCDs in carrying out the district's statutory responsibilities. This can be very useful to watershed councils, particularly in developing strategic projects and partnerships.

U. S. Environmental Protection Agency. *Handbook for Developing Watershed Plans to Restore and Protect Our Waters.* EPA 841-B-05-005. Washington, DC: 2005. Also available online at: http://www.epa.gov/owow/nps/watershed_handbook/. This publication contains information, from technical tools to references, for use in developing watershed based plans to improve and protect water quality. According to the EPA's website, this reference "is generally more specific than other guides with respect to guidance on quantifying existing pollutant loads, developing estimates of the load reductions required to meet water quality standards, developing effective management measures, and tracking progress once the plan is implemented." Chapters provide information regarding the planning process; partnership development; project research and scoping; data gathering, tracking, and analysis; pollution estimation guidelines; goals setting; program development; management strategies; design implementation; and program evaluation. Two appendices provide resources for additional information and worksheets, in addition to a glossary and bibliography.

OWEB publications and resources

OWEB maintains a website specifically for watershed and watershed council publications: http://www.oregon.gov/OWEB/publications.shtml. Full text references available electronically include:

- The Oregon Plan for Salmon and Watersheds (Original document and Biennial Reports dating from 2001 to 2009).
- OWEB Sustainability Plan
- Investments in Oregon's Future
- A Strategy for Achieving Healthy Watersheds in Oregon
- 2007 Oregon Watersheds Atlas of Achievements (a NOWC publication)
- Education and Outreach Strategy
- Oregon Plan for Salmon and Watersheds Monitoring Strategy
- Environmental Indicators for the Oregon Plan for Salmon and Watersheds
- Technical Assistance and the Oregon Plan for Salmon and Watersheds
- Riparian Tree Planting Guide
- Small Dam Removal Guide
- Western Juniper Management Field Guide
- OWEB Guide to Photo Point Monitoring
- Coastal Oregon Riparian Silviculture Guide
- Oregon Watershed Assessment Manual
- Estuary Assessment Manual
- Oregon Aquatic Habitat Restoration and Enhancement Guide
- Water Quality Monitoring Technical Guide Book

- Oregon Riparian Assessment Framework
- A Guide to Oregon Permits
- Nonpoint Source Pollution Control Guidebook
- Streamside Gardening—OSU Extension Service
- Field Guide to Riparian Plant Communities of Central and Eastern Oregon
- Native Freshwater Wetland Plant Associations of Northwestern Oregon
- Riparian Plant Communities of Northwestern Oregon: Streamside Plant Communities
- 2005 Willamette River Aerial Photography with Public Lands, Land Trusts, and Revetments

Other web-based references

Catalog of Federal Funding Sources for Watershed Protection (http://cfpub.epa.gov/fedfund/)

This US EPA resource site features a searchable database of financial assistance sources (grants, loans, cost-sharing) available to fund a variety of watershed protection projects. There are two ways to search the site: by subject matter criteria or by words in the title of the funding program. Searches result in a listing of programs by name. Click on each program name to review detailed information on the funding source.

Contact information for Oregon's watershed council coordinators (http://www.oregonwatersheds.org/councilprimarycontactsjune09) This list, maintained by the Network of Oregon Watershed Councils, provides phone numbers, mailing addresses, websites (if applicable), and email addresses for all of Oregon's watershed councils.

Energize, Inc! (http://www.energizeinc.com/index.html)

This website contains an extensive list of resources for anyone who works with volunteers. Items of note include a resource library including references on volunteer recruitment and retention, skill management, leadership development, and many others; a referral network for courses, trainings, conferences, and associations; and a "Collective Wisdom" site that offers practical advice, quotes, and stories about volunteering and working with volunteers.

Foundation Center: Proposal Writing Short Course (http://foundationcenter.org/getstarted/tutorials/shortcourse/index.html) This site provides a concise and direct step-by-step course detailing the process of writing a successful grant application. The site also provides an easy to use tool for finding information about potential funders, providing grantmakers' addresses, web sites, and 990 information, as well as national, regional, and state-by-state statistics about granting.

Fund-Raising Forum Library by Tony Poderis (http://www.raise-funds.com/library.html)

This website provides a comprehensive list of short articles on fundraising and related topics. Content sections include: Planning for fundraising, funding sources and prospects, organizing a campaign, managing a campaign, post-campaign activity, and developing the development team.

Getting in Step: A Guide for Conducting Watershed Outreach Campaigns (http://www.epa.gov/owow/watershed/outreach/documents/getnstep.pdf) This downloadable document provides a comprehensive look at watershed-level outreach, including campaign development, implementation, and evaluation. The work includes several useful appendices, such as evaluation questions and resources for additional information.

Grants.gov (http://www.grants.gov/) This site acts as a clearinghouse for information regarding federal grant programs. According to the site, information is available for over 1,000 federal grant opportunities totally over $500 million. Users must register in order to use the features of the site; registration is free but can

take several days to several weeks as your organization's information is verified. Watershed councils that are not legally non-profit organizations can register as individuals to access the information on the site, but available tools are limited when registered as an individual.

Klein, K. *Rural Fundraising: Success Stories for CASA/GAL Programs.* 2006 Edition. Seattle, WA: National CASA Association Resource Library, 2006

. (http://www.casanet.org/download/fundraising/0601_complete_guide_0036.pdf) This reference provides a good introduction to rural fundraising by starting with the seven factors rural fundraisers must account for in their fundraising plans. The work goes on to provide a review of fundraising strategies, tips for successful rural fundraising, and case studies that demonstrate the ability of rural groups to sustainably fundraise.

Non-profit guides—grant-writing tools (http://www.npguides.org/index.html) This site provides general tips for effective grant writing, as well as sample cover letters, cover sheets, budgets, RFPs, full proposals, and links to additional resources that include glossaries, training centers and opportunities, and short lists of private, public, and education grant-making organizations.

Sustainable Land Stewardship Institute International (http://www.slsii.org/weblinks.htm)

This site provides an extensive list of web links to information on "all things watershed." Topics include monitoring, salmon, watershed stewardship, watershed organizations, networks, and groups, project funding sources, grant-writing help, watershed data sources, watershed issues, agroforestry, bioassessment, environmental law, planning, restoration, and technical information for watershed work, in addition to many others.

Network of Oregon Watershed Councils

Building community for healthy watersheds.
Visit us on the web: www.oregonwatersheds.org

Our mission:
The Network supports the work of Oregon's watershed councils to enhance watershed health and benefit their local communities.

Our vision:
We envision strong, resilient watershed councils throughout Oregon sustaining healthy land, water and economies. Oregon watershed councils are the pride of our local communities and a model for our country and the world.

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