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Laura Singer  
*Portland State University*

Emily Rome  
*Portland State University*

Liubov Doerr  
*Portland State University*

Mari Saint Pierre  
*Portland State University*

Dick Townsend  
*Portland State University*

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**Authors**

Laura Singer, Emily Rome, Liubov Doerr, Mari Saint Pierre, Dick Townsend, Alexander Freed, Daniel McDuffee, Greg Nugent, Gretchen Olsen, Kirk Rea, Melissa Long, Ross D. Lamberth, and Shelley D. Searle

# LAKEVIEW, OREGON: THE LITTLE TOWN THAT COLLABORATION SAVED



An Assessment of Factors Leading to  
the Success of the Lakeview Biomass Project

Conducted by Students in  
“Skills for Being an Effective Collaborator”  
PSU Senior Capstone Course - July 2011

*Sponsored by Oregon Solutions*

## **Executive Summary**

*Lakeview was one of many timber-dependent, rural small towns in Oregon significantly impacted by legislation that constrained logging. During the late 1990s, four out of five Lakeview mills shut down and the city's population fled in droves. In desperation, city leaders turned to each other to explore how they might help renew their city's once robust economy.*

*Civic leaders reached out to stakeholders in the Lakeview area who held a wide range of interests, including environmentalists with whom the city's leaders had historically been in conflict. As a result of on-going dialogue and a search for mutual understanding, this newly formed group of individuals together forged a vision to create a small diameter tree mill and biomass plant.*

*In 2005, the group reached out to Oregon Solutions for guidance for how they might realize their vision. Over the next year, Oregon Solutions helped facilitate a collaborative process that resulted in over 20 stakeholders signing a Declaration of Cooperation (DOC). The DOC committed resources to establish the mill and biomass plant. The aptly named Lakeview Biomass Project continues to be looked upon as one of Oregon Solution's most successful projects.*

*Hoping to revisit Lakeview to see how things had progressed since the signing of the DOC, and to better understand what factors had led to the success of this project, Oregon Solutions sponsored students in the Summer 2011 PSU Senior Capstone course "Skills for Being an Effective Collaborator". Oregon Solutions Director Dick Townsend invited the class to travel to Lakeview to interview key leaders who had been involved in the collaborative process.*

*In Lakeview, students found that:*

- *Lakeview's population is on the rise.*
- *The small diameter tree saw mill is in full operation.*
- *A foundation has been laid for the biomass plant.*
- *With the support of key environmental groups, the town will soon seek Forest Stewardship Council (FSC) certification for its forest unit.*
- *An innovative forest monitoring program has been implemented in the high school.*
- *The city is poised to become "Oregon's most renewable energy county by 2012."*

*More importantly, the students experienced a vibrant city alongside civic leaders who expressed pride in all they had accomplished, who are now confident in their ability to solve their own problems, who feel hopeful and optimistic about their town's future, and who represent a community of individuals more deeply connected to one another as a result of coming through a collaborative process that took into account their respective needs and interests.*

*The students discovered that prior to Oregon Solution's intervention, a critical foundation with respect to leadership, attitude, process and environment had been laid down in Lakeview.*

*Capitalizing on this strong foundation, Oregon Solutions proved pivotal in securing and formalizing commitments of resources from key stakeholders necessary in moving the townspeople from vision to action. The factors that made the conditions ripe for Oregon Solutions' success are the same factors responsible for sustaining the momentum that helped the city evolve and overcome its challenges to implementation.*

*The next phase Lakeview will enter will involve reaching out and mentoring new leadership and visionaries to replace and carry on the passion, dedication, and connections forged by the current leaders. Cultivating new leadership equally passionate and dedicated to community will prove even more critical as potential growth, publicity and an influx of "outsiders" are drawn to the beautiful and thriving Lakeview area.*

*As other rural communities today struggle to transition from reliance on timber for their survival, Lakeview's experience offers many lessons. Consistently, the message from Lakeview is that building the leadership capacity, creating mutual trust and understanding, and encouraging respectful engagement from which an agreed upon solution can emerge and be sustained takes time. There is no short cut.*

*At such critical junctions, communities can benefit from outside resources such as leadership development from the Ford Family Foundation, neutral facilitation and connections to environmental resources from Sustainable Northwest, and an elevated forum such as that provided by Oregon Solutions that brings key stakeholders to the table to commit to turning a plan into action. However, these outside resources are best utilized when they support and empower the community's own resources and its inhabitants.*

## **Assessment Overview**

The assessment team was made up of a diverse group - eight undergraduate PSU students, two graduate teaching assistants and one instructor - representing all ages, interests and fields of study. However, one thing everyone had in common was an interest in learning about collaboration and how it might be used to improve the state of Oregon, the nation and even the world. To that end, everyone participating in the Capstone course hoped to enhance their “Skills for Being an Effective Collaborator.” As this is the first time this course has been offered, we hope our success in meeting its goals ensures it is offered again in the future.

Oregon Solutions in sponsoring the Capstone field trip, set forth on a goal of gaining greater comprehension around what it takes to guarantee a truly successful collaboration. Our goal in taking on the challenge put forth by Oregon Solutions was to examine the Lakeview Biomass Project collaborative effort to better understand why it was so successful when similar attempts at collaboration had failed. In effect, we were tasked with creating a narrative that broke the project down from inception to the present day.

In examining Lakeview’s collaborative process, we focused on three key questions: 1) What factors contributed to Lakeview’s success 2) What kept the momentum alive after Oregon Solutions was no longer involved? *and* 3) How can we generalize Lakeview’s success so that it can be applied to other communities?

This report attempts to answers these questions to get at what it takes to ensure a successful collaboration. In doing so, we will analyze the specifics of the Lakeview Biomass Project, including its history, individual achievements, and current challenges. We will then attempt to generalize those findings in a way that can be used to advise others who attempt in the future to use a collaborative process under similar circumstances.

This was no easy feat and in an effort to organize the information we received, we established several specific areas of inquiry. Our investigation fell into five general categories.

1. History of the Project
2. Factors that Led to the Project’s Success
3. Challenges and Lessons Learned
4. Replicating Lakeview Elsewhere
5. Sustaining Momentum

The stakeholders we interviewed in Lakeview were Jim Walls (LCRI), DeAnna Walls (LCRI), Jane O’Keeffe (LCRI), Arlene Clark (LCRI), Paul Harlan (Collins Company), Allen Hahn (DFS), Stephan Jolley (Iberdrola) and Anders Bisgard (Iberdrola). We also conducted some stakeholder interviews by phone.

## **History of the Project**

Southeastern Oregon is historically a remote region, best suited for people with individualistic spirits. Most of the work in the area has traditionally been related in one way or another to the forest and wildlife. Even now, with large metropolitan areas in the West connected by interstate highways and airports, Lakeview, Oregon still finds itself well off the beaten path, and as rugged and remote as ever.

Regardless, Lake County's remote location did not protect it from sweeping governmental policies which heavily impacted more than 78% of the county's federal land. More significantly, the Spotted Owl environmental movement of the late 80s and early 90s essentially ended generations of logging in the area's forests. Business as usual had come to an end, and many communities across the West were deeply challenged during this period of radical change. Under the financial stress, individuals and businesses alike opted to quit, close down or move on.

In contrast to other cities in the county, a group of stakeholders in Lakeview refused to ignore their community's interests or turn their back on the well being of their surrounding forest. Beginning in the 1990s and throughout the ensuing decade, Lakeview residents, the Collins Company, environmentalists and other committed individuals formed an informal collaborative called the Lakeview Stewardship Group, that together coalesced a new vision for a sustainable, healthy forest. The group succeeded in developing a renewed relationship with the forest, while also improving their connections with one another.

Sustainable Northwest and Ford Family Foundation deserve significant credit for supporting this ground-breaking collaborative process shepherded by the Lakeview Stewardship Group. In 2005, Governor Kulongoski further recognized the importance of the group's work by designating the Lakeview Biomass Project an Oregon Solutions priority, elevating it to the highest official state government level. Over the next two years, Oregon Solutions project managers helped Lakeview form a group of twenty-four respected and diverse stakeholders that signed a Declaration of Cooperation (DOC) committing resources to the project.

Since then, new key stakeholders have come on board while some original stakeholders left the process. All the while, the evolving group has made robust progress towards meeting the goals and commitments they set out to accomplish when signing the DOC. A significant outcome of this collaborative process not stated as a specific goal within the DOC is the confidence it inspired in its members when it empowered the community to resolve its own issues.

This is where Lakeview stands today. Stakeholders are working together side by side, not knowing what the future holds, yet agreeing among themselves that collaboration is not only possible but capable of producing a better, more sustainable outcome than disparate groups working in a parallel structure.

Timeline of Key Historical Events in Lakeview, OR

**1944 Sustained-Yield Forest Management Act** - allowed creation of stewardship units

**1950's Lakeview Oregon Stewardship Unit established** - defined way in which the forest lands in the unit would be used by the surrounding communities

**1990 Spotted Owl listed as endangered species** - restricts logging in Oregon

**1993 The Collins Pine Company gets *Forest Stewardship Council certification (FSC)*** - qualifies company to label lumber as green due to environmentally correct practices

**1990-1995 Four of Lakeview's five mills close**

**1996 The sawmill in Paisley closes, leaving only the Collins mill in the area** - 25 people lose their jobs, triggering review of Lakeview Unit (FSC certification attempt); Collins mill also in danger of closing

**1998 Begin attempt to get FSC for federal lands in unit** - Jane O'Keeffe (local rancher) and Jim Quinn (with the Collins mill) begin talking to Mark Goebel of Sustainable Northwest

**First meeting in Lakeview with outside interests involved** - 90 scientists, environmentalists and Forest Service officials

**Formation of Lakeview Stewardship Group (LSG)** - non-entity group of private and public stakeholders committed to helping the forests and communities in the unit is created during a succession of meetings

**2001 Lakeview Stewardship Unit Federally Re-designated** - allowing Lake County to reestablish how the unit will be used moving forward

***Oregon Sustainability Act*** - formed Oregon Solutions

**2002 Lakeview County Resources Initiative (LCRI) formed** - local official entity required by Sustainable NW to be their liaison

**Big forest fires (Grizzly, Toolbox, & Winter Rim) run through unit** - brings issue of salvage harvesting to forefront and reestablishes ties between stakeholders in the LSG

**Chewaucan Biophysical Monitoring Team (CBMT) formed** - high school student forestry monitoring team gathers vital data on the health and sustainability of the unit; begins study to establish benchmark data, using targeted key forest stands within the unit

**2003 Collins Companies Lakeview & Collins Lakeview Forest won "green" certification from the Forest Stewardship Council (FSC)**

**Ford Family Foundation implements its first leadership training in Lakeview** - adds to the local community leadership network, improving communication and cohesion



**Many Oregon state energy tax incentives won** - *Business Energy Tax Credit (BETC)* begins to make biomass plant economically viable

**2004 Lakeview biomass study conducted** - establishes potential viability of supply for future plant

**2005 Long-range strategy for Lakeview Federal Stewardship Unit (LFSU) drafted by LSG** - creates goals for managing, revitalizing and sustaining the forests and local economy of the unit

**Governor Kulongoski designates Lakeview biomass project as Oregon Solutions project** - Oregon Solutions Biomass Project Team meets four times from May-Nov to create a working agreement for moving forward with process that involves all stakeholders

**2006 Oregon Solutions Team signs Declaration of Cooperation** - DG Energy Solutions, LLC slated to build biomass plant; later loses contract, and is replaced by Marubeni Sustainable Energy

**Chewaucan Biophysical Monitoring Team (CBMT) efforts expanded** - gather similar data from forest stands throughout the unit

**2007 The 20-year Memorandum of Understanding signed** - further clarifies ties and commitments between Lake County governments, Collins Pine Company, Department of Forest Service (DFS), Bureau of Land Management (BLM) and other outside interests regarding lumber/biomass supplies

**The 10-year Stewardship Contract signed with Forest Service** - assures 10 year lumber/biomass supply from Forest Service lands

**Renewable Energy Director (RED) Bob Rogers is hired by LCRI with funding from Ford Family Foundation** - provides renewable energy expertise, educates and trains Lakeview and surrounding communities' citizenry, and helps Lakeview achieve their vision of becoming "Oregon's Most Renewable Energy County"

**Lakeview Fremont Sawmill, a small-diameter log facility, opens** - establishes first tangible goal set out in the DOC; doubles sawmill's previous output

**Big community volunteer celebration** - paid for by Ford Foundation and run by Deanna Wells; draws in over 1,000 people

**2009 LCRI develops Renewable Energy Implementation Plan** - makes Lakeview "a net exporter of renewable energy by the end of 2012"

**Marubeni Sustainable Energy contract to build biomass facility expires**

## **2010 Jim Walls testifies before US Senate subcommittee on Public Lands and Forests**

**Iberdrola Renewables wins contract to build biomass facility - Foundation built**

**Long-range strategy for LFSU redrafted** - helps with FSC certification goals

## **2011 *Lakeview Stewardship Landscape Proposal* written**

**PSU student review and report** - per Oregon Solutions request, students assess  
assesses the Lakeview Biomass Project's successful collaboration

## **Factors that Led to the Project's Success**

When asked about what led to the success in Lakeview, interviewees consistently responded, "All the stars aligned." Assessment findings support that there were, in fact, many factors that coalesced to achieve the phenomenal success in Lakeview. These factors can be clustered in to four main categories detailed below: 1) the environment, 2) people, organizations, and resources, 3) attitudes, and 4) process.

### 1. *The Environment*

Influential environmental factors are those that existed in Lakeview before the project took shape and, for the most part, cannot be changed. The area surrounding Lakeview is a dry forest prone to fires. For hundreds of years, fires have been a natural occurrence in the life cycle of these forests. Surface fires occur low to the ground and only consume the nearby ground level plants. These fires tend to burn at a relatively low temperature and not damage the larger trees or the soil. Surface fires are good for the forest since they clear competing trees and vegetation. The Lakeview area of Oregon is covered in Ponderosa pine forests; the Ponderosa pine flourishes when a wide space exists between trees.

Crown fires or canopy fires, on the other hand, are fires that reach up to the crown of the trees and burn the canopy. Crown fires are destructive, decimating forests and the inhabiting wildlife, and burning so hot they destroy the soil. Years of fire suppression by humans have halted the healthy surface fires, allowing many competing trees to spring up and crowd out larger trees. Now, when surface fires threaten these densely packed areas of forest, they climb up, becoming a crown fire. This is disastrous for the timber industry as well as environmental interests. The government now spends millions of dollars every year thinning forests to prevent crown fires.

The Collins Pine Company was known for good, green lumber practices and was especially committed to Lakeview's community. Therefore, when the issue of damaging crown fires came to the forefront, they cooperated with the project by creating a small-diameter sawmill to process smaller trees that would have been thinned out anyway.

As mentioned previously, Lakeview's remote location had a huge effect on the outcome of the collaborative process. The leaders in Lakeview mentioned that the farther they were from the I-5 freeway, the better it was for the process. The talks they were having were extremely fragile,

especially those between the logging companies and the environmental activists. From 1998 to 2005, copious media exposure might easily have attracted groups from outside Lakeview that had the potential to shut down talks for good.

Another positive impact stemming from its remote location was that far from the I-5 freeway or any other large city, Lakeview relied heavily on its own resources to provide the town's needs. The town's relatively small population further enhanced their independent spirit. With a population of only 2,500, there isn't a lot of padding to protect from economic collapse, which inspired the townspeople to band together to solve their problem.

The sawmills are a huge part of Lakeview's economy. If they had all been shut down for good the town may have collapsed economically. Many stakeholders knew this. Therefore when the sawmill in Paisley closed, it exacerbated the town's feeling of desperation. Far removed from any larger support network, who would come to their town's aid? If they were to solve this problem, it would have to be settled amongst themselves.

## 2. People, Organizations and Resources

Oregon Solutions came on board with the Lakeview Biomass Project with preexisting conditions ripe for collaboration. Strong local leaders such as Jim and Deanna Walls, Jane O'Keeffe, Arlene Clark, and Paul Harlan brought clear vision and perseverance to the process. More importantly, each brought an open mind to the cultivation of a collaborative climate. Their willingness to collaborate made room for key leaders from outside the Lakeview community to take part in the local process, lending strength through numbers and diversifying the group's leadership. Lakeview's leaders made a point of engaging stakeholders involved in the issue at a broader level, while also welcoming local community members to join in.

*Lakeview Stewardship Group* (LSG) leaders also maintained their devotion to the process, another factor that allowed local leaders to sustain the group's energy and step outside their comfort zone to take risks in working toward creative solutions. It also benefited the LSG's efforts that many of its leaders had authority from their individual organizations to make key decisions on their behalf. For example, environmental advocates Mike Anderson and Rick Brown were able, without prior consultation, to make decisions on behalf of the Wilderness Society and Defenders of Wildlife.

Individual participants were clearly dedicated to the project, but Sustainable Northwest, the Ford Family Foundation, and Oregon Solutions also proved their commitment to capacity building in the region by providing financial assistance, group facilitation and leadership skills development. The Collins Company showed its dedication by being a leader in environmental practices and helping make environmental advocates more comfortable with the process at hand.

In 2002, the last sawmill nearly closed. Yet, because the Collins Pine Mill had invested in the local community, had earned a reputation for being environmentally conscious, and had committed to the collaborative process, they proved a key and important player that enabled Lakeview was able to turn things around in time to prevent the closure. It seemed to all those involved that it was a matter of having all the stars lined up in the right place at the right time.

None of the members who had embarked on the collaborative process came to it with this final outcome in mind. To all, it was clear the process had evolved organically on its own.

### 3. Attitudes

The attitudes held and exhibited by many of the LSG members involved in the project led to its collaborative success. Some individuals such as Chris Jones, a newer member of the community, attested to the desperation he and others felt when he said during our interview, “The community got so beat up.” People felt strongly that they had hit rock bottom, which led them to decide that something needed be done. Instead of giving up, they took hold of the reins and approached their problematic situation with a ‘can do’ and ‘must do’ attitude.

When gathering together the necessary people and resources, they exhibited courage by inviting people with whom they had previously been in conflict. They knew that involving as many individuals, groups and organizations as possible would serve to further their progress. Once the key stakeholders were involved, a unique blend of passion and patience formed within the collective group. This dynamic combination fueled their dialogue while at the same time keeping them on task and clearly focused on the outcome they had envisioned, despite the frustration of roadblocks along the way.

From the beginning, the group acted with an open-door policy, always leaving room at the table for anyone to join whenever possible. An authentic approach with no ulterior motives or hidden agendas, open minds, and the willingness to change perspective if need be, forged a strong basis of trust among the group’s members.

Once this sense of interdependence had been established, the group felt comfortable taking risks in their approach to solving the problem. Each member made him/herself accountable to the group and demonstrated their dedication to its cause with an endless investment of time and energy. When asked to assess their group’s success, each member shows humility when recognizing their personal contributions. All agreed that the success of this project was dependent on many factors, one of the most important being the characteristics each and every member brought to the table.

### 4. Process

Collaboration is not about giving in. It is about establishing trust and consistency. This occurs when discussions are open ended. Open-ended dialogue helps promote a collective investment in finding common ground. When people come together to openly discuss their individual and collective interests and agree to leave hidden agendas aside, they can get to work on what really matters. Even when people who hold controversial perspectives come together to discuss their concerns, the process of collaboration supports discussing interests with an open minded approach that doesn’t block any one individual from speaking, but instead encourages everyone to get completely honest about their concerns.

The people involved in the Lakeview project utilized this open, honest approach which helped establish the framework that led to the project's success. The group routinely encouraged people to trust one other, and to be willing to actively listen to each other's input. For instance someone in the group might say, "Let's try this, let's see if this works." It didn't matter that no one at the table knew how this might play out. As one interviewee described their focus on being completely honest with each other this way: "We all had to get naked in the sand box", This emphasis on open honest dialogue built the high level of trust and respect between fellow members to allow a different approaches and ideas to emerge.

This basis of trust was crucial to Lakeview's process, because it helped keep the forum open to every stakeholders' ideas and interests. The members came to agreement together, with the solutions they formed originating from this organic process. By searching for workable solutions collaboratively they created common ground and were able to avoid relying on litigation to solve their problem. Trust was deepened by consistent follow through after meetings on decision and agreements made.

But without the right leadership in place, critical decisions cannot be made. You need to have all the right people invested in the project present. People with clout and authority. People respected in their communities. This is another reason the Lakeview discussions were successful. The people who came together came from a position of respected leadership in their individual communities and organizations. When people like Rick Brown and Mike Anderson from the Wilderness Society began participating in the collaborative process, they had enough clout to make definitive decisions for the parties they represented.

When all of the voices are heard in a collaborative process, the concerns of the individuals and the parties they represent become the concerns of the entire group. From this point forward, the group members worked in unison to determine what will work best for everyone involved and best serve all of the interests at stake. The level of trust and understanding grew to be so strong that if one member was absent at a meeting, others would be sure to consider how a decision might affect their interests.

Good process takes time. Interviewees continued to reinforce that they had to balance the tension between their desperation and their patience with the process. According to one interviewee, " the fact that ours took a lot of time, was really frustrating to a lot of us, but in the end, it was the glue that kept us together, because it gave us a chance to really know and understand one another, without this, you don't really establish the needed trust to support the collaborative process."

Another critical part of the process was to include food. As one interviewee stated, "If you want people to come, you have to feed them."

## **Challenges and Lessons Learned**

The first thing that must be said about the collaboration in Lakeview is that it was an astounding success. When we asked our interviewees what they would have done differently knowing what they know now, they all paused for a long time trying to think of something. That it was so hard for them to name even one thing they felt was a mistake or should have been done differently is a testament to how well this project has gone. With that in mind, we were eventually able to draw some conclusions about the lessons that this project has taught the people involved.

One of the greatest lessons learned was that collaboration is about working towards progress, not perfection. What this means is that things never go exactly the way they are planned; for instance, Iberdrola Renewables is the third company that has been contracted to run the biomass plant, and it may not be the last. The most important thing to remember is the goal is to keep moving forward, not to reach some state of absolute perfection. Keeping this in mind it also becomes clear why it is important to be extremely patient when undertaking a collaborative process. It is by no means fast, and it may take far longer than initially anticipated. In Lakeview the process took well over ten years, and is still going on now.

Along with patience also came the lesson that expectations needed to be managed. This applied to both the public's expectations and the expectations of the stakeholders. In a collaborative, it is often necessary to give something up or change your goals to suit the needs of the interdependent group whole. As a result it is important to control the expectations of those involved and those who the collaborative will affect. It could potentially lead to disappointment if these expectations are not managed.

One area of particular interest is the way that media attention was handled on the Lakeview project. To avoid attracting extreme factions on either side, an effort was made to minimize media attention. There were several lessons that arose from this strategy. By reducing their media presence they were successful in flying under the radar of the more polarized factions. But there was also a negative aspect that they did not initially anticipate. By having virtually no media presence, the Lakeview Stewardship Group did not have a method in place of continuing their collaborative after the founding members were no longer around. This was possibly the largest problem facing the collaborative as a whole because its consequences went beyond any particular project and affected the longevity of the entire organization.

On the whole the project was an enormous success and very little could have been done differently to improve it. The few lessons learned included creating a way to renew the collaborative itself, managing expectations of the public and the stakeholders, and being extremely patient are all important for successful collaboration. Finally, the most important lesson, and the one that could apply to absolutely any organization or group trying to collaborate, is the importance of working towards progress, not perfection. If that is kept in mind, then most other lessons will follow naturally.

### *Current challenges*

Throughout the Lake County collaboration project, numerous elements have not gone as planned, but a group of focused stakeholders have worked hard to be adaptive and find new

solutions and not lose momentum. Such as the using the outcry against Lake County's effort to get their Federal forests in the Lakeview Federal Stewardship Unit FSC certification (a recognition of green sustainable lumber practices) as a tool to get those against this certification in the room and to discuss their differences. This ability to adapt and push forward has been the major key to their success, but there are still a few current challenges this collaboration faces. One such challenge is their inability at obtaining a certification for the Federal lands in the Unit. In this effort, the group has drafted two editions to the *Long-range strategy for the Lakeview Federal Stewardship Unit*, created & expanded the Chewaucan Biophysical Monitoring Team (CBMT), established numerous agreements between the affected stakeholders, and paid Pinchot Institute for Conservation to run an unofficial pilot as to whether they could be successfully certified at this time. Still, however, they are struggling to acquire this certification in a quagmire of strong opinions about the ethics and interests involved in having it between numerous stakeholders.

Another ongoing challenge is the slow construction of the biomass facility. This part of the project has been passed between three different contractors since the signing of the Declaration of Cooperation (DG Energy Solutions LLC, Marubeni Sustainable Energy, and the current holder: Iberdrola Renewables). The major issues behind this challenge have been getting reliable commitments from federal agencies for a continual supply of the necessary biomass to run such a facility, gaining & maintaining key incentives to make it economically feasible (i.e. the Business Energy Tax Credit [BETC]), and the instability of the current renewable energy market & legislation. In other words, trying to ensure that once this facility is built it will have: a reliable source of fuel, a way of making it competitive in a very difficult market, and finding a buyer of the generated energy credits. Currently Iberdrola is under a time crunch to get the facility built before the summer of 2012 or they will lose the BETC, and they are facing a progressively less renewable focused energy market base due to an influx of hydroelectric power currently on the grid. Key to finding a solution for this problem is in maintaining the momentum the project has had up to this date, finding adaptable solutions, and completing the facility over the existing foundation.

Keeping momentum, however, could potentially become a large challenge in the future. Arlene Clark and Deanna Walls both expressed worries that the collaborative group's efforts to keep the project out of the media and under the radar have greatly diminished their ability to acquire new members. This is a long term project, however, and the current members know the work must continue on beyond their generation. However, the necessity of maintaining a certain amount of anonymity to ensure their individual interests don't become positions & promises before the need for adaptability has ended and consensus has been found. The key here will be finding the balance between anonymity and openness. A successful application of this concept in the past was the 2007 Ford Family Foundation sponsored & Deanna Walls ran celebration of the completion of the mill. Celebrating achievements is a great way to bring outside interest to finished areas of the collaboration. Also, another potential way they could get new blood is to utilize some the Ford Family Foundation's established leadership networks they created in their leadership workshops in the community.

Lastly, there are potential negative effects of placing a power cogeneration plant and turning Lake County into “Oregon’s most renewable energy county.” Such worries were brought up by Ford Family Foundation Director Tom Gallagher, in that Lakeview could become a “Boom Town.” Lakeview might transform into an industrial site creating problems like a proliferation of cables and wires that can clutter the environment, as well as infrastructure problems like increased rents and the construction of low quality housing. Furthermore, keeping up with the demand for growth can cause the infrastructure of the town to decay and change the type of leadership of the town. To face this challenge, Lakeview will be forced to stay adaptable in hearing and facing the interests of all in its community.

## **Replicating Lakeview Elsewhere**

What is really required if you are going to succeed at this type of project in the future? What simply can’t be left out without risking the whole project’s eventual success? How can you replicate the success of Lakeview in other communities?

As with any project of this size and complexity, there were a number of stages and major factors that contributed to its success that can be somewhat generalized to other groups wanting to learn from this example.

There are at least three stages that stand out in this project so far. There was an initial phase where concerned stakeholders self organized and brought themselves together to discuss where they were at and what ideas all of them had about options for moving forward. At this stage stakeholders tried to balance the competing interests of identify any and all relevant stakeholders who might be motivated to block any specific proposals if they were not at the table during its formulation, while also staying under the radar and not attracting unwarranted or unhelpful publicity or scrutiny from people not really willing to collaborate or move from entrenched positions. For the Lakeview project, this lasted for several years and included outside neutral facilitation as a core component to help ease tensions between people traditionally antagonistic of each other. The greatest risk to this phase going well is having egos, agendas, and positions get in the way or worse, excluding powerful parties from the discussion table who can block progress later. This phase is successful when all the relevant parties who can block the process are represented. It was also pivotal to this and all stages that the representatives for the larger stakeholder groups had the authority to make commitments to the collaborative group without having to hold up progress in going back to their constituents.

The next phase began with Oregon Solutions became involved and through the governor's office, elevated the forum and status of the early collaborative work. At this phase the project is more grounded and has enough support to withstand other interests from afar who can be expected to nay-say anything that does not align completely with their factions talking points. This phase ended with the signing of the Declaration of Cooperation. This phase is successful when the project is granted an elevated forum and all parties agree to work together even at the largest scales of business and governmental entities.



The next phase began when all committed parties set to work doing what they committed to doing in the Declaration of Cooperation. This stage can last for a short while for smaller projects or for many years or even generations for the largest of projects. This is the stage the Lakeview Biomass project is currently at. During this phase, the parties work together dynamically to self-correct their strategies and plans because the framework for working together is what the previous stages have built, not absolute adherence to any one specific solution. The greatest threat during this stage is attrition due to time and burnout, as well as the imperative to bring new blood that leverages old trust relationships. This phase is successful when the project continues to be developed and move forward dynamically even when unforeseen and unexpected turns appear in the road.

In addition to navigating critical stages, there are a number of other factors that were clearly evident in helping to make this project successful and should be considered before attempting to replicate this process elsewhere in Oregon.

1. **People:** Get the right stakeholder representatives in the room, a whole net of people with the spectrum of ideas relevant to the topic of interest, pulled together by a core common issue important enough to them to get them to show up.
2. **Leadership:** Key leadership is essential to build the network and capacity for a community to lead and sustain momentum.
3. **Professional Facilitation:** Professional level, neutral, and respected by all parties, facilitation.
4. **Authority:** Stakeholders who can make decisions and make long term commitments and investments to the group without going back to the group, anyone who can block progress or a solution must be there while decisions are made (or the process must be of such high integrity and with so much trust, that they cannot be there but can trust that their points of view are being respected).
5. **Process:** Relentless commitment to the community balanced with a humble and solutions oriented attitude. No pre-determined outcomes, start with no hidden agendas. Everyone will give something up in the process, Interests not positions, focusing on what you can agree on, not what you know you don't agree on. The solution has to grow organically as a product of the process. Don't short circuiting or try to speed up this process - be patient - taking things in their time and not rushing builds the trust needed to overcome obstacles in the future when things are higher risk. Oregon Solutions and the Governor's office helped raise the stakes so this project had more clout, and "elevated forum", then government workers could come to meetings on the clock
6. **Consensus:** Avoiding majority rule, not done by majority vote - use consensus (in whatever specific form) any one person can block for what they believe is a good cause, so people work hard to make sure people don't block and can at a minimum "live with the decision" even if they don't fully agree to help with that specific decision. Group cared for needs of stakeholders who couldn't be there "what would they say if they were here".

7. **Staying Informed:** A good neutral sources of information disseminated in a way that keeps everyone informed and on the same page with regards to where the project is at any point. Invited independent scientists from the very beginning to establish a baseline (this forest is not healthy)

## **Sustaining Momentum**

This process was not an easy one. It took a lot of time, energy and patience from all parties involved. The town people, leaders and citizens alike were nothing short of scared of losing their town. Jane O’Keefe said, “We didn’t have a lot of options anymore.” expressing her feelings of desperation. The town was at serious risk of having a failed economy like similar mill towns. It was this fear that turned into powerful motivation, and Lakeview wasn’t about to go down without a fight.

What makes Lakeview special is they never gave up, and they still are not giving up. A natural question is “What has kept the momentum going in this community is the passion and devotion of the town’s key leaders?” These people are committed to keeping their homes and the town they love. The community never forgets its goals by having a set vision and written down goals. The leaders are able to reflect back on their goals, and keep an eye on the big picture. The community always encourages youth and young adults to be educated and involved in local projects. The goals and visions of a community are not short-term, and the vision is something to be handed down to the next generation and the next. By getting today’s youth involved early in their lives, this is a passion they will grown up with, and a passion they will have when it is their turn to be leaders.

Celebrating achievements can support the idea of ‘our achievements’, and if one person or organization has an achievement, then the town has achieved something too. Celebrating you achievements is a strong factor in keeping the collective spirits of the town up, and the celebrations always have tasty cooking!

## **Conclusion**

When asked what the most important thing to come out of the collaboration in Lakeview was, the first answer was resoundingly that they saved the mill from closure. However, on deeper reflection, the leaders agree, “The biggest change since the collaboration is now the community has hope”.

## Contacts

Fremont-Winema National Forests 541-947-2151

Lake County Resources Initiative 541-947-5461

Lakeview Fremont Sawmill 541-947-2018

Sustainable Northwest 503-221-6911

Mike Anderson, Senior Resource Analyst

The Wilderness Society  
720 Third Ave, Suite 1800  
Seattle, WA 98105  
206-624-6430 x227  
[manderson@twsnw.org](mailto:manderson@twsnw.org)

Anders Bisgard, Senior Business Developer, Biomass

Iberdrola Renewables  
1125 NW Couch Street, Suite 700  
Portland, OR 97209  
503-796-6927  
[anders.bisgard@iberdrolausa.com](mailto:anders.bisgard@iberdrolausa.com)

Dee Brown, Manager

Lakeview Fremont Sawmill  
1600 Missouri Avenue  
P.O. Box 1340  
Lakeview, OR 97630  
541-947-2018 x 38  
[dxbrown@collinsco.com](mailto:dxbrown@collinsco.com)

Rick Brown

Defenders of Wildlife  
503-697-3222  
[rbrown@defenders.org](mailto:rbrown@defenders.org)

Darlene Clark, Chairperson

Lake County Resources Initiative  
100 North D Street, Suite 202  
Lakeview, OR 97630  
541-947-3032

Tom Gallagher, Ford Family Foundation

1600 NW Stewart Parkway

Roseburg, OR 97471-1957  
541-957-5574  
[tgallagher@tfff.org](mailto:tgallagher@tfff.org)

Martin Goebel, President  
Sustainable Northwest  
813 SW Alder Street, Suite 500  
Portland, OR 97205  
[mgoebel@sustainablenorthwest.org](mailto:mgoebel@sustainablenorthwest.org)  
503-221-6911

Allan Hahn, District Ranger  
Department of Forest Service, Fremont-Winema National Forest  
61100 Hwy. 140 East  
PO Box 25  
Bly, OR 97622  
541-947-6205  
[ahahn@fs.fed.us](mailto:ahahn@fs.fed.us)

Paul Harlan, Vice President Resources  
Collins Pine Company  
PO Box 1340  
1600 Missouri Ave.  
Lakeview, OR 97630  
541-947-2018 x23  
[pharlan@collinsco.com](mailto:pharlan@collinsco.com)

Steve Jolley, Asset Manager, Biomass  
Iberdrola Renewables  
23750 Old 44 Dr.  
Millville, CA 96062  
530-356-8626  
[stephen.jolley@iberdrolaren.com](mailto:stephen.jolley@iberdrolaren.com)

Andy Kerr  
Executive Director, Oregon Wild  
Founder, The Larch Company  
503-701-6298

Jane O'Keeffe, Chairperson  
Lake County Resources Initiative/Sustainable Northwest  
100 North D Street, Suite 202

Lakeview, OR 97630  
503-530-6202

Bob Rogers, Director  
Renewable Energy  
Oregon Renewable Energy Center  
Lakeview Office  
11 N. G Street  
Lakeview, OR  
[robert.rogers@oit.edu](mailto:robert.rogers@oit.edu)

Clair Thomas  
Chewaucan Biophysical Monitoring Effort  
503-801-4272

DeAnna Walls  
Lake County Resources Initiative  
100 North D Street, Suite 202  
Lakeview, OR 97630  
541-219-1811

Jim Walls  
Lake County Resources Initiative  
100 North D Street, Suite 202  
Lakeview, OR 97630  
541-947-5461  
[jim.walls@lcri.org](mailto:jim.walls@lcri.org)

Chuck Wells  
Concerned Friends of Fremont-Winema  
541-783-2866

## **Glossary**

**Crown Fire** (Canopy Fire) - a wildfire that burns at the level of the tree canopy. They burn relatively hot, decimate large areas of forest, kill wildlife, and plasticize the soil.

**Fremont-Winema National Forest** - Two forests that were administratively combined in 2002. They cover territory in southern Oregon from the crest of the Cascades on the west, past the city of Lakeview to the east.

**Forest Stewardship Council (FSC)** - an independent, non-governmental, not-for-profit organization established to promote the responsible management of the world's forests.

**Hog fuel** - The use of tree bark and limbs to generate on-site electricity or thermal energy to reduce energy cost.

**Iberdrola Renewables**- A renewable energy firm, currently the world's largest owner-operator of wind farms (2007).

**Lake County Resources Initiative (LCRI)** - A local official entity required by Sustainable Northwest to be their liaison.

**Lakeview Federal Stewardship Unit (LFSU)** - An area within the Fremont-Winema National Forests .The ecosystem ranges from towering snow-capped peaks to wide-open sage basins. Pivotal to the economy and communities of south central Oregon, this 2.3 million acre forest is known for its many recreational opportunities, scenic vistas and wild places where visitors can still find solitude.

**Lakeview Federal Sustained Yield Unit** - An act created in 1950 under a law designed to guarantee a steady stream of federal logs to mills in timber communities.

**Lakeview Stewardship Group (LSG)** - an unofficial group of private and public stakeholders committed to helping the forests and communities in unit, created from the 1998 meetings involving various interest groups which share a stake in helping the forests in the unit

**Surface Fire** - A wildfire that only burns at the level of the ground. It burns at a relatively low temperature and consumes small trees and vegetation only.

**Sustainable Northwest** - An organization that provides dedicated, nonpartisan support for a community-oriented, conservation-based economy in the West.

**Oregon National Resource Council (ONRC)** - Now called Oregon Wild. Founded in 1974, Oregon Wild works to protect and restore Oregon's wildlands, wildlife and waters as an enduring legacy for all Oregonians.

**Woody biomass** - The trees and woody plants, including limbs, tops, needles, leaves, and other woody parts, grown in a forest, woodland, or rangeland environment that are the byproducts of restoration and hazardous fuel reductions treatments.

**Woody biomass utilization** - The harvest, sale offer, trade, or utilization of wood biomass to produce the full range of bio-based products and bio-energy, including timber, engineered

lumber, paper and pulp, furniture and value-added commodities, and bio-energy and/or based products such as plastics, ethanol, and diesel.

## **PSU Capstone Course Participants**

### *Faculty & Staff*

Laurel Singer, Course Instructor

Emily Rome, Graduate Teaching Assistant

Liubov Doerr, Graduate Teaching Assistant

Mari Saint Pierre, Program Coordinator & Report Editor

Dick Townsend, Oregon Solutions Director & Course Sponsor

### *Students*

Alexander Freed

Daniel McDuffee

Greg Nugent

Gretchen Olsen

Kirk Rea

Melissa Long

Ross D. Lamberth

Shelley D. Searle

## **Appendix A - Interview Questions**

### **1. Background (2006-Present):**

- a. What has happened since the signing of DOC? 2006-Present – How has it progressed?
- b. What do you think is the most critical factor to maintain momentum on this project?

- i. What are the other factors to maintain momentum on this project?
- ii. Who else stepped in and helped the project?
- iii. What specific events lead to the completion of the project?
- iv. Can you expand on what you talked about last night? Is there more that you would like to add?

**2. Project Success Factors:**

- a. What do you think success means for this project? How would you define the success of this project and has it achieved that?
- b. What has been the most valuable aspect of this project for the community? (i.e. forest health, jobs, money)?
- c. Why has it been successful as a whole?
  - i. What specific factors do you think have led to successful implementation?
- d. What challenges did you face in implementing the project?
  - i. How did the stakeholders resolve those challenges/contentions issues/tensions (permits)?

**3. Lessons Learned:**

- a. Overall, what did you learn from this experience?
- b. What specific areas were not so successful?
- c. If you had known beforehand, how would you have approached it differently?

**4. Replicability:**

- a. Other communities have tried taking shortcuts and it did not seem possible, what part of the project do you think was essential?
  - i. If there was another community with a similar project, what advice would you give them?
  - ii. What have you learned that might be transferable to other communities in Oregon?