Case Study
Collaboration

The Willamette River Initiative facilitated strategic collaborations to increase the effectiveness of restoration throughout the river basin. The collaborations that were developed or deepened as a result of the WRI were critical to achieving the WRI's strategic goals.

The collaborations that formed during the WRI helped people see the bigger picture of the Willamette River Basin and understand their role in it more clearly. They promoted shared learning that improved the quality of interventions. They brought people together to align priorities and action across the basin. They fostered greater capacity individually and collectively across the system that increased the pace and scale of restoration. They created an identity and culture of, in the words of some, "We're all in this together." Ultimately, collaboration helped to drive progress toward making the shared vision for a healthy Willamette River Basin a reality.

The WRI Approach

The WRI provided both an environment that fostered collaboration and a model for how to collaborate effectively. The most effective elements of WRI's approach include:

1 Fostering Relationships

The WRI recognized the importance of strong, supportive relationships to improve river health. Many facets of WRI, from convenings to grantmaking, had relationships at their core. They provided opportunities for both formal and informal relationship-building across the restoration field. Most importantly, the WRI staff developed personal relationships with people throughout the sector, giving them insight into what was happening across the basin. These relationships strengthened the trust between those in the field and WRI.

2 Initiating and Supporting Collaboration

The WRI staff and core partners had a unique view of the entire river system that enabled them to see opportunities where individuals, organizations, and the river could benefit from deeper collaboration. Despite this, the WRI staff did not force collaboration. Instead, they were responsive to opportunities while supporting the needs of partners. When the time was right, they brought people together to explore possibilities for working together and then stepped back to allow the potential partners to create what was right for them.

3 Bringing People Together

One of the most effective strategies of the WRI was to function as a convener. The biennial Within Our Reach conference, biennial WRI grantee retreats, monthly Willamette Model Watershed Program meetings, and learning cohorts to advance diversity, equity, and inclusion were examples of the WRI's investments in bringing people together that helped to make connections, seed new ideas, support progress, and build trust.

4 Recognizing That Change Takes Time

The WRI realized that change is a long process if it is to be true and durable. The WRI staff's focus on relationships enabled them to understand the mental, emotional, and behavioral dynamics of change. They recognized that it takes time to establish the trust needed for collaboration to be successful. They also realized the complexity of the dynamics that have to be negotiated and the adjustments that have to be made for organizations to move from independent to interdependent habits of work. As such, they were patient and developmental in how they invited, facilitated, and supported collaborations.

5 Providing Flexible, Long–Term Funding

The WRI's flexible, long-term funding is cited by leaders of organizations throughout the Willamette as one of the important elements in encouraging collaboration. Having long-term, reliable funding afforded people the time to work on the most important projects. It provided the security for people to take risks and try new things. Flexible funding helped to fill gaps where other funding was unavailable to support collaborative efforts. It also ensured that people could create what was most appropriate and beneficial to advance their projects in collaboration with others.

6 Valuing Capacity–Building

The WRI recognized that effective collaboration takes capacity. They demonstrated the value of collaborations by making critical and substantial investments to support them. Rather than expecting collaborations to come together with nothing more than inspiration, the WRI was willing to make investments to support the kind of dedicated time and effort required to coordinate new collaborative efforts.

Fostering Collaboration

The WRI's approach fostered effective collaboration throughout the basin. The following examples represent six different types of collaboration and the lessons learned from each.

Willamette Mainstem Cooperative

The Willamette Mainstem Cooperative (WMC) is a collaboration started in 2012 to steward habitat and address invasive weeds on the Corvallis to Albany reach of the Willamette.

The WMC is guided by a 15-person steering committee under the leadership of the Benton Soil and Water Conservation District (SWCD) to coordinate the weed management efforts of a broad array of more than 50 landowners, many of whom were agricultural landowners, and organizations. Prior to the WMC, there was no venue for stakeholders to come together to learn what is happening and coordinate habitat stewardship on this critical stretch of the Willamette.

What made it work?

The WMC was an example where all of the pieces were in place for collaboration, ready to be connected and coordinated. There were dedicated partners and a vision to work together in a more coordinated way. There was also an agency in place, Benton SWCD, willing to take the lead. The WRI provided funding and co-convened the initial meeting to bring the interested partners together.

The WRI also provided funding for critical elements of the collaboration, including a habitat assessment, an action plan, and a staff position at Benton SWCD to coordinate the WMC. With this new capacity, the WMC was able to obtain additional project-related funding for invasive weed removal along this reach of the river from government sources.

Support for staff capacity, in particular, yielded significant benefits for the WMC beyond coordinating collaboration. A dedicated staff position enabled them to build stronger relationships among a wide variety of partners with diverse viewpoints including government, conservation, and agriculture. These relationships helped to create a common understanding of interests and needs that led to the development of shared goals for restoration. Recognizing the value of this staff position to support collaboration and on-the-ground restoration, Benton SWCD has budgeted for the WMC coordinator in its general fund to sustain this work after the WRI ends.

Lessons Learned

- **Collaboration requires capacity and leadership.** A strong lead agency with dedicated staff time is crucial for effective collaboration. Although the WMC partners saw the need to work together, it was not until Benton SWCD stepped up to lead the effort and the WRI provided funding for staff capacity that the collaboration formed. This lead role was essential to bring people together and coordinate their efforts.

- **A coordinated effort takes consistent communication.** With the variety of partners involved in the WMC, clear and regular communication was essential. The WMC staff took the time to get to know partners. They used a variety of communication tools to reach each partner in the way that works best for each of them, including phone, email, and in-person visits.

- **Ongoing outreach is needed to achieve goals.** A significant and systemic issue such as invasive weeds takes, in the words of one person, an "all hands on deck" approach. The WMC engaged and mobilized many volunteers to help remove invasive weeds. Continuing outreach to expand public awareness of this issue will require more volunteers to support remediation efforts and to encourage prevention efforts in the future.

- **Staff skills must fit the stage of the collaboration's life cycle.** The skills of the staff of the WMC have met the needs of each stage in its life cycle. Early on, it took strong on-the-ground project management skills to complete projects and demonstrate the value of collaboration. Next, it took someone who could build systems to streamline and codify processes. Now, it takes strong communication and outreach skills to maintain involvement and bring new people in. Matching the skillset of the staff with the stage of the collaboration's life cycle will be critical for the ongoing success of any collaboration.

The Confluence

The Confluence is a shared office space that broke ground in October 2018 in downtown Corvallis to promote collaboration and community among organizations working toward a common purpose.

The core partners include Greenbelt Land Trust, Benton Soil and Water Conservation District, Cascade Pacific Resource Conservation and Development, Corvallis Environmental Center, and Institute for Applied Ecology. Greenbelt Land Trust serves as the lead agency. While the composition of partners has changed since this collaboration has been in development, the goal of sharing resources to increase each organization's social and environmental impact remains the same.

What made it work?

The partners began meeting in 2014 to envision what collaboration might look like. They faced some common challenges but did not yet have a clear idea of how collaboration could be useful. They took time informally at first to understand each other's and the community's needs and eventually saw that coming together could provide leverage points to get competitive rates for office space and support greater sharing of resources between organizations. Although not all the core partners had been heavily involved with the WRI, the relationships between the core partners that had developed through the WRI were essential for people to be able to trust each other and give up some autonomy as they created the collaboration.

The WRI's funding, convening, and modeling created an environment that catalyzed collaboration. The WRI's flexible capacity funding for some of the partners involved in the Confluence helped to create a culture where partners were ready to collaborate more deeply. Bringing people together to talk about strategy and vision at Within Our Reach modeled how collaborative strategic planning and visioning can happen at the local level. The WRI also partnered with the Center for Diversity and the Environment (CDE) to engage cohorts of grantees and partners in learning and taking action to advance diversity, equity, and inclusion. The CDE cohort strengthened relationships, which enabled the organizations to move into collaboration with more

trust and vulnerability related to diversity, equity, and inclusion change work. It also gave people tools to hold each other accountable to shared values and goals.

Lessons Learned

- **Building collective skills in interpersonal communication strengthens collaboration.** Open and effective communication is critical to initiating and sustaining collaboration. This is especially true when partners change or staff roles in the partnerships shift. Ensuring that everyone has a common understanding of effective communication and common skills to enact it will help the collaboration weather transitions better and build stronger relationships.

- **Determining an equitable way to distribute funding and responsibility early on promotes buy-in.** Organizations are at different points of readiness and capacity to dedicate to collaboration. All partners are well-served when this variability is acknowledged early in the process to promote clarity of roles, responsibilities, and financial commitments.

- **Building a common understanding of diversity, equity, and inclusion (DEI) is needed to ensure DEI is centered in the work.** DEI is one of the core values of The Confluence, and yet different partners have different levels of understanding of DEI. The Confluence received a grant from Meyer to conduct an equity assessment of the partnering organizations, provide training to staff and boards, and create a shared equity plan for The Confluence. This will help to ensure that there is a common vision and language of equity moving forward.

- **Modeling shared leadership promotes equity and sustainability.** As part of The Confluence's commitment to DEI, they are creating a model for shared leadership. In addition to identifying a steering committee that consists primarily of the executive directors from each of the partner organizations, the

Confluence formed shared committees focused on DEI, fundraising, and marketing. These committees are open to a wide variety of leaders in the partnering organizations to ensure that more people have ownership in The Confluence and to spread the work and authority beyond executive directors.

- **Planning for effective partner transitions sustains culture.** While having consistent core partners throughout the duration of a collaboration would be ideal, such stability may be unrealistic. Transition in the partnership can present a number of challenges as new partners join without the benefit of shared history and vision. It can also provide an infusion of new ideas and perspectives that can promote learning and inclusion. Planning ahead for transitions will help

to ensure that these benefits of transition can be realized while orienting new partners to the history and culture of the collaboration. Planning ahead will also ensure that gaps in knowledge, responsibilities, and resources left by departing partners are filled.

- **Celebration reinforces the effort.** Regardless of the challenges of collaboration, it is important for partners to recognize and celebrate accomplishments along the way. Expressing appreciation for the investments everyone is making in whatever way they are able strengthens the collaboration. Ensuring that regular opportunities for appreciation and celebration are built into the routine of the collaboration is important to encourage progress and sustain momentum.

Example 3:

Upper Willamette Stewardship Network

The Upper Willamette Stewardship Network is a collaboration that formally launched in 2018 to improve and expand programs, increase cost effectiveness, eliminate duplication of efforts, and achieve long-term organizational stability to serve the Upper Willamette's land and water resources and its communities.

The partners in this collaboration include the Coast Fork Willamette Watershed Council, Friends of Buford Park and Mount Pisgah, Long Tom Watershed Council, McKenzie Watershed Council, McKenzie River Trust, and Middle Fork Willamette Watershed Council.

What made it work?

The Network started at the convergence of four conditions: (a) funders were concerned about the duplication and coordination of efforts; (b) leadership personnel at four of the six partner organizations

transitioned out, leaving new executive directors in need of resources and support; (c) a majority of the partners participated in the CDE cohorts and saw the value of peer support as they were working to integrate diversity, equity, and inclusion more deeply into their organizations; and (d) the future was uncertain as the WRI was getting closer to sunsetting. The six partners in this collaboration met informally for two years prior to launching the Network to determine what effective collaboration would look like given these factors.

The uncertainty associated with the ending of the WRI and culture of collaboration created by the WRI

motivated those involved in the collaborations to create the Network. Most of the group members had gained experience thinking bigger and working collaboratively through the Model Watershed Program and the Willamette Anchor Habitat Working Group. The end of the WRI coupled with the WRI's commitment to diversity, equity, and inclusion created a combination of uncertainty and opportunity that set up the conditions for innovation. The future did not seem as daunting if they could face it together.

In early 2015, the WRI awarded a capacity grant to McKenzie River Trust that included funding for partnership development. The partners met together over the next few years to develop the strong relationships and trust that would form the foundation for the Network. They were intentional about coming together in a way that was beneficial and sustainable for all partners. They devoted the time to determine the appropriate size and pace for building relationships and operationalizing the partnership. They took steps forward and steps back, regrouped and adapted, strengthening their partnership each step of the way. During this time, the partners also considered different models for collaboration and determined the network model was a good fit for what they wanted to accomplish together. They received a grant from the Land Trust Alliance to hire consultants to help them develop a network strategy, and in 2018, the Upper Willamette Stewardship Network was born. The WRI provided a grant that supported a coordinator position for the network, which provided essential capacity for the functioning of the network.

Lessons Learned

- **Strong relationships promote strong collaboration.** The formation of the Network required significant patience, persistence, and trust between the partners. The ability to relate to each with candor and respect, even amidst challenges, was essential to the culture of the collaboration. The relationships the partners had developed through the WRI established a foundation of trust for the partners to build on. The partners also did significant, long-term work on their own to deepen these relationships. This ensured that all partners were able to be open and vulnerable about their needs and what they could offer as they created a formal partnership.

- **Focusing on abundance reveals long-term benefits.** A collaboration makes people negotiate what they have to lose or give up to join with others. Helping people focus on what can be gained and what each partner has to offer helps to create a longer-term view for the collaboration that presents new possibilities rather than short-term limitations.

- **Bringing in skilled facilitators provides new tools for collaboration.** The Network worked with external consultants to help them develop their network strategy. They credit the consultants with helping them to create a shared vision for the collaboration and a shared language that they could refer back to when facing challenges.

The WRI's biennial Within Our Reach conference helped spark new partnerships.
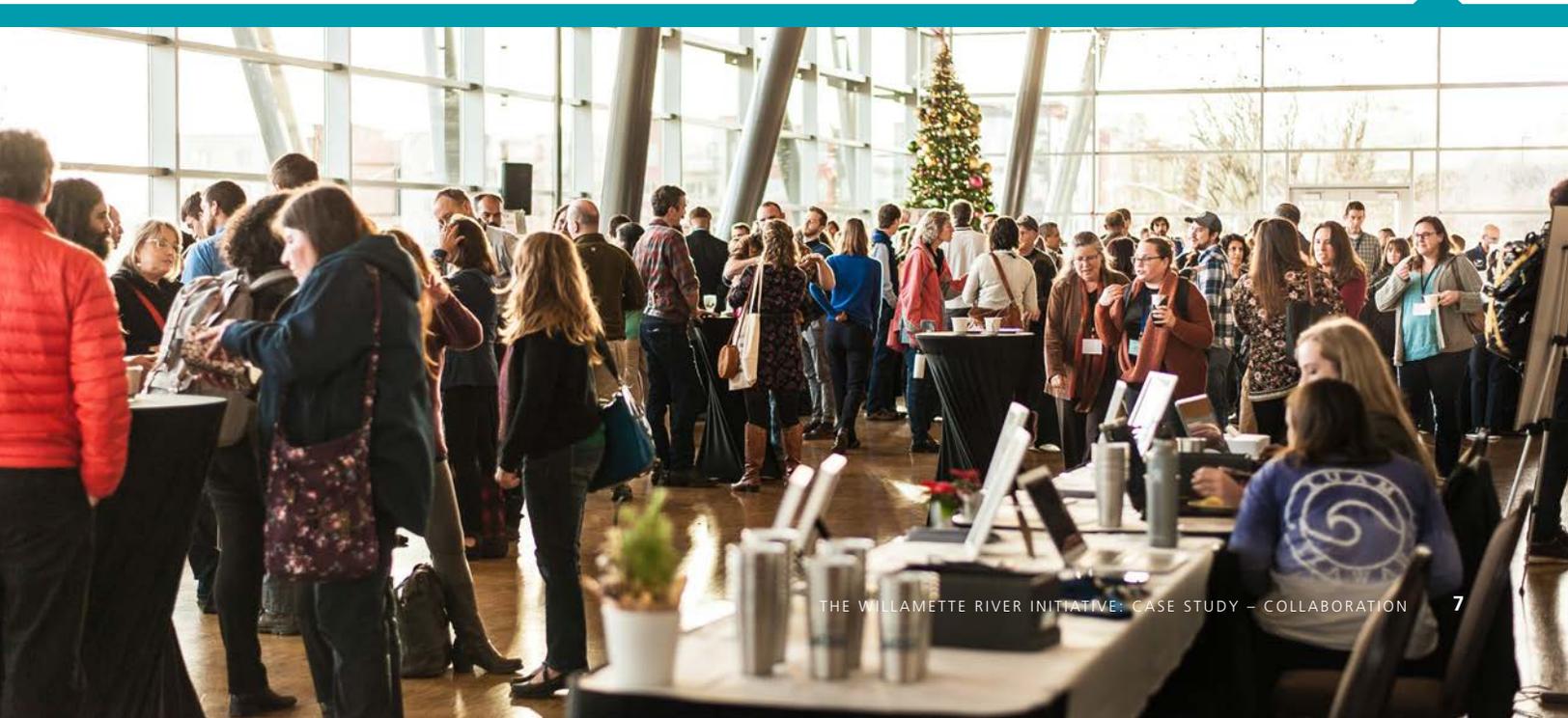
Mid–Valley River Connections

Mid-Valley River Connections (MVRC) is a collaboration that provides a system of support and sustainability for watershed councils in the Mid-Willamette Valley.

This collaborative is composed of five watershed councils—the North Santiam, South Santiam, Luckiamute, Marys River, and Calapooia—that were part of the WRI's tributary strategy, the Willamette Model Watershed Program.

WRI supported them to hire a consultant to train each council's staff and board individually, develop shared language between partners, and develop training content to support ongoing diversity, equity, and inclusion learning.

What made it work?

MVRC formed in 2019 in anticipation of the WRI's sunsetting and the end of the Model Watershed Program along with it. The model watershed councils met monthly for almost 10 years and developed a strong network of support in that time. MVRC was created to sustain the support and opportunities for learning that had been so valuable to the watershed councils. It also intended to help the watershed councils operate more efficiently and effectively through shared services. Over the course of the Model Watershed Program, WRI and Bonneville Environmental Foundation had encouraged and supported the councils in exploring ways of working together more deeply. Leading up to the formation of the MVRC, five councils worked with an Encore Fellow through Social Venture Partners to help identify shared needs among the partners. The Fellow's research revealed that fiscal management and community engagement were challenges shared across the partnering watershed councils. This insight led to the partners participating in training on community engagement and committing to work on diversity, equity, and inclusion in a coordinated way.

The CDE cohort also drove the partners toward greater collaboration. It presented an urgent, shared need for them to work together to support ongoing learning related to diversity, equity, and inclusion. A grant from

Lessons Learned

- **Balance a desire for progress with accommodating transition.** The collaboration reveals the challenge of sustaining progress without leaving partners behind. One of the most significant challenges in keeping people involved is the transitioning of staff. When staff leave, momentum fades and continuity is compromised. Staff transition is one of the many challenges MVRC is designed to help partners address. The collaboration aims to be a resource to help share knowledge and orient new staff to the culture of collaboration. Yet as gaps in staffing have emerged in partner watershed councils, taking the time to ensure that new staff are trained in their core responsibilities and able to be meaningfully involved in the collaboration has also slowed down MVRC's work to achieve their broader goals. Creating an effective system of support for new and existing staff will require balancing the competing priorities of moving forward to achieve shared goals while also allowing time to integrate new staff into the work.

- **Peer pressure is a strong motivator.** One of the benefits of having close partners nearby that know about each other's work is that their successes can be motivating. Seeing what other partners are doing and how they are benefitting from it can provide the extra incentive boards and staff need to make change.

Willamette Anchor Habitat Working Group

The Willamette Anchor Habitat Working Group (WAHWG) was formed as a result of a major funder, the Oregon Watershed Enhancement Board (OWEB), creating a new funding program that required established partnerships to be in place.

The Focused Investment Partnership (FIP), a significant new funding stream, also required applicants to submit a 6-year slate of projects as part of the application. These requirements drove partners to create a collaboration on an expedited timeline to develop this funding application.

After OWEB announced this shift in funding, WRI brought a variety of stakeholders together to identify opportunities for collaboration. A group of partners including conservation nonprofits, soil and water conservation districts, land trusts, and watershed councils, came together to form a steering committee to create an action plan. These partners worked together to identify priority projects and make a detailed plan for the grant application. The application was successful, and in 2016 OWEB committed $7 million to the group to complete projects over the next six years. Since then, these partners have been working closely together to implement the projects.

What made it work?

The WAHWG was a collaboration brought about by a sense of urgency created by the shift in OWEB's priorities and the need to find new dedicated funding from OWEB to match funding from Meyer and Bonneville Power Administration (BPA). There was a history of partners working together on increasingly aligned goals through Meyer and OWEB's previous funding stream, the Special Investment Partnership (SIP). The WRI's role as convener was essential to bringing the partners together and identifying those that were interested and equipped to work closely together on a steering committee to develop an action plan and submit an application for funding amidst significant ambiguity about OWEB's emerging requirements. While the partners had experience working together, they hadn't previously collaborated this deeply or under such uncertain conditions.

WRI's flexible funding supplemented funding from OWEB to help bring together the initial group of partners. It also enabled them to hire a consultant to guide the creation of an action plan and to write the grant application to OWEB, which was quite extensive and likely would not have been possible without these foundation funds. The steering committee's focus was highly relational. They worked to strengthen teamwork among the partners to enable them to work more efficiently and effectively together. They were essential in helping to translate and take action on the new requirements of the application for OWEB funding. They facilitated communication to ensure that the partners were aware of emerging requirements and responsibilities. They helped negotiate competing priorities among the group. And, most importantly, they helped the partners understand each other's work at a deeper level to reveal how it intersected. Without the capacity of a consultant and the steering committee, the WAHWG likely would not have been able to complete the application in the time allotted, and the partners would not have been able to work together as effectively once the funding was awarded.

Lessons Learned

- **Dedicating time to develop trust early on facilitates collaboration.** Building a sense of trust enabled the working group to be efficient, effective, and honest with one another. The history of collaboration fostered by the WRI and the OWEB SIP provided a framework for qualifying projects, and investing time to strengthen relationships as the new collaboration was developing saved significant time later in the project by promoting direct communication and expediting conflict resolution.

- **Collaboration requires capacity.** The WRI recognized that this collaboration was unique and could have tremendous benefit for the river if the partners were able to secure OWEB FIP funding. The flexible funding WRI provided to supplement OWEB funding added capacity to the steering committee through a consultant. This relatively small investment came at a critical moment that enabled the partners to take advantage of a major funding opportunity

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Example 6:

Willamette Aquatic Invasives Network

The Willamette Aquatic Invasives Network (WAIN) is an issue-based collaboration focused on a coordinated response to invasive species that live primarily in water.

WAIN was designed to bring together the private, state, local, and regional entities working on aquatic invasives throughout the Willamette River Basin.

What made it work?

Working on the challenges of aquatic invasives along the Willamette created synergies for people to innovate and advance their strategies. Previously, Willamette-wide projects needed to coordinate with five different Cooperative Weed Management Areas. Navigating five organizations was inefficient and ineffective. To become more efficient, the organizations working on multiple reaches of the Willamette collaborated to form WAIN. They soon recognized that WAIN needed designated time and effort to coordinate collaboration. The WRI funded a coordinator for WAIN based at Willamette Riverkeeper.

Having a position to coordinate WAIN has been critical to the collaborative's success. In addition to doing the behind-the-scenes work to support collaboration, the coordinator also creates messages and materials to help raise awareness about aquatic invasives throughout the Willamette Basin. These resources provide a model for collaboration and outreach around invasives beyond the Willamette as well. The WRI also created an environment that facilitated collaboration between the partners. Although many of the partners in WAIN had not collaborated previously, Within Our Reach became a venue for the group to build relationships and helped the partners see the potential of effective collaboration.

Lessons Learned

- **Dedicating time to build relationships promotes successful collaboration.** One of the challenges of issue-focused collaboration is that people who have not often worked together need to come together. At the same time, issue-focused collaboration is usually driven by a pressing need that makes it tempting to begin working together before learning how to work together. It is especially important in these collaborations to set aside additional time to understand each other's working styles and how to engage effectively.

- **A designated coordinator for collaboration is essential.** Having one person whose time is dedicated to coordinating collaboration is essential. Establishing this role from the beginning will ensure that the collaborative starts off strong and can continue the momentum that generated it.

A Culture of Collaboration

These unique collaborations demonstrate the value of the WRI's approaches to promoting and supporting collaboration. The WRI's vantage point and strong relationships enabled them to see opportunities for collaboration and identify gaps that needed to be filled to make collaboration take hold. They then planted seeds and brought the resources together to support budding partnerships and sustain ongoing partnerships. This created a culture of collaboration throughout the Willamette that will magnify the effects of the WRI for years to come.

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