

An aerial photograph of the Willamette River winding through a landscape of agricultural fields. The river is dark blue and flows from the upper left towards the lower right, curving around a central green island. The surrounding fields are mostly golden-brown, indicating they have been harvested. There are patches of green trees and vegetation along the riverbanks and on the island. The sky is clear and blue.

Meyer Memorial Trust Willamette River Strategic Initiative

Upper Willamette
Confluence Area Meeting
March 31, 2009

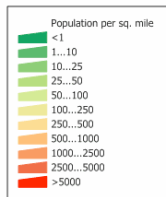
MMT Overview

- ◆ Private, independent foundation established by Fred G. Meyer, service area includes Oregon and SW Washington
- ◆ General purpose, responsive grant maker – \$100 million distributed since 2005 and just over \$500 million since 1982 to wide range of non-profits
- ◆ Three strategic initiatives – Proactive response to persistent critical issues – K-12 public education, affordable housing, Willamette River restoration, 20%-30% of total funding

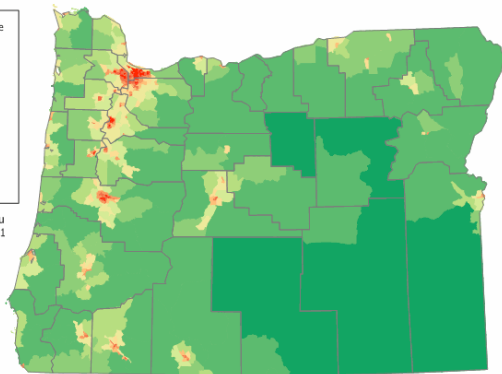


Meyer Memorial Trust

Why the Willamette River?



Source: U. S. Census Bureau
Census 2000 Summary File 1
population by census tract.



- ◆ Willamette Basin is home to 70% of Oregon's population and the source of 75% of the state's economic output
- ◆ Entirely in the state of Oregon, with its destiny largely in the hands of Oregonians
- ◆ Population expected to nearly double by 2050
- ◆ Problems are well understood; issues and opportunities are aligning; timely and ripe for philanthropic investment

Key Question for MMT

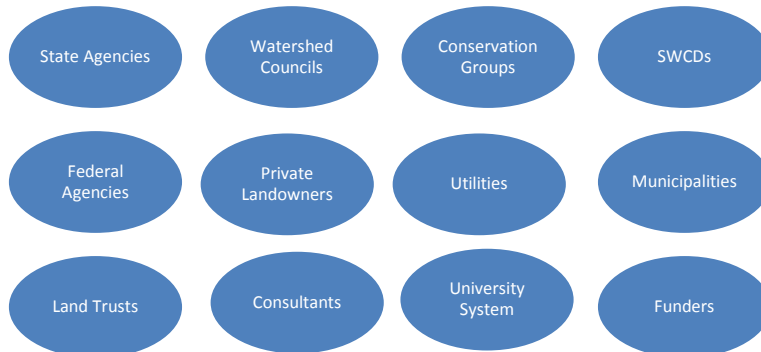
What is the most effective role for a private philanthropy to play in this setting if our goals are:

- Measurable improvements in river function & process
- Significant leveraging of its funds
- To catalyze others to action and a new level of commitment to the river
- Something that can be sustained beyond MMT's involvement
- To create a national model for philanthropic involvement in large river restoration projects



To answer these questions we:

- ◆ Conducted literature review
- ◆ Engaged stakeholders
- ◆ Convened issue-based advisory groups
- ◆ Looked for gaps, bottlenecks, leverage opportunities



Key Findings: Ecological Challenges

- ◆ Channel simplification (straightened, single channel instead of complex, braided, meandering with alcoves, islands, side channels)
- ◆ River disconnected from its floodplain
- ◆ Loss of natural habitats/historic vegetation type
- ◆ Flow modification due to dams
- ◆ Water quality—high temperatures, pollution from urban & rural run-off (pesticides, fertilizer, bacteria)

Key Findings: Institutional Challenges

- ◆ Overlapping goals, mandates and service areas
- ◆ Some stretches of the river not covered by watershed councils
- ◆ Limited access to technical expertise
- ◆ Lack of funds, funding not coordinated
- ◆ Lack of regional perspective & leadership

Key Principles



- ◆ Don't reinvent the wheel – build on other past and current efforts
- ◆ Be strategic: select a target geography, pay attention to identified ecological priorities & address critical gaps (e.g. early project development, outreach, technical assistance, monitoring)
- ◆ Make a multi-year commitment, adapt as needed

Initial Strategies: Mainstem

Vision: A series of “stepping stones” of high quality habitat characterized by cold water refuges; a dynamic, braided channel; and broad swaths of riparian forest.

Focus on projects that restore floodplain reconnection & channel complexity. Implemented through a partnership with OWEB’s Willamette Special Investment Partnership:

- ◆ Contribute funds to OWEB-approved SIP projects (up to one-third)
- ◆ Support early development stages of “SIP-worthy” projects

Initial Strategy: Tributaries

Vision: A suite of geographically represented sub-watersheds where restoration has occurred “at scale” across the landscape, engaging multiple landowners in a target geographic area and where diligent monitoring, evaluation and adaptation yield measurable improvements in watershed health within a decade.

Support integrated watershed restoration projects at a sub-basin scale. Implemented through a partnership with Bonneville Environmental Foundation

- ◆ Encourage “whole watershed” approach
- ◆ Support monitoring and capacity building
- ◆ Provide multi-year funding

Progress to date

◆ Mainstem Strategy

- ◆ SIP projects funded at Willamette Mission State Park, Bower's Rock State Park, Buford Park/Mt. Pisgah (~\$265,000 total)
- ◆ Early Project Development (~ \$100,000 committed)
- ◆ ~ \$350-400,000 in discussion – all early project development

◆ Tributary/Model Watershed Strategy

- ◆ Program manager hired
- ◆ BEF engaged in planning process with 3 “semi-finalist” watershed groups
- ◆ \$215,000 spent; \$300 – 400,000 committed through 3/31/10

MMT Funding for Watershed Councils

- ◆ Close to \$500,000 in active grants
- ◆ Support to NOWC to provide technical assistance
- ◆ Currently supporting 9 watershed councils (7 under the Willamette Initiative
- ◆ 2 non-Willamette WC's supported under Grassroots Grants

Key criteria used when looking at grant requests:

- ◆ Is it important to the community?
- ◆ Is it well thought out conceptually and financially (mission-related/appropriate amount)?
- ◆ Is it sustainable (not ongoing dependence on MMT funding)?

What we specifically look for in proposals:

- ◆ That your request align with MMT's mission and values (see website)—Stewardship, entrepreneurship, service-driven, leading by example
- ◆ Must be a 501 © (3) or government entity (*MMT careful about backfilling lost government funding—prefer to leverage government funding*)
- ◆ Stable finances over time (does organization have infrastructure to support and manage their finances? Can you provide clear financial information? Can you project finances over next few years?) If deficits, why and how have you dealt with them?
- ◆ Evidence of strong community support (up to community's ability—buy-in of many people more important than total amt of \$ raised; in-kind support important as well)
- ◆ Strong board member involvement (time and money; willingness to step up with leadership and fundraising)
- ◆ Planning (be strategic, don't come in desperate, develop a strategic plan or business plan that allows for realistic growth over time and projects what resources you'll need and how you'll get those resources)