



# **Octoraro Source Water Collaborative Strategic Plan 2022**



# TABLE OF CONTENTS

OVERVIEW.....	1
COLLABORATIVE STRUCTURE .....	3
STRATEGIC PLANNING PROCESS.....	4
MISSION, VISION, AND VALUES .....	5
GOALS .....	7
GOAL 1 – Improve Collaboration.....	8
GOAL 2 – Build Capacity.....	9
GOAL 3 – Secure Coordination Funding.....	11
GOAL 4 – Increase and Leverage Project Funding among Partners .....	12
GOAL 5 – Reduce Pollutants .....	13
GOAL 6 – Increase Understanding .....	14
ACKNOWLEDGMENTS.....	17
WHAT’S NEXT .....	18
APPENDIX .....	19
SUMMARY OF ROLES AND RESPONSIBILITIES .....	20
OCTORARO SOURCE WATER COLLABORATIVE HANDOUT .....	21

## Our Partners

**Alliance for the Chesapeake Bay – Brandywine Conservancy –  
Cecil Soil Conservation District – Chester County Conservation District –  
Chester County Water Resources Authority – Chester Water Authority –  
Economic Development Company of Lancaster County – EPA Region 3 –  
Lancaster County Conservation District – MidAtlantic Youth Anglers –  
Mowery Environmental – Octoraro Native Plant Nursery –  
Octoraro Watershed Association – Pennsylvania Department of  
Environmental Protection – Stroud Water Research Center –  
Susquehanna River Basin Commission – TeamAg**

# OVERVIEW

## The Octoraro Watershed

The Upper Octoraro Watershed includes the parts of Chester County and parts of Lancaster County in Pennsylvania that drain to the Octoraro Reservoir. The Octoraro Reservoir is the main source of drinking water for Chester Water Authority, which supplies water to more than 40,000 customers in 33 municipalities in the City of Chester, Western Delaware County, and Southern Chester County. The entire Octoraro Watershed spans 208 square miles and has a population of about 45,000. It includes many agricultural communities as agricultural land use makes up about 60% of the landscape, while forested land makes up 24% and developed land is 13% of the Watershed<sup>1</sup>. While recognizing the critical role that farming plays in the Octoraro, agricultural activities can also have unintended consequences as stormwater runoff can carry pollutants such as sediment or soil, excess nutrients, pesticides, fertilizers, and bacteria into local waterways. As these pollutants can cause serious health concerns, the Watershed has been designated a Pennsylvania Department of Environmental Protection Priority Area.

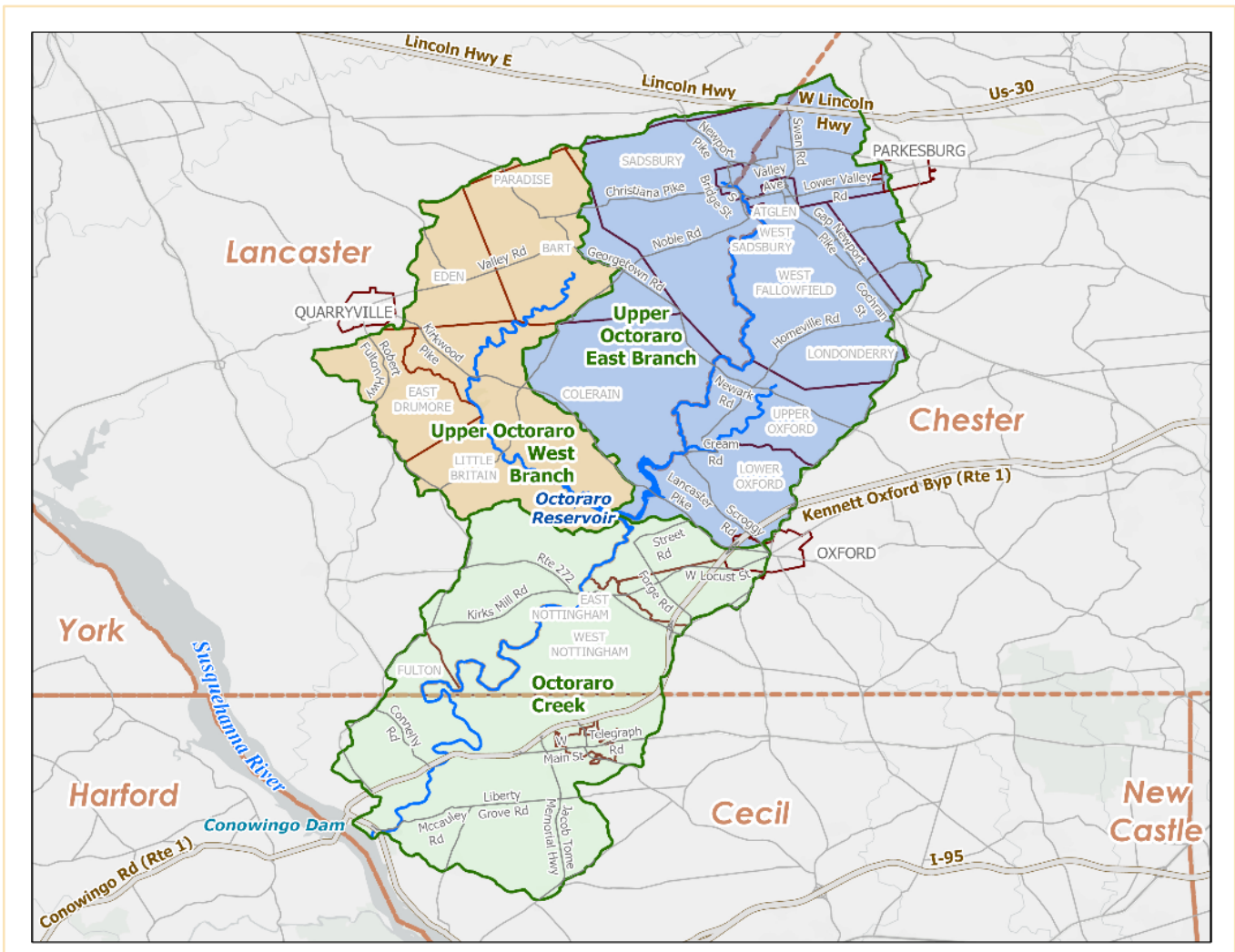


Figure 1. Map of Octoraro Watershed and surrounding area

<sup>1</sup> 2019 land cover data from the National Land Cover Database (NLCD).



# Octoraro Source Water Collaborative

The Octoraro Source Water Collaborative is a partnership of local stakeholders, environmental and non-profit organizations, government agencies, municipal staff and officials, and farmers that work together to protect the Upper Octoraro Watershed, which ultimately drains to the Octoraro Reservoir.

The Collaborative was formed in 2016 when the Alliance for the Chesapeake Bay received two grants from the National Fish and Wildlife Foundation to reduce nitrate pollution in the Octoraro Watershed within Lancaster and Chester Counties. Seeking local expertise, the Alliance for the Chesapeake Bay partnered with the Octoraro Watershed Association, which has worked in the watershed since 1967. These partners also led the creation of the Collaborative to reduce high nitrate concentrations in ground and surface waters in the contributing recharge watersheds of the Octoraro Reservoir. The Collaborative's original purpose was to conduct outreach, predominantly to Plain Sect farms and communities in the Octoraro Watershed, and to support implementation of upstream agricultural best management practices (BMPs).

Since the formation of the Collaborative in 2016, partners have seen many successes in implementing best management practices and the Collaborative has grown to include over 16 partners. This Strategic Plan sets the stage for continued growth and success of the Collaborative.

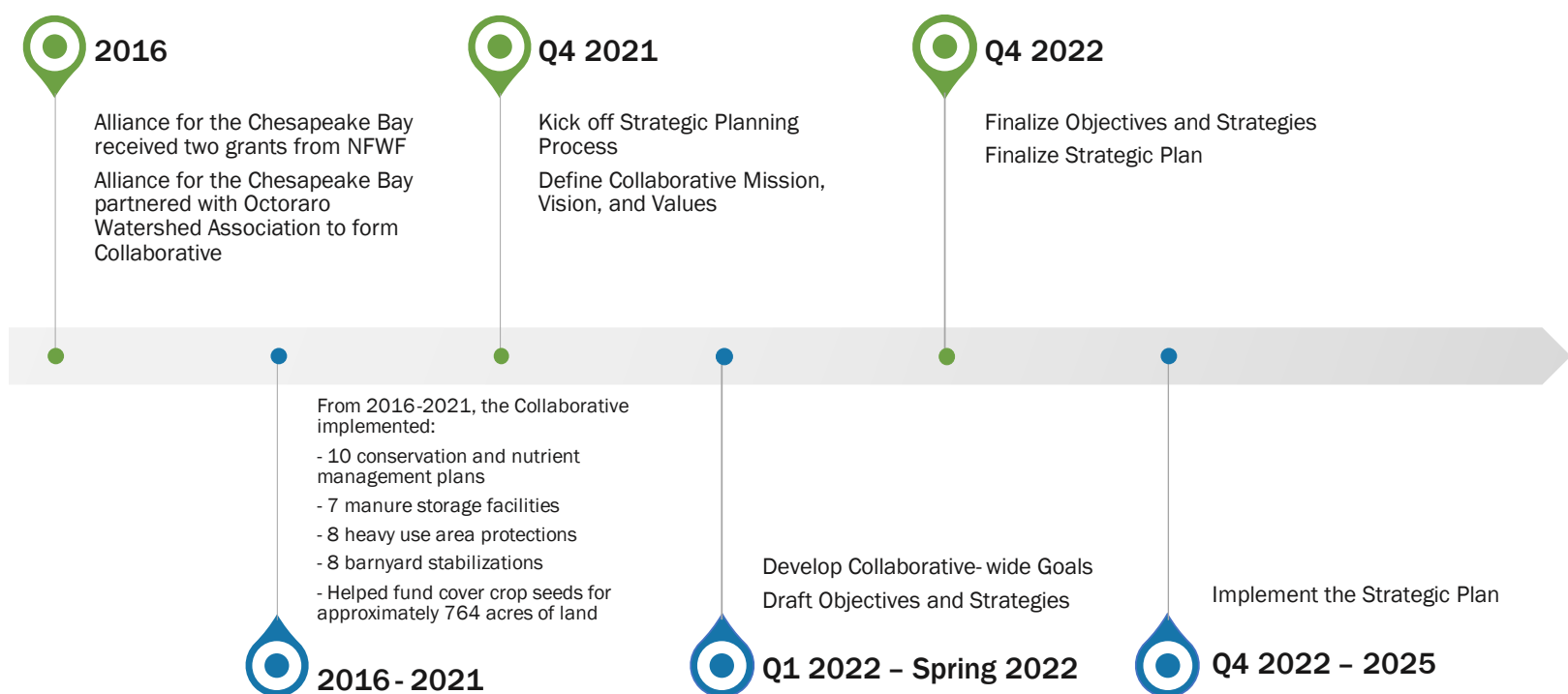
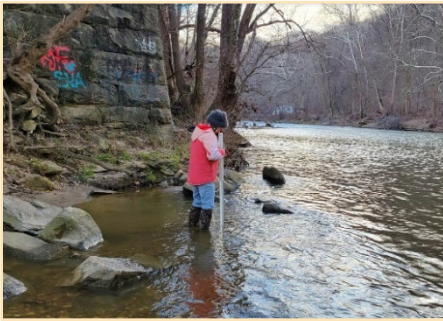


Figure 2. Timeline of Strategic Planning Process

# COLLABORATIVE STRUCTURE



The Collaborative is a network of partners, agencies, and organizations collaborating to improve water quality for drinking water protection in the Octoraro Watershed. It coordinates efforts across the watershed to maximize the impact of each partner's efforts. The Collaborative is made up of a Planning Committee, Agriculture Workgroup, Monitoring Workgroup, and ad-hoc workgroups.

## Planning Committee

The Planning Committee provides the strategic leadership and vision for the Collaborative. The Planning Committee helps guide all aspects of the Collaborative and is especially critical in coordinating across the workgroups and general partners and in sustaining the Collaborative. The Planning Committee includes a rotating Chair who leads the Planning Committee. The Planning Committee, and especially the Chair, will work closely with a paid Coordinator who provides administrative, logistical, and communications support to the Collaborative.



## Workgroups

### Agriculture Workgroup

The Agriculture Workgroup works with farmers to implement best management practices in the Octoraro Watershed.

### Monitoring Workgroup

The Monitoring Workgroup works to monitor water quality to document changes and analyze trends in water quality in the Octoraro Watershed.

### Ad-Hoc Workgroups

As necessary, the Planning Committee will form additional Workgroups to work on specific issues or tasks. When formed, these Workgroups will have directives to achieve a clear purpose.



# STRATEGIC PLANNING PROCESS

The Octoraro Source Water Collaborative Strategic Plan was developed over the course of one year, beginning in September 2021. The development of the plan was a collaborative and iterative process involving partners from all areas of the Collaborative and external stakeholders.

The strategic planning process began with defining the vision and mission of the Collaborative to define the purpose and value of the Collaborative. Following this phase of planning were capacity evaluations, including studies of nearby and similar organizations' strategic plans, to determine the best scope of the work and structure for the Collaborative. At this point in the process, the Planning Committee was formed and the leadership team concluded that a paid coordinator position is vital to the success of the Collaborative. Goals, Objectives, and Strategies were developed thanks to the hard work of the Planning Committee, and two focus groups: the Education and Outreach Focus Group and the Nutrient and Sediment Reduction Focus Group. The Planning Committee was primarily responsible for developing Objectives and Strategies for Goals 1-4, while each Focus Group developed the Objectives and Strategies for one Goal (Goals 5 & 6). The Goals, Objectives, and Strategies were developed during interactive meetings, full Collaborative meetings, one-on-one conversations, shared drafting documents, and surveys. This plan will guide the Collaborative's work for the next three years but the plan is a living document and should be updated as needed.

## Goals

These shared **Goals** are long-term and were developed based on the Collaboratives stated mission, vision, and values.

## Objectives

The Planning Committee and the Focus Groups developed **Objectives** that will help the Collaborative achieve their six goals. The Objectives are specific and measurable for each Goal and will be completed on a short-term basis.

## Strategies

The Planning Committee and the Focus Groups developed **Strategies** that provide specific actions the Collaborative will take to meet their Objectives. The Strategies were developed specifically to complete each Objective. Each Strategy is critical for achieving the Objectives of the Workgroup and are not listed in order of priority in the Plan. However, some Strategies may need to be completed before others can begin.





# MISSION, VISION, AND VALUES

The mission, vision, and values guide all actions of the Collaborative and define the Collaborative's purpose.

## Mission

To provide a collaborative forum for partners to work toward a clean Upper Octoraro watershed, to discuss common priorities, build capacity and leverage resources for their own and collective goals.

## Vision

The Collaborative developed an **external vision** and **internal vision**. The external vision describes the outcome and/or impact of the work and the Collaborative's aspirations for the Octoraro Reservoir, and is useful for general communications purposes. The internal vision describes the desired future position of the Collaborative and defines the direction the Collaborative needs to focus on to create that future.

### External Vision

A clean and healthy Upper Octoraro Watershed that protects drinking water sources and contributes to high quality of life for the entire community with co-benefits for the natural environment.

### Internal Vision

A collaborative that effectively brings together organizations and individuals to create an Upper Octoraro Watershed community where:

- Everyone understands and wants to take action to reduce nutrient and sediment pollution in surface and groundwater, in order to protect drinking water quality and create related environmental benefits;
- Agricultural communities want to manage their farms with best management practices, understand how to take steps to implement practices, and have adequate funds for implementation; and
- All users of the Octoraro watershed have access to quality water resources and habitat.



# Values

The values of the Collaborative are the beliefs, philosophies, and principles, that drive the work. Values important to the Collaborative include:



Science-based decision making



Community-based efforts, including agricultural, recreational, residential, business, and municipal communities



Collaboration



Habitat restoration



Open communication and partnership



Cultural heritage





# GOALS

The Collaborative developed six goals; each of which has its own set of Objectives and Strategies.

1. **Improve Collaboration:** The Octoraro Source Water Collaborative Planning Committee will create collaboration opportunities in multiple formats so that all partners are engaged and can provide feedback to further enhance Collaborative efforts.
2. **Build Capacity:** The Octoraro Source Water Collaborative will build capacity of individual partners and the Collaborative as a whole
  - a. through meetings,
  - b. by providing financial, data management, outreach and other training opportunities,
  - c. by expanding the Collaborative's membership, and
  - d. by creating opportunities for collective leadership.
3. **Secure Coordination Funding:** The Planning Committee will identify and secure funding to support the administration and coordination of the Collaborative by Q3 2023.
4. **Increase and Leverage Project Funding among Partners:** The Octoraro Source Water Collaborative Planning Committee will establish a OSWC Funder and Fundee Network to coordinate during major grant rounds (and as new opportunities/leads arise). Partners of this Network will be responsible for:
  - a. comparing planned efforts to avoid duplication, coordinating on applications, and identifying opportunities to create stackable matches.
  - b. requesting letters of support from all partner organizations and/or the 'Collaborative' to present as a unified approach/effort to funders.
  - c. Overall, at least 3 partners should collaborate on at least 4 grant applications each year. These goals have potential to grow annually.
5. **Reduce Pollutants:** The Agriculture and Monitoring Workgroups will improve water quality by reducing nutrient and sediment loading in the Upper Octoraro through increased BMP implementation, identifying and accessing funding, monitoring and documenting changes, and sharing successes and lessons learned.
6. **Increase Understanding:** The Octoraro Source Water Collaborative will update its stakeholder list annually. Responsible partners (i.e., Stakeholder-focused Workgroups, such as the Agriculture Workgroup) will engage each partner of the OSWC stakeholder list at least once a year so that community members, landowners, farmers, and community leaders are kept updated on success stories and ways they can protect surface and groundwater.

# GOAL 1 – Improve Collaboration

The Octoraro Source Water Collaborative Planning Committee will create collaboration opportunities in multiple formats so that all partners are engaged and can provide feedback to further enhance Collaborative efforts.

## Objective 1

The Planning Committee will develop a web presence and other structures to improve communications with internal stakeholders and increase awareness of efforts.

### Strategies

- a. The Coordinator will create a group chat or internal communication structure that allows for frequent, informal communication by Q3 2023.
- b. The Coordinator will develop an internal document sharing structure, such as a Google Drive or Box, where all Collaborative resources, especially those that need to be updated frequently, can be stored by Q3 2023.
- c. The Coordinator will create and host a calendar of events by Q3 2023 and the Planning Committee will ensure partners are aware of and the calendar and encourage its use. The calendar will include Collaborative hosted events as well as events that are open to partners.

## Objective 2

The Planning Committee will develop a recognizable brand that people can associate with the Octoraro Source Water Collaborative to improve communications with external stakeholders and increase awareness of efforts.

### Strategies

- a. The Planning Committee will develop template documents and promotional materials as well as guidance for partners to understand how and when to use OSWC materials versus their own organization's materials by Q2 2023.
- b. The Planning Committee will develop agreed upon design elements (i.e., color palette, fonts) that the OSWC will use in materials by Q2 2023.
- c. The Planning Committee will coordinate the development of a web presence with information about the Collaborative and resources for new partners to get involved by Q3 2023. The Planning Committee will develop the content and format. The Coordinator will lead logistics of the web presence with a contractor or individual partner organization.

## Objective 3

The Planning Committee will create opportunities to review and improve the functioning of the Collaborative on an annual basis.

### Strategies

- a. The Planning Committee will create and share by-laws for the Collaborative by Q1 2023.
- b. The Planning Committee will create and share expectations for partners by Q1 2023.
- c. The Coordinator will develop, distribute, and collate responses from partners annually through a survey that documents progress and provides opportunities to share feedback annually in Q4.
- d. The Coordinator will share results and work with the Planning Committee for use in Goal 2 (Build Capacity) Strategies 2b and 2d and to recommend/make changes as necessary.

## Objective 4

The Coordinator, Planning Committee, and Workgroup Leaders will host Full Collaborative Meetings, Planning Committee Meetings, and Workgroup Meetings.

### Strategies

- a. The Planning Committee will host Full Collaborative meetings annually in Q4 to provide updates and share Collaborative and partner successes, updates, and priorities for the next year. The Planning Committee Chair will develop agendas for these meetings with assistance from the Coordinator and review them with the Planning Committee. The annual Full Collaborative meeting will provide opportunity for any current OSWC partners to take leadership as a Workgroup Leader. All OSWC partners should know their point of contact within a few weeks of each annual meeting.
- b. The Planning Committee will meet monthly to review grant and funding opportunities, plan Full Collaborative meetings and other Collaborative events, and coordinate with workgroup leaders to keep updated on workgroup activities.
- c. Workgroup Leaders will host quarterly workgroup meetings to coordinate and share progress on workgroup efforts and will share action items between meetings.

# GOAL 2 – Build Capacity

The Octoraro Source Water Collaborative will build capacity of individual partners and the Collaborative as a whole (a) through meetings, (b) by providing financial, data management, outreach and other training opportunities, (c) by expanding the Collaborative's membership, and (d) by creating opportunities for collective leadership.

## Objective 1

The Octoraro Source Water Collaborative will involve members in knowledge sharing through specific, action-oriented training meetings/events on topics of interest.



## Strategies

- a. Workgroup Leaders will host quarterly workgroup meetings to coordinate and share progress on workgroup efforts and will share action items between meetings.
- b. All partners will communicate about partner-led events that are open to other partners by using the shared calendar.
- c. The Octoraro Source Water Collaborative will hold approximately two Collaborative-specific events per year to provide project ideas, collaboration inspiration, and networking opportunities to all OSWC partners. The Planning Committee will provide strategic leadership and visioning for these events. The Coordinator will lead logistical planning of these events with input from the Planning Committee and workgroup partners (e.g., if partners have a relationship with a desired guest speaker and can connect the OSWC to them).
  - The Planning Committee will hold one event that includes expert panels/guest speakers on topics such as Countywide Action Plans (CAPs), Octoraro Reservoir Source Water Protection efforts, new outreach strategies or new best management practices (BMPs), based on feedback on what topics partners are interested in from the annual survey.
  - Other example events that could be held include site visits of successful projects, grant workshops, or meetings with other “Collaboratives” to learn best practices.
- d. Each workgroup and the Planning Committee will provide opportunities for partners to contribute and connect outside of meetings, such as Jamboards, the group chat (see Goal 1 Objective 1f), and seeking feedback on shared Google Docs.

## Objective 2

The Planning Committee will lead membership expansion and retention efforts once per year to include more local voices in the OSWC.

## Strategies

- a. Workgroups will contribute to updating a spreadsheet of contacts in the Octoraro by interest and/or stakeholder group (e.g., farmers, residential landowners, township staff/officials, water utilities environmental groups, etc.).
- b. As part of the annual membership survey, the Planning Committee will ask partners which voices are missing from the OSWC. The Planning Committee will reach out to newly identified stakeholders or designate partners to reach out.
- c. The Planning Committee will track membership year over year.
- d. The Planning Committee, using data collected by themselves, the Agriculture Workgroup, and Monitoring Workgroup will annually prepare a report, using the information collected from the annual survey, to communicate successes and progress to partners to promote retention in involvement with the Collaborative. The Coordinator will help assign pieces of the report to Planning Committee members.

- e. The Coordinator will create and maintain a “partner inventory” spreadsheet which includes information about partner organizations, areas of focus, and other pertinent information that all partners contribute to. The tool will be updated annually.

## GOAL 3 – Secure Coordination Funding

The Planning Committee will identify and secure funding to support the administration and coordination of the Collaborative by Q3 2023.

### Objective 1

In Q4 2022, the Planning Committee will develop a scope of work for the Coordinator and ensure the specified roles are clear for workgroups, the Planning Committee, and the Coordinator.

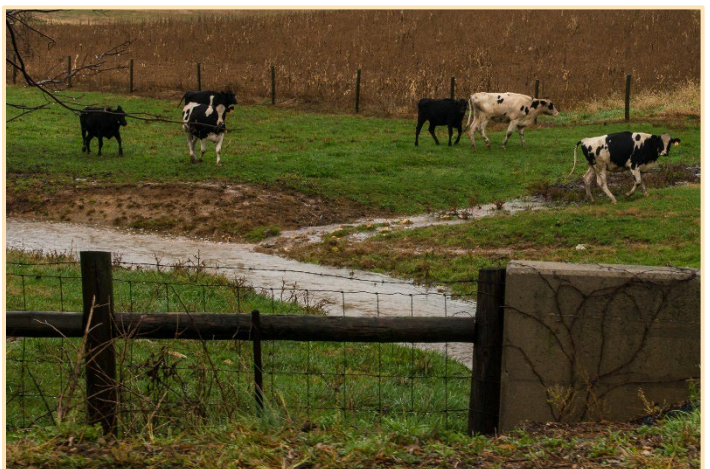
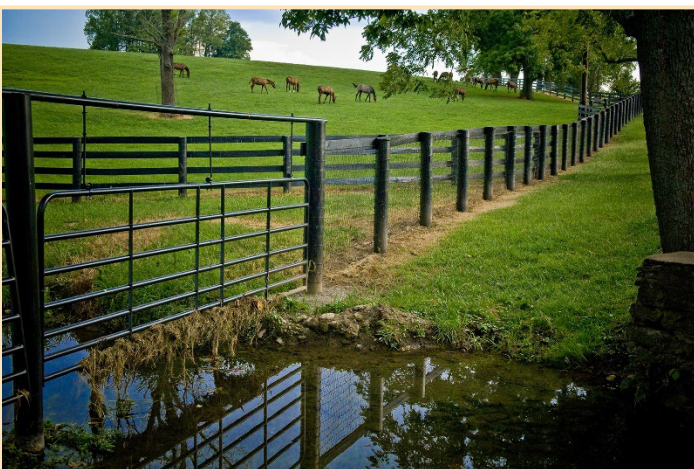
The Planning Committee will determine the role and responsibility of this position and estimate annual funding needs.

### Objective 2

By Q3 2023, the Planning Committee will identify and the Alliance will secure funding capacity and capability grants (a variety over time) that are sufficient to support a Coordinator to administer the OSWC.

### Strategies

- a. The Planning Committee will identify funding and financing options to support a Coordinator to administer the OSWC by Q1 2023.
- b. The Planning Committee will support the Alliance in securing funding for a Coordinator by Q3 2023.
- c. As part of the Annual Report, the Planning Committee will annually compare the current funding levels versus required funding levels for the Coordinator to identify and fill gaps if needed.



# GOAL 4 – Increase and Leverage Project Funding among Partners

The Octoraro Source Water Collaborative Planning Committee will establish a OSWC Funder and Fundee Network to coordinate during major grant rounds (and as new opportunities/leads arise). Partners of this Network will be responsible for:

- comparing planned efforts to avoid duplication, coordinating on applications, and identifying opportunities to create stackable matches.
- requesting letters of support from all partner organizations and/or the ‘Collaborative’ to present as a unified approach/effort to funders.

Overall, at least 3 partners should collaborate on at least 4 grant applications each year. These goals have potential to grow annually.

## Objective 1

The Planning Committee will increase coordination of grants among partners by creating a funder/fundee network with Octoraro Source Water Collaborative partners and external funders.

### Strategies

- a. The Coordinator and the Planning Committee will host an annual grant coordination workshop in Q1 in accordance with major grant rounds to coordinate efforts.
- b. The Coordinator and the Planning Committee will organize at least one grant writing skill building session in the annual grant coordination workshop.
- c. The Coordinator and the Planning Committee will convene a funding brainstorming session bi-annually to discuss potential grants for project funding. As part of convening this session, the Coordinator and Planning Committee will identify and invite partners and external organizations from both the funder and fundee sides.
- d. The Monitoring Workgroup will coordinate with partners to develop joint grant applications to fund monitoring in strategic locations as determined by the Octoraro Watershed Model and partner activities.
- e. The Coordinator will start the creation of a Grant Inventory and Opportunity Tracker, based on funding brainstorming workshops and annual grant workshop, between Q4 2023 and Q1 2024.
- f. The Coordinator will draft a general letter of support template by the end of Q3 2023 that the Octoraro Source Water Collaborative partners can use when partners coordinate and apply for grant funding.
- g. Partners of the Funder/Fundee Network will discuss whether any organizations are willing to provide Letters of Support, in addition to the above OSWC general Letter of Support. Partners who are willing will be added to a tracker.



## Objective 2

The Planning Committee will explore alternative methods of financing to sustain the Collaborative.

### Strategies

- a. During monthly Planning Committee meetings, the Planning Committee will have an agenda item to discuss new opportunities/mechanisms for funding, especially those focused on drinking water protection and those identified in the EFC-developed Regional Financing Strategy.
- b. As part of annual grant workshops, brainstorming sessions, and other capacity building training events, the Coordinator and the Planning Committee will invite innovative financing experts to speak with and help educate partners and assist in generating ideas for alternative methods of financing.

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## GOAL 5 – Reduce Pollutants

The Agriculture and Monitoring Workgroups will improve water quality by reducing nutrient and sediment loading in the Upper Octoraro through increased BMP implementation, identifying and accessing funding, monitoring and documenting changes, and sharing successes and lessons learned.

## Objective 1

The Agriculture and Monitoring Workgroups will coordinate partners to maximize the impact of BMP implementation by providing a forum for collaboration and prioritization of focus areas.

### Strategies

- a. The Agriculture and Monitoring Workgroups will use the Octoraro Watershed Model and other tools to prioritize areas for BMP implementation. The Agriculture and Monitoring Workgroups will review the model, identify focus geographic areas based on the model and willingness of farmers in an area, prioritize BMPs, and develop joint grant applications and work plans to get the most impactful BMPs in strategic locations.
- b. The Agriculture Workgroup will hold quarterly Agriculture Workgroup meetings where partners share best practices for outreach and BMP implementation.
- c. The Agriculture and Monitoring Workgroups will coordinate efforts among interested partners who are stakeholders in the Upper Octoraro watershed to focus on high priority areas to maximize impact.

## Objective 2

The Monitoring Workgroup and other partners will coordinate monitoring plans and share monitoring data and other related information to maximize impact in accordance with the Octoraro Watershed Model, to optimize coverage, and limit redundancy.

## Strategies

- a. The Monitoring Workgroup will hold quarterly or biannual meetings, depending on the needs of current monitoring activities, to review current monitoring locations and future plans.
  - At the first meeting held in 2023, the Monitoring Workgroup will identify the additional partners who need to be considered and involved in coordinating monitoring plans and sharing data.
- b. The Monitoring Workgroup will measure water quality at strategic locations as defined by the Octoraro Watershed Model and partners activities, document changes, and analyze trends at least annually.
- c. The Monitoring Workgroup and other partners will develop or identify and contribute to a shared database for managing and presenting water quality data, trends, and summary information for the Octoraro Watershed.

## Objective 3

The Agriculture and Monitoring Workgroups will support the Coordinator and the Planning Committee to collect information and successes from all partners on their work in the Octoraro Watershed over the year to be included in an annual report that celebrates the progress of the Octoraro Source Water Collaborative.

## Strategies

- a. The Agriculture Workgroup will draft a question for the annual survey administered by the Planning Committee each year to collect information and successes from all partners on BMP implementation in the Octoraro Watershed.
- b. The Monitoring Workgroup will draft a question for the annual survey administered by the Planning Committee each year to collect information and successes from all partners on monitoring water quality in the Octoraro Watershed as part of the annual survey administered by the Planning Committee each year.

# GOAL 6 – Increase Understanding

The Octoraro Source Water Collaborative will update its stakeholder list annually. Responsible partners (i.e., Stakeholder-focused Workgroups, such as the Agriculture Workgroup) will engage each partner of the OSWC stakeholder list at least once a year so that community members, landowners, farmers, and community leaders are kept updated on success stories and ways they can protect surface and groundwater.

## Objective 1

The Agriculture and Monitoring Workgroups will analyze outreach efforts annually and track stakeholder outreach regularly to ensure we are successfully reaching and engaging important groups.

## Strategies

- a. Annually, workgroups will document previous outreach efforts, identify successful strategies for reaching groups of stakeholders, and create outreach plans for the coming year.
  - At the beginning of each year, the Agriculture and Monitoring Workgroups will meet to determine which metrics are important to track for the coming year. Year 1 will provide a baseline for understanding past efforts by tracking numbers of attendees at events, stakeholder groups reached, a lead contact for reaching individual farmers, and the type of outreach currently conducted across all partners annually.
- b. The Agriculture Workgroup will develop a list of local technical service providers and will convene a meeting of these providers annually to share community-specific best practices for successfully engaging different communities of farmers.

## Objective 2

The Agriculture Workgroup will engage, collaborate, or communicate with at least 100 farmers through appropriate outreach and educational events.

### Strategies

- a. Agriculture Workgroup Partners will conduct 60-70 site visits with farmers for new projects that offer additional benefits per year. Each partner in the Agriculture Workgroup will track site visits in the shared spreadsheet to track efforts across all partners. The Agriculture Workgroup will revisit this strategy annually with an aim to increase the number of site visits by 10% annually.
- b. The Agriculture Workgroup will create a professional display with one to two outreach brochures/factsheets targeted towards farmers. The outreach package will include information for farmers about organizations to contact for specific types of technical assistance and suggested incentives for engaging farmers at the OSWC table at outreach events (e.g., First Friday events).
  - The Coordinator will make outreach materials accessible to partners on the shared online platform (e.g. Google Drive or Box).
  - The Coordinator will encourage partners to bring OSWC materials to events. When partners request to add their event to the Collaborative calendar, they will automatically receive a link to the outreach brochure and information on where to pick up the professional display.
- c. The Agriculture Workgroup will organize one special event per year to engage farmers, such as a farmer bus tour around the watershed.

## Objective 3

The Planning Committee, Agriculture Workgroup, and Monitoring Workgroup will engage community leaders from different groups and identify those willing to speak on behalf of the Octoraro Source Water Collaborative.

### Strategies

- a. The Planning Committee, Agriculture Workgroup, and Monitoring Workgroup will identify



community leaders who can be champions or are willing to speak on behalf of the Octoraro Source Water Collaborative.

- The Agriculture Workgroup will identify agricultural stakeholder groups and leaders from prioritized groups (e.g., municipalities, Amish Bishops, farmers with years of successful conservation BMPs).
  - The Monitoring Workgroup will identify community environmental, residential, and municipal stakeholder groups and leaders from prioritized groups (e.g., conservation districts, counties conducting monitoring, MS4 municipalities, and environmental organizations).
  - The Planning Committee will identify municipal leaders and government stakeholder groups and leaders from prioritized groups (e.g., elected officials, Chester Water Authority leadership, and MS4 municipalities).
  - The Coordinator will check in on and track the Workgroups and Planning Committee's progress on identifying community leaders from each prioritized group.
- b. The Planning Committee, Agriculture Workgroup, and Monitoring Workgroup will invite champions and those who are willing to speak on behalf of the Collaborative to events and encourage champions to bring other stakeholders to events.
- c. The Planning Committee, Agriculture Workgroup, and Monitoring Workgroup will build relationships (where individuals can serve as partners in grant applications), provide individuals with talking points and information to be effective champions for the Collaborative, and consider opportunities to form ad-hoc workgroups. Over time, ask those willing to speak on behalf of the Octoraro Source Water Collaborative to share their communities' strengths and needs with the OSWC, so that OSWC can tailor efforts accordingly.

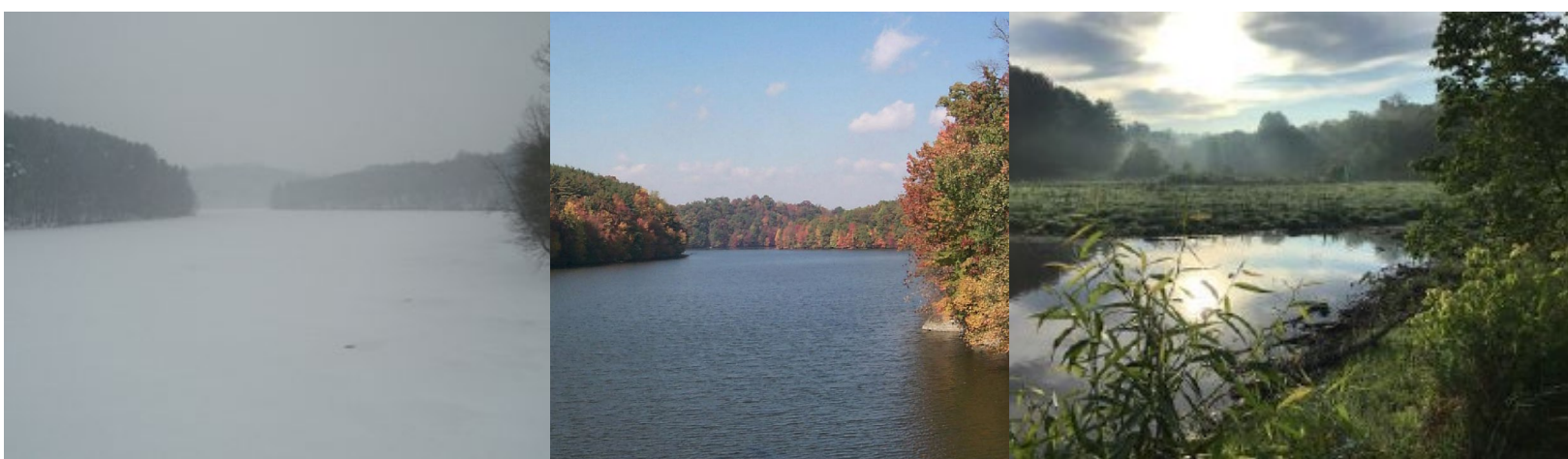
## Objective 4

Partners of workgroups will conduct outreach to the general public through developing materials specifically targeted towards the general public and attending and hosting community outreach events for the public.

### Strategies

- a. All partners will add Community Outreach events that are hosted by OSWC partners to the Collaborative calendar. All partners can submit requests, and the Coordinator will add events to the calendar.
- b. The Monitoring Workgroup will create a professional display and one to two outreach brochures or factsheets targeted towards the public.
- The Coordinator will make outreach materials accessible to partners on the shared online platform (e.g. Google Drive or Box).
  - The Coordinator will encourage partners to bring OSWC materials to events. When partners request to add their event to the Collaborative calendar, they will automatically receive a link to the outreach brochure and information on where to pick up the professional display.

- c. The Octoraro Watershed Association, working with the Lancaster County Conservation District and Chester County Conservation District, will host one special event, such as a reservoir tour or picnic at the reservoir, to engage the general public (e.g., schools, clubs) and public entities (e.g., municipalities, agencies) in conservation education and dialogue.
- d. The Agriculture Workgroup will work with community leaders to educate the Plain Sect community about water quality concerns especially regarding public health through two smaller events per year focused on this issue.



## ACKNOWLEDGMENTS

Many thanks to the outstanding partners who contributed to this plan. Special thanks to the Planning Committee represented by:

- The Alliance for the Chesapeake Bay
- Chester County Conservation District
- Chester County Water Resources Authority
- Chester Water Authority
- EPA Region 3
- Lancaster County Conservation District
- Octoraro Watershed Association

Thank you to EPA Region 3 for their funding support and guidance and to the Cadmus Group for facilitating the strategic planning process.

# WHAT'S NEXT

Throughout the development of the Strategic Plan, the Octoraro Source Water Collaborative defined its mission, vision, values, and goals and they determined the path forward to achieve our mission. The Strategic Plan lays the groundwork for the Octoraro Source Water Collaborative to protect the Octoraro Reservoir for safe, healthy drinking water. Over the next three years, partners will implement the Objectives and Strategies in this Strategic Plan to achieve our Goals.



Figure 3. Forward looking timeline for the Collaborative



# APPENDIX

**A. Roles and Responsibilities - Tasks by Responsible Party**

**B. Roles and Responsibilities - Calendar of Select Tasks**

**C. OSWC One-Pager**



# SUMMARY OF ROLES AND RESPONSIBILITIES

## Tasks by Responsible Party

### Planning Committee

Goal 1 - Improve Collaboration: The Octoraro Source Water Collaborative Planning Committee will create collaboration opportunities in multiple formats so that all partners are engaged and can provide feedback to further enhance Collaborative efforts.

Roles and Responsibilities:

#### *Objective 1*

- Develop a web presence and other structures to improve communications with internal stakeholders and increase awareness of efforts.
- Ensure partners are aware of and the calendar and encourage its use.
- Develop a recognizable brand that people can associate with the Octoraro Source Water Collaborative to improve communications with external stakeholders and increase awareness of efforts.

#### *Objective 2*

- Develop template documents and promotional materials as well as guidance for partners to understand how and when to use OSWC materials versus their own organization's materials by Q2 2023.
- Develop agreed upon design elements (i.e., color palette, fonts) that the OSWC will use in materials by Q2 2023.
- Coordinate the development of an external-facing website or a dedicated webpage with information about the Collaborative and resources for new partners to get involved by Q3 2023.
- Develop the content and format (*of the website or dedicated webpage*).

#### *Objective 3*

- Create opportunities to review and improve the functioning of the Collaborative on an annual basis.
- Create and share expectations for partners by Q1 2023.

#### *Objective 4*

- Host Full Collaborative meetings annually in Q4 to provide updates and share Collaborative and partner successes, updates, and priorities for the next year.
- Develop agendas for Full Collaborative meetings.

- Meet monthly to plan Full Collaborative meetings and other Collaborative events.
- Coordinate with workgroup leaders to keep updated on workgroup activities.

Goal 2 - Build Capacity: The Octoraro Source Water Collaborative will build capacity of individual partners and the Collaborative as a whole (a) through meetings, (b) by providing financial, data management, outreach and other training opportunities, (c) by expanding the Collaborative's membership, and (d) by creating opportunities for collective leadership.

#### Roles and Responsibilities:

- Hold one event that includes expert panels/guest speakers on topics such as Countywide Action Plans (CAPs), Octoraro Reservoir Source Water Protection efforts, new outreach strategies or new best management practices (BMPs), based on feedback on what topics partners are interested in from the annual survey.
- Provide strategic leadership and visioning for approximately two Collaborative-specific events per year.
- Provide opportunities for partners to contribute and connect outside of meetings, such as Jamboards, the group chat (see Goal 1 Objective 1f), and seeking feedback on shared Google Docs.
- Lead membership expansion and retention efforts once per year to include more local voices in the OSWC.
- Ask members whose voice is missing from the OSWC, as part of the annual membership survey.
- Reach out to newly identified stakeholders or designate partners to reach out.
- Track membership year over year.
- Annually prepare a report, using the information collected from the annual survey, to communicate successes and progress to partners to promote retention in involvement with the Collaborative.

Goal 3 - Secure Coordination Funding: The Planning Committee will identify and secure funding to support the administration and coordination of the Collaborative by Q3 2023.

#### Roles and Responsibilities:

- In Q4 2022, develop a scope of work for the paid coordinator and ensure the specified roles are clear for workgroups, the Planning Committee, and the paid coordinator.
- Determine the role and responsibility of this position and estimate annual funding needs.
- By Q3 2023, identify and the Alliance will secure funding capacity and capability grants (a variety over time) that are sufficient to support a coordinator to administer the OSWC.
- As part of the Annual Report, the Planning Committee will annually compare the current funding levels versus required funding levels for the Coordinator to identify and fill gaps if needed.

Goal 4 - Increase and Leverage Project Funding among Partners: The Octoraro Source Water Collaborative Planning Committee will establish a OSWC Funder and Fundee Network to coordinate during major grant rounds (and as new opportunities/leads arise). Partners of this Network will be responsible for:

- comparing planned efforts to avoid duplication, coordinating on applications, and identifying opportunities to create stackable matches.
- requesting letters of support from all partner organizations and/or the 'Collaborative' to present as a unified approach/effort to funders.

Overall, at least 3 partners should collaborate on at least 4 grant applications each year. These goals have potential to grow annually.

#### Roles and Responsibilities:

- With the Coordinator, host an annual grant coordination workshop in Q1 in accordance with major grant rounds to coordinate efforts.
- With the Coordinator, organize at least one grant writing skill building session in the annual grant coordination workshop.
- With the Coordinator, convene a funding brainstorming session bi-annually to discuss potential grants for project funding. As part of convening this session, the Coordinator and Planning Committee will identify and invite partners and external organizations from both the funder and fundee sides.
- Explore alternative methods of financing to sustain the Collaborative.
- During monthly Planning Committee meetings, have an agenda item to discuss new opportunities/mechanisms for funding, especially those focused on drinking water protection.
- As part of annual grant workshops, brainstorming sessions, and other capacity building training events, working with the Coordinator, invite innovative financing experts to speak with and help educate partners and assist in generating ideas for alternative methods of financing.

Goal 5 - Reduce Pollutants: The Agriculture and Monitoring Workgroups will improve water quality by reducing nutrient and sediment loading in the Upper Octoraro through increased BMP implementation, identifying and accessing funding, monitoring and documenting changes, and sharing successes and lessons learned.

#### Roles and Responsibilities:

- Administer the annual survey.

Goal 6 - Increase Understanding: The Octoraro Source Water Collaborative will update its stakeholder list annually. Responsible partners (i.e., Stakeholder-focused Workgroups, such as the Agriculture Workgroup) will engage each partner of the OSWC stakeholder list at least once a year so that community members, landowners, farmers, and community leaders are kept updated on success stories and ways they can protect surface and groundwater.

## Roles and Responsibilities:

- Engage community leaders from different groups and identify those willing to speak on behalf of the Octoraro Source Water Collaborative.
- Identify community leaders who can be champions for the Octoraro Source Water Collaborative.
- Identify municipal leaders and government stakeholder groups and leaders from prioritized groups (e.g., elected officials, Chester Water Authority leadership, and MS4 municipalities)
- Invite champions and those who are willing to speak on behalf of the Collaborative to Collaborative events and encourage champions to bring other stakeholders to events.
- Build relationships (where individuals can serve as partners in grant applications), provide individuals with talking points and information to be effective champions for the Collaborative, and consider opportunities to form ad-hoc workgroups. Over time, ask those willing to speak on behalf of the Octoraro Source Water Collaborative to share their communities' strengths and needs with the OSWC, so that OSWC can tailor efforts accordingly.

## OSWC Coordinator

Goal 1 - Improve Collaboration: The Octoraro Source Water Collaborative Planning Committee will create collaboration opportunities in multiple formats so that all partners are engaged and can provide feedback to further enhance Collaborative efforts.

## Roles and Responsibilities:

### *Objective 1*

- Create a group chat or internal communication structure that allows for frequent, informal communication by Q3 2023.
- Develop an internal document sharing structure, such as a Google Drive or Box, where all Collaborative resources, especially those that need to be updated frequently, can be stored by Q3 2023.
- Create and host a calendar of events by Q3 2023. The calendar will include Collaborative hosted events as well as events that are open to partners.

### *Objective 2*

- Lead logistics of website creation with a contractor or individual partner organization.

### *Objective 3*

- Develop, distribute, and collate responses from partners annually through a survey that documents progress and provides opportunities to share feedback annually in Q4.
- Share results and work with the Planning Committee for use in Goal 2 (Build Capacity) Strategies 2b and 2d and to recommend/make changes as necessary.



Goal 2 - Build Capacity: The Octoraro Source Water Collaborative will build capacity of individual partners and the Collaborative as a whole (a) through meetings, (b) by providing financial, data management, outreach and other training opportunities, (c) by expanding the Collaborative's membership, and (d) by creating opportunities for collective leadership.

Roles and Responsibilities:

*Objective 1*

- Lead logistical planning of approximately two Collaborative-specific events with input from the Planning Committee and workgroup partners (e.g., if partners have a relationship with a desired guest speaker and can connect the OSWC to them).

*Objective 2*

- Help assign pieces of the annual report to Planning Committee members.

*Objective 3*

- Create and maintain a "partner inventory" spreadsheet that all partners contribute to. The tool will be updated annually.

Goal 4 - Increase and Leverage Project Funding among Partners: The Octoraro Source Water Collaborative Planning Committee will establish a OSWC Funder and Fundee Network to coordinate during major grant rounds (and as new opportunities/leads arise). Partners of this Network will be responsible for:

- comparing planned efforts to avoid duplication, coordinating on applications, and identifying opportunities to create stackable matches.
- requesting letters of support from all partner organizations and/or the 'Collaborative' to present as a unified approach/effort to funders.

Overall, at least 3 partners should collaborate on at least 4 grant applications each year. These goals have potential to grow annually.

Roles and Responsibilities:

*Objective 1*

- With the Planning Committee, host an annual grant coordination workshop in Q1 in accordance with major grant rounds to coordinate efforts.
- With the Planning Committee, organize at least one grant writing skill building session in the annual grant coordination workshop.
- With the Planning Committee, convene a funding brainstorming session bi-annually to discuss potential grants for project funding. As part of convening this session, the Coordinator and Planning Committee will identify and invite partners and external organizations from both the funder and fundee sides.
- Start the creation of a Grant Inventory and Opportunity Tracker, based on funding brainstorming workshops and annual grant workshop, between Q4 2023 and Q1 2024.
- Draft a general letter of support template by the end of Q3 2023 that the Octoraro Source Water Collaborative partners can use when partners coordinate and apply for grant funding.

## *Objective 2*

- As part of annual grant workshops, brainstorming sessions, and other capacity building training events, working with the Planning Committee, invite innovative financing experts to speak with and help educate partners and assist in generating ideas for alternative methods of financing.

Goal 6 - Increase Understanding: The Octoraro Source Water Collaborative will update its stakeholder list annually. Responsible partners (i.e., Stakeholder-focused Workgroups, such as the Agriculture Workgroup) will engage each partner of the OSWC stakeholder list at least once a year so that community members, landowners, farmers, and community leaders are kept updated on success stories and ways they can protect surface and groundwater.

### Roles and Responsibilities:

#### *Objective 2*

- Make outreach materials accessible to members on the shared online platform (e.g. Google Drive or Box).
- Encourage partners to bring OSWC materials to events. When partners request to add their event to the Collaborative calendar, they will automatically receive a link to the outreach brochure and information on where to pick up the professional display.

#### *Objective 3*

- Check in on and track the Workgroups and Planning Committee's progress on identifying community leaders from each prioritized group.

#### *Objective 4*

- Add events to the calendar.

## Agriculture Workgroup

Goal 5 - Reduce Pollutants: The Agriculture and Monitoring Workgroups will improve water quality by reducing nutrient and sediment loading in the Upper Octoraro through increased BMP implementation, identifying and accessing funding, monitoring and documenting changes, and sharing successes and lessons learned.

### Roles and Responsibilities:

#### *Objective 1*

- Coordinate partners to maximize the impact of BMP implementation by providing a forum for collaboration and prioritization of focus areas.
- Use the Octoraro Watershed Model and other tools to prioritize areas for BMP implementation. Review the model, identify the 3-5 highest priority sub-basins, and develop joint grant applications and work plans to get the most impactful BMPs in strategic locations.
- Hold quarterly Agriculture Workgroup meetings where partners share best practices for outreach and BMP implementation.

- Coordinate efforts among interested partners who are stakeholders in the Upper Octoraro watershed to focus on high priority areas to maximize impact.

#### *Objective 4*

- Draft a question for the annual survey administered by the Planning Committee each year to collect information and successes from all partners on BMP implementation in the Octoraro Watershed.

Goal 6 - The Octoraro Source Water Collaborative will update its stakeholder list annually. Responsible partners (i.e., Stakeholder-focused Workgroups, such as the Agriculture Workgroup) will engage each partner of the OSWC stakeholder list at least once a year so that community members, landowners, farmers, and community leaders are kept updated on success stories and ways they can protect surface and groundwater.

#### **Roles and Responsibilities:**

##### *Objective 1*

- Analyze outreach efforts annually and track stakeholder outreach regularly to ensure we are successfully reaching and engaging important groups.
- Document previous outreach efforts, identify successful strategies for reaching groups of stakeholders, and create outreach plans for the coming year.
- Meet to determine which metrics are important to track for the coming year. Year 1 will provide a baseline for understanding past efforts by tracking numbers of attendees at events, stakeholder groups reached, a lead contact for reaching individual farmers, and the type of outreach currently conducted across all partners annually.
- Develop a list of local technical service providers and will convene a meeting of these providers annually to share community-specific best practices for successfully engaging English and Plain Sect farmers.

##### *Objective 2*

- Engage, collaborate, or communicate with at least 100 farmers through appropriate outreach and educational events.
- Conduct 60-70 number of site visits with farmers for new projects that offer additional benefits per year. Each partner of Agriculture Workgroup will track site visits in the shared spreadsheet to track efforts across all partners. Revisit this strategy annually with an aim to increase the number of site visits by 10% annually.
- Create a professional display with one to two outreach brochures/factsheets targeted towards farmers. The outreach package will include information for farmers about organizations to contact for specific types of technical assistance and suggested incentives for engaging farmers at the OSWC table at outreach events (e.g., First Friday events).
- Organize one special event per year to engage farmers, such as a farmer bus tour around the watershed.

### *Objective 3*

- Identify community leaders who can be champions or are willing to speak on behalf of the Octoraro Source Water Collaborative.
- Identify agricultural stakeholder groups and leaders from prioritized groups (e.g., municipalities, Amish Bishops, farmers with years of successful conservation BMPs).
- Invite champions and those who are willing to speak on behalf of the Collaborative to Collaborative events and encourage champions to bring other stakeholders to events.
- Build relationships (where individuals can serve as partners in grant applications), provide individuals with talking points and information to be effective champions for the Collaborative, and consider opportunities to form ad-hoc workgroups. Over time, ask those willing to speak on behalf of the Octoraro Source Water Collaborative to share their communities' strengths and needs with the OSWC, so that OSWC can tailor efforts accordingly.

### *Objective 4*

- Work with community leaders to educate the Plain Sect community about water quality concerns especially regarding public health through 2 smaller events per year focused on this issue.

## Monitoring Workgroup

Goal 4 - Increase and Leverage Project Funding among Partners: The Octoraro Source Water Collaborative Planning Committee] will establish a OSWC Funder and Fundee Network to coordinate during major grant rounds (and as new opportunities/leads arise). Partners of this Network will be responsible for:

### Roles and Responsibilities:

#### *Objective 1*

- Coordinate with partners to develop joint grant applications to fund monitoring in strategic locations as determined by the Octoraro Watershed Model and partner activities.
- Coordinate partners to maximize the impact of BMP implementation by providing a forum for collaboration and prioritization of focus areas.
- Use the Octoraro Watershed Model and other tools to prioritize areas for BMP implementation. Review the model, identify focus geographic areas based on the model and willingness of farmers in an area, prioritize BMPs, and develop joint grant applications and work plans to get the most impactful BMPs in strategic locations.
- Coordinate efforts among interested partners who are stakeholders in the Upper Octoraro watershed to focus on high priority areas to maximize impact.

#### *Objective 2*

- Coordinate monitoring plans and share monitoring data and other related information to maximize impact in accordance with the Octoraro Watershed Model, to optimize coverage, and limit redundancy. hold quarterly or half-yearly meetings, depending on the needs of current monitoring activities, to review current monitoring locations and future plans.



- Hold quarterly or half-yearly meetings, depending on the needs of current monitoring activities, to review current monitoring locations and future plans.
- At the first meeting held in 2023, identify the additional partners who need to be considered and involved in coordinating monitoring plans and sharing data.
- Measure water quality at strategic locations as defined by the Octoraro Watershed Model and partners activities, document changes, and analyze trends at least annually.
- Develop or identify and contribute to a shared database for managing and presenting water quality data, trends, and summary information for the Octoraro Watershed.

#### *Objective 3*

- Support the Coordinator and the Planning Committee to collect information and successes from all partners on their work in the Octoraro Watershed over the year to be included in an annual report that celebrates the progress of the Octoraro Source Water Collaborative.
- Draft a question for the annual survey administered by the Planning Committee each year to collect information and successes from all partners on monitoring water quality in the Octoraro Watershed as part of the annual survey administered by the Planning Committee each year.

Goal 6 - The Octoraro Source Water Collaborative will update its stakeholder list annually. Responsible partners (i.e., Stakeholder-focused Workgroups, such as the Agriculture Workgroup) will engage each partner of the OSWC stakeholder list at least once a year so that community members, landowners, farmers, and community leaders are kept updated on success stories and ways they can protect surface and groundwater.

#### **Roles and Responsibilities:**

#### *Objective 1*

- Analyze outreach efforts annually and track stakeholder outreach regularly to ensure we are successfully reaching and engaging important groups.
- Meet to determine which metrics are important to track for the coming year. Year 1 will provide a baseline for understanding past efforts by tracking numbers of attendees at events, stakeholder groups reached, a lead contact for reaching individual farmers, and the type of outreach currently conducted across all partners annually.

#### *Objective 3*

- Engage community leaders from different groups and identify those willing to speak on behalf of the Octoraro Source Water Collaborative.
- Identify community environmental, residential, and municipal stakeholder groups and leaders from prioritized groups (e.g., conservation districts, counties conducting monitoring, MS4 municipalities, and environmental organizations).
- Identify community environmental, residential, and municipal stakeholder groups and leaders from prioritized groups (e.g., conservation districts, counties conducting monitoring, MS4 municipalities, and environmental organizations).

- Build relationships (where individuals can serve as partners in grant applications), provide individuals with talking points and information to be effective champions for the Collaborative, and consider opportunities to form ad-hoc workgroups. Over time, ask those willing to speak on behalf of the Octoraro Source Water Collaborative to share their communities' strengths and needs with the OSWC, so that OSWC can tailor efforts accordingly.

*Objective 4*

- Create a professional display and one to two outreach brochures or factsheets targeted towards the public.

# CALENDAR OF SELECT TASKS

Note that this document only includes tasks that are meant to be done in a specific time frame. Not all tasks are reflected in the calendar. Please see the [Strategic Plan Goals](#) and [Tasks by Responsible Party](#) for a complete list.

2022			
<b>Q1</b>	<b>Q2</b>	<b>Q3</b>	<b>Q4</b> Planning Committee <ul style="list-style-type: none"> <li>Review Tasks by Responsible Party document</li> <li>Develop scope of work for Coordinator.</li> <li>Monthly meetings</li> </ul> Workgroups <ul style="list-style-type: none"> <li>Review Tasks by Responsible Party document</li> <li>Quarterly meeting</li> </ul>
2023			
<b>Q1</b> Planning Committee <ul style="list-style-type: none"> <li>Review Tasks by Responsible Party document</li> <li>Monthly meetings</li> <li>Create and share by-laws for the Collaborative by Q1 2023.</li> <li>Create and share expectations for partners by Q1 2023.</li> <li>Identify funding and financing options to support a Coordinator to administer the OSWC by Q1 2023.</li> </ul> Workgroups	<b>Q2</b> Planning Committee <ul style="list-style-type: none"> <li>Review Tasks by Responsible Party document</li> <li>Monthly meetings</li> <li>Develop template documents and promotional materials as well as guidance for partners to understand how and when to use OSWC materials versus their own organization's materials by Q2 2023.</li> <li>Develop agreed upon design elements (i.e., color palette, fonts) that the OSWC will use</li> </ul>	<b>Q3</b> Planning Committee <ul style="list-style-type: none"> <li>Review Tasks by Responsible Party document</li> <li>Monthly meetings</li> <li>Identify and secure funding to support the administration and coordination of the Collaborative by Q3 2023.</li> <li>Identify and the Alliance will secure funding capacity and capability grants (a variety over time) that are</li> </ul>	<b>Q4</b> Coordinator <ul style="list-style-type: none"> <li>Review Tasks by Responsible Party document</li> <li>Start the creation of a Grant Inventory and Opportunity Tracker, based on funding brainstorming workshops and annual grant workshop, between Q4 2023 and Q1 2024.</li> </ul> Planning Committee <ul style="list-style-type: none"> <li>Review Tasks by Responsible Party document</li> </ul>

<ul style="list-style-type: none"> <li>• Review Tasks by Responsible Party document</li> <li>• Quarterly meeting</li> <li>• Meet to determine which metrics are important to track for the coming year. Each year, the workgroups will re-evaluate the metrics tracked based on success and challenge.</li> </ul>	<p>in materials by Q2 2023.</p> <p>Workgroups</p> <ul style="list-style-type: none"> <li>• Review Tasks by Responsible Party document</li> <li>• Quarterly meeting</li> </ul>	<p>sufficient to support a Coordinator to administer the OSWC.</p> <ul style="list-style-type: none"> <li>• Coordinate the development of a web presence with information about the Collaborative and resources for new partners to get involved by Q3 2023. The Planning Committee will develop the content and format.</li> <li>• Support the Alliance in securing funding for a Coordinator by Q3 2023.</li> </ul> <p>Coordinator</p> <ul style="list-style-type: none"> <li>• Review Tasks by Responsible Party document</li> <li>• Create a group chat or internal communication structure that allows for frequent, informal communication by Q3 2023.</li> <li>• Develop an internal document sharing structure, such as a Google Drive or Box, where all Collaborative resources, especially those that need to be updated frequently, can be stored by Q3 2023.</li> <li>• Create and host a calendar of events by Q3 2023 and the Planning Committee will ensure partners are aware of and the calendar and</li> </ul>	<ul style="list-style-type: none"> <li>• Monthly meetings</li> <li>• Develop, distribute, and collate responses from partners annually through a survey that documents progress and provides opportunities to share feedback annually in Q4.</li> <li>• Annually host Full Collaborative meetings in Q4.</li> <li>• Annually assess the role of the coordinator and the funding sources to ensure the role's effectiveness and sustainability.</li> </ul> <p>Workgroups</p> <ul style="list-style-type: none"> <li>• Review Tasks by Responsible Party document</li> <li>• Quarterly meeting</li> <li>• Support the Coordinator and the Planning Committee to collect information and successes from all partners on their work in the Octoraro Watershed over the year to be included in an annual report that celebrates the progress of the Octoraro Source Water Collaborative.</li> </ul>
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		<p>encourage its use. The calendar will include Collaborative hosted events as well as events that are open to partners.</p> <ul style="list-style-type: none"> <li>• Draft a general letter of support template by the end of Q3 2023 that the Octoraro Source Water Collaborative partners can use when partners coordinate and apply for grant funding.</li> <li>• Lead logistics of the web presence with a contractor or individual partner organization by Q3 2023.</li> </ul> <p>Workgroups</p> <ul style="list-style-type: none"> <li>• Review Tasks by Responsible Party document</li> <li>• Quarterly meeting</li> </ul>	
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## Annual

### Planning Committee

- Create opportunities to review and improve the functioning of the Collaborative on an annual basis.
- As part of the Annual Report, annually compare the current funding levels versus required funding levels for the Coordinator to identify and fill gaps if needed.
- Host Full Collaborative meetings annually in Q4 to provide updates and share Collaborative and partner successes, updates, and priorities for the next year.
- Hold one event that includes expert panels/guest speakers on topics such as Countywide Action Plans (CAPs), Octoraro Reservoir Source Water Protection efforts, new outreach strategies or new best management practices (BMPs), based on feedback on what topics partners are interested in from the annual survey.
- Provide strategic leadership and visioning for approximately two Collaborative-specific events per year.
- Lead membership expansion and retention efforts once per year to include more local voices in the OSWC.
- Track membership year over year.

- Annually prepare a report, using the information collected from the annual survey, to communicate successes and progress to partners to promote retention in involvement with the Collaborative.
- With the Coordinator, host an annual grant coordination workshop in Q1 in accordance with major grant rounds to coordinate efforts.
- With the Coordinator, organize at least one grant writing skill building session in the annual grant coordination workshop.
- With the Coordinator, convene a funding brainstorming session bi-annually to discuss potential grants for project funding. As part of convening this session, the Coordinator and Planning Committee will identify and invite partners and external organizations from both the funder and fundee sides.
- As part of annual grant workshops, brainstorming sessions, and other capacity building training events, working with the Coordinator, invite innovative financing experts to speak with and help educate partners and assist in generating ideas for alternative methods of financing.
- Administer the annual survey.

#### Coordinator

- Share results and work with the Planning Committee for use in Goal 2 (Build Capacity) Strategies 2b and 2d and to recommend/make changes as necessary.
- Lead logistical planning of approximately two Collaborative-specific events with input from the Planning Committee and workgroup partners (e.g., if partners have a relationship with a desired guest speaker and can connect the OSWC to them).
- Help assign pieces of the annual report to Planning Committee members.
- Create and maintain a “partner inventory” spreadsheet that all partners contribute to. The tool will be updated annually.
- With the Planning Committee, host an annual grant coordination workshop in Q1 in accordance with major grant rounds to coordinate efforts.
- With the Planning Committee, organize at least one grant writing skill building session in the annual grant coordination workshop.
- With the Planning Committee, convene a funding brainstorming session bi-annually to discuss potential grants for project funding. As part of convening this session, the Coordinator and Planning Committee will identify and invite partners and external organizations from both the funder and fundee sides.
- As part of annual grant workshops, brainstorming sessions, and other capacity building training events, working with the Planning Committee, invite innovative financing experts to speak with and help educate partners and assist in generating ideas for alternative methods of financing.

#### Agriculture Workgroup

- Draft a question for the annual survey administered by the Planning Committee each year to collect information and successes from all partners on BMP implementation in the Octoraro Watershed.
- Analyze outreach efforts annually and track stakeholder outreach regularly to ensure we are successfully reaching and engaging important groups.
- Document previous outreach efforts, identify successful strategies for reaching groups of stakeholders, and create outreach plans for the coming

year.

- Meet to determine which metrics are important to track for the coming year. Year 1 will provide a baseline for understanding past efforts by tracking numbers of attendees at events, stakeholder groups reached, a lead contact for reaching individual farmers, and the type of outreach currently conducted across all partners annually.
- Engage, collaborate, or communicate with at least 100 farmers through appropriate outreach and educational events.
- Conduct 60-70 number of site visits with farmers for new projects that offer additional benefits per year. Each partner of Agriculture Workgroup will track site visits in the shared spreadsheet to track efforts across all partners. Revisit this strategy annually with an aim to increase the number of site visits by 10% annually.
- Organize one special event per year to engage farmers, such as a farmer bus tour around the watershed.
- Work with community leaders to educate the Plain Sect community about water quality concerns especially regarding public health through 2 smaller events per year focused on this issue.

#### Monitoring Workgroup

- Hold quarterly or half-yearly meetings, depending on the needs of current monitoring activities, to review current monitoring locations and future plans.
- Support the Coordinator and the Planning Committee to collect information and successes from all partners on their work in the Octoraro Watershed over the year to be included in an annual report that celebrates the progress of the Octoraro Source Water Collaborative.
- Draft a question for the annual survey administered by the Planning Committee each year to collect information and successes from all partners on monitoring water quality in the Octoraro Watershed as part of the annual survey administered by the Planning Committee each year.
- Analyze outreach efforts annually and track stakeholder outreach regularly to ensure we are successfully reaching and engaging important groups.
- Meet to determine which metrics are important to track for the coming year. Year 1 will provide a baseline for understanding past efforts by tracking numbers of attendees at events, stakeholder groups reached, a lead contact for reaching individual farmers, and the type of outreach currently conducted across all partners annually.

## 2024

### Q1

#### Planning Committee

- Review Tasks by Responsible Party document
- Monthly meetings

#### Coordinator

- Review Tasks by Responsible Party document
- Start the creation of a Grant Inventory and Opportunity Tracker, based on funding brainstorming workshops and annual grant workshop, between Q4 2023 and Q1 2024.

#### Workgroups

- Review Tasks by Responsible Party document
- Quarterly meeting
- Meet to determine which metrics are important to track for the coming year. Each year, the workgroups will re-evaluate the metrics tracked based on success and challenge.

### Q2

#### Planning Committee

- Review Tasks by Responsible Party document
- Monthly meetings

#### Workgroups

- Review Tasks by Responsible Party document
- Quarterly meeting

### Q3

#### Planning Committee

- Review Tasks by Responsible Party document
- Monthly meetings

#### Workgroups

- Review Tasks by Responsible Party document
- Quarterly meeting

### Q4

#### Planning Committee

- Review Tasks by Responsible Party document
- Monthly meetings
- Develop, distribute, and collate responses from partners annually through a survey that documents progress and provides opportunities to share feedback annually in Q4.
- Annually host Full Collaborative meetings in Q4.
- Annually assess the role of the coordinator and the funding sources to ensure the role's effectiveness and sustainability.

#### Workgroups

- Review Tasks by Responsible Party document
- Quarterly meeting
- Support the Coordinator and the Planning Committee to collect information and successes from all partners on their work in the Octoraro Watershed over the year to be included in an annual report that celebrates the progress of the Octoraro Source Water Collaborative.

### Annual

#### Planning Committee

- Create opportunities to review and improve the functioning of the Collaborative on an annual basis.
- As part of the Annual Report, annually compare the current funding levels versus required funding levels for the Coordinator to identify and fill



gaps if needed.

- Host Full Collaborative meetings annually in Q4 to provide updates and share Collaborative and partner successes, updates, and priorities for the next year.
- Hold one event that includes expert panels/guest speakers on topics such as Countywide Action Plans (CAPs), Octoraro Reservoir Source Water Protection efforts, new outreach strategies or new best management practices (BMPs), based on feedback on what topics partners are interested in from the annual survey.
- Provide strategic leadership and visioning for approximately two Collaborative-specific events per year.
- Lead membership expansion and retention efforts once per year to include more local voices in the OSWC.
- Track membership year after year.
- Annually prepare a report, using the information collected from the annual survey, to communicate successes and progress to partners to promote retention in involvement with the Collaborative.
- With the Coordinator, host an annual grant coordination workshop in Q1 in accordance with major grant rounds to coordinate efforts.
- With the Coordinator, organize at least one grant writing skill building session in the annual grant coordination workshop.
- With the Coordinator, convene a funding brainstorming session bi-annually to discuss potential grants for project funding. As part of convening this session, the Coordinator and Planning Committee will identify and invite partners and external organizations from both the funder and fundee sides.
- As part of annual grant workshops, brainstorming sessions, and other capacity building training events, working with the Coordinator, invite innovative financing experts to speak with and help educate partners and assist in generating ideas for alternative methods of financing.
- Administer the annual survey.

#### Coordinator

- Share results and work with the Planning Committee for use in Goal 2 (Build Capacity) Strategies 2b and 2d and to recommend/make changes as necessary.
- Lead logistical planning of approximately two Collaborative-specific events with input from the Planning Committee and workgroup partners (e.g., if partners have a relationship with a desired guest speaker and can connect the OSWC to them).
- Help assign pieces of the annual report to Planning Committee members.
- Create and maintain a “partner inventory” spreadsheet that all partners contribute to. The tool will be updated annually.
- With the Planning Committee, host an annual grant coordination workshop in Q1 in accordance with major grant rounds to coordinate efforts.
- With the Planning Committee, organize at least one grant writing skill building session in the annual grant coordination workshop.
- With the Planning Committee, convene a funding brainstorming session bi-annually to discuss potential grants for project funding. As part of convening this session, the Coordinator and Planning Committee will identify and invite partners and external organizations from both the funder and fundee sides.

- As part of annual grant workshops, brainstorming sessions, and other capacity building training events, working with the Planning Committee, invite innovative financing experts to speak with and help educate partners and assist in generating ideas for alternative methods of financing.

#### Agriculture Workgroup

- Draft a question for the annual survey administered by the Planning Committee each year to collect information and successes from all partners on BMP implementation in the Octoraro Watershed.
- Analyze outreach efforts annually and track stakeholder outreach regularly to ensure we are successfully reaching and engaging important groups.
- Document previous outreach efforts, identify successful strategies for reaching groups of stakeholders, and create outreach plans for the coming year.
- Meet to determine which metrics are important to track for the coming year. Year 1 will provide a baseline for understanding past efforts by tracking numbers of attendees at events, stakeholder groups reached, a lead contact for reaching individual farmers, and the type of outreach currently conducted across all partners annually.
- Engage, collaborate, or communicate with at least 100 farmers through appropriate outreach and educational events.
- Conduct 60-70 number of site visits with farmers for new projects that offer additional benefits per year. Each partner of Agriculture Workgroup will track site visits in the shared spreadsheet to track efforts across all partners. Revisit this strategy annually with an aim to increase the number of site visits by 10% annually.
- Organize one special event per year to engage farmers, such as a farmer bus tour around the watershed.
- Work with community leaders to educate the Plain Sect community about water quality concerns especially regarding public health through 2 smaller events per year focused on this issue.

#### Monitoring Workgroup

- Hold quarterly or half-yearly meetings, depending on the needs of current monitoring activities, to review current monitoring locations and future plans.
- Support the Coordinator and the Planning Committee to collect information and successes from all partners on their work in the Octoraro Watershed over the year to be included in an annual report that celebrates the progress of the Octoraro Source Water Collaborative.
- Draft a question for the annual survey administered by the Planning Committee each year to collect information and successes from all partners on monitoring water quality in the Octoraro Watershed as part of the annual survey administered by the Planning Committee each year.
- Analyze outreach efforts annually and track stakeholder outreach regularly to ensure we are successfully reaching and engaging important groups.
- Meet to determine which metrics are important to track for the coming year. Year 1 will provide a baseline for understanding past efforts by

tracking numbers of attendees at events, stakeholder groups reached, a lead contact for reaching individual farmers, and the type of outreach currently conducted across all partners annually.

## 2025

### Q1

#### Planning Committee

- Review Tasks by Responsible Party document
- Monthly meeting

#### Workgroups

- Review Tasks by Responsible Party document
- Quarterly meeting
- Meet to determine which metrics are important to track for the coming year. Each year, the workgroups will re-evaluate the metrics tracked based on success and challenge.

### Q2

#### Planning Committee

- Review Tasks by Responsible Party document
- Monthly meeting

#### Workgroups

- Review Tasks by Responsible Party document
- Quarterly meeting

### Q3

#### Planning Committee

- Review Tasks by Responsible Party document
- Monthly meeting

#### Workgroups

- Review Tasks by Responsible Party document
- Quarterly meeting

### Q4

#### Planning Committee

- Review Tasks by Responsible Party document
- Monthly meeting
- Develop, distribute, and collate responses from partners annually through a survey that documents progress and provides opportunities to share feedback annually in Q4.
- Annually host Full Collaborative meetings in Q4.
- Annually assess the role of the coordinator and the funding sources to ensure the role's effectiveness and sustainability.

#### Workgroups

- Review Tasks by Responsible Party document
- Quarterly meeting
- Support the Coordinator and the Planning Committee to collect information and

			successes from all partners on their work in the Octoraro Watershed over the year to be included in an annual report that celebrates the progress of the Octoraro Source Water Collaborative.
<p><b>Annual</b></p> <p>Planning Committee</p> <ul style="list-style-type: none"> <li>• Create opportunities to review and improve the functioning of the Collaborative on an annual basis.</li> <li>• As part of the Annual Report, annually compare the current funding levels versus required funding levels for the Coordinator to identify and fill gaps if needed.</li> <li>• Host Full Collaborative meetings annually in Q4 to provide updates and share Collaborative and partner successes, updates, and priorities for the next year.</li> <li>• Hold one event that includes expert panels/guest speakers on topics such as Countywide Action Plans (CAPs), Octoraro Reservoir Source Water Protection efforts, new outreach strategies or new best management practices (BMPs), based on feedback on what topics partners are interested in from the annual survey.</li> <li>• Provide strategic leadership and visioning for approximately two Collaborative-specific events per year.</li> <li>• Lead membership expansion and retention efforts once per year to include more local voices in the OSWC.</li> <li>• Track membership year over year.</li> <li>• Annually prepare a report, using the information collected from the annual survey, to communicate successes and progress to partners to promote retention in involvement with the Collaborative.</li> <li>• With the Coordinator, host an annual grant coordination workshop in Q1 in accordance with major grant rounds to coordinate efforts.</li> <li>• With the Coordinator, organize at least one grant writing skill building session in the annual grant coordination workshop.</li> <li>• With the Coordinator, convene a funding brainstorming session bi-annually to discuss potential grants for project funding. As part of convening this session, the Coordinator and Planning Committee will identify and invite partners and external organizations from both the funder and fundee sides.</li> <li>• As part of annual grant workshops, brainstorming sessions, and other capacity building training events, working with the Coordinator, invite innovative financing experts to speak with and help educate partners and assist in generating ideas for alternative methods of financing.</li> <li>• Administer the annual survey.</li> </ul> <p>Coordinator</p> <ul style="list-style-type: none"> <li>• Share results and work with the Planning Committee for use in Goal 2 (Build Capacity) Strategies 2b and 2d and to recommend/make changes as necessary.</li> </ul>			

- Lead logistical planning of approximately two Collaborative-specific events with input from the Planning Committee and workgroup partners (e.g., if partners have a relationship with a desired guest speaker and can connect the OSWC to them).
- Help assign pieces of the annual report to Planning Committee members.
- Create and maintain a “partner inventory” spreadsheet that all partners contribute to. The tool will be updated annually.
- With the Planning Committee, host an annual grant coordination workshop in Q1 in accordance with major grant rounds to coordinate efforts.
- With the Planning Committee, organize at least one grant writing skill building session in the annual grant coordination workshop.
- With the Planning Committee, convene a funding brainstorming session bi-annually to discuss potential grants for project funding. As part of convening this session, the Coordinator and Planning Committee will identify and invite partners and external organizations from both the funder and fundee sides.
- As part of annual grant workshops, brainstorming sessions, and other capacity building training events, working with the Planning Committee, invite innovative financing experts to speak with and help educate partners and assist in generating ideas for alternative methods of financing.

#### Agriculture Workgroup

- Draft a question for the annual survey administered by the Planning Committee each year to collect information and successes from all partners on BMP implementation in the Octoraro Watershed.
- Analyze outreach efforts annually and track stakeholder outreach regularly to ensure we are successfully reaching and engaging important groups.
- Document previous outreach efforts, identify successful strategies for reaching groups of stakeholders, and create outreach plans for the coming year.
- Meet to determine which metrics are important to track for the coming year. Year 1 will provide a baseline for understanding past efforts by tracking numbers of attendees at events, stakeholder groups reached, a lead contact for reaching individual farmers, and the type of outreach currently conducted across all partners annually.
- Engage, collaborate, or communicate with at least 100 farmers through appropriate outreach and educational events.
- Conduct 60-70 number of site visits with farmers for new projects that offer additional benefits per year. Each partner of Agriculture Workgroup will track site visits in the shared spreadsheet to track efforts across all partners. Revisit this strategy annually with an aim to increase the number of site visits by 10% annually.
- Organize one special event per year to engage farmers, such as a farmer bus tour around the watershed.
- Work with community leaders to educate the Plain Sect community about water quality concerns especially regarding public health through 2 smaller events per year focused on this issue.



#### Monitoring Workgroup

- Hold quarterly or half-yearly meetings, depending on the needs of current monitoring activities, to review current monitoring locations and future plans.
- Support the Coordinator and the Planning Committee to collect information and successes from all partners on their work in the Octoraro Watershed over the year to be included in an annual report that celebrates the progress of the Octoraro Source Water Collaborative.
- Draft a question for the annual survey administered by the Planning Committee each year to collect information and successes from all partners on monitoring water quality in the Octoraro Watershed as part of the annual survey administered by the Planning Committee each year.
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# Octoraro Source Water Collaborative

## What is a Source Water Collaborative?

Source Water Collaboratives are groups of organizations that include a wide cross-section of partners who work together to protect sources of drinking water.

## The Octoraro Source Water Collaborative

The Octoraro Source Water Collaborative is a partnership of local stakeholders, environmental and non-profit organizations, agency and municipal officials, and farmers that work to protect the Upper Octoraro Watershed and the Octoraro Reservoir. The Collaborative is a network of partners, agencies, and organizations collaborating to improve water quality for drinking water protection in the Octoraro Watershed. It coordinates efforts across the watershed to maximize the impact of each partner's efforts. The Collaborative is made up of a Planning Committee, Agriculture Workgroup, Monitoring Workgroup, and ad-hoc workgroups who all work together to achieve the mission, vision, and goals of the Collaborative.

The Octoraro Source Water Collaborative was formed in 2016 when the Alliance for the Chesapeake Bay received two grants from the National Fish and Wildlife Foundation to reduce nitrate pollution in the Octoraro Watershed within Lancaster and Chester Counties. Seeking local expertise, the Alliance for the Chesapeake Bay partnered with the Octoraro Watershed Association, which has worked in the watershed since 1967. These partners also led the creation of the Collaborative to reduce high nitrate concentrations in ground and surface waters in the contributing recharge watersheds of the Octoraro Reservoir.

## The Octoraro Watershed

The Upper Octoraro Watershed includes the parts of Chester County and parts of Lancaster County in Pennsylvania that drain to the Octoraro Reservoir. The Octoraro Reservoir is the main source of drinking water for Chester Water Authority, which supplies water to more than 40,000 customers in 33 municipalities in the City of Chester, Western Delaware County, and Southern Chester County. The entire Octoraro Watershed spans 208 square miles and has a population of about 45,000. It includes many agricultural communities as agricultural land use makes up over 70% of the landscape.

## Values

The values of the Collaborative are the beliefs, philosophies, and principles, that drive the work. Values important to the Collaborative include:

- Science-based decision making
- Community-based efforts, including agricultural, recreational, residential, business, and municipal communities
- Collaboration
- Habitat restoration
- Open communication and partnership
- Cultural heritage



# Mission

To provide a collaborative forum for partners to work toward a clean Upper Octoraro watershed to discuss common priorities, build capacity and leverage resources for their own and collective goals.

# Vision

A clean and healthy Upper Octoraro Creek Watershed that protects drinking water sources and contributes to high quality of life for the entire community with co-benefits for the natural environment.

# Goals

1. **Improve Collaboration:** The Octoraro Source Water Collaborative Planning Committee will create collaboration opportunities in multiple formats so that all partners are engaged and can provide feedback to further enhance Collaborative efforts.
2. **Build Capacity:** The Octoraro Source Water Collaborative will build capacity of individual partners and the Collaborative as a whole (a) through meetings, (b) by providing financial, data management, outreach and other training opportunities, (c) by expanding the Collaborative's membership, and (d) by creating opportunities for collective leadership.
3. **Secure Coordination Funding:** The Planning Committee will identify and secure funding to support the administration and coordination of the Collaborative by Q1 2023.
4. **Increase and Leverage Project Funding among Partners:** The Octoraro Source Water Collaborative Planning Committee will establish a OSWC Funder and Fundee Network to coordinate during major grant rounds (and as new opportunities/leads arise). Partners of this Network will be responsible for:
  - a. comparing planned efforts to avoid duplication, coordinating on applications, and identifying opportunities to create stackable matches.
  - b. requesting letters of support from all partner organizations and/or the 'Collaborative' to present as a unified approach/effort to funders.



Overall, at least 3 partners should collaborate on at least 4 grant applications each year. These goals have potential to grow annually.

5. **Reduce Pollutants:** The Agriculture and Monitoring Workgroups will improve water quality by reducing nutrient and sediment loading in the Upper Octoraro through increased BMP implementation, identifying and accessing funding, monitoring and documenting changes, and sharing successes and lessons learned.
6. **Increase Understanding:** The Octoraro Source Water Collaborative will update its stakeholder list annually. Responsible partners (i.e., Stakeholder-focused Workgroups, such as the Agriculture Workgroup) will engage each partner of the OSWC stakeholder list at least once a year so that community members, landowners, farmers, and community leaders are kept updated on success stories and ways they can protect surface and groundwater.