

2 Introduction

2.1 Description of Planning Entity

In April 2003, the Northwest Power and Conservation Council (NPCC) designated the Willamette Restoration Initiative (WRI) as the lead entity for developing the *Willamette Subbasin Plan*. (In this document, the terms Willamette Subbasin and Willamette Basin are used interchangeably.) NPCC entered into a contract with WRI to produce the draft plan in June 2003.

WRI has a 26-member Board of Directors drawn from all walks of life across the full extent of the basin. WRI was established to develop and implement a long-range conservation plan for the Willamette River and its watershed. Completed in 2001, this conservation plan, called the *Willamette Restoration Strategy*, is the “Willamette chapter” of the Oregon Plan for Salmon and Watersheds. The *Willamette Restoration Strategy* identifies 27 critical actions needed to preserve and improve watershed health in the areas of water quality, water supply, habitat and hydrology, and institutions. Two of the actions call for more detailed identification of fish and wildlife conservation priorities and more integrated environmental planning. The development of the *Willamette Subbasin Plan* represents substantial progress for WRI in both these areas. More information on WRI and the *Strategy* can be found at: www.oregonwri.org.

2.2 List of Participants

The primary participants in the development of the Willamette Subbasin Plan include WRI staff and the members of work groups who contributed to different plan components. WRI’s Subbasin Plan Coordinator was David Primozech, who was assisted by WRI Executive Director Rick Bastasch. WRI was helped greatly by the work group members shown in Table 2-1 (the purpose of the work groups is described in Section 2.3). WRI also consulted widely with professionals in the environmental community.

2.3 Stakeholder Involvement Process

WRI’s stakeholder involvement process began far in advance of WRI’s designation as lead entity. In the fall of 2002, WRI initiated a series of meetings to scope expectations and possible partnerships for the subbasin planning process. These meetings included representatives from the cities of Portland and Albany; the Lower Columbia River Estuary Partnership; the Oregon Watershed Enhancement Board (OWEB); the Northwest Power and Conservation Council; the National Marine Fisheries Service in the National Oceanic and Atmospheric Administration (NOAA Fisheries); the U.S. Fish and Wildlife Service (USFWS); Clean Water Services of Washington County; Clackamas Water Environment Services; the U.S. Bureau of Land Management (BLM); and watershed councils.

Table 2-1: Participants in the Development of the *Willamette Subbasin Plan*

Plan Oversight Group	
Sara Vickerman	Defenders of Wildlife
John Miller	Wildwood-Mahonia
Steve Gordon,	Lane Council of Governments
Martin Hudson	U.S. Army Corps of Engineers
Chris Wheaton & Greg Sieglitz	Oregon Department of Fish and Wildlife
Karl Weist & Bill Blosser	Northwest Power and Conservation Council
Rob Walton & Patty Dornbusch	NOAA Fisheries
Steve Smith	U.S. Fish and Wildlife Service
Ken Bierly	Oregon Watershed Enhancement Board
Julia Dougan & Mark Brown	Bureau of Land Management
Technical Advisory Group	
Stan Gregory	Oregon State University Department of Fisheries and Wildlife
Paul McElhaney & Patty Dornbusch	NOAA Fisheries
Chuck Willis	U.S. Army Corps of Engineers
Dave Ward and Greg Sieglitz	Oregon Department of Fish and Wildlife
Doug Young	U.S. Fish and Wildlife Service
Gordon Grant	U.S. Forest Service, Pacific Northwest Research Station
Jim Middaugh	City of Portland
Kathryn Boyer	Natural Resources Conservation Service
Cathy MacDonald	Nature Conservancy
Wildlife Team	
Greg Sieglitz	Oregon Department of Fish and Wildlife
Cathy MacDonald	Nature Conservancy
Holly Michael	Oregon Department of Fish and Wildlife
Paul Adamus	Adamus Resource Assessment, Inc.
Bob Altman	American Bird Conservancy
Jimmy Kagan	Oregon Natural Heritage Initiative
Technical Consultants	
John Runyon	Biosystems, Inc.
Chip McConnaha	Mobrand Biometrics, Inc.
Paul Hoobyar	Watershed Initiatives
Michael Carlson	Clackamas River Basin Council
Karen Streeter	Clackamas County Water Environment Services
Cedric Cooney	Oregon Department of Fish and Wildlife
Tom O'Neil	Northwest Habitat Institute
Paul Adamus	Adamus Resource Assessment

Once WRI was designated as the lead entity for development of the plan, it established three stakeholder work groups to inform the planning process (members of the work groups are listed in Section 2.2):

- Technical Advisory Group (TAG)
 - Primary responsibility: Advise WRI on the assessment and the research, evaluation, and monitoring strategy
 - Tasks: Identify focal species and priority habitats, advise on methods for modeling species’ needs and responses, identify key data and information sources, review objectives, and identify limiting factors
- Wildlife Team
 - Primary responsibility: Advise WRI and TAG on specifics of the wildlife assessment, including the selection of focal species and the identification and incorporation of new, highly detailed data with the SITES and IBIS models; identify wildlife limiting factors
- Plan Oversight Group
 - Primary responsibility: Advise WRI on the management plan (see Chapter 5) and inventory (see Chapter 4)
 - Tasks: Articulate the vision, major goals, strategies, and objectives of the management plan and advise on key areas of emphasis; recommend principle means of ensuring that the plan becomes a conservation framework used not just by the NPCC, but by other agencies and organizations as well

As described in the *Willamette Subbasin Plan* work plan (Northwest Power Planning Council, 2003), the primary means of communicating with stakeholders was through representative bodies—that is, collectives of interests that convene regularly under the auspices of various organizations. WRI shared information about subbasin planning and sought input on plan products by communicating directly with the entities Table 2-2.

Table 2-2: Stakeholder Groups Consulted Regarding Subbasin Planning

Body	Description
Willamette Urban Watershed Network	Members representing urban interests throughout the Willamette Basin who meet quarterly to share information on approaches and needs relating to urban aspects of watershed and species management
Willamette Provincial Interagency Executive Committee	Executives from federal natural resource agencies who meet every other month to cooperate in implementation of the Northwest Forest Plan
State of Oregon Northwest Region Managers Team	Administrators of state natural resource agencies who meet quarterly to discuss implementation of environmental programs, coordination opportunities, and agency needs

Table 2-2: Stakeholder Groups Consulted Regarding Subbasin Planning

Body	Description
Willamette Basin Watershed Council Coordinators	Coordinators of basin councils within the Willamette Basin
WRI Board of Directors	26 citizens overseeing implementation of the <i>Willamette Restoration Strategy</i>

WRI also worked closely with local stakeholders in the development of products of Ecosystem Diagnosis and Treatment (EDT), a habitat modeling tool developed by Mbrand Biometrics, Inc., that rates habitat conditions relative to the needs of a focal species, such as Chinook salmon. With its partners, WRI hosted meetings of local experts in the lower Willamette, McKenzie, and Clackamas watersheds to critique and refine reach breaks, parameter ratings, and other EDT inputs and outputs. These experts—who were convened with the help of the City of Portland, Clackamas Water Environment Services, Clackamas River Basin Council, and the McKenzie River Watershed Council—included local and district representatives from the Oregon Department of Fish and Wildlife (ODFW), the U.S. Forest Service, and utilities. Substantial assistance was also provided by many staff at ODFW’s headquarters and field offices and the City of Portland.

WRI also hosted several *Willamette Subbasin Plan* meetings specifically for staff of ODFW and USFWS. In addition, in April 2004, WRI convened more than 60 Willamette Basin experts for a facilitated review of draft subbasin plan products and the identification of most important strategies for addressing key environmental factors.

WRI developed its own *Willamette Subbasin Plan* Web site (<http://www.oregonwri.org/willamette-synthesis>) to share approaches and plan products and solicit feedback on them.

2.4 Overall Approach to the Planning Activity

The prime objective of WRI’s *Willamette Subbasin Plan* process was to establish a compelling, enduring, and locally appropriate conservation framework for use not only by NPCC, but by a wide range of conservation organizations.

Another aim of WRI’s planning strategy was to address all areas of this river basin—the size of Maryland—while recognizing key locations of high importance and the fact that certain areas had already undergone detailed analysis. In other words, because NPCC’s schedule and budget did not allow for concentrated analysis in all locations, WRI needed to target detailed analysis in key locations (for example, EDT assessments in the Clackamas and McKenzie watersheds). At the same time, WRI was committed to presenting in this document a sound characterization of conditions and needs in areas that had not yet received concentrated analysis. In other words, WRI wanted to avoid bestowing an advantage on areas simply because they have been studied the most.

So as not to fall into the trap of relying too heavily on data from already well-studied areas, WRI conducted several surveys to bring to light important limiting factors, conservation

needs, and existing programs throughout the Willamette Basin, including in areas that have not been studied extensively. These surveys included the following:

- An inventory of federal, state, and regional conservation plans and programs in the Willamette Basin
- A survey of the conservation needs of watershed council coordinators
- A survey of conservation programs of local governments and groups
- A survey of ODFW biologists regarding multi-species limiting factors
- A survey of technical experts regarding research, monitoring, and evaluation needs

Given the sheer size of the basin, both geographically and in terms of its human population (about 2.5 million), it was necessary for WRI to conduct outreach to stakeholders primarily through existing organizations and networks, rather than having local dialogues that would have anchored the *Willamette Subbasin Plan* in the minds of local citizens as a useful and respectful framework for conservation actions (see Section 2.5). (Unfortunately, these types of dialogues were largely precluded by budget and time constraints.)

The result was a planning process that did the following:

- **Created a synergy of interests and investment** in the *Willamette Subbasin Plan*. WRI was privileged to work with a number of partners who—through their own, substantive expenditures—increased the NPCC Willamette budget by 75 percent. (This does not include the many in-kind contributions of all the partners.)
- **Put a premium on the cooperation** of Willamette Basin partners. In the nine-month period allotted for this major planning effort, WRI made it a commitment to develop close working partnerships with about 30 conservation agencies, organizations, and efforts.¹
- **Placed a priority on laying a solid, lasting analytical framework.** WRI elected to take the time and allocate its limited budget to ensure that EDT, Qualitative Habitat Assessment (QHA), and wildlife modeling processes used the latest and most detailed information, and that local experts were given the time to refine and comment on both the modeling processes and the data used in the models. This meant that fewer resources were made available for speculative modeling runs for multiple alternative conservation scenarios. In other words, WRI chose not to rush through developing modeling inputs that would be poorly understood by and of little value to local experts, simply to crank out modeling results.
- **Addressed all areas of the basin,** while incorporating detailed analysis for specific locales, where available.

¹ These include Defenders of Wildlife, Wildwood-Mahonia, Lane Council of Governments, the U.S. Army Corps of Engineers, the Oregon Department of Fish and Wildlife, NPCC, NOAA Fisheries, the U.S. Fish and Wildlife Service, OWEB, BLM, the City of Portland, NRCS, the Nature Conservancy, the American Bird Conservancy, the Oregon Natural Heritage Initiative, the Clackamas River Basin Council, Clackamas County Water Environment Services, McKenzie River WSC, the Northwest Habitat Institute, Oregon State University's Department of Fisheries and Wildlife, USFS-PNW, WUWN, PIEC, NW Oregon Managers, Core Team, the Willamette Basin Conservation Project, the WRI Board of Directors, and the Grande Ronde Tribes.

- **Included the most detailed spatial and narrative descriptions of conservation priorities** yet produced in the Willamette Basin.

2.5 Process and Schedule for Revising/Updating the Plan

WRI is working with its Willamette Basin partners and stakeholders to develop a process, schedule, and budget for updating the *Willamette Subbasin Plan*. However, as previously communicated to NPCC and its Oregon Level II Group, which coordinates subbasin planning within the state, WRI will not be able to facilitate or participate in revision and updates of the plan without additional funding.

Nevertheless, as discussed with NPCC as this subbasin was developed, there is a critical need to provide for updates in the near future to incorporate expected results of the following:

- The Willamette Basin Project Biological Opinion
- The State of Oregon Conservation Plan
- State of Oregon native fish conservation policy implementation
- The Oregon Watershed Enhancement Board watershed restoration prioritization
- NOAA Fisheries' Willamette-Lower Columbia salmon recovery plan
- Oregon Department of Fish and Wildlife anadromous fish conservation curves
- The U.S. Army Corps of Engineers' Floodplain Restoration Feasibility Study
- Total maximum daily load (TMDL) implementation plans and schedules by designated management entities