

IAE LISTENING SESSION



**Institute
for
Applied
Ecology**

8/14/2012

Corvallis, Oregon

IAE Listening Session

PURPOSE

The Institute for Applied Ecology (IAE), a 501 (c)(3) nonprofit organization located in Corvallis, Oregon, has a mission to conserve native species and habitats through restoration, research, and education. IAE fills a unique niche among nonprofit organizations and agencies because of its joint focus on restoration, research and education. In 2009, IAE developed a three-year strategic plan to review its mission, vision, and programs, conduct a self-evaluation, and plan its near-term future. They completed the majority of action items in that strategic plan, and launched an initiative in 2012 to develop a 2013–2016 strategic plan.

As part of that strategic planning process, IAE leadership sought input from key partner organizations via a listening session on August 14, 2012 in Corvallis, Oregon. Partners were asked to provide input to the following areas:

- The value of IAE to the regional conservation community, and the difference IAE is making through its actions and initiatives.
- The elements of IAE that distinguish it from other regional entities.
- IAE's strengths and weaknesses.
- The perception of IAE by the general public and partner organizations.
- How IAE should respond to existing and emerging priorities, and where it should allocate its resources.
- The appropriate geographic scope and scale of IAE.
- Ways IAE can demonstrate success as well as provide educational opportunities.
- The highest priority IAE actions.
- Influences that affect how all conservation entities should be addressing the conservation of native species and habitats.

This document summarizes themes/responses from these conversations from the following participants:

- Xan Augerot—*Mary's River Watershed Council*
- Jenny Ayotte—*Benton Soil and Water Conservation District*
- Samantha Bartling—*Natural Resources Conservation Service*
- Dan Bell—*The Nature Conservancy*
- Steve Caico—*US Fish and Wildlife Service*
- Rebecca Currin—*US Fish and Wildlife Service*
- Jeff Dillon—*US Fish and Wildlife Service*
- Jarod Jebousek—*US Fish and Wildlife Service*
- Dominic Maze—*City of Portland Bureau of Environmental Services*
- Michael Pope—*Greenbelt Land Trust*
- Jeff Powers—*Benton County Natural Area and Parks*
- Kelli VanNorman—*Bureau of Land Management*

In all cases, comments listed are bulleted, and are direct quotes, with very minor editorial changes to enhance readability.

Lisa DeBruyckere of Creative Resource Strategies, LCC, facilitated the listening session and summarized the listening session comments.

THE ROLE AND NICHE OF IAE, AND ITS IMPACT

IAE is recognized as having a unique role among conservation entities in the region, providing a comprehensive set of services, from planning and restoration, through monitoring at a landscape scale. The organization is recognized for its keen ability to ask much-needed research questions, and respond with lean, efficient research projects that competently address the research questions, then document project outcomes. IAE staff is relied upon for their expertise and knowledge, particularly in upland areas, where few other organizations have the capacity, knowledge, and experience. IAE is recognized as a trustworthy, flexible, organization that assists other organizations with developing realistic expectations relative to habitat restoration. IAE has the reputation and ability to convene others, and partners recognized the expansion in the portfolio of services has provided over time.

- When developing Habitat Conservation Plans (HCP), organizations need guidance in both process and habitat restoration protocols—through our relationship with IAE, we become more sophisticated relative to HCP responsibilities and generally with restoration and habitat management.
- We are looking for partners that can take on recovery efforts/listed species—not just an entity that restores, but one that does landscape-scale work; IAE is one of the few that can do that.
- IAE provides a unique service to the federal agencies—conservation research—they provide valid, well-thought out research to answer our questions (land management) that we can apply to habitat restoration.
- We seek input on land transactions and conservation property values—IAE builds the larger ecological context. They provide great tools, including an analysis of where a property or project fits into the larger landscape.
- A lot of our work involves easements—yet many entities are not structured to manage the land. We rely on IAE and their expertise for management of these sites, including types of species.
- We look to IAE as a resource for specific ecological expertise—savannah and prairie species in particular. We value them for their educational programs; it's a small part of what they do, but we work hand-in-hand with them to take programs to schools through RARE, which involves classroom and field work.
- IAE can identify key management questions, then develops protocols to answers the questions, and then documents the results; that is rare and valuable.
- Our partnership is crucial; they know what they are doing in their ability to handle the species. There are not many other folks we would trust to do those things. Their ability to take funds and work within our bureaucratic constraints has also been crucial. We know the job will get done right.
- In the restoration realm, we're always working on common projects (e.g., WRPs). They conduct research in restoration, which is invaluable. We help them with their projects, and they in turn, get a few of their people certified to operate federal equipment, so everyone benefits when a project is being completed.
- There's no similar organization as IAE in Washington State; I wish there was.
- I've seen a steep evolution of the number of services they provide in the past few years. Their portfolio is expanding; it's a good trajectory.
- IAE is moving recovery forward for a lot of species. They have a big picture perspective. They have become one of the best entities out there for bringing together partners. They know all the players. They are good conveners.

- They're good at answering the questions we don't know. We can give a landowner a species list, but their research helps us manage best for species on different sites. They help answer the questions we don't have answers to.
- They're good at bringing us back to reality, telling us certain areas cannot be restored to what we originally proposed. They're a good check in terms of expectations. They're a small group of restoration practitioners sharing experiences with others.
- They are one of the few groups that is the full meal. Some groups can do a project here or there, e.g., they can only do either education, or research, or restoration. IAE is one of the few groups that can do everything. They are science based and research based.
- They work throughout Oregon, not just the Willamette Valley.

IAE'S STRENGTHS

IAE is recognized for being responsive, cost-effective, lean, and flexible. The organization has reputation for hiring qualified people, and has a proven capacity to raise funds to sustain the organization long-term. When developing its strategic initiatives, it considers its partners and their needs, and has demonstrated its ability to be flexible as partner needs change. IAE is noted for tackling tough conservation issues as well as providing multiple services.

- They hire good people.
- They're responsive.
- They're good at raising money.
- They are cost-effective and lean.
- They are completely applied (i.e., they didn't write their goals and objectives themselves; their plan is their partners' vision). A lot of other nonprofits have a board or steering group that develop their own priorities and goals, and then tailor whatever they do for other folks. IAE hasn't gone down that road. They do what needs to be done to achieve everyone else's goals.
- They're flexible. We've been able to describe our needs and niche, and there's no case where they haven't been able to simply and effectively fill that niche—with no filters.
- They provide multiple services. They help us identify the conservation values, they do the assessment to illuminate the values of the property, and they help us in management planning and outreach. No other organization has that complex capacity. They provide the whole spectrum.
- Their willingness to tackle difficult issues, e.g., native plant materials. They're making a concerted effort to develop a market for that.

IAE'S WEAKNESSES

IAE lacks adequate infrastructure in terms of office and meeting space, storage space, and equipment, and has an underfunded education program. Staff turnover has affected partner projects. Data management has not kept pace with the growth of IAE. Coordination and communication could be improved with partner organizations. Some consider IAE's project proposals to be expensive, and several

suggestions were made relative to IAE bringing new types of funding into its organization outside of cyclical grant funding. It was noted that the list of programs for an organization as small as IAE is significant.

- Lack of infrastructure—adequate office space, lack of adequate facilities. They should have meeting space, own greenhouses for storage, etc. Lack of infrastructure contributes to job dissatisfaction among employees.
- Regulatory and cost-effective requirements. IAE is restoring wetlands, yet at the same time, they aren't accruing enough money to park or buy mowing equipment.
- Underfunded education program—trying to raise money for the education program by raising overhead rates makes it a struggle for partners at times, who seek to minimize overhead rates.
- Staff turnover—on one management plan, we had 3 different people working on it. Stability in staff needed.
- Data management—their data management has not kept pace with the growth of the organization. It has been difficult to obtain information at times because they can't keep up with the data.
- Cost of projects—IAE proposals are very expensive.
- Coordination/Communication—IAE is working with a lot of listed species. It's not uncommon to find out IAE is working with a listed species that we knew nothing about. We would like more information about where all of these populations are (on an annual basis) before they are planted. It's not about trust—we just need to respond to numerous inquiries. There was an instance on Basket Butte when we thought we knew what was going on, and IAE had crews on the Butte, and we didn't know about it. A grant got funded, but we didn't realize they were part of the grant until it was funded—the more IAE reaches out to its partners, the better.
- IAE capacity—The list of programs for the size of the organization is huge. Is this more than IAE can have on its plate at one time? Are there areas they can be more focused on, are they trying to do too much?
- Chasing grant opportunities—Can IAE commit to programs for a period of time versus taking advantage of cycling grant funding program opportunities (i.e., the foundation cycle)? It's hard to stay focused keeping programs funded and running well versus chasing the next thing.
- Development—They need to think of ways to bring funding into the organization outside of the grant cycle.
- Employee time off—Give employees July 4th off.

HOW IAE IS PERCEIVED

IAE is not a well-recognized organization in the eyes of the general public, and is considered a silent partner on projects at differing scales. Lack of awareness of IAE could be a barrier to expanding its income source to enhance long-term sustainability and lessen the cyclical effect of grant program funding. Within the conservation community, IAE is very well known and respected, and is recognized as a science-based impartial organization. If IAE decides to increase its profile, it should be cognizant of increased pressures it could face and how its priorities could change. IAE should consider endowments as a way to enhance sustainability of the organization long-term.

- IAE is not widely known.
- When IAE is recognized, it is believed to be part of Oregon State University, or it's confused with the Institute for Natural Resources. Oregon's native plant society (NPSO) provides a small grant to IAE, and the

IAE interns write short articles to NPSO members. Still, NPSO members probably don't have a clear understanding of IAE, especially outside of the Corvallis chapter.

- There is some public awareness because of their education program locally, but they are kind of a secondary figure. The county HCP got tons of publicity, but it wasn't centered around IAE; it was centered around the county. IAE is a quiet partner, but for fundraising purposes, they deserve to be better known.
- IAE is extremely well known in the conservation community. If they want to expand their individual donor fundraising, they need to make more friends. They could host specific events and deepen their relationship with partners and others already interested in native plants, and then broaden statewide.
- Because of the whole threatened and endangered species thing (which is inflammatory), they don't want to be high profile.
- If IAE goes down the road to getting memberships, will they need to establish a new or changed identity and lose something by doing down that road? Would they lose any of that ability if they went more broadly public?
- If IAE broadens its donor support, they have another set of people to answer to, which may force them to shift how the agencies perceive their work.
- We currently perceive their work as impartial.
- In the nonprofit realm, it is valuable to have a steady income stream when grant cycles go up and down; it's important. Support the development director to see where it could go.
- We're in a nonprofit rich community—we have everyone struggling for the same donors, so it won't be an easy task for them to build a new donor program. Look at an operational endowment and how you would build that. A legacy program that they can focus on will result in an endowment that will make a significant difference.
- A wider public awareness will be beneficial; public funding could create flexibility. It seems unwise to keep yourself so closely tied to government funding. They need to get themselves out of that situation to be sustainable long-term. Focus on endowment and small pool of people giving a large amount of money.

PARTNERSHIPS

The value of LAE in the conservation community is well appreciated by LAE's partners, so much so that hope was expressed that other organizations like LAE would exist in other states. At the same time, it was noted that LAE's focus in the Willamette Valley, where it is located, is integral to its success. Still, there may be opportunities to expand the reach of the organization to WRP sites, via training opportunities, in eastern Oregon, in Washington, and with other organizations. A key question LAE needs to ask itself is whether or not it seeks to grow.

- I wish there were other organizations like IAE that could be created in other states. The whole conservation community would benefit from reputable solid players.
- One of their strengths is that they are based in the Willamette Valley. You lose place-based experience the further you get away from the Valley. Focus on the current footprint—continue to work with primary partners. Growth is perhaps working with more nonprofits and watershed councils to create local partnerships. Produce training partners and materials.

- Lots of WRP sites that need help in the lower part of the valley.
- An expansion of training opportunities will build partnership and expertise.
- There are a lot of unfilled niches (eastside, Washington)—develop those. IAE has expertise they can provide, if they can manage the growth.
- Does IAE want to grow? It's a good place to work because it's a small office. The culture of the organization may need to change to adapt to a changing perspective.
- There's a need to get a few things in place on a smaller scale before taking on new initiatives.
- There are challenges to growth. The Center for Natural Lands Management is doing similar kinds of stuff; there are overlapping niches. Not sure how much growth is potential outside of Oregon.

IAE'S PROGRAMMING

Partners expressed alignment with three core LAE programs—Habitat Restoration, Conservation Research, and the Native Seed Network, noting alignment with these programs and partner initiatives, but also noting this alignment was funding driven. Education was mentioned as being critical for advocacy for conservation. Monitoring within the Habitat Restoration Program could be enhanced, but it was recognized that few funders are willing to fund monitoring, especially long-term monitoring. Most were unaware that LAE has an Estuary Technical Group, and it was suggested by numerous partners that LAE brainstorm new ways to communicate its programs using different language that describes what staff are doing, where they are doing it, and why that work is important. LAE was encouraged to think about what happens after a project concludes—and describe the vision for these lands 50 years from now.

- Four of the five programs correspond almost exactly with the policy tenants put forth in our comprehensive plan, so there's a lot of alignment. I would advocate that they continue to focus on those five focus areas.
- There's a crucial need for better monitoring, which should be embedded in habitat restoration.
- I never even knew they had an Estuary Technical Group—I'm not sure why they chose that ecosystem versus some other ecosystem, unless they received funding for coastal estuary work. There's lack of awareness of this program—it seems a little out of sync with the others.
- I have a hard time figuring out what these four programs are—what are they doing where are they doing it, what is compelling about the work they are doing?
- Education is more of a component of all programs, not a separate program, even if the funding streams are separate. Education supports the other areas; all five programs are intermingled. But there are better ways of describing all four programs.
- Does IAE want to own land or hold easements? The money and opportunity is there with BPA. Does IAE want to think about a long-term stewardship role without being the landowner? Routine management past the restoration phase? What happens after a project ends? How does IAE develop a concept for that? How do we maintain these areas, keep out invasives, etc. What does it look like in 50 years?
- Demonstration sites can be used for native plant seed banks as well as demo sites; IAE could have its headquarters on a demo site; it would be a great outreach tool.
- How IAE is organized is funding driven.

- Conservation research—learning through trial and error— is really important.
- Habitat Restoration is where we, as partners, need a lot of help. A key component of habitat restoration is management planning. We really hope they continue to expand the program to the extent they can given the portion of private lands and diverse landscapes in the Willamette Valley.
- Native plant material production places a limit on how much habitat restoration we can achieve.
- Habitat Restoration, Conservation Research, and the Native Seed Network help us build the infrastructure.
- For building advocacy for conservation, the advocacy/education piece is important.
- The publication, *From Salmonberry to SageBrush*, is fantastic. It's unique, and there's little of that kind of thing done now. There's a marketing opportunity for IAE to promote their educational materials.

IAE'S GEOGRAPHIC FOCUS

LAE has opportunities to “stretch” the work of the organization, but needs to be mindful of focusing on doing quality work if its scope expands. Opportunities exist to partner with organizations that have overlap with LAE goals, such as the Center for Natural Lands Management, and the coalition of Oregon Land Trusts.

- You could envision them stretching the work they currently do to the north, but it’s a question for IAE—how far can you stretch yourselves? You can be somewhat good in a lot of areas, or be great in a small number of areas.
- Another option is to increase regional partnership with the Center for Natural Lands Management—integrate programs to work with others on similar types of issues. There are reservations about them getting bigger because some of the problems they are dealing with are really difficult, e.g. seed production increases. If IAE moves out of this particular ecoregion, it will be dealing with another suite of farmers, nursery people, species, etc.
- The coalition of Oregon Land Trusts has a great need for an organization like IAE to assist in landscape values, management planning, and implementation. There’s so few organizations that do all of these things in its entirety. There is a great partnership with land trusts—this network could be expanded.

HOW IAE CAN DEMONSTRATE ITS SUCCESS

Communication and collaboration are two key ways LAE can demonstrate success; partners can be integral in both approaches. Using tools that exist, such as the Conservation Registry, to document and share project outcomes, hosting public tours, using social media and its own website, and expanding collaboration to minimize costs were mentioned as ways to demonstrate success.

- Communication—
 - getting the information about what has been done, finishing projects, how it was done, when it was done, and what is going to be done in the coming year to follow up—this will give us a grasp of what has been going on and what has been successful. It would help us speak to their accomplishments; we could be their marketing outreach.
 - Communication can be done more effectively with more maps - recognizing the double- edged sword of threatened and endangered species maps.
 - The Conservation Registry is already in place and could be used.

- Communicating with the public—tours are well received. Demonstrate your work and get publicity.
 - Newsletter, blog, sending out messages when new blogs are posted. Focusing on sensitive species projects we funded—it's a small community that outreach is going to. We use IAE's website to see what projects they have done in the past. Keep old reports on the IAE website. Post opportunities for volunteers.
- They are in the vanguard for perfection techniques—that demonstrates success.
 - Long-term collaborations with nonprofits—good collaboration examples spread the costs across the organizations. Organizations can assist one another with grant writing.

IMPROVING IAE'S EDUCATION INITIATIVES

Numerous opportunities exist to improve IAE's education initiatives, including incorporating educational components through all aspects of landscape planning and management, hosting interns, providing education via demonstration sites, continuing the school greenhouse program, creating and sharing curriculum, and providing opportunities for adults to participate in tours. It was, however, noted, that education is time consuming and people intensive—it's a big commitment for a small organization to implement a comprehensive education program.

- Take a collaborative approach and focus on one landscape through time, from the early stages of planning, through restoration and monitoring—and include an educational component.
- Intern programs at IAE—these are important because it's a training ground for restoration folks—continue that.
- Efficient is the wrong criteria when it comes to education—you can't do it without people. Most funders don't want to fund people—makes it challenging. It has to be funded by individual donors. Build the connection between people and kids going through these programs and funding.
- Education on site is important.
- We have an education center and we keep hitting walls with school and funding. It's going to take a groundswell of people throwing money into a pot and facilitating school systems.
- IAE is the only one doing a greenhouse-based program. Through time, the schools have geared up—hate to lose that. The connection to propagation, how things grow, and habitats—it just connects to so much and makes science real. Others should help fund it.
- IAE put together curriculum that can be used more broadly in other places. This is their backyard.
- Outreach to provide opportunities for adults to monitor and share information. Would love to see "Friend of Jepson Herbarium-type workshops. No one does that in Oregon or the PNW—they are expensive, people go, see different parts of the state, and see different habitats. Siskiyou Field Institute does something along those lines.
- Caution—education takes a lot of time. IAE needs to ask themselves is where it wants to go with its organization. It's not an efficient use of funds to conduct education programs. It's people intensive and collaborative.

HIGHEST PRIORITY ACTIONS FOR THE CONSERVATION COMMUNITY

To ensure native habitats exist for future generations, a number of high priority actions were mentioned, ranging from land acquisition to voting and funding. Numerous participants mentioned the need to have a clear sense of articulating the cost of doing business, from the short-term costs of restoration and maintenance activities to the longer-term costs of stewardship and monitoring.

- Land acquisition
- Protection of sites (both administrative protection and management protection ecologically from changes that happen at sites)
- Landowner education
- Coordinated approaches
- Best management practices
- Voting and funding
- Clear sense of cost of:
 - doing key restoration activities
 - maintenance and operation
 - long-term stewardship costs
 - long-term monitoring

CHANGES IN THE LAST DECADE THAT ARE AFFECTING IAE AND ITS PARTNERS

The lack of uncertainty in the funding arena was mentioned as a key change that should be considered as conservation entities collectively address the conservation of native species and habitats. On the other hand, several positives were mentioned, including more focus on the Willamette main stem and floodplain habitats, increased capacity of watershed councils, and increased focus on awareness of invasive species and the importance of native plants.

- Indirect response—there has been a lot more focus on Willamette main stem and floodplain habitats in last 10 years.
- General increase in uncertainty in agency funds and private nonprofit funds.
- Increased capacity of watershed councils in Willamette Valley, resulting in increased assessment and prioritization. Some of the rest of the state may not be as focused.
- Increased focus on awareness of invasive species and natives as well.

ADVICE TO IAE'S BOARD

- Keep up the good fight.

- Strengthen the areas you are strong in programmatically.
- Sustain staff and support a good work culture.
- Maintain flexibility, outreach, and service you provide to all partners.
- Congratulations on hiring a development director—run hard with that.
- Impressed with questions IAE is asking—what can we do together?
- Maintain the landscape view.
- Create wording that speaks to an audience broader than conservation community.