

Situation Assessment Memorandum for the

Upper Klamath Basin Working Group Proposed Restoration Planning Process

Submitted to:

The Upper Klamath Basin Working Group
and
The U.S. Institute for Environmental Conflict

Submitted by:

 Jones & Stokes

October 2001

FINAL

Situation Assessment Memorandum

for the

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Proposed Restoration Planning Process

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Section 1

Introduction

Organization of the Situation Assessment Memorandum

Jones & Stokes conducted a situation assessment of the Upper Klamath Basin Working Group's (Working Group's) capacity to initiate, conduct, and complete a resource planning process for the Upper Klamath Basin (Upper Basin). This document presents the results of that situation assessment.

This Situation Assessment Memorandum is organized into three sections. The *Introduction* provides the background of the Working Group and describes the purpose and scope of the situation assessment. Section 2, *Findings of the Situation Assessment*, provides the results of interviews conducted as part of the situation assessment. Section 3, *Recommendations*, offers specific recommendations to help the Working Group move forward with a collaborative process to produce a resource-based plan for the Upper Basin. Appendix A is a sample interview questionnaire, and Appendix B provides the verbatim summaries of subgroup interviews (both as described below).

Upper Klamath Basin Working Group Background

Appointed by Senator Mark Hatfield in 1995 and authorized by Congress through the Oregon Resource Conservation Act of 1996 (ORCA), the diverse membership of the Working Group is uniquely positioned to provide a broad-scale vision for the future of the Upper Basin. The Working Group's mandate was and is to identify short- and long-term solutions for addressing the natural resource issues of the Upper Basin, focusing on ecosystem restoration, water quality enhancement, economic stability, and reduction of impacts associated with drought.

The Working Group has successfully provided guidance and advice on the implementation of restoration-based projects in the Upper Basin that have been funded through ORCA (and other sources). These recommendations have been made with a focus on improving resource conditions throughout the Upper Basin. However, no long-term, prioritized resource-based plan has been developed to serve as a framework for these recommendations. Therefore, project recommendations have been made in a well-intended but nonetheless ad hoc fashion. It has been the intent and mission of the Working Group to create a planning framework that will inform and guide future recommendations.

Since the Working Group's creation in 1995, the natural resource challenges in the Upper Basin have become increasingly difficult and complex. In April 2001, the U.S. Bureau of Reclamation (BOR), in keeping with the U.S. Fish and Wildlife Service's (USFWS's) biological opinion¹, determined that releasing irrigation water from Upper Klamath Lake could imperil Lost River sucker fish and shortnose sucker fish, both of which are listed as endangered species under the federal Endangered Species Act. As a result of this decision, water was withheld from agricultural irrigators that are part of BOR's Klamath Project, as well as from managed wetland operations at the USFWS's Klamath, Tule Lake, and Clear Lake National Wildlife Refuges.

In addition to the recent water management issues, other factors also affect the Working Group's efforts. A number of other groups, operating under similar but unrelated mandates, are also engaged in various processes to address resource issues in the Upper Basin. Presently, many of these groups operate independently of each other and of the Working Group. Should these various endeavors remain uncoordinated, this situation could complicate and confuse the Working Group's role, mission, and presence in the Upper Basin community.

Purpose of the Situation Assessment

In order to address the above issues, the U.S. Bureau of Land Management (BLM) and USFWS requested assistance from the U.S. Institute for Environmental Conflict Resolution (USIECR) to solicit, screen, and contract a qualified consultant to provide an assessment of the Working Group's organizational capacity for the development of a planning process, and potentially to facilitate such a process. USIECR retained Jones & Stokes (facilitation team) to assist the Working Group in this effort. The facilitation team's scope is to assist the Working Group in determining the feasibility of developing a basinwide resource management plan. Accordingly, the key component of the Situation Assessment is an evaluation of the Working Group's organizational capacity for productive collaboration in such an effort.

Scope of the Situation Assessment

Jones & Stokes met with the Working Group in April 2001 to initiate relationships with the participants and to gain a better understanding of the Working Group's internal dynamics, issues, and challenges. At that meeting, Jones & Stokes proposed that the Working Group form a project-specific Steering Committee to provide focused guidance and feedback to the facilitation team on issues related to the Situation Assessment and the facilitation of a planning process. The following Working Group members volunteered to serve on the Steering Committee: Glenn Barrett, Jim Carpenter, Rich McIntyre, Jennie Messmer, Teri Raml, and Steve West.

The facilitation team also proposed that, for the purpose of the Situation Assessment interviews, the Working Group be organized into interest-specific subgroups. It was felt that, because participants would feel more comfortable expressing their feelings and observations in the

¹ U.S. Fish and Wildlife Service. 2001. Biological/conference opinion regarding the effects of operation of the Bureau of Reclamation's Klamath project on the endangered Lost River sucker (*Deltistes Luxatus*), endangered shortnose sucker (*Chasmistes Brevirostris*) threatened bald eagle (*Haliaeetus Leucocephalus*) and proposed critical habitat for the Lost River/shortnose suckers. Prepared by Klamath Falls Fish and Wildlife Office.

company of peers, such an approach would increase the likelihood of capturing the opinions of all Working Group members. The facilitation team proposed that the subgroups be interviewed by means of telephone conference calls in order to manage the project within the available budget. The Working Group concurred with the facilitation team’s proposals and authorized Jones & Stokes to initiate the interview process. The individual subgroups, their respective organizations, and number of participants are shown below in Table 1.

Table 1. Overview of Subgroups for the Situation Assessment Interviews

Subgroup	Organizations Represented	Number of Participants
1. Agricultural Interests	<ul style="list-style-type: none"> • Klamath County Cattlemen’s Association • Private farming interests 	2
2. Business and Industry	<ul style="list-style-type: none"> • Cell Tech • U.S. Timberlands • KCEDA 	3
3. Conservation and Environmental Interests	<ul style="list-style-type: none"> • Klamath River Compact Commission • Recreational Fishery Interest • The Nature Conservancy 	4
4. Federal Agencies	<ul style="list-style-type: none"> • Natural Resources Conservation Service • Winema National Forest • U.S. Fish and Wildlife Service • U.S. Bureau of Land Management 	5
5. State and Local Agencies	<ul style="list-style-type: none"> • Klamath County Soil & Water Conservation District • City of Klamath Falls 	2
6. Tribal Interests	<ul style="list-style-type: none"> • Klamath Tribe 	4
7. Water User Interests	<ul style="list-style-type: none"> • Klamath Basin Water Users • Klamath Irrigation District 	2
8. Legislative Representatives	<ul style="list-style-type: none"> • Staff persons of elected officials 	Did not participate

Following the April 2001 meeting, Jones & Stokes staff members reviewed an extensive array of background materials detailing efforts of the Working Group as well as those of other organizations and processes in the Upper Basin. Subsequent to this review, Jones & Stokes prepared a draft comprehensive interview questionnaire to use during the subgroup interviews. The project Steering Committee reviewed and commented on the draft questionnaire in May 2001. A final questionnaire was completed in June 2001 and distributed to all Working Group members. Jones & Stokes then spent several weeks organizing and conducting the eight subgroup phone interviews.

It should be noted that despite significant efforts on the part of the facilitation team to ensure total participation, not all Working Group members were available to participate in the interviews. In addition to random members of several subgroups, none of the legislative representatives were interviewed; however, they were contacted formally by means of a letter sent on behalf of the Working Group. (A point of contact for each federal legislator representative was appointed to the Working Group. Although these individuals did not provide feedback in the early phase of the situation assessment, they are expected to be more readily available for the remainder of the proposed planning process.)

David Ceppos, leader of the Jones & Stokes Public Involvement, Facilitation, and Mediation Group, is the manager and principal facilitator for the project. Austin McInerny (associate facilitator) and Travis Hemmen (project coordinator and facilitation support) are the other facilitation team members. Each interview (by telephone conference call) was conducted by either Mr. Ceppos or Mr. McInerny while Mr. Hemmen recorded notes. The interviews lasted between 90 minutes and 2 hours. Jones & Stokes explained to interviewees that specific viewpoints or comments would not be attributed to anyone by name. The questionnaire used as the basis for the interviews is attached (Appendix A). Draft interview summary notes were made available to interviewees requesting them in order to verify the accuracy of the notes.

Findings of the Situation Assessment

This section presents the facilitation team's findings regarding the breadth and scope of opinions held by the stakeholder subgroups discussed in Section 1.

Interviews were conducted with interest-specific subgroups during July and August 2001. The goal of these discussions was to assess whether Working Group members shared compatible goals, objectives, and expectations for the proposed planning process. The secondary goal was to formulate, if possible, a process that would allow the Working Group to collaborate in creating a resource management plan for the Upper Basin.

The interview questionnaire was organized by the following planning-related categories:

- goals, objectives, and visions for the planning process,
- organizational issues,
- geographical issues,
- technical issues,
- structure and content of the envisioned planning document, and
- outreach issues.

For each category, a set of questions was developed that would guide subgroup input during the interviews. This section is organized by the above categories. Each category is introduced with a description of the basis for that category and a restatement of the specific questions. The summary of each subgroup's responses follows the introductory discussion.

It should be noted that while the subgroup responses have been organized and paraphrased, Jones & Stokes has attempted to capture the opinions, concerns, and interests of Working Group members in their own words, as recorded in the interview notes (Appendix B). This initial summary does not attempt to interpret, analyze, or judge these comments and concerns, but rather attempts to represent the broad diversity of interests, concerns, and expectations held by the interviewed individuals within each subgroup. It should be further noted that individuals within a subgroup may hold dissimilar or even opposing views. These summary statements are, consequently, at times inconsistent. The statements are not weighted to express how often

different individuals expressed the same sentiments. Thus, a view expressed in any given summary below might represent the views of one or several individuals from that particular subgroup.

Following the summary of comments, a concluding set of observations is provided for each category, addressing *Issues in Agreement*, *Issues Needing Resolution*, and *Other Issues and Suggestions*. In contrast to the quasi-verbatim response summaries provided earlier, these observations are opinion based and assess the general tone of discussion as well as the sentiment and viewpoint toward which a particular subgroup appeared to incline. In cases where no clear consensus emerged from the discussion, the lack of such concurrence is noted. These observations, which were developed subsequent to the completion of all interviews, are based on the best professional judgement and experience of the facilitation team, and represent a concise but nevertheless subjective assessment of interview participant sentiments. These observations form the basis for the recommendations (Section 3) resulting from the Situation Assessment.

Goals/Objectives/Vision

In order for multiple parties to collectively support a planning process, it is important that the participants develop a unified vision of the process. Such a vision defines the framework for everything else in the process and essentially becomes the planning blueprint. Ideally, this vision helps define the initial needs of all participants, the desired and/or required results of participants, the goals and objectives to be achieved through the process, and the focus and scope of the process. Such a vision can be amended over time and should inherently accommodate all participants, but it must be a starting point that all participants can accept. In the case of the Upper Basin, issues related to improving basinwide conditions have become controversial, volatile, and symbolic. Therefore, even the act of titling the proposed planning process is one that requires discussion and assessment. This category and the questions within it were developed to identify Working Group members' feelings about terms that could find their way into the planning process, and to further define the aforementioned needs, desires, goals, and objectives of participants.

Questions

1. Do you think of the proposed document as a restoration plan or something different?
2. If so, how do you define "restoration"?
3. If not, what would you title the plan?
4. What do you want the plan and planning process to address (e.g., habitat restoration land use issues, natural resource use issues, social/economic issues, others)
5. What result does your organization and constituency want/expect from this planning process?
6. What is your vision for this planning process and the final plan?

Subgroup Response Summaries

Agricultural Interests

The plan should be a strategic plan, almost like a business plan, that lasts between 15 and 30 years and identifies specific actions that will provide both environmental restoration and economic stability within the region. The plan should have buy-in from all interests and should focus on long-term solutions.

Business and Industry

The word *restoration* may limit the scope of a Klamath Working Group plan; therefore, perhaps it should be entitled a “working plan”. Plan development should include all individual interests and all visions should be incorporated. The plan should not have an indepth socioeconomic analysis but should include economic impacts that may be encountered and that may need to be addressed during the planning process. The Upper Basin should be broken into problem areas, a list of the solutions to those problems should be drafted, a timeframe on the individual solutions should be established, and a price tag should be put on the final product or products.

Conservation and Environmental Interests

The document should be a strategy and it should be a “restoration-plus” plan that includes socioeconomic impacts. The plan could be entitled, *A Comprehensive Strategy for Restoration and Stabilization of the Upper Klamath Basin*. This plan should educate and inform readers about how habitat and ecosystem restoration can provide economic benefits as well as result in beneficial restoration. BOR must consult with the Working Group or a similar advisory body prior to making any critical decisions in the Klamath Basin.

Federal Agencies

The plan should be called a restoration plan; however, it should be a strategy to provide a sustainable environment for the Upper Basin (sustainability for aquatic, terrestrial, and socioeconomic issues in the Upper Basin). It could also be a framework, not too exhaustive, but a broad vision (a roadmap). The plan should include some drought-proofing and will also be a tool to solicit funds.

State and Local Agencies

Three goals of the Working Group are drought-proofing, economic stability, and restoration. The plan should be a strategic planning effort and if the term “restoration” is acceptable by everyone else, then it is acceptable by the state and local agencies. The plan will also be a roadmap to explain how the Working Group will achieve its goals.

Tribal Interests

We think of it as a restoration plan and it should be a long-term restoration effort. Economics has to be a component of the restoration plan. A simple, general definition would be: “Putting the ecological and social pieces in place that will allow us to have healthy ecosystems alongside healthy economic systems.” A more technical definition would be: “Reestablishment of the structural and functional ecological attributes which provide for the long-term maintenance of

diverse, robust terrestrial, aquatic, and riparian ecosystems within landscapes also used for robust, sustainable, and profitable economic activities.”

Water User Interests

Water users have been involved in two other restoration programs (1993 General Restoration Plan and another one this year); therefore, there is concern about the actual scope of this restoration plan. The plan must not only address restoration but must also include economic stability and drought-proofing. Additionally, the plan should identify benefits prior to implementation and include a “safe harbor” component for assurances.

Summary Observations Regarding Goals/Objectives/Vision

Issues in Agreement

Most participants in each subgroup agreed to and/or accepted the use of *restoration* in the title of the planning process. A similar majority also agreed that *restoration* includes more than habitat- and ecosystem-based issues. Rather, most participants indicated that *restoration* needs to be broadly defined to include topics such as economic stability, drought-proofing, and social outreach (e.g., cultural significance of resources, local education). More specifically, almost all the subgroups indicated either directly or by inference that the original three goals of the Working Group—restoration, economic stability, and drought-proofing—should be the focus of the proposed planning effort.

Although specific terminology differed between subgroups, a general sentiment expressed by all subgroups was that the planning process must provide a “road map” or “strategy” for the future. It appears that Working Group participants are unified in desiring a process and a document that can unify the Upper Basin. It was unanimously stated that such a process must be developed with all interested parties working together, and that the process undertaken to create the final product must strike a balance that accommodates the viewpoints of all participants.

Issues Needing Resolution

While most participants indicated an acceptance and/or agreement of the term *restoration*, several remained concerned about the semantics of that term. Many participants expressing approval of the term *restoration* did so almost reluctantly and also used the term *strategy* to define their vision of the final product. Similarly, while almost all participants supported the inclusion of economic issues in the planning process, the scope of such inclusion varied widely. While the Working Group members appear to share a conceptual agreement about the general topics appropriate for the planning process, decisions regarding the plan’s title, scope, scale, and level of specificity still need resolution. One subgroup suggested that the plan be titled *A Comprehensive Strategy for Restoration and Stabilization of the Upper Klamath Basin*.

Other Issues and Suggestions

Two subgroups suggested that the proposed planning process is the appropriate time to address both past and present problems, to air out these differences, and to resolve them at a local level, rather than through a continued focus on litigation and federal government involvement.

The following suggestions and comments also emerged from the foregoing discussion.

- The planning process should show how habitat and ecosystem restoration can provide economic benefits to the Upper Basin.
- The Working Group should look to other areas in the country to see how they have resolved similar issues and developed similar resource management plans.
- The planning process and final document should be a tool to secure more funding for the Upper Basin.
- The Working Group's role should be expanded to act as an advisory committee to BOR and USFWS on restoration and similar issues.
- *Safe Harbor* assurances relative to threatened and endangered species issues need to be included in the plan.
- Past planning processes have not been implemented. The proposed process should not repeat past efforts and programs.

Organizational Issues

One of the expressed goals of the Working Group, USIECR, and BLM was for this Situation Assessment to evaluate the organizational capacity of the Working Group. Specifically, it was deemed necessary to determine whether the Working Group has the leadership, membership, relationships, and decision-making rules in place to support a basinwide planning process. In a planning process that is likely to necessitate the scale proposed by the Working Group, it is important to develop and maintain support at multiple levels of "community." The need for such support is all the more critical in view of the current social and political climate of the Upper Basin.

The *Organizational Issues* category and its associated questions were developed to assess what the Working Group has done in the past and what the group's members envision will work in the future regarding leadership and decision making. Additionally, this category examines past and potential future relationships with the state and federal governments, which will likely be involved in a planning process. Lastly, this category raises questions about relationships with other Upper Basin organizations and entities that may have the influence to support or derail efforts pursued by the Working Group.

Questions

1. What types of decisions has the Working Group made in the past?
2. What types of decision-making processes have been used?
3. Have the decision-making processes been timely, equitable, and cost-efficient? If so, how? If not, why not?
4. What types of decisions do you envision the Working Group making in the future?
5. Will the past decision-making processes work for future efforts? If so, why? If not, why not? If not, how do you propose to change the Working Group's decision-making processes?
6. How will decisions be made regarding the content of the plan?
7. How would you describe the past roles and activities of the Oregon and California state governments, and the Federal government with the Working Group?
8. What expectations do you have of the Oregon and California state governments, and the Federal government in the proposed planning process?
9. There are numerous ongoing planning-related processes, committees, and organizations in the Upper Basin. How will the Working Group's plan relate to these other processes?
10. Will the Working Group's plan compete with these other processes?
11. How will the Working Group's plan be accepted by these other processes and the general public?
12. How will the Working Group's plan be implemented?

Subgroup Response Summaries

Agricultural Interests

Three goals of the Working Group were established to focus on *drought-proofing*, *stream/wetland restoration*, and *economic stability*. However, there has not been enough work performed for drought-proofing or economic stability. These goals and other decisions have been decided through consensus. The Working Group should include representatives that are able to make decisions at the agency level and may also include representatives from the Upper Sprague, the Williamson River, and the Lower Basin. The "plan" should include projects that would provide benefit towards drought-proofing, stream/wetland restoration, and economic stability. The group should first define goals and objectives and consensus must be used to approve the final plan.

Business and Industry

The consensus-based process has been the decision-making procedure of the Working Group. As a part of the plan, the Working Group needs to consider the decision process and structure of the group. Consensus will only work if the plan has benefits for each individual interest. As the group works on the plan, the smaller decision could be made without consensus (super majority); however, the final plan should have consensus from the entire group. Someone must put a real solution on the table and the federal congressional delegates must support the plan. The plan should also be additive and collaborative with other efforts around the Upper Basin. Implementation of this plan will require a lot of financial resources and requires that everyone stays at the table to produce a final product.

Conservation and Environmental Interests

There has been a lack of leadership in the Working Group. Currently, the group lacks the political leadership they had under Senator Hatfield's direction. The consensus process has allowed members to remain neutral, which has kept the group together but has limited decisions needing to be made. The past decision-making process (consensus) may work if there is a common vision of the Upper Basin and the group is willing to avoid crafting every minor detail. (One member explains that) consensus is "dead" and a super majority should be the decision-making process; however, a super majority would be a problem for some interest groups if they felt that voting blocks were being created. There is a possibility that some groups would drop out if they feel the process is unfair.

The Working Group needs to interrelate with the ADR process, the Lower Basin, Klamath River Compact Commission, and Klamath Fisheries Task Force. This coordination should include making presentations for other groups and inviting individuals to attend the Working Group meetings. The plan should be implemented through agencies and local government and will be implemented through federal legislation.

Federal Agencies

Consensus has worked in the past; however, due to the recent events individuals may be less inclined to work together. It may be important to establish a new decision-making process for this specific planning process. If the plan is written that includes assurances to everyone, then it may work.

The group cannot operate as merely a citizen's group, but should receive support from government agencies. This effort will be a delicate balancing act between the local, state, and federal interests. The planning process must also have built-in comfort for all the other efforts, and the plan must blend with the other plans for the Upper Basin.

Additionally, there is a possibility of expanding the group to incorporate those not presently represented.

State and Local Agencies

Decisions have been made through a consensus process. First, the Working Group needs to reunite and focus on common goals, and ideally, the Working Group will make decisions based on the goals set for the plan. Drought-proofing data are important to include in the plan. The state agencies should become advocates for the Working Group and the planning effort and take steps to ensure the plan is supported. The plan should not compete with the other efforts and the plan should not duplicate work currently being done, and the first step would be to identify all the groups that are involved in Upper Basin restoration.

Tribal Interests

Decisions have been made through consensus; however, there are too many conflicts for that process to work during development of the plan. The federal government could initiate legislation to assist in implementation of the plan. The plan should acknowledge, review, and evaluate each of the other plans within the Upper Basin. In the present climate it is unlikely that any restoration plans will be warmly received by private landowners, and this will be a major

challenge to overcome. The general public's reception will depend largely on how they view the problems in the Upper Basin. The Working Group may first want to generate "problem statements" about the Upper Basin to help identify the issues within the Upper Basin.

Water User Interests

The group has attempted to run as a "consensus" group; however, it has not been very efficient. Lack of participation has been a problem; however, tribal participation has increased, which is encouraging. The State of Oregon has set up watershed groups that are identifying issues and some projects, and the Working group should facilitate those types of processes. The Working Group should be a group of citizens with some authority and the agencies should take a less active role in decision making for the group.

The plan cannot be in competition with the other processes but must be comprehensive enough to avoid conflict with the other processes. The plan will be implemented with "serious" dollars such as in the Colorado River and California Central Valley.

Summary Observations Regarding Organizational Issues

Issues in Agreement

The subgroups unanimously agreed that the Working Group has made past decisions using a consensus-based approach. The subgroups generally agreed that relying on a consensus process has been instrumental in keeping all parties involved in the process. However, participants also generally agreed that these consensus methods have been time consuming and, in some cases, inefficient.

Perhaps more importantly, almost all the subgroups indicated dissatisfaction with the leadership, guidance, and direction of the Working Group. This dissatisfaction was focused internally at group members and leadership, and also at outside political interests that participants feel should be more involved with the Working Group. Several participants observed that the group lacks focus and that its role has been increasingly undefined since Senator Hatfield's involvement and elected tenure ended.

Regarding the past involvement of state and federal governments, there was general agreement that the State of Oregon has been somewhat (although not extensively) involved with the Working Group. Conversely, there was almost unanimous agreement that the State of California has played little or no role with the Working Group. This lack of involvement extends beyond physical participation at meetings to include a lack of financial contributions to projects/issues related to the Working Group. There was general agreement that the federal agencies have been actively involved in the past.

Issues Needing Resolution

There was no agreement on the types of decisions the Working Group will make in the future. Responses encompassed a variety of issues at differing levels of specificity. These ranged from recommendations for drought-specific problem solving at a project-level scale, to a general

concern by some participants that the present makeup of the Working Group does not include decision makers with the capability to influence Upper Basin conditions.

This breadth of disparity indicates a self-held uncertainty about the future role of the Working Group. More specifically, it could indicate that the Working Group has neither addressed the definition of its regional role and responsibilities, nor determined the shared goals of its members. Inherent in this uncertainty (and discussed later under the organizational, geographic, and outreach issues categories) is a potentially unresolved issue: that is, whether the current composition of the group is appropriate for future efforts.

As discussed in the introductory discussion of this issue category, it is important for a planning process of this magnitude to develop and maintain support at many levels of “community.” If the Working Group is to be considered the primary organization for solving problems related to resource management in the Upper Basin, it will need to accommodate the perspectives of organizations that can influence the success of its efforts.

Similarly, there was no agreement about what type of decision-making methods should be used for the proposed planning process and other issues. Responses ranged from support of consensus, to a resignation that consensus may be the only (but not necessarily preferred) decision method, to the proposed abandonment of previous consensus methods in favor of other methods (e.g., majority, super-majority voting).

Comments by participants reluctant to continue with consensus methods indicate a general concern that such processes will not allow timely decision making. These comments were made in the context of a current sense of urgency in the Upper Basin that basinwide issues require rapid and decisive response from the Working Group and others. A concern was voiced by some participants that consensus will not be possible with federal agencies that have recently been responsible for controversial water delivery decisions. Finally, several concerns were raised as to whether a consensus-based process will work for a planning effort that may involve a large amount of specific information and data. Specifically, it was suggested that such a specific document cannot afford to be indefinitely “wordsmithed.” In general, all participants seem to be struggling with defining a process that can uphold the spirit of past consensus efforts, while accommodating the need to expedite future decisions.

Interestingly, while the subgroups unanimously agreed that they have made past decisions using consensus methods, there was significant variation regarding what types of decisions the Working Group has actually made. Of the seven subgroups interviewed, three groups were unsure what the Working Group has decided in the past. Three other subgroups’ responses included a recollection of decisions on funding, restoration projects, and major restoration goals, respectively. One subgroup stated that the Working Group is not a decision-making body and that their role was to advise Senator Hatfield on ways to resolve Upper Basin issues.

This discrepancy in responses and in “institutional memory”, assessed in the context of other issues regarding leadership and future decision making, underscores several potential issues needing resolution. First, it again appears that despite continued meetings, the Working Group has not necessarily had a unified focus, and that this lack of focus has become an endemic issue in the group. Similarly (and as previously discussed), it appears that the group may lack a clear

vision (whether self-appointed or granted by others) of its roles and responsibilities in the Upper Basin. Lastly, it is possible that despite the efficient and timely recording of meeting notes and the availability of these notes to all members and the public, the Working Group is not taking the time to review its record of work. More specifically, it appears the Working Group does not revisit its accomplishments, celebrate successes, create future achievable goals, or communicate such information to the general public.

Regarding the future involvement of state and federal governments, several feasible ideas were proposed, but none was proposed by a majority or consensus of participants. The most common of these was that state and federal governments should provide technical support to the planning process. An additional recurring comment was that state and federal governments need to provide funding to the planning process and to future plan implementation. One comment that received no consensus but was raised several times regarded the most appropriate level of “hands-on” involvement of government/agency representatives. Some participants stated that agency/political representatives should be actively involved with the Working Group. Conversely, a similar number of participants believe that the government should minimize its presence in the process, particularly regarding federal legislative involvement. Other ideas included the following:

- The state and federal governments should play an important role in public education;
- Government representatives should become advocates for the Working Group at political levels including the initiation of legislative actions; and
- Government representatives should assist in environmental compliance issues.

A wide variety of ideas were expressed regarding integration with other programs in the Upper Basin. In particular, several participants stated that the Working Group may need to reassess its current membership and consider broadening the Working Group’s composition. However, there was general uncertainty by all participants about how such integration should occur as well as the extent that would be necessary to ensure a successful planning process.

Lastly, regarding the discussion of how the Working Group’s plan will be implemented, there was again a great deal of uncertainty among participants. Perhaps the only consistent response was that plan implementation will be very costly.

Other Issues and Suggestions

Very few suggestions were made beyond those described above, with the exception of one unique suggestion regarding the role of the state and federal governments. The speaker turned the question somewhat inside/out and suggested that the Working Group needs to have a stronger physical presence in Washington, D.C., and Sacramento, California, to further the Working Group’s agenda with the federal and state legislative bodies.

Geographic Issues

Just as developing an overarching vision for a planning process is critical for its success, defining its geographic scope is also an essential component. Without defining a specific geographic scope, the planning process will lack focus. Gathering and use of data can be inefficient, participation of appropriate stakeholders can be inconsistent, mapping can be confusing, and monitoring of implementation success can be arduous. In short, geographic decisions have direct influence on the cost and duration of a planning process. This category and associated questions were developed to assess the geographic scale and scope of the proposed planning process. Specifically, they sought to define the macro-level boundary of the planning area, as well as more specific land use and land management issues that might be considered in a final plan.

Questions

1. What should be the geographic boundaries for the plan? Should the Lower Basin be included? How do you define the difference between the Lower and Upper Basin?
2. What habitats should be included in the planning area?
3. What unique conditions should be considered in the plan?
4. What land use conditions should be considered in the plan?
5. What resource management issues should be considered in the plan?
6. What is your expectation of the types/locations of habitat projects to be included in the plan?

Subgroup Response Summaries

Agricultural Interests

Initially, the plan should focus on the Upper Basin and should not regulate certain land use activities. The plan needs to consider agriculture as a whole industry and should address availability of water.

Business and Industry

The plan should be a “watershed approach,” from ridgetop to ridgetop. For necessity, the plan should focus on the Upper Basin. The ecotypes should be broken into four categories (forested areas, the valley, the lake, and the farmlands). Each type has its own political/biological considerations that need to be addressed, and the possibility of expanding available capacity for storage may be something that the plan should address.

Conservation and Environmental Interests

The Working Group should focus on the Upper Basin, but they should consider the Lower Basin while developing the plan. There should also be an Upper Basin and Lower Basin Working Group with a Coordinating Group between the two. The plan should include all habitats, ecological conditions, and land use conditions. Additionally, the plan should include urban areas because they are the some of the largest users of water in the area.

Federal Agencies

The plan should focus on the Upper Basin, but consider the impacts on the Lower Basin. If you focus on specific issues, then the plan can be more narrow and manageable. There is a lot of economic work currently in progress and that information should be included in the plan; however, the plan should not be a judgment on the economics of farming, but should be an attempt to preserve the resources and balance the water available in the Upper Basin. Finally, the plan should look at projects that benefit all year types and resolve the issues for multiple years.

State and Local Agencies

The Upper and Lower Basins are all one area and the plan must incorporate everything together and it is not good to separate the two. It is difficult to see the harm that has been done in the larger basin and a lot of the problems will fix themselves. Timber management should be included in the plan.

Tribal Interests

The kinds of restoration needed in the Upper Basin differ from that needed in much of the Lower Basin, and so it makes more sense to focus initially on the Upper Basin. All terrestrial and aquatic habitats and land uses should be considered.

Overall, we think the most effective way to approach restoration is to identify the key functional attributes which have been damaged or lost, identify the structural aspects of the ecosystem which produce those functions, and then restore the appropriate ecosystem structure and monitor both the integrity of the structural changes over time as well as the success in restoring the targeted function.

Water User Interests

The plan should be focused on the Upper Basin and coordinate with the other activities in the entire basin. The plan should start with prioritizing issues and the plan should look at the whole ecosystem of the Upper Basin. There is a reluctance to limit certain development; however, development should be complementary to restoration. If the Working Group was going to address habitat today, it would have to deal with the degradation of habitat resulting from the lack of water being distributed.

Summary Observations Regarding Geographic Issues

Issues in Agreement

There was general agreement that the planning process should focus on the Upper Basin, defined generally as the upper watershed from ridgetop to ridgetop and including the Klamath River's upstream tributaries. There was further general agreement that the downstream boundary of the process should end at one of the dams, such as Keno Dam or Iron Gate Dam; however, the specific downstream boundary requires resolution (as described below).

An additional issue of general agreement was that involvement/inclusion of the Lower Basin needs to occur. However, there were few specific ideas regarding how this would occur; accordingly, this is discussed further as an issue needing resolution.

Lastly, there was general agreement that the plan should include a wide range of habitats, land use conditions, resource management issues, and unique conditions. That said, as with other previous topics, there were few specific suggestions regarding how to decide what would ultimately be included in the plan. This matter is discussed further below.

Issues Needing Resolution

As previously stated, there was general agreement on the upstream geographic scope of the planning process. However, specific direction will be needed to determine the final planning boundary. Most specifically, the Working Group will need to decide the downstream boundary for the planning process and will likely need to develop defensible rationale for such a decision (as well as for all planning area boundaries). Such a decision may be questioned in the future by a variety of interests, and the Working Group would be well served to have specific, logical reasons for boundary decisions.

Similarly, most participants indicated a desire to include the Lower Basin into the Upper Basin planning process. While such a goal is laudatory, it again requires far more specificity regarding what groups and/or individuals would be included, what means of communication would be used to access these Lower Basin entities, what role these entities would be asked/allowed to take in the Upper Basin planning process, what level of technical data coordination might be desired/necessary between the basins, and similar considerations.

Lastly, regarding the incorporation into the plan of different land use, resource management, and habitat issues, there was general agreement that a broad selection of these variables should be included. However, as discussed above in the context of the Lower Basin, the Working Group presently lacks specificity about what actual conditions would be included and how these decisions would be made. Therefore, the Working Group should be prepared to address these issues early in the planning process as an additional element to accurately define the scope and scale of the process. The Working Group will need to provide specific guidance to whomever is developing the plan regarding what resources should be assessed. Such specificity will be critical to the process.

Other Issues and Suggestions

Few suggestions were proposed beyond those described above, with the exception of one unique idea regarding coordination between the Upper and Lower Basins. Specifically, the speaker suggested that the existing Lower Basin group be “gutted” and that new federal legislation be created to form a Lower Basin equivalent of the Working Group. Additionally, this proposed new legislation would include a federally supported mechanism to coordinate this new Lower Basin Group with the Working Group on a regular basis.

Technical Issues

A planning process can be based on as much or as little technical data as planning participants deem necessary. As with the determination of geographic scope, technical data decisions have direct influence on the cost and duration of a planning process. Additionally, however, the use of technical data also defines the defensibility and utility of a resource plan. Broad-scaled, concept-based plans have several benefits. They are generally less expensive and less time consuming to complete, and it is easier to achieve multi-party consensus on their contents. Such plans are most effective when they are used to build and/or express multi-party commitments and consensus of concepts and theories. Conversely, such plans are often difficult to translate into “on the ground” implementation because of their lack of specificity. By contrast, comprehensive planning processes generally cost more money and take more time. They often necessitate additional technical specialists in the authoring and potential review phases. They often require more outreach to stakeholders who might have data to contribute to the planning process. Lastly, it is more difficult to reach consensus on such plans because of differing opinions regarding the quality and quantity of data as well as the inherently larger number of decisions that must be made. However, when conducted appropriately, these comprehensive efforts tend to be more defensible to scrutiny, they provide a more realistic foundation for funding requests, and they generally set the stage for actual project implementation. This category and questions were developed to assess the range and acceptability of data sources and quality, and to determine any consensus about the overall technical scale of the proposed planning process.

Questions

1. What is your understanding of the amount and quality of available technical data on issues such as species status, water quality, watershed management, agricultural and grazing practices, water use, and similar resource management issues?
2. What are the appropriate data sources to be used in support of the planning process?
3. How would you like to see technical data used in the plan?
4. Are there data gaps that will inhibit completion of the plan? If so, please explain these gaps.
5. Are there differences of opinion regarding data that will inhibit the resolution of technical issues? If so, how would you suggest these differences be resolved?
6. How will plan implementation be funded?
7. Do you anticipate that plan implementation will require monitoring?
8. Who should conduct the monitoring?
9. How will monitoring will be funded?
10. Do you believe that water is over-allocated in the Upper Basin?
11. How would you propose to manage water under different water year scenarios (e.g., wet, average, dry, critical)?
12. Has a study ever been completed for the Upper Basin regarding the amount of water the Basin can produce (mass balance study)?
13. What amount and detail of mapping is necessary for the plan?
14. Who will conduct/complete mapping efforts?

Subgroup Response Summaries

Agricultural Interests

Agriculture has not supported most of the data that have been interpreted. There should be scientific data regarding the amount of phosphorus introduced into the water from agricultural practices and the irrigation districts can be part of the monitoring effort. Monitoring should be a part of the plan and all monitoring should be independently peer-reviewed. Water is not over-allocated in the Upper Basin because there is an opportunity to store water in wet years. There are a lot of resources available to provide mapping (e.g., U.S. Forest Service, BLM, USFWS, and Oregon Department of Water Resources.)

Business and Industry

There are overwhelming data but lack of uniform support for the findings, and the planning process should use the technical data to help create a defensible product. There is a lot of money out there looking for a good investment. If a credible plan is developed and becomes a good investment, then it will be funded. The plan must have monitoring and even if a project fails, common knowledge is improved if you have monitoring.

Clearly, water is over-allocated in the Upper Basin; however, there are administrative issues that are involved in that conclusion. There have been a number of studies done on water availability in the Upper Basin. Jim Kerns has conducted a study for years. California's State Water Resources Control Board has also conducted studies.

Maps provide one of the best communication tools for a planning process and the Oregon Institute of Technology (OIT) was funded by the Working Group. The Working Group should be able to "cash in" on that investment.

Conservation and Environmental Interests

Technical data are being collected all the time. The Working Group must figure out the data that are available for the Upper Basin, such as some water quality data being gathered by the Tribes (regarding phosphorus in the lake) and the Working Group should look at the results of that data. The data needs to have independent peer review to inject credibility into using that data. There needs to be a "full Upper Basin water budget" that describes the water allocation and availability of the entire Upper Basin. There are always differences in data. The best the Working Group can do is to agree on a framework and get the best people to interpret the data. Then we need to move ahead and see if disagreements actually occur. A large federal package will help fund the plan and also some private foundations will assist in the funding (e.g., the Klamath Basin Ecosystem Foundation). Monitoring must be included as part of the plan and the federal government will help fund the monitoring.

Water is over-allocated in the Upper Basin. BOR has done a model regarding the amount of water in the Upper Basin. Susan Burke of CH2M Hill in Sacramento has also done a detailed study, as well as the American Land Conservancy. Oregon Department of Water Resources has attempted to do a study, but they do not have access to some of the private properties that they need to complete the study.

The Bureau of Reclamation, USFWS, Oregon Department of Water Resources, and OIT have done a lot of GIS mapping. There should be lots of maps and visual assistance for reference.

Federal Agencies

There is a lot of data on the Upper Basin and this should be utilized in the plan; however, there are conflicts among the data that exists. There is room for technical data and one standard should be water quality standards, but the plan should stay away from contentious issues such as lake levels.

The overall plan would require funding through federal legislation; however, the timing is critical, and funding should be solicited within 6 months. If the plan were submitted today, then it would be immediately funded, but that may change as time passes.

Monitoring also needs to be included in the funding and should be considered up front and should be conducted by a third party.

Water is over-allocated in the Upper Basin. The Oregon Department of Water Resources may have the data that explains the amount of water the Upper Basin can produce (from the adjudication). There is a lot of mapping data available for the private and federal lands. The mapping issue is a coordination effort with the different agencies.

State and Local Agencies

The Extension Service has a lot of data available; however, the information is different from the data in the environmental community. Not sure who will fund the monitoring. Some training could be provided to local farmers on how to collect water samples.

Yes, the Upper Basin is able to produce the amount of water required, but currently there is not enough storage capacity to capture flows during wet years.

The Natural Resource Conservation Service (NRCS) has a lot of maps available.

Tribal Interests

There is much information available on a variety of these topics. Quality and quantity of the information varies among the topics as well as among locations in the Upper Basin. From a restoration perspective, however, crucial information is largely absent or incomplete. Merely managing lake levels will not solve the problem. The real problem is the degraded watershed.

The planning process simply must require monitoring. A basinwide monitoring program should be set up so that individual projects can proceed with minimal monitoring needs, while ensuring that the cumulative improvements resulting from restoration are tracked.

Long-term, landscape-scale monitoring should be funded through the federal government, and the Tribes would want a large role in the monitoring component of the plan.

Without question, water is over-allocated in the Upper Basin. USBR has a hydrologic model (KPSIM) that provides information on water quantity in the Upper Basin.

Extensive and detailed GIS mapping is required for both restoration planning and implementation, and several entities in the Working Group possess GIS capabilities, including the Klamath Tribes.

Water User Interests

There are informational gaps; however, the real concern is how the existing data were interpreted. The plan should focus on the data that is available, not the data that does not exist. The Water Users want to be involved in every aspect of the data gathering, interpretation, and monitoring. Diverse group involvement will add credibility to the process.

The public should help fund this effort and the Working Group is responsible for ensuring those public dollars are spent wisely.

Monitoring is an important component of the plan and should be an unbiased account of the benefits of the plan.

Water is not over-allocated in the Upper Basin. There is no cutback above the Upper Basin or on all the tributaries. The Klamath Project is being called upon to meet the fish demands of the whole Upper Basin.

Oregon Water Resources (OWR) is currently doing a water quantity study through the ADR process. There are gaps in data but OWR is building a fairly comprehensive database of mapping information and they should do the mapping work.

Summary Observations Regarding Technical Issues

Issues in Agreement

All subgroups agreed that the Upper Basin has been scientifically analyzed to great lengths and that a wide range of technical data exists; however, opinions as to the quality of the data differed widely (discussed below). All subgroups unanimously support independent peer review of all scientific work. Many subgroups suggested the need for an accurate Upper Basin water budget study to determine the annual water availability and allocation in the Upper Basin. Also, many subgroups stated their desire for a better understanding of the amount and sources of phosphorous entering the Upper Klamath Lake. Clear support exists throughout the Working Group for undertaking monitoring of all future restoration efforts.

Lastly, all groups believe that sufficient mapping and baseline information regarding the Upper Basin is available from a variety of sources.

Issues Needing Resolution

Many interviewees expressed severe criticism of the analysis used to support the recently released biological opinions. Moreover, many subgroups expressed differing opinions regarding the quantity and quality of available information as it relates to the effectiveness of restoration activities.

There appears to be disagreement regarding the extent and source of phosphorous entering the Upper Basin's river system; this issue clearly warrants further investigation. While the idea of monitoring was generally well received, a few subgroups raised concerns over who would conduct future monitoring of restoration activities. Accordingly, the Working Group will have to determine the most appropriate entity to oversee future monitoring efforts.

As discussed above, the question of whether or not water is over-allocated in the Upper Basin is a highly contentious one. Participants' responses ranged from "the Upper Basin is clearly over-allocated" to "we just need to store more water in wet years." To help resolve this question, the Working Group must agree to undertake a study, or to agree that one of the studies currently underway is acceptable. Specific studies that have been completed or are underway include work undertaken by CH2M Hill – Sacramento, California (Susan Burke); Oregon Department of Water Resources; and the BOR (KPSIM model).

There was no agreement or unified vision about how plan implementation will be funded. Several participants indicated that the federal government (and to a lesser extent the state governments) will have to play a funding role. However, these speakers offered no specificity beyond that general observation. Some participants stated that private funding and in-kind services would support plan implementation. Conversely, several participants stated that they did not know how or from what source(s) plan implementation could be funded. As part of the proposed planning process, it will be important for the Working Group to develop a much clearer and realistic vision regarding funding sources and amounts.

As discussed above, substantial mapping of the Upper Basin is available; the task is to determine who will collect and catalogue the materials. Specific organizations that were suggested as good sources of maps and data include the U.S. Forest Service, BLM, USFWS, Oregon Department of Water Resources, Oregon Institute of Technology, Klamath Basin Ecosystem Foundation, Natural Resource Conservation Service, and the Klamath Tribes.

Other Issues and Suggestions

One subgroup suggested that many potential funding sources exist for undertaking necessary technical studies and monitoring efforts, and that agreement on the planning process will help secure future funding.

Structure/Content of the Plan

The preceding categories and questions focus on the strategic aspects of conducting a planning process. This category and its associated questions focus more specifically on the pragmatic aspects of creating the planning document. Planning processes can be large endeavors that are both time and cost intensive. Many of the financial and time-related requirements are associated with authoring, reviewing, and producing the draft and final documents. Too often, questions about the physical creation of the plan are not considered until very late in the planning effort when most of the funding has already been expended in earlier phases of the process. Before initiating a planning effort, therefore, it is important that all participants address these basic, production-related questions and reach an agreement on how the plan will be written, reviewed,

produced, and distributed. Similarly, these questions help the participants define who or what will pay for the creation of the document and whether such support will come in the form of appropriations, contracts, grants, loans, and/or in-kind services, equipment, materials, and facilities of process participants.

Questions

1. Who will write the plan?
2. Who do you feel comfortable with writing the plan?
3. Who will review and approve the evolving plan?
4. If you are not directly involved in the writing, what level of review do you/does your organization need?
5. How many draft versions of the plan do you envision before the plan is finalized?
6. How much time do reviewers need to review draft plan sections?
7. Should the public be involved as reviewers of the plan? If so, at what stage(s) of completion?
8. What technical specialists, if any, will be needed to write the plan?
9. Do you envision support from educational organizations, non-governmental and governmental organizations, consultants, etc., for the planning process?
10. What resources (e.g., staff, facilities, funds) does your organization have to contribute to the planning process?
11. How long will it take to write the plan?
12. How much will it cost to write the plan?
13. How would you like the document to be organized?
14. What should be the look and feel of the plan? Should the document be a “show piece” or a basic document?
15. Should the plan be made available on the Internet?
16. Should the plan be made available in CD-ROM format? If so, how many copies should be made?
17. Should the plan be made available as a “hard copy” book? If so, how many copies should be made?
18. What previous reports and plans have been developed for the project area?
19. Should the Working Group’s new plan draw on those past works?
20. How will the Working Group’s plan differ from past efforts?
21. Do you expect that the plan will be amended? If so, how often and by what mechanisms should this occur?
Is this plan a “living” document?

Subgroup Response Summaries

Agricultural Interests

The Working Group will be the ultimate visionary and a consultant would be hired to do the detailed work. There should be some agreement about the directions of the plan within 6 months; however, the plan will take approximately 3–4 years to complete and will undergo hundreds of drafts. The public should have a period to comment on the plan, but only when it is at a final stage. Cost of the plan will depend on the science and the level of detail included. The final plan should be made available in many forms (Internet, CD-ROM, etc.). Finally, the plan should be a living document.

Business and Industry

The committee should review the document but the initial writing should be given to experts. A subgroup should be formed to assist in the writing of the plan and then a presentation will be given to the Working Group. The Working Group can make comments and suggestions on the progress. Periodic presentations would be given throughout the process.

The public should be allowed to provide review comments near the end of the process when the plan is almost complete. Ideally the plan would be done in 1 year with approximately 6 drafts; however, the plan may take at least 2 years to complete and could cost up to 2 million dollars.

It would be beneficial to engage educational organizations to help with the process (it is affordable and adds credibility to the process).

“You sell the sizzle not the steak.” The first impression of the plan is important in order to gain support. The final product should teach and communicate well. The plan must be readable. It should be different and more useable than standard government-led documents.

The final plan should be available in all formats as long as it is affordable. Finally, the plan should be a living document, one that is flexible enough to embrace change.

Conservation and Environmental Interests

The federal government or a consultant should write the plan. At least 1–2 individuals from the different interest groups (in the Working Group) should collaboratively write the plan or consultants should write the plan in coordination with the Working Group.

There also needs to be checkpoints along the way and it would take 2–3 drafts. It will take 2–3 weeks to review each draft. Technical specialists will be used during the planning process.

The public should comment on one draft submitted by the Working Group near the end of the writing process. The public needs to be informed of the planning effort; however, they should be kept from assisting to develop the plan.

There could be some fundraising that our organizations could provide for the effort.

Ideally, the plan would be complete in 3–6 months and it may cost between fifty and a hundred thousand dollars. The plan should be somewhat of a “showpiece,” should be easy to understand, and should be a living document. The plan should also be available in all formats.

Federal Agencies

The working group will write the plan and that way it should be a framework rather than a detailed document. A consultant should be also included in the writing.

Outreach efforts should parallel the preparation of the document so the public is informed of the progress of the working group.

Internal review of sections should be at least 2 weeks and it is important to receive good review from important agencies (National Marine Fisheries Service).

It will be important to focus on the information that is currently available. The Working Group does not have the time to conduct additional research, but technical specialists may assist in writing the plan. This planning process will take approximately 6 months and we are unsure about how much it will cost to produce.

The plan should be made available in all formats, and the plan itself isn't the living document, it is the people behind the plan that makes it "living".

State and Local Agencies

A consultant will write the plan and a mediator would be helpful to focus the discussions of the Working Group. The Working Group, all applicable agencies, and the public will review the plan, and the public needs to be involved 100%. OIT should also be involved as long as the information they provide is understandable. The plan should be available in all formats.

Tribal Interests

Regardless of who writes it, we want to participate at a significant level. All entities in the Working Group must review the plan, and the full Working Group must approve it. We would need to review the plan in great detail. There is always so much going on in the Upper Basin that it is extremely difficult for us to thoroughly review documents in less than a month.

At certain points, the public should be informed and heard so that their concerns can be addressed.

If we pursue adequate assessments first, then in 3–5 years we should have a good plan, and the plan may cost 3–5 million dollars. The plan should be available in all formats, and the plan needs to be a living document for it to succeed.

Water User Interests

The Working Group should contract with an entity that specializes in planning work and it needs to be "the best group that is available in the world today." This is a very important and large undertaking.

Every stakeholder will want to take the drafts to individual experts to edit and review and the Working Group does represent the public, but the public should participate at some level. This plan has to be comprehensive and it will be expensive. The cost of *implementation* of the plan would be approximately 1 billion dollars.

This plan has to be "useable" by all people that sit on the Working Group and should be available to the public in all formats. There should be a commitment to implement the plan and it will be a living document.

Summary Observations Regarding Structure/Content of the Plan

Issues in Agreement

All subgroups agree that the completed planning document must be a “showpiece” plan that can serve the Upper Basin for years to come. Specifically, the plan must be a “living” document that is amendable based on the findings of future monitoring efforts and possible changes in local conditions. Some participants further suggested that the plan be “different” and “more approachable” than typical government-produced documents.

All subgroups stressed that the process of developing a comprehensive planning document is a difficult and challenging undertaking and that the Working Group will require technical support in writing and preparing the plan. Most subgroups felt that some Working Group members or technical representatives from some agencies should be involved with writing the plan. However, all subgroups also identified a need for some level of professional assistance from consultants in developing the plan. In addition, all subgroups expressed concern that this process must be initiated as soon as possible and that a unified approach should be crafted in the immediate future.

All groups strongly support wide dissemination of the plan in a variety of affordable formats (e.g., books, CD ROMs, Internet).

Issues Needing Resolution

While everyone agrees that the full Working Group must reach consensus on final approval of the plan, some subgroups proposed that a smaller working committee be formed to initiate drafting the plan. The composition of such a working committee would have to be determined by the full Working Group.

Opinions differ as to the level of detail the plan should provide. While some subgroups believe the plan will identify specific restoration activities that should be undertaken, other subgroups felt that the plan should provide a “framework” for restoration activities. Clearly, the plan’s level of specificity must be resolved prior to initiating the writing process.

There are extreme differences in opinion regarding the expense and time necessary to produce the plan. According to some interviewees, the final cost of this planning effort should be \$50,000–\$100,000, while others estimated a total cost of \$2–5 million. Some groups believe the plan can be written and approved in 6 months while others think it will require 2–4 years. There was no consensus regarding realistic review periods or how many review periods will be needed. As with previous observations, it will be critical for the Working Group to decide on a realistic project timeline, key milestones within that timeline, and a project budget.

Similarly, there was no shared idea of what previously plans or reports have been prepared for the Upper Basin, nor was there any shared vision regarding how this proposed effort will differ from similar past efforts.

Subgroups expressed widely differing opinions as to the optimal level of public participation in drafting and reviewing the plan. These opinions are summarized in the following category, *Outreach Issues*.

Other Issues and Suggestions

One subgroup estimated that implementation of the plan would cost approximately \$1 billion. In addition, one subgroup suggested that the plan include a strongly worded commitment to implementation that should be ratified by all Working Group participants.

Outreach Issues

The Working Group was created as a forum to represent numerous Upper Basin stakeholders on habitat restoration, drought, and economic issues. To that end, the Working Group is an Federal Advisory Committee Act chartered organization that regularly holds public meetings which are publicized throughout the Upper Basin. Nonetheless, the proposed planning process creates a new set of decisions that the Working Group must make regarding public outreach and involvement. As in any such undertaking, one overriding dilemma is how to make such a planning process inclusive and yet time and cost efficient. Striking a balance between these variables is one of the many challenges that must be addressed prior to initiation of the proposed planning process. More specifically, planning issues related to outreach (e.g., publicity, education) and involvement (e.g., public review, additional public authors) need to be considered. As discussed above in *Organizational Issues*, the breadth and scope of relationships that the Working Group develops and maintains relative to this planning process will have a strong influence on the ultimate success of future efforts the Working Group pursues. This category and the associated questions were developed to guide Working Group members towards decisions on these critical components of the public planning process.

Questions

1. Do you want public education provided to the community about this planning process?
2. Should other groups outside of the Working Group be involved in the planning process?
3. Should the general public play a role in the planning process? If so, how would this be accomplished?
4. What techniques should be used to expand public outreach and involvement?
5. Do you want media involvement? If so, how?
6. Do you want state and/or federal elected representatives involved in the planning process? If yes, what are your expectations for this involvement?

Subgroup Response Summaries

Agricultural Interests

As the plan is being developed the public is invited to the meetings, and after the plan is complete then the plan can be distributed for public comment. There is a good local television station, but the newspaper and radio would be the best source to reach the public. There should

also be a mailing list developed and they can use current mailing lists of other groups to help public outreach.

Business and Industry

One of the criticisms of the Working Group is that it is “secretive.” The meetings are open to the public so such a perception is unfounded. The Working Group does need public sponsorship; therefore, the public should be kept informed about the planning process.

Conservation and Environmental Interests

Many of the members of the Working Group belong to other groups, and they can help involve other individuals. The public should not be excluded; however, the public should not be solicited to help with the planning process. The Working Group should consider putting out a newsletter to inform the public, and should coordinate with the press and local television.

State and federal elected representatives should be involved (more than aware of the plan), and they should have some ownership of the planning process.

There should be some type of public outreach or information strategy.

Federal Agencies

The public should be involved but not too early in the process, and the Working Group could get public opinion through a focus group.

People are going to be aware of the plan regardless of the outreach effort. It is important to clearly articulate the process and let the public know when comments will be solicited from the Working Group.

Steve West is the only elected official in the Working Group. Outreach is important to the elected representatives but they should not be involved in writing the document.

State and Local Agencies

The public needs to be aware of the planning effort early so they can buy into the process. All the members in the Working Group should be involved in outreach to the general public.

The state and federal representatives should support the vision of the local community.

Tribal Interests

Regular columns in the newspaper should be written describing the planning process, and describing how the various ecosystem components work. Perhaps an Internet site could be set up as well, both to provide information to folks and to solicit their input via email. Public input could be summarized and reported in the planning document, and responded to in other ways.

There needs to be a serious campaign to distribute accurate information to the public.

The public has to been informed of the planning effort; however, the planning process must not be interrupted by public involvement.

Water User Interests

Any person who has anything to contribute should come forward to support this effort and the public should be involved as long as public involvement does not confuse or slow down the process.

The Working Group should welcome any ideas for this planning process.

The state and federal representatives should be technical advisors.

Summary Observations Regarding Outreach Issues

Issues in Agreement

The creation of a “Public Participation Plan (PPP) that would outline the process, products, and schedule for public input was strongly supported by most subgroups. The PPP could specify media outlets to be contacted; could describe the contents of a project-specific website; and would serve as the framework for all public outreach strategies, such as key dates and milestones, stakeholder types, project information to be developed, and similar tasks.

Issues Needing Resolution

All subgroups support public involvement in the planning process, but expressed differing opinions as to the best point during plan development for the public to become involved. Some subgroups advocated “early and often” public involvement, while others strongly suggested that the Working Group wait until a draft document was available before soliciting public comment. While not suggesting that the public be excluded, some subgroups expressed concern that the process could become stalled if extensive public dialogue is initiated during the plan’s drafting.

One subgroup expressed concern over the appropriateness of elected officials being involved in writing the plan. Also, subgroups expressed varying opinions regarding the role that Working Group members who represent the federal government should play in writing the plan. Some participants stated that the federal government should provide technical support for the local planning effort while another subgroup stated that federal interests should not be involved in the actual plan development. These issues will have to be addressed prior to initiating plan development.

Other Issues and Suggestions

No suggestions were received beyond those described above.

Final Comments

This category was included to all subgroups to allow them to make final comments that did not fall within the previous categories, or to reiterate comments that they felt were critically important.

Agricultural Interests

If members of the Working Group do not see a vision of both agriculture and fish coexisting in the Upper Basin, then the planning effort should not be initiated.

Business and Industry

This subgroup had no additional comments.

Conservation and Environmental Interests

The Working Group should be an Advisory Committee to the Bureau of Reclamation.

Federal Agencies

The end product needs to have assurances. The report may be phased in to get funding earlier. It is important keep everyone in the Working Group engaged in the process.

State and Local Agencies

The agricultural and water district stakeholders need to get involved in the Working Group again to help create this plan.

Tribal Interests

The focus is on ecosystem restoration, which is badly needed. However, we need to integrate social, cultural, and economic considerations into the plan. If ecosystem restoration is pursued without attending to these other critical needs, we are unlikely to ultimately succeed.

We believe it would be useful to put considerable effort toward developing resources to assist agricultural operators in becoming more prosperous. That may mean helping them develop new markets, helping them to become more efficient, whatever. We think it is likely to be easier to accomplish restoration if agricultural operators see a lot of help coming their way as part of the overall approach. Otherwise, many will see it as being threatening to them. But most importantly, they will be kept whole.

Like any other entity in the Upper Basin, the Klamath Tribes need a land base to prosper. At present, we are the only entity in the Upper Basin lacking in this regard. The return of our ancestral homelands would accomplish this, and allow us to once again become whole culturally, spiritually and economically.

Water User Interests

The Working Group should really consider if all interests are adequately represented.

After all interests are involved, everyone has to represent their own needs. Those needs must be incorporated into the final plan and should not infringe on the needs of the other parties.

Summary Observations Regarding Final Comments

Issues in Agreement

Most subgroups expressed a desire for all Working Group participants to commit to this planning effort. In addition, a few subgroups reiterated that this effort must incorporate social, cultural, economic, and environmental considerations into the plan.

Issues Needing Resolution

Methods for increasing water district and agricultural involvement in the Working Group need to be developed.

Other Issues and Suggestions

One subgroup stressed the need for implementation assurances; a method for incorporating this suggestion into the plan should be developed.

Section 3

Recommendations

Based on the information obtained during the subgroup interviews (Section 2), Jones & Stokes believes that there is a strong likelihood that the Working Group can successfully initiate and complete a resource-based planning process.

Despite numerous differences that exist regarding the specifics of such a process, there is significant agreement regarding the fundamental principles that a multi-party group must share to make such an endeavor feasible. Namely, there is a shared need, desire, expertise, sense of responsibility, and sense of urgency among Working Group participants to accomplish this work on behalf of their respective communities, as well as in the interests of the overall social and physical resources of the Upper Basin. Accordingly, this section presents final recommendations based on the results of the Situation Assessment. These recommendations are presented in two categories: *Overall Plan Development* and *Required Planning Decisions*.

Overall Plan Development

As discussed above and throughout Section 2, a shared need, desire, and urgency was expressed by all participants that some type of planning effort should take place. Based on the results of the interviews, regular assessment of current conditions in the Upper Basin, and feedback from the Working Group on the draft Situation Assessment memorandum, the Jones & Stokes facilitation team made the following key observations:

- There is likely a finite “window of opportunity” that basinwide issues will remain visible to state and federal decision makers, after which the Upper Basin will be replaced by other local, national, and international priorities.
- The Working Group needs and wants to establish a stronger relationship with state and federal decision makers as rapidly as possible.
- The Working Group wants to create a meaningful, substantive, professional-looking planning document that can capture the attention of state and federal decision makers and local stakeholders.
- The Working Group wants to ensure that conditions such as those that have occurred this year, and resources that have degraded over time, are improved.

- The Working Group desires and needs staff to provide logistical and organizational support

In the context of these key observations, and based on Jones & Stokes' extensive resource planning experience, the facilitation team offers the following recommendations.

We recommend the Working Group initiate a two-phase planning process. This two-phase process should be designed to address immediate and long-term planning needs, respectively. The first phase of the process would focus on creating an interim planning document that will present a fundamental planning framework for the Upper Basin. The second phase would focus on the development of the comprehensive resource plan that the first phase presents.

The first phase must be designed, initiated, and completed within 6 months. The interim document will rely on and present numerous critical planning decisions (described below) that will establish the framework for the more comprehensive, long-term resource-based planning effort. The interim document will be considered the "preamble" to the comprehensive resource management plan.

The information presented in the interim document will demonstrate consensus within the Working Group about key planning goals, planning objectives, and document development decisions. These decisions will provide a consensus-based blueprint for how the planning and outreach will be undertaken. For example, the interim plan will not need to identify exactly how many maps might be needed for a specific chapter; however, it would make clear to all readers that the Working Group has a procedure in place for reaching such a decision.

While not explicitly stated, this document will also serve as a "planning scope of work" for the Working Group and for state and federal decision makers. More specifically, the interim document will include tangible (albeit broad) projections of the funding, labor, and materials necessary to complete the longer-term planning process. This "scope of work" concept will be critical to ensure that substantive funding decisions are made on behalf of the Upper Basin as a result of this proposed document. As stated above, the interim document must be completed in no more than 6 months to effectively capture the attention of decision makers and to reflect proactive, basinwide leadership on the part of the Working Group.

Development of the interim document should incorporate decisions on the graphic "look and feel" of the resulting planning document. These "packaging" decisions will be carried forth throughout the entire planning process to give the process and all its products a unique and unmistakable identity related to the Working Group's efforts. We envision that the interim planning document will be extensively presented by all Working Group members to a variety of state, federal, tribal, private, and nongovernmental entities and individuals. It will be the "sales piece" for the longer-term second phase.

As previously stated, the Working Group expressed a need and desire for staff support. Although not covered in the interviews, follow-on discussion with the group resulted in this sentiment being expressed by a majority of members. In that context, and in support of the interim planning phase, Jones & Stokes recommends that the Working Group identify appropriate staff from either local private contractors, federal or state staff, or planning consultant staff to provide this support. More specifically, this staff would provide logistical,

organizational, and document development support for meetings, and the authoring, production, and distribution of the interim planning phase draft and final documents.

The second phase of the proposed planning process will be the development of the aforementioned comprehensive resource plan. The title, scope, and specificity of this plan will be determined during the development of the interim document. That said, the results of the interviews suggest that the focus of the proposed planning effort should be on the three original goals of the Working Group:

- restoration,
- economic stability, and
- drought-proofing.

This second phase will be the time period when most of the comprehensive planning is undertaken. Jones & Stokes' experience has shown that this period could take anywhere from 1.5 to 4 years depending on the roles and responsibilities of plan authors and reviewers, and on the decision-making capacity of the Working Group. Greater detail can not be provided at this time about the comprehensive planning phase because several key decisions still need to be made. These decisions are addressed below.

Required Planning Decisions

This discussion presents a list of 12 necessary planning decisions and the rationale behind each recommendation. As a general rule (and based upon Jones & Stokes' extensive resource planning experience), these planning elements should be resolved and implemented as a mandatory component of the interim planning process. It should be pointed out that resolution of these recommendations in the proposed 6-month time frame for the interim planning phase will be challenging and will require a significant level of commitment from the Working Group. Nonetheless, such an effort may be necessary to achieve the goals expressed above. Although the following recommendations are not formally prioritized, generally speaking, the decisions at the top of the list are the most critical to planning success.

Identify a Functional Decision-Making Process

Without a doubt, the first and most important decision Working Group members must make is what decision-making process(es) they will use throughout the planning effort. As discussed in Section 2, the Working Group is struggling to define a process that upholds the spirit of previous consensus methods while allowing more expeditious solutions. Such a process may be a restatement of the existing consensus process, or it may be a minor or major revision of the existing process. Regardless, this decision will establish the framework with which all other issues will be addressed. Resolution of this issue will require facilitation, education regarding creative/feasible options, and (potentially) cost/benefit analyses of the impacts of different decision-making processes on the time and cost of a planning effort.

Define the Leadership and Guidance of the Working Group

With all due respect to past and present Working Group co-chairs, the Working Group must define and delineate the roles and responsibilities of its co-chairs and hold them accountable to these standards. Furthermore, the Working Group must assess and decide what leadership role it wants from its facilitator for the planning process. During the planning process, the relationship between the facilitator and the co-chairs can be either tenuous or highly productive depending on the expressed goals, desires, and needs of the Working Group. Such information must be discussed and formalized early to establish clear and accountable expectations of the facilitator during the planning process.

Define the Specific Geographic Boundary of the Planning Area

Very simply, the Working Group must decide on a specific planning area and should develop defensible rationale for this decision. This decision will establish the parameters for future mapping, stakeholder involvement, data research, and other similar issues.

Develop a Public Participation Plan

As a general rule for the Working Group, and most specifically for the planning process, the Working Group should create a public participation plan (PPP). The PPP could include but would not be limited to the following elements:

- a complete catalog of all other Upper and Lower Basin resource-oriented programs, organizations, and entities, including a summary of their missions, membership, meeting schedules, and key points of contact;
- a realistic outreach schedule to routinely communicate and interact with the aforementioned other groups (including the assignment of responsible Working Group members to make these contacts and the establishment of self-imposed tools for accountability);
- a realistic outreach strategy for the aforementioned other groups, including agreed-upon (by the Working Group) roles, responsibilities, and expectations for some level of involvement with the Working Group's effort (e.g., public review periods, timing);
- a comprehensive media outreach strategy, including proposals for current and future information materials, specific points of contact at all appropriate media outlets, key milestones at which to maximize media coverage;
- a comprehensive stakeholder outreach strategy, including definitions of the different stakeholder types (e.g., politicians, agriculturists) in the Upper and Lower Basins and any specific data needs they may have;
- a comprehensive agency partner outreach strategy, including information materials and specific points of contact at all appropriate agencies;

- an information newsletter prototype for regular direct mailing; and
- a web-based outreach strategy to ensure that planning information is being prepared for web-based distribution/availability.

Assess and Potentially Revise the Membership of the Working Group

In order for planning recommendations to be acceptable to Upper Basin Stakeholders and supportable by interested funding sources, the Working Group will need to show broad-based support for these recommendations. This will potentially require more proactive and consistent outreach, as described above. In addition to these outreach efforts, however, the Working Group should consider revising its composition. A focused membership change could expand representation and increase the likelihood that important and potentially intractable entities become fully vested in the planning process. Such involvement would hopefully reduce the risk of accusations that planning decisions made by the Working Group are underrepresented or indefensible.

Develop Interim Opportunities, Constraints, Goals, and Objectives for the Planning Process

The Working Group must develop a list of opportunities, constraints, goals, and objectives for the proposed planning process. Opportunities and constraints should be reasonably easy for the Working Group to identify (but not necessarily to prioritize), given the amount of existing data and anecdotal opinions in the Upper Basin. The level of detail of the goals and objectives should be sufficient to allow readers to infer specific future Upper Basin benefits, while retaining future flexibility for the comprehensive planning process and plan implementation. The stated goals and objectives conform to the proposed focus of the three original Working Group goals: restoration, economic stability, and drought-proofing.

As discussed in Section 2, some Working Group members believe the proposed plan will identify specific restoration activities, complex economic analyses, extensive hydrologic studies, and so on. Other members believe that the plan should only provide a “framework” for restoration activities. By the time the interim planning phase is completed, these critical decisions regarding scale and scope must be equitably resolved through a facilitated process.

Identify the Authors, Producers, and Managers of the Plan

The Working Group has numerous members (as well as relationships with individuals outside the group) with extensive expertise on various aspects of the Upper Basin. The extent of members’ expertise as it pertains to the synthesis of such information, or its integration into the planning process, is less clear. Nonetheless, it is assumed that the Working Group could mobilize an internal team to develop the proposed plan. Such involvement would depend on available staff and resources, trust between members, and desired timeframe/cost for plan completion (discussed below). Conversely, all interview subgroups identified a need for some level of professional assistance from consultants in developing the plan. Regardless, using the

scope and scale information determined above (opportunities, constraints, goals, and objectives) the Working Group must decide who will research, write, produce, present, and distribute the plan. Also regardless of who performs these components of the planning process, such efforts will require a planning management team (or Steering Committee) that must be made up of representative Working Group members and that will provide guidance and oversight to the planning process. The decisions regarding plan preparation must be achievable and affordable and must be formalized in the interim plan such that the financial needs of the second (comprehensive) planning phase are clearly defined.

Discuss and Determine the Proposed Cost and Timeframe of the Planning Process

This decision is closely linked with the preceding discussion. The Working Group must set realistic targets for the cost and duration of the planning process. These issues elicited some of the most diverse responses during the interview process. Such diversity likely reflects the lack of applied planning experience of many members combined with the lack of consensus regarding plan scope and scale. Therefore, resolution of this issue will likely require education of the Working Group on the scope, scale, and associated costs and timeframes of other regional planning efforts throughout the country. These examples should include but not be limited to in-kind services, equipment, overhead, materials, facilities, travel and per diem, data collection and management, potential consultant fees, production, and distribution.

Discuss and Document the Roles of the State and Federal Governments

A discussion regarding the future involvement of state and federal governments should take place concurrently with the discussion of who will develop the plan and how much will it cost. As discussed in Section 2, some participants stated that the federal government should provide technical and/or financial support for the local planning effort but should not be involved in the actual plan development. Similar opinions were expressed about state government representatives. Given the current social and emotional conditions in the Upper Basin, the Working Group must decide what roles and responsibilities the government entities will have. These decisions will have a critical impact on the cost and timeframe of the planning process, as they may determine who the principal authors will be.

Discuss and Define Technical Data Assessment and Use Protocols

The Working Group does not need to assess the validity of myriad Upper Basin data during the interim planning phase. However, the Working Group does need to agree on a data assessment and use protocol that will be consistently followed when future data issues arise. Specifically, the Working Group must develop a pattern for equitable problem solving (using the previously discussed decision-making processes) that can not only reach real, mutually beneficial data decisions, but can also send a clear message to decision makers, funding sources, and potential adversaries that such issues will be efficiently and transparently addressed. Furthermore, adherence to the protocol will be vitally important if the Working Group intends to maintain a cost and time budget. It is critical, therefore, that the protocol be meticulously reviewed,

discussed, and agreed to by all concerned Working Group members during the interim planning phase so that a demonstrable consensus-based data approach is in place when the second comprehensive phase begins.

Identify and Document Potential Funding Sources

As part of the proposed planning process, it will be important for the Working Group to develop a much clearer and more realistic vision about funding sources and available funding amounts. Having this information cataloged will prove extremely helpful if the Working Group chooses to submit funding requests, grant proposals, or other solicitations. Completing the interim plan will provide the Working Group with a powerful and persuasive tool for funding requests; however, the group needs to know in advance how to direct such requests and what target organizations will want to see and hear.

This funding information should also be considered for long-range implementation of plan recommendations. The Working Group should determine in advance what funding sources are available for specific project types, such that plan text can be tailored to meet the exact requirements of such sources. In doing so, the Working Group will enhance the likelihood that such projects will be supported.

Discuss and Determine the Future Direction of the Working Group

Although not critical during the interim planning phase, the Working Group should consider setting aside time to discuss and refine its direction. It was the unfortunate observation of the facilitation team that many Working Group members are unclear about what the group has done recently and what it should do next. It is highly likely that the synergy developed through the proposed planning process will provide an inherent direction and “new” vision for individual members of the group. While such intense efforts can often provide an important catalyst to move an organization like the Working Group beyond existing “roadblocks,” this is, nevertheless, an issue that should not be ignored.

Appendix A

Sample Interview Questionnaire

**Upper Klamath Basin Working Group
Proposed Planning Process
Draft Interview Questionnaire**

Goals/Objectives/Vision

1. Do you think of the proposed document as a restoration plan or something different?
2. If so, how do you define “restoration”?
3. If not, what would you title the plan?
4. What do you want the plan and planning process to address (e.g., habitat restoration land use issues, natural resource use issues, social/economic issues, others)
5. What result does your organization and constituency want/expect from this planning process?
6. What is your vision for this planning process and the final plan?

Organizational Issues

1. What types of decisions has the Working Group made in the past?
2. What types of decision-making processes have been used?
3. Have the decision-making processes been timely, equitable, and cost-efficient? If so, how? If not, why not?
4. What types of decisions do you envision the Working Group making in the future?
5. Will the past decision-making processes work for future efforts? If so, why? If not, why not? If not, how do you propose to change the Working Group’s decision-making processes?

6. How will decisions be made regarding the content of the plan?
7. How would you describe the past roles and activities of the Oregon and California state governments, and the Federal government with the Working Group?
8. What expectations do you have of the Oregon and California state governments, and the Federal government in the proposed planning process?
9. There are numerous ongoing planning-related processes, committees, and organizations in the Upper Basin. How will the Working Group's plan relate to these other processes?
10. Will the Working Group's plan compete with these other processes?
11. How will the Working Group's plan be accepted by these other processes and the general public?
12. How will the Working Group's plan be implemented?

Geographical Issues

1. What should be the geographic boundaries for the plan? Should the Lower Basin be included? How do you define the difference between the Lower and Upper Basin?
2. What habitats should be included in the planning area?
3. What unique conditions should be considered in the plan?
4. What land use conditions should be considered in the plan?
5. What resource management issues should be considered in the plan?
6. What is your expectation of the types/locations of habitat projects to be included in the plan?

Technical Issues

1. What is your understanding of the amount and quality of available technical data on issues such as species status, water quality, watershed management, agricultural and grazing practices, water use, and similar resource management issues?
2. What are the appropriate data sources to be used in support of the planning process?
3. How would you like to see technical data used in the plan?
4. Are there data gaps that will inhibit completion of the plan? If so, please explain these gaps.
5. Are there differences of opinion regarding data that will inhibit the resolution of technical issues? If so, how would you suggest these differences be resolved?
6. How will plan implementation be funded?
7. Do you anticipate that plan implementation will require monitoring?
8. Who should conduct the monitoring?
9. How will monitoring will be funded?
10. Do you believe that water is over-allocated in the Upper Basin?
11. How would you propose to manage water under different water year scenarios (e.g., wet, average, dry, critical)?
12. Has a study ever been completed for the Upper Basin regarding the amount of water the basin can produce (mass balance study)?
13. What amount and detail of mapping is necessary for the plan?

14. Who will conduct/complete mapping efforts

Structure / Content of the Plan

1. Who will write the plan?
2. Who do you feel comfortable with writing the plan?
3. Who will review and approve the evolving plan?
4. If you are not directly involved in the writing, what level of review do you/does your organization need?
5. How many draft versions of the plan do you envision before the plan is finalized?
6. How much time do reviewers need to review draft plan sections?
7. Should the public be involved as reviewers of the plan? If so, at what stage(s) of completion?
8. What technical specialists, if any, will be needed to write the plan?
9. Do you envision support from educational organizations, non-governmental and governmental organizations, consultants, etc. for the planning process?
10. What resources (i.e., staff, facilities, funds) does your organization have to contribute to the planning process?
11. How long will it take to write the plan?
12. How much will it cost to write the plan?
13. How would you like the document to be organized?

14. What should be the look and feel of the plan? Should the document be a “show piece” or a basic document?
15. Should the plan be made available on the Internet?
16. Should the plan be made available in CD-Rom format? If so, how many copies should be made?
17. Should the plan be made available as a “hard copy” book? If so, how many copies should be made?
18. What previous reports and plans have been developed for the project area?
19. Should the Working Group’s new plan draw on those past works?
20. How will the Working Group’s plan differ from past efforts?
21. Do you expect that the plan will be amended? If so, how often and by what mechanisms should this occur? Is this plan a “living” document?

Outreach Issues

1. Do you want public education provided to the community about this planning process?
2. Should other groups outside of the Working Group be involved in the planning process?
3. Should the general public play a role in the planning process? If so, how would this be accomplished?
4. What techniques should be used to expand public outreach and involvement?
5. Do you want media involvement? If so, how?

6. Do you want state and/or federal elected representatives involved in the planning process? If yes, what are your expectations for this involvement?

Conclusion

1. Do you have any other questions or concerns that did not get addressed in this questionnaire?

Verbatim Summaries of Subgroup Interviews

Appendix B is a compilation of the data collected during the seven individual interviews of the subgroups. Individual answers were not attributed to specific individuals; however, a list of participants that reflects the overall subgroup participation is provided at the top of each interview document. Most of the comments during the interviews were individual opinions. The comments that were agreed upon by all participants are denoted by an asterisk. The interview documents appear in the chronological order in which the interviews were conducted.

Meeting Summary

Interview Group #7 - Business and Industry Interests

Friday, July 6th – 3:00 to 5:00 p.m.

(Jim Carpenter, Martin Lugas, Monte Mendenhall, Dr. Karl Wenner, Trey Senn)

Attendants

- Jim Carpenter, Cell Tech
- Martin Lugas, U.S. Timberlands
- Trey Senn, KCEDA

Facilitator: Dave Ceppos, Jones & Stokes

Recorder: Travis Hemmen, Jones & Stokes

General Introduction

The interviews are the first, critical step in the situation assessment process. The goal of this process is to assess whether the members of the Working Group share the same goals, objectives, and expectations for the proposed restoration plan. This process will also help identify whether the Working Group has the appropriate organizational and decision-making structure to complete and implement the plan as they envision it. Based on the interview results, Jones & Stokes will prepare a draft and final Situation Assessment Memorandum summarizing the response to the questionnaire and recommendations for future steps. If it appears that the Working Group is ready to proceed with the planning process, Jones & Stokes will then prepare a draft and final Work Plan that details the next steps, responsible parties, schedule and cost associated with preparing the plan.

- The facilitator, Dave Ceppos, explained that the purpose of the comprehensive questionnaire was to encourage thought and discussion on all issues regarding the Klamath Basin. Mr. Ceppos also explained that the questions were clustered around specific issue categories in order to address each topic in a condensed manner.

Ground Rules

The Facilitator set a few groundrules for the interviews.

- If a participant could not commit to the two hours, then accommodations were made for early departures.
- Participants were asked to be concise and provide focused answers.
- Participants were asked to allow time for everyone to have an opportunity to speak.
- Participants were asked to be “courteous”.
- Facilitator assured participants that comments were confidential (i.e. individual answers would not be attributed to specific individuals).

Interview Summary

The following interview summary includes the specific questions that were raised and the corresponding relevant comments that were made by interviewees. An “*” denotes a specific comment that was agreed upon by all the participants. All other recorded comments were raised by individuals and discussed, but do not necessarily represent a unified opinion of all those interviewed.

Goals/Objectives/Vision

1. Do you think of the proposed document as a restoration plan or something different?
2. If so, how do you define “restoration”?
3. If not, what would you title the plan?

- Uncomfortable with the word restoration, but feels like there is no alternative.
- The word “restoration” may limit the scope of a Klamath Working Group plan.
- The plan should be called the plan something other than restoration.
- Maybe a “working plan”. Perhaps look at other examples from other regional efforts in the country.

4. What do you want the plan and planning process to address (e.g., habitat restoration land use issues, natural resource use issues, social/economic issues, others)
5. What result does your organization and constituency want/expect from this planning process?
6. What is your vision for this planning process and the final plan?

- Would like all individual interests involved in the process to develop this plan. All visions should be incorporated. The examples provided in Number 4 are appropriate
- The plan should address socio-economic issues, however, there is a concern about addressing such issues because of the complexity.
- At the very least, address the concerns involved in the socio-economic issues.
- In the effected areas, there should be some good information to use for socio-economic analysis.

**Do not have an in-depth socio- economic analysis but include economic impacts that may be encountered and may need to addressed during the planning process.*

- Ideally the plan should be an equitable solution. This should be the beginning of an approach to make everyone “whole”
- For industrial/business, the expectations are rather “cynical” about the process. The Basin should be broken into problem areas, list the solutions to those problems, place a timeframe on the individual solutions, and put a price tag on it.
- There should be a commitment by everyone to find creative solutions.

Organizational Issues

1. What types of decisions has the Working Group made in the past?
2. What types of decision-making processes have been used?
3. Have the decision-making processes been timely, equitable, and cost-efficient? If so, how? If not, why not?

- Working Group is a consensus group and it takes a long time to make decisions, however, I’m satisfied with the current process.
- In the past, the Working Group decided how funds were applied, but that is not the case any more. The role has changed over the years.
- There is a sense of frustration with the group because the group has not been able to make certain decisions.

**The consensus-based process has been the decision-making procedure of the working group.*

- If one person feels uncomfortable with a decision and votes “thumbs-down”, then the discussion is tabled. -A person may vote “thumb-sideways” to show disagreement.
- The consensus process has been frustrating. I am leaning towards more of a majority rule decision-making approach for this planning process.

4. What types of decisions do you envision the Working Group making in the future?
5. Will the past decision-making processes work for future efforts? If so, why? If not, why not? If not, how do you propose to change the Working Group's decision-making processes?

- Instead of consensus maybe 60% (or super majority) for the planning process. A significant planning process could not be accomplished through the consensus process.
- Hopes are not real high to accomplish significant plan through the consensus process.
- As a part of the plan the group needs to consider the decision process and the structure of the group.

6. How will decisions be made regarding the content of the plan?

- Consensus will work if the plan has benefits for each individual interest.
- It is very difficult to change the current decision-making process of consensus, but it may be necessary for this planning process.
- As the group works on the plan, the smaller decisions should be made without consensus, however the final plan should have the agreement of the entire group.

7. How would you describe the past roles and activities of the Oregon and California state governments, and the Federal government with the Working Group?
8. What expectations do you have of the Oregon and California state governments, and the Federal government in the proposed planning process?

- The group moved past these two questions however, one participant stated that the federal entities need to work better together and minimize cross-agency disagreements

9. There are numerous ongoing planning-related processes, committees, and organizations in the Upper Basin. How will the Working Group's plan relate to these other processes?
10. Will the Working Group's plan compete with these other processes?
11. How will the Working Group's plan be accepted by these other processes and the general public?

- Difficult to imagine how these other efforts will relate to the Upper Klamath Plan.
- It is very possible that the plan will not implemented.
- The plan must be truly inspirational for it to be supported by all interest groups.
- Someone must put a real solution on the table and the federal congressional delegation must pick up the plan and support it.
- The plan should be additive and collaborative with other efforts around the Basin.
- The planning process should include a coordination effort with the other groups and that may include Internet correspondence.

12. How will the Working Group's plan be implemented?

**Implementation will require a lot of money.*

- Everyone stays at the table to finalize a solution.
- A clear message needs to be sent via the plan that ideas put forth in the plan are good incentives/investments to put money towards.

Geographical Issues

1. What should be the geographic boundaries for the plan? Should the Lower Basin be included? How do you define the difference between the Lower and Upper Basin?

- The plan should be a "watershed approach", from ridge top to ridge top. For necessity, the plan should focus on the Upper Basin.

- The focus should be above the dams (e.g. Iron Gate). Couldn't imagine the complexity of incorporating the entire basin.
- Not even in our name (Upper Klamath Working Group), so we should focus on the Upper Basin.

**Focus on the Upper Basin.*

2. What habitats should be included in the planning area?
3. What unique conditions should be considered in the plan?
4. What land use conditions should be considered in the plan?
5. What resource management issues should be considered in the plan?

- The ecotypes should be broken into four categories (forested areas, the valley, the lake, and the farmlands). Each type has its own political/biological considerations that need to be addressed.
- Yes, all of the above (all the habitats) should be addressed in the plan. Nothing should be off the table.
- The possibility of expanding available capacity for storage may be something that the plan should address.
- The group should be careful with "unique" conditions because it may distract the progress of the plan.

6. What is your expectation of the types/locations of habitat projects to be included in the plan?

- The plan should address other cash crops that would need as much or less water by growers. Are there other less water dependent crops out there that farmers could make a living on?
- The plan should consider habitat projects.
- The plan should include projects that all groups could agree on, such as healthy riparian areas.

Technical Issues

1. What is your understanding of the amount and quality of available technical data on issues such as species status, water quality, watershed management, agricultural and grazing practices, water use, and similar resource management issues?
2. What are the appropriate data sources to be used in support of the planning process?
3. How would you like to see technical data used in the plan?
4. Are there data gaps that will inhibit completion of the plan? If so, please explain these gaps.
5. Are there differences of opinion regarding data that will inhibit the resolution of technical issues? If so, how would you suggest these differences be resolved?

- There is a wealth of data. The trick is not accessing data but achieving consensus on its validity.
- There is overwhelming data but lack of uniform support of the findings.
- The planning process should use the technical data to help create a defensible product.
- It is important to include the amount of data that makes sense.

6. How will plan implementation be funded?

- The plan will be funded by every conceivable source.
- In-kind funding from landowners? Special appropriation?
- There is a lot of money out there looking for a good investment. If a credible plan is developed and becomes a good investment, then it will be funded.

7. Do you anticipate that plan implementation will require monitoring?
8. Who should conduct the monitoring?
9. How will monitoring will be funded?

**The plan must have monitoring.*

- Technical advisory committee established in the county organized through the watershed groups may be utilized.
- Receiving federal funding may require a plan with a monitoring component.
- Even if a project fails, common knowledge is improved if you have monitoring.

10. Do you believe that water is over-allocated in the Upper Basin?
11. Has a study ever been completed for the Upper Basin regarding the amount of water the basin can produce (mass balance study)?

**Clearly, water is over-allocated in the Upper Basin, however there are administrative issues that are involved in that conclusion.*

- Yes, there have been a number of studies. Jim Kerns has conducted a study for years. The State Water Resources Control Board has also conducted studies.

12. What amount and detail of mapping is necessary for the plan?
13. Who will conduct/complete mapping efforts?

- OSU (Oregon State University) and particularly OIT (Oregon Institute of Technology) has done mapping.
- Maps provides one of the best communication tools for a planning process.
- The Working Group funded -OIT. The Working Group should be able to “cash in” on that investment.

Structure / Content of the Plan

1. Who will write the plan?
2. Who do you feel comfortable with writing the plan?

- Hopefully the Working Group with a “working scribe”, such as Jerry (current note taker for the group)
- Too much technical expertise for the group. Need to hire an entity to do the work.
- The committee can review but the initial writing should be given to experts.
- Currently, there is not enough confidence in the agencies to write this plan.

3. Who will review and approve the evolving plan?
4. If you are not directly involved in the writing, what level of review do you/does your organization need?
5. How many draft versions of the plan do you envision before the plan is finalized?
6. How much time do reviewers need to review draft plan sections?
7. Should the public be involved as reviewers of the plan? If so, at what stage(s) of completion?

- The Working Group will review the plan. More broadly, everybody will review the plan.
- A subgroup should be formed to assist in the writing the plan and then a presentation will be given to the Working Group. The Working Group can make comments and suggestions on the progress. Periodic presentations would be given throughout the process.
- The public should be allowed to provide review comments near the end of the process when the plan is almost complete. Question regarding whom will be defined as “the public”.
- Hope to do the plan in 1 year with approximately 6 drafts.
- The plan will take at least 2 years

8. What technical specialists, if any, will be needed to write the plan?
9. Do you envision support from educational organizations, non-governmental and governmental organizations, consultants, etc. for the planning process?
10. What resources (i.e., staff, facilities, funds) does your organization have to contribute to the planning process?

- Not sure.
- There are so many people out there willing to help, but unsure of technical specialists that would be required.
- U.S. Timberlands company has a lot of information that might contribute to the process.

**It would be beneficial to engage educational organizations to help with the process (affordable and adds credibility to the process).*

11. How long will it take to write the plan?
12. How much will it cost to write the plan?

- One year and at least 1 million dollars
- At least 2 years and at least 2 million dollars.

13. What should be the look and feel of the plan? Should the document be a “show piece” or a basic document?

- “You sell the sizzle not the steak.” The first impression is important in order to gain support.
- The final product should teach and communicate well. The plan must be readable. It should be different and more useable than standard government-lead documents.

14. Should the plan be made available on the Internet?
15. Should the plan be made available in CD-Rom format? If so, how many copies should be made?
16. Should the plan be made available as a “hard copy” book? If so, how many copies should be made?

- Yes, OIT has just hired a full-time webmaster.

**Yes, to all formats (as long as it is affordable).*

17. How will the Working Group’s plan differ from past efforts?

-The strength of the group is the broad range of interests. The plan will incorporate all these interests.

18. Do you expect that the plan will be amended? If so, how often and by what mechanisms should this occur? Is this plan a “living” document?

-The plan should be a living document. One that is flexible enough to embrace change.

Outreach Issues

1. Do you want public education provided to the community about this planning process?
2. Should other groups outside of the Working Group be involved in the planning process?
3. Should the general public play a role in the planning process? If so, how would this be accomplished?

- Not sure.
- One of the criticisms of the Working Group is that it is “secretive”. The meetings are open to the public so such a perception is unfounded but the opinion is still out there.
- The Working Group is subject to FACA chartering.

**The Working Group does need public sponsorship, therefore, the public should be kept informed about the planning process.*

4. What techniques should be used to expand public outreach and involvement?
5. Do you want media involvement? If so, how?
6. Do you want state and/or federal elected representatives involved in the planning process? If yes, what are your expectations for this involvement?

- The interview ended prior to asking these questions.

Conclusion

1. Do you have any other questions or concerns that did not get addressed in this questionnaire?

- Attendants did not have any further questions.

Meeting Summary

Interview Group #3 – Federal Agencies

Monday, July 9th – 1:00 to 3:00 p.m.

(Kevin Conroy, Steve Lewis, Phil Norton, Karl Wirkus, Doug Tedrick, Ginnie Grilley, Teri Raml)

Attendants

- Kevin Conroy
- Steve Lewis
- Phil Norton
- Ginnie Grilley
- Teri Raml

Facilitator: Dave Ceppos, Jones & Stokes

Recorder: Travis Hemmen, Jones & Stokes

General Introduction

The interviews are the first, critical step in the situation assessment process. The goal of this process is to assess whether the members of the Working Group share the same goals, objectives, and expectations for the proposed restoration plan. This process will also help identify whether the Working Group has the appropriate organizational and decision-making structure to complete and implement the plan as they envision it. Based on the interview results, Jones & Stokes will prepare a draft and final Situation Assessment Memorandum summarizing the response to the questionnaire and recommendations for future steps. If it appears that the Working Group is ready to proceed with the planning process, Jones & Stokes will then prepare a draft and final Work Plan that details the next steps, responsible parties, schedule and cost associated with preparing the plan.

- The facilitator, Dave Ceppos, explained that the purpose of the comprehensive questionnaire was to encourage thought and to include all issues regarding the Klamath Basin. Mr. Ceppos also explained that the questions were clustered in order to address each issue in a condensed manner.

Ground Rules

The Facilitator set a few groundrules for the interviews.

- If a participant could not commit to the two hours, then accommodations were made for early departures.
- Participants were asked to be concise and provide focused answers due to time frame.
- Participants were asked to allow time for everyone to have an opportunity to speak.
- Participants were asked to be “courteous”.
- Facilitator ensured participants that comments were confidential (i.e. individual answers will not be attached to the individuals but to the group).

Interview Summary

The following interview summary includes the specific questions that were raised and the corresponding relevant comments that were made by interviewees. An “*” denotes a specific comment that was agreed

upon by all the participants. All other recorded comments were raised by individuals and discussed, but do not necessarily represent a unified opinion of all those interviewed.

Goals/Objectives/Vision

1. Do you think of the proposed document as a restoration plan or something different?
2. If so, how do you define “restoration”?
3. If not, what would you title the plan?

- It should be called a restoration plan; however, it should be a strategy to provide a sustainable environment for the Basin (sustainability for aquatic and terrestrial conditions, and socio-economic issues in the basin).
- It should be a framework, not exhaustive, but a broad vision (a roadmap).
- Everybody should have a role in the process.
- The plan should not be titled a “restoration” plan. It implies putting it back. The plan should be called a “strategy”.
- Restoration should be a “bottom line” goal for the plan but the goals should address more than biological conditions.
- Restoration may be a “hot button” for some individuals. The situation in the basin is currently very contentious.
- The plan should be entitled with what it will hopefully achieve and if its restoration, then restoration should be in the title (If it walks like a duck and sounds like a duck...)

4. What do you want the plan and planning process to address (e.g., habitat restoration land use issues, natural resource use issues, social/economic issues, others)
5. What result does your organization and constituency want/expect from this planning process?
6. What is your vision for this planning process and the final plan?

- The plan should be a roadmap and it should address these broad issues of land use, economics, etc.
- A land management issue on Tule Lake should be addressed in the plan.
- The plan should look at drought proofing.
- The plan should be a tool to solicit funds.
- The plan should address the problems and the causes.
- The plan should lean towards the recovery of the sucker fish and should provide guidance on how to get to that point with buy-in from all the stakeholders.
- The plan should be prepared on a landscape scale.

Organizational Issues

1. What types of decisions has the Working Group made in the past?
2. What types of decision-making processes have been used?
3. Have the decision-making processes been timely, equitable, and cost-efficient? If so, how? If not, why not?

- Consensus has worked in the past however, due to the recent events individuals may be less inclined to work together.
- The group was not formed to make decisions. The group was used to advise Senator Hatfield on ways to resolve Basin issues. The first few recommendations were on Tuolanta and pesticide use on the national wildlife refuge. The group has been advisory, but since Senator Hatfield is gone the group has lost some guidance.
- The consensus process will not work for development of this plan.
- The current decision making process has been consensus where all parties must agree before accepting a proposal.

4. What types of decisions do you envision the Working Group making in the future?
5. Will the past decision-making processes work for future efforts? If so, why? If not, why not? If not, how do you propose to change the Working Group's decision-making processes?

- Consensus does lead to some frustration.
- If the plan is written that includes assurances to everyone, then it may work.
- If the plan is written as a roadmap with general principles, then there may be enough buy in.

6. How will decisions be made regarding the content of the plan?

**It may be important to establish a new decision making process for this specific planning process.*

7. How would you describe the past roles and activities of the Oregon and California state governments, and the Federal government with the Working Group?
8. What expectations do you have of the Oregon and California state governments, and the Federal government in the proposed planning process?

- Other than the priority setting for restoration dollars, not sure about the past roles and activities.
- All government agencies should come to the table and be a part of the process. Additionally, all participants should have defined roles in the plan.
- Not sure about the past roles of the government. The government could play an important role in public education during this process.
- A key role for government agencies would be to provide technical support.
- The group may be more effective if the plan is a "citizen plan" but the agencies cannot allow the product to oppose federal regulations.
- The group cannot operate as merely a citizen's group, but should receive support from government agencies. This effort will be a delicate balancing act between the local, state, federal interests.

9. There are numerous ongoing planning-related processes, committees, and organizations in the Upper Basin. How will the Working Group's plan relate to these other processes?
10. Will the Working Group's plan compete with these other processes?
11. How will the Working Group's plan be accepted by these other processes and the general public?

- The planning process must have built in comfort for all the other efforts. The plan must blend with the other plans for the basin. The other plans must be folded into this plan or should be used to steer all the other plans.

**There is a concern that the current Working Group does not represent all the interested groups in the Basin. There is a possibility of expanding the group to incorporate those not presently represented.*

12. How will the Working Group's plan be implemented?

- One action at a time.

Geographical Issues

1. What should be the geographic boundaries for the plan? Should the Lower Basin be included? How do you define the difference between the Lower and Upper Basin?

- The Upper Basin should be the focus, but the plan should not ignore the Lower Basin. The Iron Gate should be the southern boundary.
- The Upper Basin includes all the tributaries that feed into the basin (ridge top to ridge top).

**The plan should focus on the Upper Basin, but consider the impacts to the Lower Basin.*

2. What habitats should be included in the planning area?
3. What unique conditions should be considered in the plan?
4. What land use conditions should be considered in the plan?
5. What resource management issues should be considered in the plan?

- The real question should be “what are the primary resources that the group wants to address in the Basin?” If you focus on the environmental issues, then the plan can focus on the solutions on those issues.
- If you focus on specific issues, then the plan can be more narrow and manageable.
- Yes, the unique conditions should be considered (tribal interests and Klamath project). Water availability is another issue that should be included in the plan.
- The plan should not focus too closely on one issue (like lake levels).
- The planning process should be an opportunity to educate the public and themselves on the problems of the Basin and solutions that are agreeable to everyone.
- The plan should look at the economic issues as well as the socio-cultural issues.
- There is a lot of economic work currently in progress and that information should be included in the plan.
- The plan should avoid doing complex analysis of economics of the Basin because that will just turn into a debate.
- The plan should not be a judgement on the economics on farming, but should be an attempt to preserve the resources and balance the water available in the basin.
- There should be some level of economics (not sure of the level) but the discussion should be included.

6. What is your expectation of the types/locations of habitat projects to be included in the plan?

- The plan should look at projects that benefit all year types and resolve the issues for multiple years.

Technical Issues

1. What is your understanding of the amount and quality of available technical data on issues such as species status, water quality, watershed management, agricultural and grazing practices, water use, and similar resource management issues?
2. What are the appropriate data sources to be used in support of the planning process?
3. How would you like to see technical data used in the plan?
4. Are there data gaps that will inhibit completion of the plan? If so, please explain these gaps.
5. Are there differences of opinion regarding data that will inhibit the resolution of technical issues? If so, how would you suggest these differences be resolved?

- There is a data gap when assessing private land conditions.
- There is a lot of data on the basin and should be utilized in the plan however, there are conflicts among the data that exists.
- Not sure about the amount of technical data, but there are gaps.
- The plan should be scientifically based although not sure what that means.
- There is room for technical data and one standard should be water quality standards. The plan should stay away from contentious issues such as lake levels.
- The plan needs to use the existing data.
- There is general agreement that riparian restoration on the Sprague River should occur.

6. How will plan implementation be funded?

- The plan will be funded through legislative sponsorship and/or grants from individual agencies. The overall plan would require funding through federal legislation.
- The timing is critical. If the plan was submitted today, then it would be immediately funded, but that may change as time passes.
- The time is ripe.
- The funding will be a mix of state and federal funds.
- The 2002 budget is being prepared now. The plan should be ready prior to the next water year, before April 1st.
- The sooner the better and the funding should be solicited within six months.
- The funding should be encumbered by the next water year. Money is not the issue, but it's the organizational capacity to get the money and spend it.

7. Do you anticipate that plan implementation will require monitoring?

8. Who should conduct the monitoring?

9. How will monitoring will be funded?

- Some level of monitoring is important and the detail of that monitoring will correspond to the level of detail within the plan.
- Monitoring should be on a large scale and a smaller scale to address specific issues (sucker fish population).
- Monitoring also needs to be included in the funding and should be considered in front.

**Monitoring should be included in the plan and should be at the level the specificity of the plan.*

- Monitoring should not be subjective but conducted by a third party.
- It doesn't matter who does the monitoring or funded, as long as it gets done.

10. Do you believe that water is over-allocated in the Upper Basin?

11. Has a study ever been completed for the Upper Basin regarding the amount of water the basin can produce (mass balance study)?

- Not sure if a study has been done and the water is definitely over-allocated in the Upper Basin.
- Groundwater over-allocation should also be a concern.

**Water is over-allocated in the Upper Basin.*

- The Oregon Department of Water Resources hydrologist, Jonathan may have the data that explains the amount of water the basin can produce (from the adjudication).

12. What amount and detail of mapping is necessary for the plan?

13. Who will conduct/complete mapping efforts?

- Between the state and federal agencies the mapping needs could be met through effective coordination.
- Not sure what level of mapping would be required for the plan.
- There is a lot of mapping data available for the private and federal lands. The mapping issue is a coordination effort with the different agencies.
- "A picture is worth thousand words."

Structure / Content of the Plan

1. Who will write the plan?
2. Who do you feel comfortable with writing the plan?

- The working group will write the plan and that why it should be a framework rather than a detailed document.
- A consultant should be included in the writing.
- There is a possibility of an interagency group to assist in the writing or hire a consultant. Ownership of the document doesn't seem as strong if someone else writes it.
- The working group definitely needs the assistance from an outside entity to help write the plan.

3. Who will review and approve the evolving plan?
4. If you are not directly involved in the writing, what level of review do you/does your organization need?
5. How many draft versions of the plan do you envision before the plan is finalized?
6. How much time do reviewers need to review draft plan sections?
7. Should the public be involved as reviewers of the plan? If so, at what stage(s) of completion?

- Writing the plan should be confined to the working group. The working group should complete a single draft and then the public should have one month to review it.
- Outreach efforts should parallel the preparation of the document so the public is informed of the progress of the working group.
- Internal review of sections should be at least two weeks.
- Important to receive good review from important agencies (National Marine and Fisheries Service).

8. What technical specialists, if any, will be needed to write the plan?
9. Do you envision support from educational organizations, non-governmental and governmental organizations, consultants, etc. for the planning process?
10. What resources (i.e., staff, facilities, funds) does your organization have to contribute to the planning process?

- There will be hydrologist and biologist required for preparing the plan.
- Office space could be made available to assist in the process.
- The amount and type of technical specialists will depend on the level of detail of the plan.

**Important to focus on the information that is currently available. The working group does not have the time to conduct additional research, but technical specialists may assist in writing the plan.*

11. How long will it take to write the plan?
12. How much will it cost to write the plan?

- Approximately six months and no idea how much it will cost.
- Six to eight months and commit the resources to get it done.
- Six months and/or before the next water year. Not sure about the cost.

**Approximately six months and not sure about the cost.*

13. What should be the look and feel of the plan? Should the document be a “show piece” or a basic document?

- The plan should be a showpiece but not “too slick”. The plan should effectively communicate to the public.
- The document has to sell itself and it should look professional.

14. Should the plan be made available on the Internet?

15. Should the plan be made available in CD-Rom format? If so, how many copies should be made?

16. Should the plan be made available as a “hard copy” book? If so, how many copies should be made?

**The plan should be made available in all three formats.*

17. How will the Working Group’s plan differ from past efforts?

- A lot of independent plans have been produced (water users restoration plan or sucker fish recovery plan), but these plans have not been completely accepted by the public. Hopefully this plan will be accepted by the Working Group and public, will be funded, and will be effectively implemented.

18. Do you expect that the plan will be amended? If so, how often and by what mechanisms should this occur? Is this plan a “living” document?

- The plan itself isn’t the living document; it is the people behind the plan that makes it “living”.

Outreach Issues

1. Do you want public education provided to the community about this planning process?

2. Should other groups outside of the Working Group be involved in the planning process?

3. Should the general public play a role in the planning process? If so, how would this be accomplished?

**Yes the public should be involved but not too early in the process.*

- The Working Group could get public opinion through a focus group.
- There is a concern that the public might be overly concerned about the process of the Working Group.
- Provide the public with a comment period during the draft stage.

4. What techniques should be used to expand public outreach and involvement?

5. Do you want media involvement? If so, how?

6. Do you want state and/or federal elected representatives involved in the planning process? If yes, what are your expectations for this involvement?

- People are going to be aware of the plan regardless of the outreach effort. It is important to clearly articulate the process and let the public know when comments will be solicited from the Working Group.
- Mr. Ceppos recommended that the Working Group develop a Public Information Plan (PIP) to address these issues. The PIP makes the entire process transparent to the public.
- Steve West is the only elected official in the group. Outreach is important to the elected representatives but they should not be involved in writing the document.

**Outreach to the elected representatives without letting them write the plan.*

- The elected officials are feeling pressure to change something.

- The elected representatives could provide good input but they would not be effective during the writing of the plan.

Conclusion

1. Do you have any other questions or concerns that did not get addressed in this questionnaire?

- The end product needs to have assurances. The report may be phased in to get funding earlier.
- It is important keep everyone in the Working Group engaged in the process.

Meeting Summary

Interview Group #6 - Tribal Interests

Tuesday, July 10th – 7:00 to 9:00 p.m.

(Elwood Miller, Allen Foreman, Brandi Snoozy, Joe Hobbs)

Attendants

- Elwood Miller
- Allen Foreman
- Joe Hobbs
- Larry Dunsmore, Biologist for Klamath Tribe

Facilitator: Austin McInerny, Jones & Stokes

Recorder: Travis Hemmen, Jones & Stokes

General Introduction

The interviews are the first, critical step in the situation assessment process. The goal of this process is to assess whether the members of the Working Group share the same goals, objectives, and expectations for the proposed restoration plan. This process will also help identify whether the Working Group has the appropriate organizational and decision-making structure to complete and implement the plan as they envision it. Based on the interview results, Jones & Stokes will prepare a draft and final Situation Assessment Memorandum summarizing the response to the questionnaire and recommendations for future steps. If it appears that the Working Group is ready to proceed with the planning process, Jones & Stokes will then prepare a draft and final Work Plan that details the next steps, responsible parties, schedule and cost associated with preparing the plan.

- The facilitator, Austin McInerny, explained that the purpose of the comprehensive questionnaire was to encourage thought and discussion on all issues regarding the Klamath Basin. Mr. McInerny also explained that the questions were clustered around specific issue categories in order to address each topic in a condensed manner.

Ground Rules

The Facilitator set a few groundrules for the interviews.

- If a participant could not commit to the two hours, then accommodations were made for early departures.
- Participants were asked to be concise and provide focused answers.
- Participants were asked to allow time for everyone to have an opportunity to speak.
- Participants were asked to be “courteous”.
- Facilitator assured participants that comments were confidential (i.e. individual answers would not be attributed to specific individuals).

Interview Summary

The following interview summary includes the specific questions that were raised and the corresponding relevant comments that were made by interviewees. An “*” denotes a specific comment that was agreed upon by all the participants. All other recorded comments were raised by individuals and discussed, but do

not necessarily represent a unified opinion of all those interviewed. [Written answers were submitted by the Klamath Tribe and are presented in brackets]. Other comments made during the phone interview are provided after the written answers.

Goals/Objectives/Vision

1. Do you think of the proposed document as a restoration plan or something different?
2. If so, how do you define “restoration”?
3. If not, what would you title the plan?

We think of it as a restoration plan.

When we ‘restore’ something we either bring something back that was gone, or we put something that is broken back into working order. In the present context we are speaking of both ecosystem and economic restoration. To us this means that we look from the top of the mountains to the mouth of the Klamath River, focusing on aquatic and terrestrial ecosystem needs, as well as the needs of people.

A simple, general definition would be: “Putting the ecological and social pieces in place that will allow us to have healthy ecosystems alongside healthy economic systems.”

A more technical definition would be: “Re-establishment of the structural and functional ecological attributes which provide for the long-term maintenance of diverse, robust terrestrial, aquatic, and riparian ecosystems within landscapes also used for robust, sustainable, and profitable economic activities.

Integrating Ecosystem, Economic, and Social Ingredients to Build a Healthy Klamath Basin

**The plan has to be a long- term restoration effort.*

4. What do you want the plan and planning process to address (e.g., habitat restoration land use issues, natural resource use issues, social/economic issues, others)
5. What result does your organization and constituency want/expect from this planning process?
6. What is your vision for this planning process and the final plan?

Ecological, economic, and cultural issues that presently challenge our ability to build a healthy Klamath Basin.

We want a common vision of how the Basin should be managed in the future, which should include the livelihoods of all people. This will require resolution, at some level, of the issues which have kept us from working together in the past.

The planning process should force all participants to squarely face the issues which have divided us, especially the most difficult ones. Let’s choose to do it in this process, as a community striving for a common vision, instead of a courtroom somewhere. We either get together and tell the United States government how we want to do this, or we continue to bicker and fight and force the government to decide how it must be done. The final plan will only be as good as the planning process, and if the process does not force us to face our problems, then the final plan will be of little use.

**Economics has to be a component of the restoration plan.*

Organizational Issues

1. What types of decisions has the Working Group made in the past?
2. What types of decision-making processes have been used?
3. Have the decision-making processes been timely, equitable, and cost-efficient? If so, how? If not, why not?

N/A
Consensus.
No, because of diverse interests in the group.

- The Working Group helped to purchase the Wood River Project and acquire funding for restoration.

4. What types of decisions do you envision the Working Group making in the future?
5. Will the past decision-making processes work for future efforts? If so, why? If not, why not? If not, how do you propose to change the Working Group's decision-making processes?

Extraordinary ones!
Yes. Because it's the only process that protects everyone's interests.

6. How will decisions be made regarding the content of the plan?

Consensus

7. How would you describe the past roles and activities of the Oregon and California state governments, and the Federal government with the Working Group?
8. What expectations do you have of the Oregon and California state governments, and the Federal government in the proposed planning process?

N/A?
Facilitator.

- In the ADR process in Oregon the state government has been lacking in participation.
- The Federal government would assist with some of environmental requirements involved in the planning process (NEPA, ESA, Corps permitting).
- The Federal government could also initiate legislative actions as well.

9. There are numerous ongoing planning-related processes, committees, and organizations in the Upper Basin. How will the Working Group's plan relate to these other processes?
10. Will the Working Group's plan compete with these other processes?
11. How will the Working Group's plan be accepted by these other processes and the general public?

Work in union with them.

The plan should acknowledge, review, and evaluate each of these other processes. Then the Working Group must decide whether to integrate them into its plan, or to continue with an independent process.

It seems more likely that our plan would be complementary to other sincere restoration efforts, to the extent to which we produce an effective plan.

In the present climate it is unlikely that any restoration plans will be warmly received by private landowners, and this will be a major challenge to overcome. The general public's reception will depend largely on how they view the problems in the Basin. They have been on the receiving end of a media blitz identifying the ESA as the main problem which is faced in the Basin, which certainly does not help them understand why restoration is so important here. Regardless of how one feels about the ESA, the reality is that it would not be an issue if the Basin ecosystems had not been allowed to become so impaired that species become imperiled. If the Working Group truly intend to engage in a meaningful restoration planning process, and if the Working Group truly sees restoration as a vehicle to improve things for

everyone in the Basin, then the Working Group needs to become very active in conveying that message, and to date they have been silent.

- The Klamath Basin is currently involved in all the processes within the Klamath Basin.

12. How will the Working Group's plan be implemented?

Implementation is a complex challenge which must be fully addressed by the plan.

- The Working may first want to generate "problem statements" about the Basin.

Geographical Issues

1. What should be the geographic boundaries for the plan? Should the Lower Basin be included? How do you define the difference between the Lower and Upper Basin?

If one uses landforms to divide Upper and Lower Basins, then the Keno Dam on the Klamath River makes sense. Low gradient rivers and extensive wetlands and lakes once dominated the geography above the Keno Dam, and below the dam the Klamath River runs on a steeper gradient through a canyon all the way to the ocean. These characteristics have set the stage for both the present pattern of land use and the present pattern and nature of ecosystem degradation in the Upper Basin. The kinds of restoration needed in the Upper Basin differ from that needed in much of the Lower Basin, and so it makes more sense to focus initially on the Upper Basin.

**The focus should be on the Upper Basin, however, consider the Lower Basin during the process.*

2. What habitats should be included in the planning area?
3. What unique conditions should be considered in the plan?
4. What land use conditions should be considered in the plan?
5. What resource management issues should be considered in the plan?

All terrestrial and aquatic habitats.
All land use should be considered.
All issues are pertinent.

6. What is your expectation of the types/locations of habitat projects to be included in the plan?

Restoring appropriate channel geometry to river channels, restoring proper connectivity between river channel and floodplain, re-establishment of riparian communities, restoring appropriate hydrologic regimes to rivers and wetlands, re-establishment of wetland ecosystems, re-connecting wetlands to lakes, enhancing fish spawning/rearing habitat as appropriate, raising local water tables in floodplains, restoring perennial flow to ephemeral seeps and springs, restoring complex forest structure across landscape, returning fire to the ecosystem, etc.

Overall, we think the most effective way to approach restoration is to identify the key functional attributes which have been damaged or lost, identify the structural aspects of the ecosystem which produce those functions, and then restore the appropriate ecosystem structure and monitor both the integrity of the structural changes over time as well as the success in restoring the targeted function.

Technical Issues

1. What is your understanding of the amount and quality of available technical data on issues such as species status, water quality, watershed management, agricultural and grazing practices, water use, and similar resource management issues?
2. What are the appropriate data sources to be used in support of the planning process?
3. How would you like to see technical data used in the plan?
4. Are there data gaps that will inhibit completion of the plan? If so, please explain these gaps.
5. Are there differences of opinion regarding data that will inhibit the resolution of technical issues? If so, how would you suggest these differences be resolved?

There is much information available on a variety of these topics. Quality and quantity of the information varies among the topics as well as among location in the Basin. In general, the least is known about agricultural and grazing practices, water use in terms of quantity and efficiency, effects of groundwater withdrawals on surface water and groundwater resources, etc.

From a restoration perspective, however, crucial information is largely absent or incomplete. Before restoring rivers, for example, it is vital to perform thorough hydrologic and geomorphic assessments identifying and quantifying impaired structural and functional attributes of the ecosystem. Such assessments are required to accurately design restoration projects, estimate the cost of projects, and predict the benefits.

Any data source is fine as long as the work is done well.

Technical data should underpin all restoration actions. In order to restore something, we must know what is wrong, how bad the problem is, and what it will take to fix it. This is impossible to do well if we lack appropriate data. Restoration should be approached deliberately: 1) actions should follow, not precede, an adequate understanding of the impaired ecosystem functions; 2) design and implementation of restoration actions requires intensive data collection; 3) outcome of actions should be monitored to assess goal attainment.

Again, focusing on river restoration, we lack quantified assessments of the hydrologic/geomorphic conditions of our rivers. Without them, it is difficult to agree on what the problems are, to gauge the magnitude and form of restoration to be done, to clearly define goals, and expected outcomes, and so on. Clearly, the absence of such assessments are critical data gaps which will inhibit completion of the plan.

Certainly, there are differences of opinion regarding data that hinder resolution of technical issues. Frankly, we believe these mostly stem from two things: 1) failure of the scientific community to clearly communicate with stakeholders about how studies are done and what they mean; and, 2) reluctance of stakeholders to accept results of studies because they do not like the ramifications. A complex web of better communications and growth of trust must be woven to surmount these difficulties, and doing so will certainly be a major challenge of this planning effort. Viewed positively, perhaps the present planning effort can be a vehicle through which this situation is much improved.

** Merely managing lake levels will not solve the problem. Real problem is the degraded watershed.*

6. How will plan implementation be funded?

The magnitude of the restoration needs in the Upper Basin is enormous, and we believe that the Federal government is only possible major funding source. Private foundations may be significant sources as well. However, a major hurdle to the success of federally funded restoration will center on the ability to resolve 'federal nexus' issues.

7. Do you anticipate that plan implementation will require monitoring?
8. Who should conduct the monitoring?
9. How will monitoring will be funded?

It simply must require monitoring. We are talking about doing restoration, if we approach it correctly we should have very specific goals. A Basin-wide monitoring program should be set up so that individual projects can proceed with minimal monitoring needs, while ensuring that the cumulative improvements resulting from restoration are tracked so we know whether we are achieving the goal or not.

For example, let's say we re-build a mile of the Sprague River. We know from our assessment (which has not yet been done, this is an example) of the entire Sprague River that we need to rebuild many river miles. The expected benefit of doing so over a large area is an increase in summer baseflows, decreased water temperatures, increased dissolved oxygen concentrations, decreased loading of phosphorus and nitrogen to Upper Klamath Lake, and a higher local water table in the floodplain. Now, we go in to a single landowner and rebuild 1 mile of the river. We set up a monitoring program to detect all of these benefits at the project site by measuring the condition of the water coming in compared to its condition as it leaves, and we may see that the project has very little effect.

However, we also set up a long term monitoring program designed to detect the cumulative benefits of all the restoration that occurs. In this way we try to detect the benefits of all of the isolated 1 mile long projects that get done, and as we pass 10 miles, then 20, and then 30 miles of river restored, we see a progressive improvement in all of these attributes. The incremental improvements caused by each individual project are small, but the cumulative improvement caused by many small projects is large. Each individual project will require some monitoring to see if the structural changes are holding up – e.g. river channel banks are stable, willows are recruiting as expected, longitudinal channel profiles are diverse, etc. However, many of the functional benefits we hope to restore through these structural changes will be detectable only if we monitor at a landscape scale.

A mixture of organizations will likely be appropriate.

Long term, landscape scale monitoring should be funded through the Federal government.

- The Tribes would want a large role in the monitoring component of the plan.
- The Tribes have been monitoring (lake levels, nutrient loading) before 1990.

**Monitoring should definitely be included in the restoration plan.*

10. Do you believe that water is over-allocated in the Upper Basin?
11. How would you propose to manage water under different water year scenarios (e.g., wet, average, dry, critical)?
12. Has a study ever been completed for the Upper Basin regarding the amount of water the basin can produce (mass balance study)?

Without question, water is over-allocated in the Upper Basin.

The present highly degraded conditions in the Upper Basin remove management flexibility in this regard. We believe greater management flexibility will emerge as ecosystem improvements are realized at the landscape scale. Consumptive water uses must decrease to meet even minimal ecosystem needs under present conditions. Decreases in consumptive uses should be spread out, not confined to any specific portion of the Basin. In general, decreases in consumptive use higher in the Basin help the most because more water stays in the rivers and inflows to the Upper Klamath Lake increase. This increases ability to deliver water to the Klamath Project users, to maintain Klamath River flows for salmon, and to maintain lake levels for fish.

In all year types, minimum river flows and lake levels suitable for appropriate ecosystem function should be maintained. Consumptive water uses Basin-wide should decrease sufficiently to balance with these non-consumptive needs.
Not so much a study as a model. USBR has a hydrologic model (KPSIM) that provides this information.

13. What amount and detail of mapping is necessary for the plan?
14. Who will conduct/complete mapping efforts?

Extensive and detailed GIS mapping is required for both restoration planning and implementation. Mapping needs will include aerial photo/satellite image mosaics, land use/ownership, ecosystem stratification, location, distribution, and status of all restoration projects, monitoring results, project construction plans, etc.

Several entities in the Working Group possess GIS capabilities, including the Klamath Tribes. Work could be divided among them, as long as adequate funding is provided.

Structure / Content of the Plan

1. Who will write the plan?
2. Who do you feel comfortable with writing the plan?

We don't know, but they must have expertise in restoration.

We feel comfortable helping with portions of the plan, but not the whole thing. Regardless of who writes it, we want to participate at a significant level. Our comfort with having a contractor write the plan would very much depend upon contractors restoration capability and philosophy.

3. Who will review and approve the evolving plan?
4. If you are not directly involved in the writing, what level of review do you/does your organization need?
5. How many draft versions of the plan do you envision before the plan is finalized?
6. How much time do reviewers need to review draft plan sections?
7. Should the public be involved as reviewers of the plan? If so, at what stage(s) of completion?

All entities in the Working Group must review the plan, and the full Working Group must approve it.

We would need to review the plan in great detail. For us, and we believe for everyone else, much of our hope for future health and stability of both ecosystems and economic systems in this Basin rests in the success of restoration. Therefore, we need to carefully review any plans and fully participate in their development.

It depends in part on the scope of what is attempted, as well as on the capabilities of the authors, but mostly it depends on the willingness and ability of the diverse interests in the Basin to come together. After two or three drafts we should know if the plan is coming together.

No less than a month. There is always so much going on here that it is extremely difficult for us to thoroughly review a major document more quickly than this.

We think that the Group needs to be able to conduct its planning without interruption. At certain points, the public should be informed and heard so that their concerns can be addressed.

8. What technical specialists, if any, will be needed to write the plan?

9. Do you envision support from educational organizations, non-governmental and governmental organizations, consultants, etc. for the planning process?
10. What resources (i.e., staff, facilities, funds) does your organization have to contribute to the planning process?

Different portions would require different specialists. A competent geomorphologist/hydrologist experienced in restoration in systems like ours, and armed with adequate assessments as described previously, is an absolute requirement. Limnologists and fisheries biologists will be necessary to cover water quality and fisheries issues. Wetland ecologists will be needed as well. Wildlife biologists, forest ecologists, and botanists will be required to cover terrestrial issues. Agricultural professionals will be required to address the many agricultural issues that will arise. Economists will be needed to project economic ramifications of various alternatives.

Yes.

Staff and facilities to a greater extent than funds, although we could specifically pursue grant funding to accommodate this work. In addition, we are already doing significant work that will be usable within the planning process.

- A consultant (geomorphologist), Graham Matthews did some good research for the Wood River project and other projects in the area.

11. How long will it take to write the plan?
12. How much will it cost to write the plan?

If we do it right by pursuing adequate assessments first, three-five years down the road we should have a good plan.

Including assessment costs, 3-5 million dollars.

- The ultimate cost of the plan depends on the level of detail within that plan.

13. How would you like the plan to be organized?
14. What should be the look and feel of the plan? Should the document be a “show piece” or a basic document?

Ecosystem issues, social/cultural issues, economic issues, and a synthesis culminating in recommendations.

It should be a weighty document with a substantive basis in science and economics, but ultimately flowing from the common social vision of Basin residents. It should not be science forced upon folks, but rather science serving their joint vision. There will need to be a briefer summary document for people who do not have the time or inclination to study the complete Plan.

15. Should the plan be made available on the Internet?
16. Should the plan be made available in CD-Rom format? If so, how many copies should be made?
17. Should the plan be made available as a “hard copy” book? If so, how many copies should be made?

Sure.

Three per entity on the Working Group, plus several for appropriate public access (libraries, etc.)

18. What previous reports and plans have been developed for the project area?
19. How will the Working Group's plan differ from past efforts?

A wide variety.
Yes, as appropriate.
If done well in manner that brings diverse groups together in cooperation, it will offer the first landscape-scale restoration plan for the Upper Basin.

20. Do you expect that the plan will be amended? If so, how often and by what mechanisms should this occur? Is this plan a "living" document?

Maybe, but probably not. If it is effective, it won't be because it's some sort of legally binding document, but rather because it is believed in by the people who live here. It's the snowball on top of the hill – if we get everyone to believe in the value of restoration, help them to understand the scale at which it needs to occur and the resulting benefits that can be expected, then we have pushed the snowball and it will roll downhill on its own.

The written plan itself has its greatest value in representing the cooperative distillation of a common vision for the Upper Basin. If, during the planning process, it becomes clear that there is a need to provide processes to amend the plan, this can be accommodated. But amendment processes do not need to be an announced goal from the beginning.

**The plan needs to be a living document for it to succeed.*

Outreach Issues

1. Do you want public education provided to the community about this planning process?
2. Should other groups outside of the Working Group be involved in the planning process?
3. Should the general public play a role in the planning process? If so, how would this be accomplished?

Yes.

As necessary and helpful.

It should flow from the efforts in number 1 above. Regular columns in the newspaper should be written describing the planning process, and describing how the various ecosystem components work. Perhaps an Internet site could be set up as well, both to provide information to folds and to solicit their input via email. Public input could be summarized and reported in the planning document, and responded to in other ways.

- There needs to be a serious campaign to distribute accurate information to the public.

**The public has to be informed of the planning effort, however, the planning process must not be interrupted by public involvement.*

7. What techniques should be used to expand public outreach and involvement?
8. Do you want media involvement? If so, how?
9. Do you want state and/or federal elected representatives involved in the planning process? If yes, what are your expectations for this involvement?

Only as necessary to help us deal with issues under their purview.

Conclusion

1. Do you have any other questions or concerns that did not get addressed in this questionnaire?

The focus is on ecosystem restoration, which is badly needed. However, we need to integrate social, cultural, and economic considerations into the plan. If ecosystem restoration is pursued without attending to these other critical needs, we are unlikely to ultimately succeed.

We believe it would be useful to put considerable effort toward developing resources to assist agricultural operators in becoming more prosperous. That may mean helping them develop new markets, helping them to become more efficient, whatever. We think it is likely to be easier to accomplish restoration if agricultural operators see a lot of help coming their way as part of the overall approach. Otherwise, many will see it as being threatening to them. But most importantly, they will be whole.

Like any other entity in the Basin, the Klamath Tribes need a land base to prosper. At present, we are the only entity in the Basin lacking in this regard. The return of our ancestral homelands would accomplish this, and allow us to once again become whole culturally, spiritually and economically.

Meeting Summary
Interview Group #5 – Agricultural Interests
Thursday, July 12th – 3:00 to 5:00 p.m.
(Marshall Staunton, Glenn Barrett)

Attendants

- Marshall Staunton, Independent Farmer
- Glenn Barrett, Klamath County Cattlemen’s Association

Facilitator: Austin McInerny, Jones & Stokes

Recorder: Travis Hemmen, Jones & Stokes

General Introduction

The interviews are the first, critical step in the situation assessment process. The goal of this process is to assess whether the members of the Working Group share the same goals, objectives, and expectations for the proposed restoration plan. This process will also help identify whether the Working Group has the appropriate organizational and decision-making structure to complete and implement the plan as they envision it. Based on the interview results, Jones & Stokes will prepare a draft and final Situation Assessment Memorandum summarizing the response to the questionnaire and recommendations for future steps. If it appears that the Working Group is ready to proceed with the planning process, Jones & Stokes will then prepare a draft and final Work Plan that details the next steps, responsible parties, schedule and cost associated with preparing the plan.

- The facilitator, Austin McInerny, explained that the purpose of the comprehensive questionnaire was to encourage thought and discussion on all issues regarding the Klamath Basin. Mr. McInerny also explained that the questions were clustered around specific issue categories in order to address each topic in a condensed manner.

Ground Rules

The Facilitator set a few groundrules for the interviews.

- If a participant could not commit to the two hours, then accommodations were made for early departures.
- Participants were asked to be concise and provide focused answers.
- Participants were asked to allow time for everyone to have an opportunity to speak.
- Participants were asked to be “courteous”.
- Facilitator assured participants that comments were confidential (i.e. individual answers would not be attributed to specific individuals).

Interview Summary

The following interview summary includes the specific questions that were raised and the corresponding relevant comments that were made by interviewees. An “*” denotes a specific comment that was agreed upon by all the participants. All other recorded comments were raised by individuals and discussed, but do not necessarily represent a unified opinion of all those interviewed.

Goals/Objectives/Vision

1. Do you think of the proposed document as a restoration plan or something different?
2. If so, how do you define “restoration”?
3. If not, what would you title the plan?

- An idea of the plan has changed due to recent events. Before it was “restoration”, but there is more focus on economic stability now.
- A “glorified” habitat restoration plan.
- The plan should be a strategic plan, almost like a business plan.
- Plan should last between 15-30 years and should identify specific goals with interim milestones.

4. What do you want the plan and planning process to address (e.g., habitat restoration land use issues, natural resource use issues, social/economic issues, others)
5. What result does your organization and constituency want/expect from this planning process?
6. What is your vision for this planning process and the final plan?

- The plan should have buy-in from all interests, including project irrigators and refuge operators.
- A plan that is a “living document” and is focused on long term solutions.
- The plan will depend on how much water is made available.

**The plan should provide some assurances for economic stability.*

Organizational Issues

1. What types of decisions has the Working Group made in the past?
2. What types of decision-making processes have been used?
3. Have the decision-making processes been timely, equitable, and cost-efficient? If so, how? If not, why not?

- The Working Group did agree to five major goals for restoring the Basin. For example, one goal was to deal with juniper encroachment and pesticide management.
- These past decisions were based on “consensus”.
- The Working Group needs sponsorship from political leaders (much like the support provided by Senator Hatfield).
- Three goals of the Working Group were set out to do three things drought proofing, stream/wetland restoration, and economic stability. There has not been enough done for drought proofing or economic stability.

4. What types of decisions do you envision the Working Group making in the future?
5. Will the past decision-making processes work for future efforts? If so, why? If not, why not? If not, how do you propose to change the Working Group’s decision-making processes?

- The final plan will end up in legislation therefore the Working Group decisions need to have legislative support.
- The people at the table (agencies) are not individuals that ultimately make the decisions.
- The Working Group must include representatives that are able to make decisions at the agency level.
- Consensus will have to work while developing the restoration plan.

**Ideally projects within the plan would provide benefit towards drought proofing, stream/wetland restoration, and economic stability.*

6. How will decisions be made regarding the content of the plan?

- Consensus should be used to approve the final plan.
- The Working Group needs to have a facilitator help focus the process.
- First the group should define goals and objectives.

7. How would you describe the past roles and activities of the Oregon and California state governments, and the Federal government with the Working Group?

8. What expectations do you have of the Oregon and California state governments, and the Federal government in the proposed planning process?

- If the state government cannot come to the table with authority to make decisions, then the state agencies should serve a technical role.
- There has to be “agency buy-in” but the Working Group can conduct discussions without the agencies.

9. There are numerous ongoing planning-related processes, committees, and organizations in the Upper Basin. How will the Working Group’s plan relate to these other processes?

10. Will the Working Group’s plan compete with these other processes?

11. How will the Working Group’s plan be accepted by these other processes and the general public?

- This restoration plan will work well with the other processes.
- Representatives from the Upper Sprague, Williamson River and Lower Basin could be added to the Working Group.
- There has been a lot of focus on projects outside of the Klamath Project and those decisions have been made without representation of interests outside the Klamath Project

12. How will the Working Group’s plan be implemented?

- Not sure

Geographical Issues

1. What should be the geographic boundaries for the plan? Should the Lower Basin be included? How do you define the difference between the Lower and Upper Basin?

- Wood River Valley should be included in the restoration plan.
- The focus should be on Keno Dam up.

**The focus should initially be on the Upper Basin.*

2. What habitats should be included in the planning area?

3. What unique conditions should be considered in the plan?

4. What land use conditions should be considered in the plan?

5. What resource management issues should be considered in the plan?

- The plan should deal with agriculture as a whole and determine water availability for the industry.

**The plan should not regulate certain land use activities.*

6. What is your expectation of the types/locations of habitat projects to be included in the plan?

- The projects outlined in the plan should be generalized and initially be located above Keno Dam.

Technical Issues

1. What is your understanding of the amount and quality of available technical data on issues such as species status, water quality, watershed management, agricultural and grazing practices, water use, and similar resource management issues?
2. What are the appropriate data sources to be used in support of the planning process?
3. How would you like to see technical data used in the plan?
4. Are there data gaps that will inhibit completion of the plan? If so, please explain these gaps.
5. Are there differences of opinion regarding data that will inhibit the resolution of technical issues? If so, how would you suggest these differences be resolved?

- There has been little faith in the interpretations of data so far.
- There needs to be consensus on this data to complete the plan.
- Agriculture has not supported most of the data that has been interpreted.
- There is a study on the practice of flood irrigation that states this practice works much like a wetland for nutrient uptake.
- Use the goals to move past differences in scientific data and the plan should include assurances.
- There needs to be scientific data regarding the amount of phosphorus introduced into the water due to agricultural practices.
- The Biological Opinion did not assess the natural hydrologic conditions in the region.

6. How will plan implementation be funded?

- The plan should be funded through the State and Federal Governments.
- There is potentially \$2 million dollar from re-authorization coming from Senator Wyden's office.

7. Do you anticipate that plan implementation will require monitoring?
8. Who should conduct the monitoring?
9. How will monitoring will be funded?

- The irrigation district can be a part of the monitoring effort.
- The land grant universities could also participate in the monitoring.
- All monitoring has to be independently peer reviewed.

**Yes monitoring should be a component of the plan.*

10. Do you believe that water is over-allocated in the Upper Basin?
11. Has a study ever been completed for the Upper Basin regarding the amount of water the basin can produce (mass balance study)?

**Water is not over-allocated in the Basin.*

- There is an opportunity to store excess water in wet water years.
- The Bureau of Reclamation might have studies on the potential water yield of the Basin.

12. What amount and detail of mapping is necessary for the plan?
13. Who will conduct/complete mapping efforts?

- The Working Group funded some GIS at OIT.
- Forest Service, BLM, and Fish and Wildlife are strong sources for mapping.
- Oregon Water Resources also has some maps that may be useful.

Structure / Content of the Plan

1. Who will write the plan?
2. Who do you feel comfortable with writing the plan?

- The Working Group must have overall ownership of the plan.
- The Working Group will be the visionary and the consultant would do the detailed work.

**The Working Group would hire a consultant.*

3. Who will review and approve the evolving plan?
4. If you are not directly involved in the writing, what level of review do you/does your organization need?
5. How many draft versions of the plan do you envision before the plan is finalized?
6. How much time do reviewers need to review draft plan sections?
7. Should the public be involved as reviewers of the plan? If so, at what stage(s) of completion?

- Ideally this would take 6 months.
- There should be a settlement in 6 months but the plan will take 3 to 4 years and it will undergo hundreds of drafts.
- Some sections (chapters) will take a few weeks to review and other sections will take three or four weeks to review.
- Every meeting is open to the public; however, the public should have a comment period to respond to the final plan.

8. What technical specialists, if any, will be needed to write the plan?
9. Do you envision support from educational organizations, non-governmental and governmental organizations, consultants, etc. for the planning process?
10. What resources (i.e., staff, facilities, funds) does your organization have to contribute to the planning process?

- The agricultural organization will contribute “sweat equity” to developing the plan.

11. How long will it take to write the plan?
12. How much will it cost to write the plan?

- Six months to enter into a “truce” and then 4 to 5 years to complete the plan.
- Not sure of the cost and it will depend on the science and level of detail of the plan. Approximately 5 to 10 million dollars to complete the process.

13. What should be the look and feel of the plan? Should the document be a “show piece” or a basic document?

- The document should be like a tabular report and the chapters should be tied to the goals.

14. Should the plan be made available on the Internet?
15. Should the plan be made available on the Internet?
16. Should the plan be made available as a “hard copy” book? If so, how many copies should be made?

**Yes - once it's done.*

17. How will the Working Group's plan differ from past efforts?

- These other efforts can be referred to by this specific plan.
- The plan should not model the other efforts, however, it should incorporate some of the work.

18. Do you expect that the plan will be amended? If so, how often and by what mechanisms should this occur? Is this plan a "living" document?

**The plan should be a living document.*

Outreach Issues

1. Do you want public education provided to the community about this planning process?
2. Should other groups outside of the Working Group be involved in the planning process?
3. Should the general public play a role in the planning process? If so, how would this be accomplished?

- As the plan is being developed, the public is invited to the meeting.
- Once the plan is complete, then the plan can be distributed for public comment.
- Public hearings can help distribute the plan and its purpose to the public.

4. What techniques should be used to expand public outreach and involvement?
5. Do you want media involvement? If so, how?
6. Do you want state and/or federal elected representatives involved in the planning process? If yes, what are your expectations for this involvement?

- There is a good local television, but the newspaper and radio would be the best source.
- There should be a mailing list developed and they can use current mailing list of other groups to help public outreach.

Conclusion

1. Do you have any other questions or concerns that did not get addressed in this questionnaire?

- Do members of the Working Group see a vision of both agriculture and fish co-existing in the Basin? If not, then the effort should not be initiated.

Meeting Summary

Interview Group #1 - Conservation/Environmental

Friday, July 13th – 3:00 to 5:00 p.m.

(Alice Kilham, Bill Gaines, Rich McIntyre, Mark Stern, Keith Wilkinson, Anita Ward)

Attendants

- Alice Kilham, Klamath River Compact Commission
- Rich McIntyre, Recreational Fisheries
- Mark Stern, The Nature Conservancy
- Anita Ward, Conservation Community

Facilitator: Dave Ceppos, Jones & Stokes

Recorder: Travis Hemmen, Jones & Stokes

General Introduction

The interviews are the first, critical step in the situation assessment process. The goal of this process is to assess whether the members of the Working Group share the same goals, objectives, and expectations for the proposed restoration plan. This process will also help identify whether the Working Group has the appropriate organizational and decision-making structure to complete and implement the plan as they envision it. Based on the interview results, Jones & Stokes will prepare a draft and final Situation Assessment Memorandum summarizing the response to the questionnaire and recommendations for future steps. If it appears that the Working Group is ready to proceed with the planning process, Jones & Stokes will then prepare a draft and final Work Plan that details the next steps, responsible parties, schedule and cost associated with preparing the plan.

- The facilitator, Dave Ceppos, explained that the purpose of the comprehensive questionnaire was to encourage thought and discussion on all issues regarding the Klamath Basin. Mr. Ceppos also explained that the questions were clustered around specific issue categories in order to address each topic in a condensed manner.

Ground Rules

The Facilitator set a few groundrules for the interviews.

- If a participant could not commit to the two hours, then accommodations were made for early departures.
- Participants were asked to be concise and provide focused answers.
- Participants were asked to allow time for everyone to have an opportunity to speak.
- Participants were asked to be “courteous”.
- Facilitator assured participants that comments were confidential (i.e. individual answers would not be attributed to specific individuals).

Interview Summary

The following interview summary includes the specific questions that were raised and the corresponding relevant comments that were made by interviewees. An “*” denotes a specific comment that was agreed upon by all the participants. All other recorded comments were raised by individuals and discussed, but do not necessarily represent a unified opinion of all those interviewed.

Goals/Objectives/Vision

1. Do you think of the proposed document as a restoration plan or something different?
2. If so, how do you define “restoration”?
3. If not, what would you title the plan?

- The document should be a “strategy” and it should seek to resolve issues. Restoration will be a large part of it but the title “restoration” is sometimes too confining.
- The plan will be a “restoration – plus” plan. The “plus” includes socio-economic impacts. Outreach and education must be a part of the plan.
- The proposed title should be ‘A Comprehensive Strategy for Restoration and Stabilization of the Upper Klamath Basin’
- The Working Group only has time to do a small piece of a larger (geographic) restoration plan. This effort needs to coordinate with other larger geographic efforts. Water quality and quantity need to also be considered

4. What do you want the plan and planning process to address (e.g., habitat restoration land use issues, natural resource use issues, social/economic issues, others)
5. What result does your organization and constituency want/expect from this planning process?
6. What is your vision for this planning process and the final plan?

- Habitat restoration, land use issues, and economics issues should be included in the plan.
- The Bureau of Reclamation must consult with the Working Group or a similar advisory body prior to any critical decisions in the Klamath Basin. The plan should extend across the entire upper basin, it should be multi-year in scope rather than crisis driven, and it should include protection for all species, rather than focus on critical species of concern
- The plan should balance restoration and the economy.
- The plan should educate and inform readers about how habitat and ecosystem restoration can provide economic benefits resulting from that restoration.
- Economic analysis should be used to explain the benefits of the restoration.
- The plan should embody the truth of the changing perspective of how water is utilized.

Organizational Issues

1. What types of decisions has the Working Group made in the past?
2. What types of decision-making processes have been used?
3. Have the decision-making processes been timely, equitable, and cost-efficient? If so, how? If not, why not?

- Consensus has worked and there have been some good restoration projects approved but the group has been complacent lately.
- The agricultural community has been “coddled” somewhat and that has been detrimental to the Working Group.
- There has been a lack of leadership in the Working Group. The current co-chairs have not been effective as leaders of the Working Group. Currently, the group lacks the political leadership they had under Senator Hatfield.
- The organizational problems of the group are actually a “leadership” issue of the group.
- The consensus process has allowed members to remain neutral which has kept the group together but has limited decisions needing to be made.
- Absent Senator Hatfield’s direction, the Working Group has been co-opted by the ORCA group to direct its actions. The Working Group should have established itself enough to create its own mandates.

4. What types of decisions do you envision the Working Group making in the future?
5. Will the past decision-making processes work for future efforts? If so, why? If not, why not? If not, how do you propose to change the Working Group's decision-making processes?

- "Consensus is dead." Decisions regarding the plan must be decided through a super majority.
- The past decision making process (consensus) may work if there is a common vision of the Basin and the group is willing to avoid crafting every minor detail.
- The super majority would be a problem for some interest groups if they felt that voting blocks were being created. There is a possibility that some groups would drop out if they feel the process is unfair.
- Attendance is important so decisions are made with the involvement of every group.

6. How will decisions be made regarding the content of the plan?

- Consensus
- Super majority
- Consensus – with a strong collaborative outreach effort

7. How would you describe the past roles and activities of the Oregon and California state governments, and the Federal government with the Working Group?
8. What expectations do you have of the Oregon and California state governments, and the Federal government in the proposed planning process?

- Oregon has had the most involvement however it has been difficult to coordinate with the state government. The coordination effort should be extended to include California.
- The resources agencies and representatives need to be involved to help support the plan.
- The California State government presence has been non-existent.
- The Working Group needs to have a stronger presence in Washington D.C. and Sacramento, and it needs more involvement by legislative and gubernatorial representatives.

9. There are numerous ongoing planning-related processes, committees, and organizations in the Upper Basin. How will the Working Group's plan relate to these other processes?
10. Will the Working Group's plan compete with these other processes?
11. How will the Working Group's plan be accepted by these other processes and the general public?

- "Beats me." The Working Group's strength is its diverse representation and the federal funding and mandate it originally received.
- Uncertain how the Working Group's plan will relate to or be accepted by the other processes.
- There should be coordination with the other groups, but not sure how that will work. We need to keep our "ear to the ground" better to know what is being said in the basin.
- The current Working Group may be asked to expand depending on authorization through the Bureau of Reclamation.
- The Working Group needs to interrelate with the ADR process, the Lower Basin, Klamath River Compact Commission, and Klamath Fisheries Task Force. This coordination should include making presentations for other groups and inviting individuals to attend the Working Group meetings.
- The group may need to be willing to "give up" some issues, be flexible on things or it risks losing its authorization.

12. How will the Working Group's plan be implemented?

- The plan needs to be embraced and embodied by Federal legislation.
- The plan should be implemented through agencies and local government. The plan should also have clearly defined roles and responsibilities.
- The state governments must also play a role during implementation of the plan.

**The plan will be implemented through Federal legislation.*

Geographical Issues

1. What should be the geographic boundaries for the plan? Should the Lower Basin be included? How do you define the difference between the Lower and Upper Basin?

- The Lower Basin should be included in the plan and should be “phased in” after dealing with the issues of the Upper Basin.
- The Working Group needs to be responsible for the Upper Basin, however, understand that the work is only a piece of the entire Basin.
- The Working Group should focus on the Upper Basin, but they should consider the Lower Basin while developing the plan.
- The Working Group should focus on the Upper Basin (Iron Gate Dam – north).
- There should be an Upper Basin and Lower Basin Working Group with a Coordinating Group between the two.
- The Lower Basin Group should be “guttled” and have Federal legislation form the groups (Coordinating and Lower Working Groups).

2. What habitats should be included in the planning area?
3. What unique conditions should be considered in the plan?
4. What land use conditions should be considered in the plan?
5. What resource management issues should be considered in the plan?

- The plan should include all habitats, ecological conditions, and land use conditions.
- The plan should also include urban areas because they are the some of the largest users of water in the area
- The Working Group needs to rely heavily on the facilitator for guidance during the planning process.

6. What is your expectation of the types/locations of habitat projects to be included in the plan?

- There needs to be wetland restoration.

Technical Issues

1. What is your understanding of the amount and quality of available technical data on issues such as species status, water quality, watershed management, agricultural and grazing practices, water use, and similar resource management issues?
2. What are the appropriate data sources to be used in support of the planning process?
3. How would you like to see technical data used in the plan?
4. Are there data gaps that will inhibit completion of the plan? If so, please explain these gaps.
5. Are there differences of opinion regarding data that will inhibit the resolution of technical issues? If so, how would you suggest these differences be resolved?

- There is technical data being collected all the time. The Working Group must figure out the data that is available for the Basin.
- The Working Group has to determine where the differences are regarding the data. Those differences will have to be overcome.
- There is some water quality data being done by the Tribes (regarding phosphorus in the lake) and the Working Group should look at the results of that data.
- The data needs to have independent peer review to inject credibility into using that data.
- What constitutes a peer?
- There needs to be a “full Basin water budget” that describes the water allocation and availability of the entire basin.

- There are always differences in data. The best the Working Group can do is to agree on a framework and get the best people to interpret the data. Then we need to move ahead and see if disagreements actually occur. Don't get stuck worrying ahead of time.
- Hope that data will not be necessary for everything or the group and process will get bogged down.

6. How will plan implementation be funded?

- The plan will be funded through the Federal government with participation of the state government.
- Federal funds tied to state and local governments.
- Federal funds along with some private funds as well.
- A large federal package will help fund the plan and also some private foundations will assist in the funding. (The Klamath Basin Ecosystem Foundation)

7. Do you anticipate that plan implementation will require monitoring?

8. Who should conduct the monitoring?

9. How will monitoring will be funded?

**Monitoring must be included on part of the plan.*

- Federal government will help fund the monitoring.
- Federal agencies should conduct the monitoring along with advisory groups.
- Federal and state governments will help fund the monitoring.

10. Do you believe that water is over-allocated in the Upper Basin?

11. Has a study ever been completed for the Upper Basin regarding the amount of water the basin can produce (mass balance study)?

**Water is over-allocated in the Basin.*

- The Bureau of Reclamation has done a model regarding the amount of water in the basin.
- Susan Burke of CH2M Hill in Sacramento has also done a detailed study, as well as the American Land Conservancy.
- Yes, however, there is not universal acceptance of the study. Also the "Hardy flows" study is still being conducted on the Lower Basin flows.
- Oregon Department of Water Resources has attempted to do a study, but they do not have access to some of the private properties that they need to complete the study.

12. What amount and detail of mapping is necessary for the plan?

13. Who will conduct/complete mapping efforts?

- The Bureau of Reclamation and OIT have done a lot of GIS mapping.
- The Oregon Department of Water Resources has done some mapping too.
- The plan should not be "data or map rich".
- The degree of mapping required would be available through the resources agencies.
- The U.S. Fish and Wildlife Service has maps as well.
- Some of the mapping efforts should be contracted to private entities.
- There should be lots of maps and visual assistance for reference. Maps have not been used well in the past but they should be used this time as simple but effective tools.

Structure / Content of the Plan

1. Who will write the plan?

2. Who do you feel comfortable with writing the plan?

- The Federal government or a consultant should write the plan. The agencies could potentially write the plan as long as the Working Group reviews the work but more likely, they should fund the process instead.
- At least one to two individuals from the different interest groups (in the Working Group) should collaboratively write the plan.
- Consultants should write the plan in coordination with the Working Group.

3. Who will review and approve the evolving plan?
4. If you are not directly involved in the writing, what level of review do you/does your organization need?
5. How many draft versions of the plan do you envision before the plan is finalized?
6. How much time do reviewers need to review draft plan sections?
7. Should the public be involved as reviewers of the plan? If so, at what stage(s) of completion?

- The Working Group will review the plan using a majority and there should be one draft.
- The public should comment on one draft submitted by the Working Group near the end of the writing process.
- There needs to be checkpoints along the way and it would take two to three drafts. It will take two to three weeks to review each draft.
- A Steering Group (and anyone interested) should be created by the Working Group and they will review the drafts.
- The public needs to be informed of the planning effort, however, they should be kept from assisting to develop the plan.
- There should be specific times when the public (parts thereof) is invited to review the document..

8. What technical specialists, if any, will be needed to write the plan?
9. Do you envision support from educational organizations, non-governmental and governmental organizations, consultants, etc. for the planning process?
10. What resources (i.e., staff, facilities, funds) does your organization have to contribute to the planning process?

- Technical specialists should be used and they could come consultants or other sources.
- Technical specialists need to be involved but we are unsure where they would come from.
- Water quality, fisheries, and policy experts may be utilized during the planning process.
- There could be some fund raising that our organizations could provide for the effort.

**Technical specialists will be used during the planning process.*

11. How long will it take to write the plan?
12. How much will it cost to write the plan?

- One year and not sure about the cost
- Not sure about time or cost
- Ideally the plan would be complete in 3 to 6 months and it may cost between fifty to a hundred thousand dollars.
- Not sure on the time but perhaps would cost up to \$80,000.

13. What should be the look and feel of the plan? Should the document be a “show piece” or a basic document?

- The plan should be very “presentable” with diagrams, and the plan should be understandable and readable.
- The plan should be somewhat of a “showpiece” and should be easy to understand.
- There should be maps and diagrams included in the plan.

- It shouldn't be too "slick". It likely isn't going to be an "end all" piece so it needs to be flexible.

14. Should the plan be made available on the Internet?
15. Should the plan be made available in CD-Rom format? If so, how many copies should be made?
16. Should the plan be made available as a "hard copy" book? If so, how many copies should be made?

**Yes the plan should be available in all formats.*

17. How will the Working Group's plan differ from past efforts?

- The other plans have not been as broad as this effort should be. This effort will need to be inclusive.
- There should be a historical discussion about the projects that have been implemented prior to the plan.

18. Do you expect that the plan will be amended? If so, how often and by what mechanisms should this occur? Is this plan a "living" document?

- The plan should be a living document, however, unsure how it will be amended.
- Initially the plan should be a "stand-alone" document and then after 3 to 5 years it should be reviewed for possible amendments.
- Mixed feelings on these issues. Not sure.

Outreach Issues

1. Do you want public education provided to the community about this planning process?
2. Should other groups outside of the Working Group be involved in the planning process?
3. Should the general public play a role in the planning process? If so, how would this be accomplished?

- The public needs to buy in to the planning effort. Many of the members of the Working Group belong to other groups and they can help involve other individuals.
- The public should not be excluded, however, the public should not be solicited to help with the planning process. This is the standard dilemma between being expeditious and being inclusive. It is difficult to be both.
- The Working Group should consider putting out a newsletter to inform the public.

4. What techniques should be used to expand public outreach and involvement?
5. Do you want media involvement? If so, how?
6. Do you want state and/or federal elected representatives involved in the planning process? If yes, what are your expectations for this involvement?

- The Working Group should coordinate with the press.
- The Working Group should involve television.
- There should be state and federal elected representatives should be involved (more than aware of the plan) and they should have some ownership of the planning process.
- The plan should be publicized once the Working Group has something to show the public.
- There should be some type of public outreach or information strategy.

Conclusion

1. Do you have any other questions or concerns that did not get addressed in this questionnaire?

- The Working Group should be an Advisory Committee to the Bureau of Reclamation.

Meeting Summary

Interview Group #4 - State and Local Agencies

Wednesday, July 25th – 9:00 to 11:00 a.m.

(Martha Anne Dow, Glenn Lorenz, Steve West, Jennie Messmer, Bob Main)

Attendants

- Glenn Lorenz, Klamath County Soil and Water Conservation District
- Jennie Messmer, City of Klamath Falls

Facilitator: Austin McInerny, Jones & Stokes

Recorder: Travis Hemmen, Jones & Stokes

General Introduction

The interviews are the first, critical step in the situation assessment process. The goal of this process is to assess whether the members of the Working Group share the same goals, objectives, and expectations for the proposed restoration plan. This process will also help identify whether the Working Group has the appropriate organizational and decision-making structure to complete and implement the plan as they envision it. Based on the interview results, Jones & Stokes will prepare a draft and final Situation Assessment Memorandum summarizing the response to the questionnaire and recommendations for future steps. If it appears that the Working Group is ready to proceed with the planning process, Jones & Stokes will then prepare a draft and final Work Plan that details the next steps, responsible parties, schedule and cost associated with preparing the plan.

- The facilitator, Austin McInerny, explained that the purpose of the comprehensive questionnaire was to encourage thought and discussion on all issues regarding the Klamath Basin. Mr. McInerny also explained that the questions were clustered around specific issue categories in order to address each topic in a condensed manner.

Ground Rules

The Facilitator set a few groundrules for the interviews.

- If a participant could not commit to the two hours, then accommodations were made for early departures.
- Participants were asked to be concise and provide focused answers.
- Participants were asked to allow time for everyone to have an opportunity to speak.
- Participants were asked to be “courteous”.
- Facilitator assured participants that comments were confidential (i.e. individual answers would not be attributed to specific individuals).

Interview Summary

The following interview summary includes the specific questions that were raised and the corresponding relevant comments that were made by interviewees. An “*” denotes a specific comment that was agreed upon by all the participants. All other recorded comments were raised by individuals and discussed, but do not necessarily represent a unified opinion of all those interviewed.

Goals/Objectives/Vision

1. Do you think of the proposed document as a restoration plan or something different?
2. If so, how do you define “restoration”?
3. If not, what would you title the plan?

- The definition of restoration is probably different to each member in the Working Group.
- One of the three goals of the Working Group is drought proofing along with economic stability and restoration.
- The plan should give the Working Group a mission or “marching orders” to help focus their efforts.
- The plan should be a strategic planning effort. If the term “restoration” is acceptable by everyone else, then it is acceptable by this group.

4. What do you want the plan and planning process to address (e.g., habitat restoration land use issues, natural resource use issues, social/economic issues, others)
5. What result does your organization and constituency want/expect from this planning process?
6. What is your vision for this planning process and the final plan?

- There is not a direct impact to the city of Klamath Falls but all aspects of the plan will impact us indirectly.
- The situation is not as serious as it appears to be. It will take time and a new generation of individuals to clean up over time.
- The plan will be a roadmap to explain how the Working Group will achieve its goals.

Organizational Issues

1. What types of decisions has the Working Group made in the past?
2. What types of decision-making processes have been used?
3. Have the decision-making processes been timely, equitable, and cost-efficient? If so, how? If not, why not?

- Not sure of the types of decisions made, however, the decisions have been made through a consensus process.
- During the meetings, there is a lot of discussion that occurs and most of the issues are addressed.

4. What types of decisions do you envision the Working Group making in the future?
5. Will the past decision-making processes work for future efforts? If so, why? If not, why not? If not, how do you propose to change the Working Group’s decision-making processes?

- Drought proofing data is important to determine within the plan.
- Ideally the Working Group will make decisions based on the goals of the plan.
- If the Working Group makes decisions to fund projects, then they should look at the plan to make those decisions.

6. How will decisions be made regarding the content of the plan?

- The restoration plan will incorporate the goals of the Working Group.
- First the Working Group needs to reunite and focus on common goals.
- Development of this plan may lead to reconstructing the Working Group.

7. How would you describe the past roles and activities of the Oregon and California state governments, and the Federal government with the Working Group?
8. What expectations do you have of the Oregon and California state governments, and the Federal government in the proposed planning process?

- There has been no involvement by the California government.
- The state agencies should become advocates for the Working Group and the planning effort and take steps to ensure the plan is supported.
- The state and federal governments need to dedicate time through the planning process.

9. There are numerous ongoing planning-related processes, committees, and organizations in the Upper Basin. How will the Working Group's plan relate to these other processes?
10. Will the Working Group's plan compete with these other processes?
11. How will the Working Group's plan be accepted by these other processes and the general public?

- The Working Group needs to coordinate with these groups and be aware of the other efforts in the Basin.
- The plan should not compete with the other efforts and the plan should not duplicate work currently being done.
- The first step would be to identify all the groups that are involved in Basin restoration.
- The public needs to be involved in the planning process.

12. How will the Working Group's plan be implemented?

- The public must support the plan for it to be implemented.

Geographical Issues

1. What should be the geographic boundaries for the plan? Should the Lower Basin be included? How do you define the difference between the Lower and Upper Basin?

- The Basin is all one area and the plan must incorporate everything together and it is not good to separate the two.

2. What habitats should be included in the planning area?
3. What unique conditions should be considered in the plan?
4. What land use conditions should be considered in the plan?
5. What resource management issues should be considered in the plan?

- It is difficult to see the harm that is currently been done in the Basin. A lot of the problems will fix itself.
- Timber management should be included in the plan.

6. What is your expectation of the types/locations of habitat projects to be included in the plan?

- Not sure

Technical Issues

1. What is your understanding of the amount and quality of available technical data on issues such as species status, water quality, watershed management, agricultural and grazing practices, water use, and similar resource management issues?
2. What are the appropriate data sources to be used in support of the planning process?
3. How would you like to see technical data used in the plan?
4. Are there data gaps that will inhibit completion of the plan? If so, please explain these gaps.
5. Are there differences of opinion regarding data that will inhibit the resolution of technical issues? If so, how would you suggest these differences be resolved?

- The Extension Service has a lot of data available, however, the information is different from the data in the environmental community.
- The data will depend on the focus on the vision of the Basin in the future.
- If data is agreed upon, then it should be used in developing the plan.
- How much does livestock actually degrade the water quality?

6. How will plan implementation be funded?

- Not sure

7. Do you anticipate that plan implementation will require monitoring?
8. Who should conduct the monitoring?
9. How will monitoring will be funded?

- Yes, however, it should be to the “specs” of the Federal and State governments. It is too expensive to conform to the monitoring criteria of the government.
- Not sure who will fund the monitoring. Some training could be provided to local farmers on how to collect water samples.

10. Do you believe that water is over-allocated in the Upper Basin?
11. Has a study ever been completed for the Upper Basin regarding the amount of water the basin can produce (mass balance study)?

- Yes, Klamath Basin is able to produce the amount of water required, but there is currently no storage capacity to capture flows during wet years.
- Not sure

12. What amount and detail of mapping is necessary for the plan?
13. Who will conduct/complete mapping efforts?

- The Natural Resource Conservation Service (NRCS) has a lot of maps available.

Structure / Content of the Plan

1. Who will write the plan?
2. Who do you feel comfortable with writing the plan?

- A consultant will write the plan.
- A mediator would be helpful to focus the discussions of the Working Group.

3. Who will review and approve the evolving plan?
4. If you are not directly involved in the writing, what level of review do you/does your organization need?
5. How many draft versions of the plan do you envision before the plan is finalized?
6. How much time do reviewers need to review draft plan sections?
7. Should the public be involved as reviewers of the plan? If so, at what stage(s) of completion?

- The Working Group, all applicable agencies, and the public will review the plan.
- The public needs to be involved 100%.

8. What technical specialists, if any, will be needed to write the plan?
9. Do you envision support from educational organizations, non-governmental and governmental organizations, consultants, etc. for the planning process?
10. What resources (i.e., staff, facilities, funds) does your organization have to contribute to the planning process?

- Biologists will be needed. The extension service also has some experts that can be used.
- OIT should be involved as long as the information they provide is understandable.
- The District can help with maps and potentially monitoring assistance.

11. How long will it take to write the plan?
12. How much will it cost to write the plan?

- Not sure, however, the plan should be written quickly (next few years).
- Not sure how much it will cost.

13. What should be the look and feel of the plan? Should the document be a “show piece” or a basic document?

- The document should be bound so the pages will not come apart.

14. Should the plan be made available on the Internet?
15. Should the plan be made available in CD-Rom format? If so, how many copies should be made?
16. Should the plan be made available as a “hard copy” book? If so, how many copies should be made?

- Yes the plan should be available in all formats.

17. How will the Working Group’s plan differ from past efforts?

- Not sure

18. Do you expect that the plan will be amended? If so, how often and by what mechanisms should this occur? Is this plan a “living” document?

- Not sure

Outreach Issues

1. Do you want public education provided to the community about this planning process?
2. Should other groups outside of the Working Group be involved in the planning process?
3. Should the general public play a role in the planning process? If so, how would this be accomplished?

- The first step should be to “get a feeling on the direction” the plan should go.
- The public needs to be aware of the planning effort early so they can buy into the process.

4. What techniques should be used to expand public outreach and involvement?
5. Do you want media involvement? If so, how?
6. Do you want state and/or federal elected representatives involved in the planning process? If yes, what are your expectations for this involvement?

- All the members in the Working Group should be involved in outreach to the general public.
- Involve the media and the newspaper as soon as possible but not sure how the level of involvement.
- The state and federal representatives should support the vision of the local community.

Conclusion

1. Do you have any other questions or concerns that did not get addressed in this questionnaire?

- The agricultural and water district stakeholders need to get involved in the Working Group again to help create this plan.

Meeting Summary

Interview Group #2 - Water User Interests

Thursday, July 26th – 12:00 to 2:00 p.m.

Attendants

- John Crawford, Klamath Basin Water Users
- Steve Kandra, Klamath Irrigation District

Facilitator: Austin McInerny, Jones & Stokes

Recorder: Travis Hemmen, Jones & Stokes

General Introduction

The interviews are the first, critical step in the situation assessment process. The goal of this process is to assess whether the members of the Working Group share the same goals, objectives, and expectations for the proposed restoration plan. This process will also help identify whether the Working Group has the appropriate organizational and decision-making structure to complete and implement the plan as they envision it. Based on the interview results, Jones & Stokes will prepare a draft and final Situation Assessment Memorandum summarizing the response to the questionnaire and recommendations for future steps. If it appears that the Working Group is ready to proceed with the planning process, Jones & Stokes will then prepare a draft and final Work Plan that details the next steps, responsible parties, schedule and cost associated with preparing the plan.

- The facilitator, Austin McInerny, explained that the purpose of the comprehensive questionnaire was to encourage thought and discussion on all issues regarding the Klamath Basin. Mr. McInerny also explained that the questions were clustered around specific issue categories in order to address each topic in a condensed manner.

Ground Rules

The Facilitator set a few groundrules for the interviews.

- If a participant could not commit to the two hours, then accommodations were made for early departures.
- Participants were asked to be concise and provide focused answers.
- Participants were asked to allow time for everyone to have an opportunity to speak.
- Participants were asked to be “courteous”.
- Facilitator assured participants that comments were confidential (i.e. individual answers would not be attributed to specific individuals).

Interview Summary

The following interview summary includes the specific questions that were raised and the corresponding relevant comments that were made by interviewees. An “*” denotes a specific comment that was agreed upon by all the participants. All other recorded comments were raised by individuals and discussed, but do not necessarily represent a unified opinion of all those interviewed.

Goals/Objectives/Vision

1. Do you think of the proposed document as a restoration plan or something different?
2. If so, how do you define “restoration”?
3. If not, what would you title the plan?

- Water users have been involved in two other restoration programs (1993 General Restoration Plan and another one this year) so there is concern about what the scope of this restoration plan is.
- No problem with calling this effort a “restoration” plan.
- Restoration is only one-third of the component. The plan has to address economic stability and drought-proofing also.
- Due to past events, it may be difficult to solicit more restoration if the plan does not include economic stability.
- None of the '93 plan recommendations were implemented and we do not want to repeat that process.

4. What do you want the plan and planning process to address (e.g., habitat restoration land use issues, natural resource use issues, social/economic issues, others)
5. What result does your organization and constituency want/expect from this planning process?
6. What is your vision for this planning process and the final plan?

- The plan will have to address some of the chaos that currently exists.
- The plan should identify benefits prior to implementing the plan.
- The plan should include a “safe harbor” component for assurances.
- There is concern that if the plan does not address the current problems, then there will not be an agricultural community to support the plan.
- The plan must address all three goals of restoration, drought-proofing, and economic stability.

Organizational Issues

1. What types of decisions has the Working Group made in the past?
2. What types of decision-making processes have been used?
3. Have the decision-making processes been timely, equitable, and cost-efficient? If so, how? If not, why not?

- The group has attempted to run as a “consensus” group, however, it has not been very efficient.
- Lack of participation has been a problem. Tribal participation has increased which is encouraging.
- It will very difficult to have consensus process with individuals that were responsible for writing the biological opinions.
- There is not much confidence with the current members of the Working Group.
- There are approximately 8,000 acres of farmland that have been taken out of production because of the Williamson River restoration and the lake level was suppose to increase by 2 feet. Unfortunately, the lake has dropped by 3 feet.

4. What types of decisions do you envision the Working Group making in the future?
5. Will the past decision-making processes work for future efforts? If so, why? If not, why not? If not, how do you propose to change the Working Group’s decision-making processes?

- The Working Group should be a group of citizens with some authority and the agencies should take a less active role in decision making of the group.
- The agency role needs to be modified.
- Locally made decisions should be implemented.

6. How will decisions be made regarding the content of the plan?

**The content of the plan must not be restricted to restoration (drought-proofing and economics stability must be included).*

7. How would you describe the past roles and activities of the Oregon and California state governments, and the Federal government with the Working Group?

8. What expectations do you have of the Oregon and California state governments, and the Federal government in the proposed planning process?

- Oregon state government involvement has been limited and has been disappointing.
- Contributions of the government agencies have been “luke warm”.
- Do not advocate a stronger federal agency presence.

9. There are numerous ongoing planning-related processes, committees, and organizations in the Upper Basin. How will the Working Group’s plan relate to these other processes?

10. Will the Working Group’s plan compete with these other processes?

11. How will the Working Group’s plan be accepted by these other processes and the general public?

- The State of Oregon has set up watershed groups that are identifying issues and some projects and Working group should facilitate those types of processes.
- The Working Group needs to coordinate with those groups in order to see the current projects in the Basin.
- Currently there is no planning effort in the Basin focused on alleviating the issues of water supply.
- The plan should parallel the adjudication process to avoid complications once the adjudication is complete.
- The Working Group has not been very successful in coordinating with the other groups.

**The plan cannot be in competition with the other process but must be comprehensive enough to avoid conflict with the other processes.*

12. How will the Working Group’s plan be implemented?

- The taxpayers of the government must be interested in resource management and be willing to finance the plan.
- The plan will be implemented with “serious” dollars such as in the Colorado River and California Central Valley.

Geographical Issues

1. What should be the geographic boundaries for the plan? Should the Lower Basin be included? How do you define the difference between the Lower and Upper Basin?

- The Klamath River Task Force has tried to assert some authority in the Upper Basin, and the Working Group should coordinate with efforts in the Lower Basin.

**The plan should be focused on the Upper Basin and coordinate with the other activities within the entire Basin.*

2. What habitats should be included in the planning area?

3. What unique conditions should be considered in the plan?

4. What land use conditions should be considered in the plan?

5. What resource management issues should be considered in the plan?

- The plan should start with prioritizing issues. For example, start with suckers without sacrificing all the other resources.
- The plan should look at the whole ecosystem of the Upper Basin.
- There is a reluctance to limit certain development, however, development should be complimentary to restoration.

6. What is your expectation of the types/locations of habitat projects to be included in the plan?

- The plan should initially deal with the Upper Basin habitat issues.
- The Working Group has been good at ascertaining where to get optimal benefit for restoration until this year.
- If the Working Group was going to address habitat today, it would have to deal with the degradation of the habitat resulting from the lack of water being distributed.

Technical Issues

1. What is your understanding of the amount and quality of available technical data on issues such as species status, water quality, watershed management, agricultural and grazing practices, water use, and similar resource management issues?
2. What are the appropriate data sources to be used in support of the planning process?
3. How would you like to see technical data used in the plan?
4. Are there data gaps that will inhibit completion of the plan? If so, please explain these gaps.
5. Are there differences of opinion regarding data that will inhibit the resolution of technical issues? If so, how would you suggest these differences be resolved?

- There are informational gaps, however, the real concern is how the existing data was interpreted.
- There is an issue of flow on the Klamath River however there is no flow data.
- On the Trinity River there is a 12-year flow study.
- Focus on the data that is available, not the data that does not exist.
- The science needs to explain what has happened in history.
- The Water Users want to be involved in every aspect of the data gathering, interpretation, and monitoring. Diverse group involvement will add credibility to the process.
- There needs to be a scientific explanation to why all the sucker fish kills occurred at high lake levels. Why don't they die when lake level is low?

**All stakeholders need to be involved and need to agree on the data used while designing the plan.*

6. How will plan implementation be funded?

- The public should help fund this effort and the Working Group is responsible for ensuring those public dollars are spent wisely.

7. Do you anticipate that plan implementation will require monitoring?
8. Who should conduct the monitoring?
9. How will monitoring will be funded?

**Monitoring is an important component to the plan and should be unbiased account of the benefits of the plan.*

- "You can't have the fox watching the hen house." Some independent entity needs assist in the monitoring.

10. Do you believe that water is over-allocated in the Upper Basin?

11. Has a study ever been completed for the Upper Basin regarding the amount of water the basin can produce (mass balance study)?

**Water is not over allocated in the Basin.*

- In 1992 & 1993 there was a similar drought and the Klamath Basin survived and there was even an increase in the salmon population.
- There is no cutback above the Basin or on all the tributaries. The Klamath Project is being called upon to meet the fish demands of the whole basin.
- Oregon Water Resources is currently doing a water quantity study through the ADR process.

12. What amount and detail of mapping is necessary for the plan?

13. Who will conduct/complete mapping efforts?

- Oregon Water Resources should do the work.
- There are gaps in data but OWR is building a fairly comprehensive database of mapping information.

Structure / Content of the Plan

1. Who will write the plan?

2. Who do you feel comfortable with writing the plan?

**Contract with an entity that specializes in planning work.*

- It needs to be “the best group that is available in the world today.” This is a very important and large undertaking.

3. Who will review and approve the evolving plan?

4. If you are not directly involved in the writing, what level of review do you/does your organization need?

5. How many draft versions of the plan do you envision before the plan is finalized?

6. How much time do reviewers need to review draft plan sections?

7. Should the public be involved as reviewers of the plan? If so, at what stage(s) of completion?

- The Working Group needs to be involved in creating the plan but as reviewers.
- Every stakeholder will want to take the drafts to individual experts to edit and review.
- The Working Group does represent the public, but the public should participate at some level.

8. What technical specialists, if any, will be needed to write the plan?

9. Do you envision support from educational organizations, non-governmental and governmental organizations, consultants, etc. for the planning process?

10. What resources (i.e., staff, facilities, funds) does your organization have to contribute to the planning process?

- Technical specialists will be required and will depend on the different sections of the restoration plan.
- Support will come from all sources.

11. How long will it take to write the plan?

12. How much will it cost to write the plan?

- Not sure
- This plan has to be comprehensive and it will be expensive. The cost of implementation of the plan would be approximately a billion dollars.
- Part of the plan must be an EIS, therefore, an EIS should be a part of the plan.

13. What should be the look and feel of the plan? Should the document be a “show piece” or a basic document?

- It’s “War and Peace” (commenter was referring to the length and extent of the restoration plan).

**This plan has to be “useable” by all people that sit on the Working Group.*

14. Should the plan be made available on the Internet?

15. Should the plan be made available in CD-Rom format? If so, how many copies should be made?

16. Should the plan be made available as a “hard copy” book? If so, how many copies should be made?

- All of the above.

17. How will the Working Group’s plan differ from past efforts?

- This plan should become a restoration example for all other future restoration plans. All of the components that provide difficulty in planning exist in the Basin.
- There should be a commitment to implement the plan.

18. Do you expect that the plan will be amended? If so, how often and by what mechanisms should this occur? Is this plan a “living” document?

- Yes.

Outreach Issues

1. Do you want public education provided to the community about this planning process?

2. Should other groups outside of the Working Group be involved in the planning process?

3. Should the general public play a role in the planning process? If so, how would this be accomplished?

- Any person who has anything to contribute should come forward to support this effort.
- As long as public involvement does not confuse or slow down the process.
- The Working Group should welcome any ideas for this planning process.

4. What techniques should be used to expand public outreach and involvement?

5. Do you want media involvement? If so, how?

6. Do you want state and/or federal elected representatives involved in the planning process? If yes, what are your expectations for this involvement?

- Don’t under-estimate the magnitude of the impacts to the public due to the current events.
- It is more important to get water to the people or there will be no public to help implement the restoration plan.
- The state and federal representatives should be technical advisors.

**The public must be informed of the planning process.*

Conclusion

1. Do you have any other questions or concerns that did not get addressed in this questionnaire?

- The Working Group should really consider if all interests are adequately represented.
- After all interests are involved, everyone has to represent their own needs. Those needs must be incorporated into the final plan and should not infringe on the needs of the other parties.