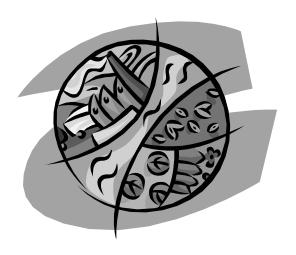
Plan2Fund: A Tool to Organize Your Watershed Funding



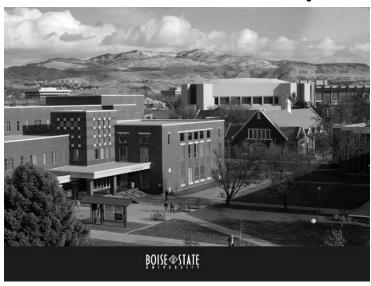
Bill Jarocki Environmental Finance Center Boise State University

Amy Williams Environmental Finance Center Boise State University

Lee Napier Grays Harbor County Chehalis Basin Partnership

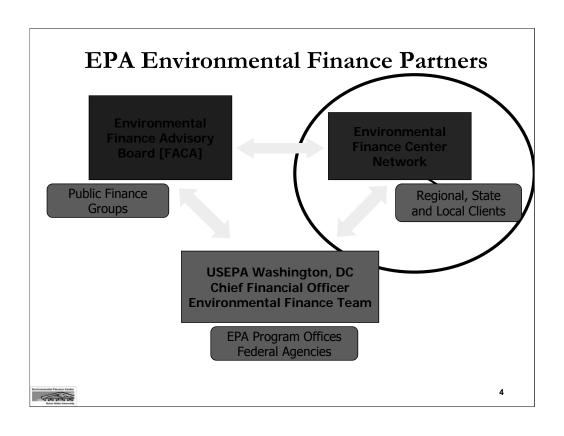
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Environmental Finance Center at Boise State University



Environmental Finance Con





Mission:

- The mission of the Environmental Finance Center at Boise State is to provide help to those facing the "how to pay" challenges of environmental protection.
- EFC-10 is committed to helping communities build and improve the technical, managerial, and financial capabilities needed to comply with federal and state environmental protection laws.



Macro and Micro Environmental Finance



Macro - EF

Watershed Finance Regionally Oriented Non-Point Source Micro - EF

Utility Finance Community Oriented Point Source

Environmental Financia Contor

Micro - Environmental Finance Programs

- - Alternative Financing Methods
 - Guidebook of Financing Tools
- Management and Financial Capacity Tools Idaho DW Handbook for Board Members Kansas, Washington budgeting tools
- Utility Asset Inventory and Replacement Financing
 - CAPFinance[™]
- CWSRF/DWSRF Financial and Management Capacity Reviews (Idaho, Alaska and Washington in 2004)
- Brownfields Project Assistance



Macro – Environmental Finance Programs

Watershed Financing Workshops
DIRECTORY OF WATERSHED RESOURCES (Web-Based)
Watershed Funding Interactive Database - included Region 10
and Region 1 Region data and Replicated for Region 4 by
University of North Carolina
Strategic Planning for Watershed Improvements

Strategic Planning for Watersned Improvements
Plan2Fund™
Lawar Boiga Birgar Bollytian Trading Project

Lower Boise River Pollution Trading Project Watershed Financing Assistance Alternative Financing Methods Guidebook of Financing Tools

Prioritization Tool – Chehalis Model Brownfields Project Assistance

Community Charrettes: Jerome, ID; Pocatello, ID; Newberg, OR;

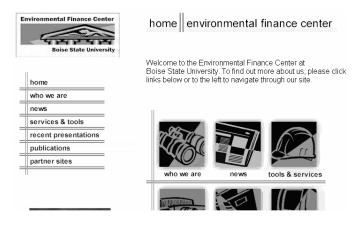
Siletz Tribe, OR; Chiloquin, OR

Agency Charrettes: Lower Boise Watershed Stakeholders,

EPÁ Region10



Building Financial & Management Capacity Through Research, Training and Assistance



http://sspa.boisestate.edu/efc

Environmental Finance Cuetor

This is what we've learned...

In pure public finance terms, watershed funding is one of the most difficult funding challenges.

This is because cost, organizational, intergovernmental and time factors are more complex in watershed restoration than in any other environmental finance setting.



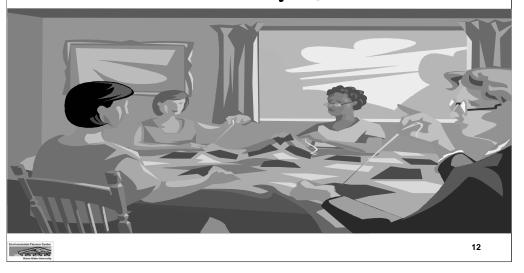
If this is so...

Recognize that there never has been, nor will there ever be, enough <u>public</u> funding available to get the job done.

Utilize the existing watershed framework to create a funding strategy that uses the skills and strengths of stakeholders, in coordination with multiple funding sources, to realize implementation of plans and reach objectives.



Financing Watershed Restoration with a "Community Quilt"

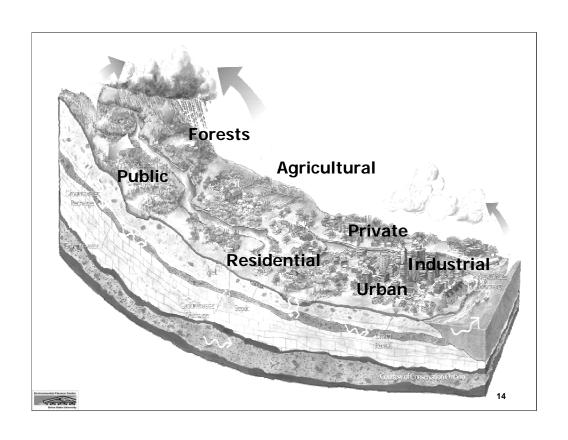


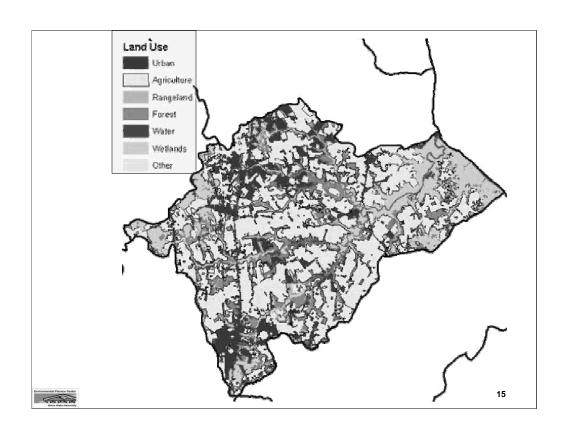
"Community Quilt" concept of financing

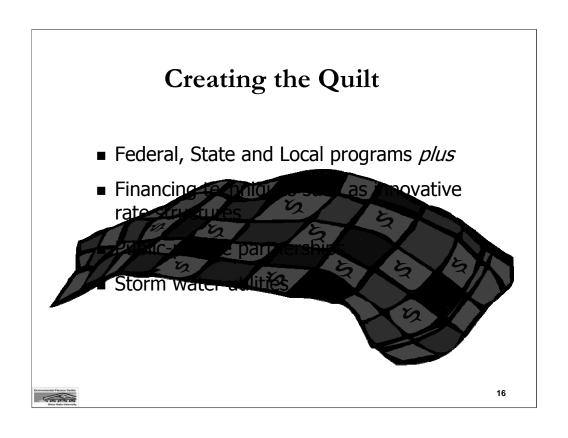
- The Watershed is a Mosaic of public, private and nonprofit land ownership and a myriad land uses.
- Using a breader collection of terms of the broader to trees of funding for our state.

 Identify land owners and the uses watershed to create a patchwork of funding opportunities.

Environmental Finance Gueter







Each land use and activity has different funding options.



Forest Stewardship Program

Forest Legacy Program

American Forest Foundations



Community Development Block Grants

Greenspaces Program

Alaska Conservation Foundation Sustainable

community grants

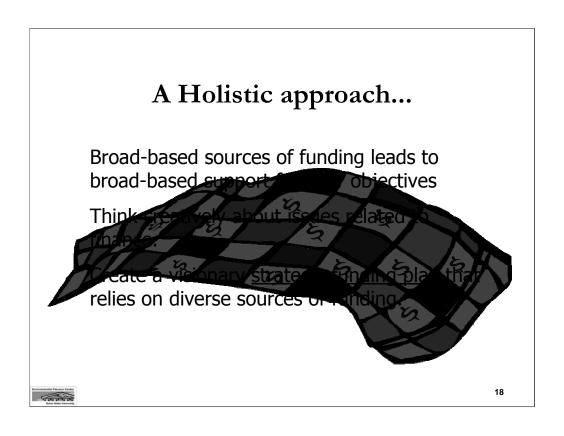


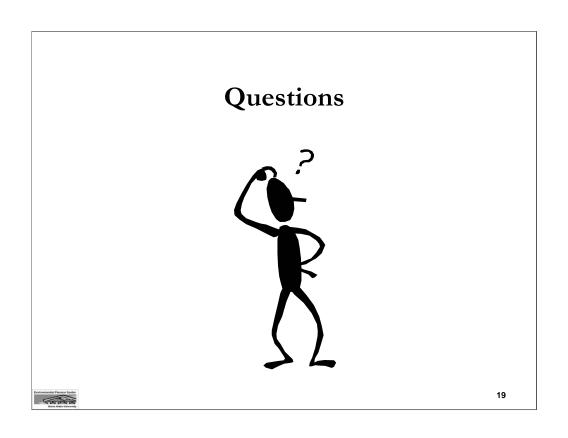
EQUIP

Alaska Commercial Fishing and Agriculture Bank

319 Non Point Source Grants



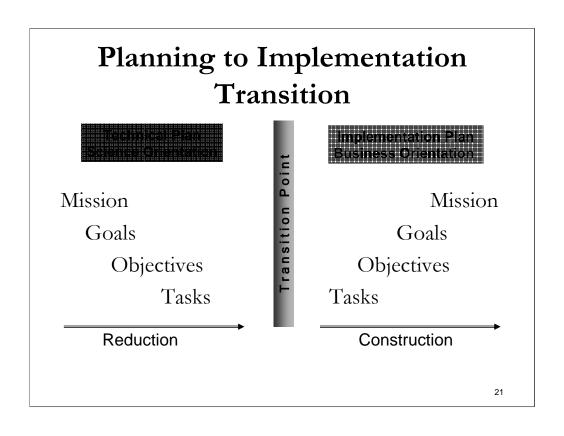


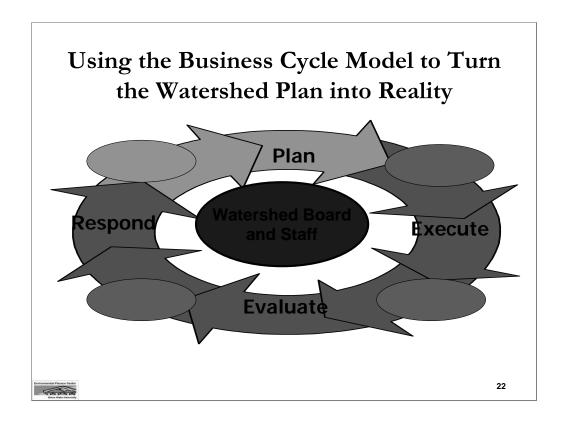


What are the tools for developing a strategic funding strategy?

- Plan2Fund
- Prioritization Tool
- Funding Sources and Financing Techniques
 - Guidebook of Financial Tools
 - Directory of Watershed Resources, Catalog of Federal Funding for Watershed Protection and other databases







Planning: Where do we want to go?

How do we compare to peers?

What is the impact of these decisions?

Budget: What do we have to do?

Can we achieve the targets?

How do we allocate resources?

Report: Where are we?

How are we doing compared to the plan?

What actually happened?

Analysis: What decisions do we make?

What are the alternatives?

Why did it happen?

Turning the Plan into a Budget

- The planning process identifies goals, objectives and tasks for the next year and <u>future</u> years
- Priorities are then established
- Each task requires resources
- The budget is the roadmap for how resources will be acquired and used



Watershed Planning: Using the Classical Planning Process

Mission Statement

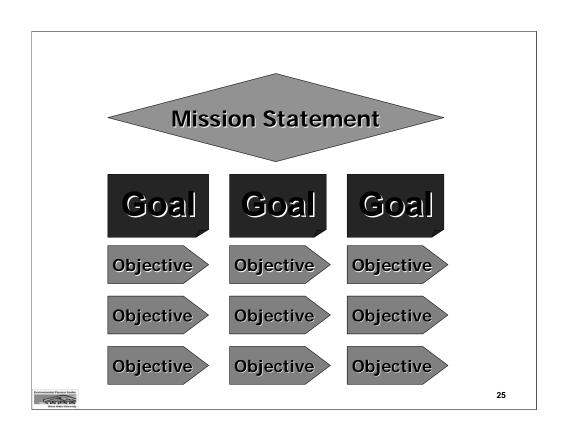


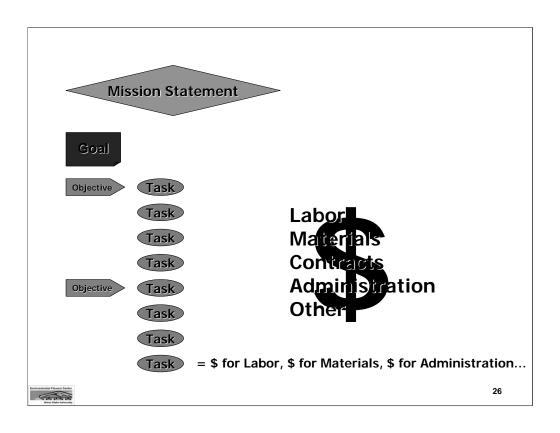


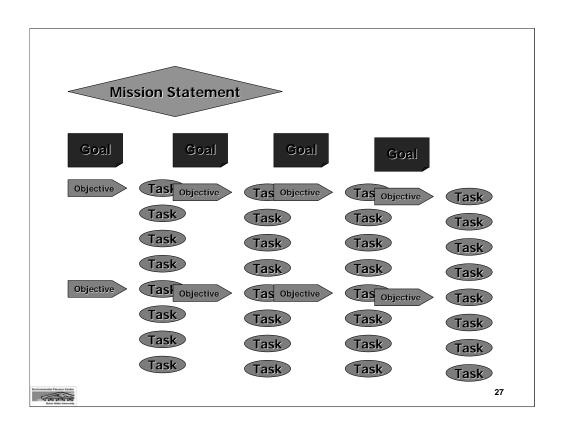


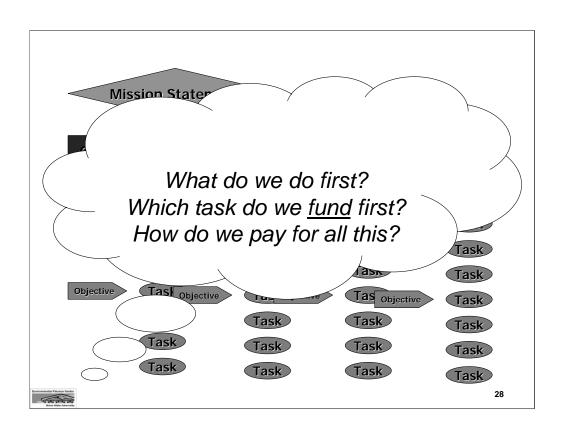
As we move from Mission to Goals - and then to Objectives - more specific information is revealed that is essential for implementation...

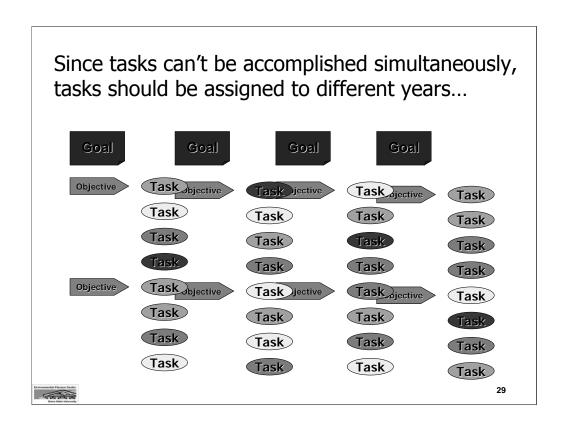


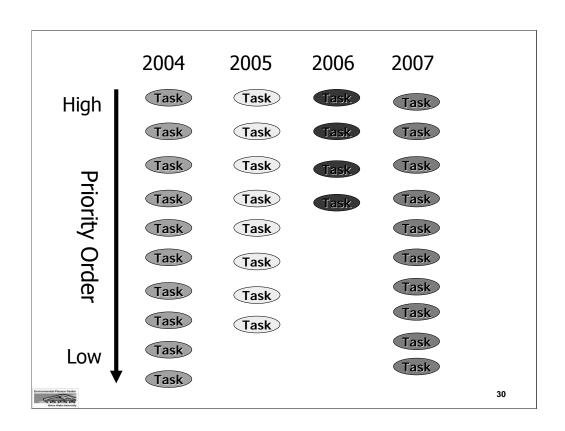


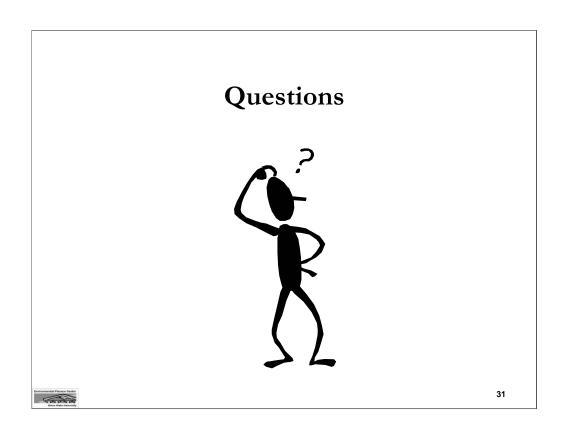








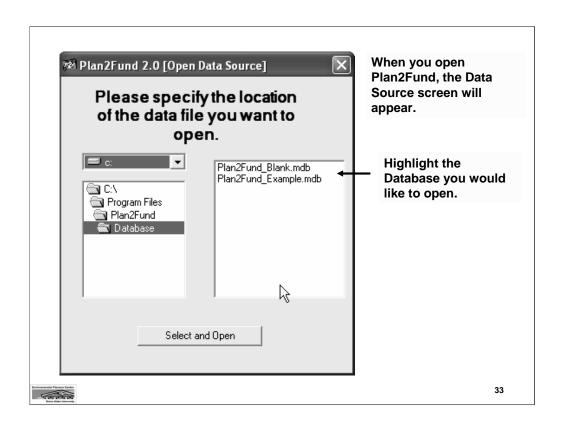


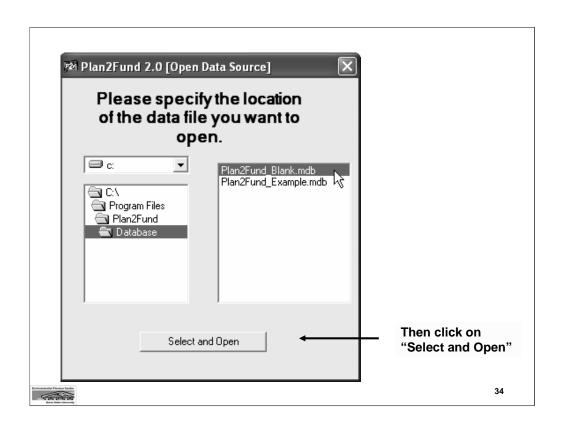


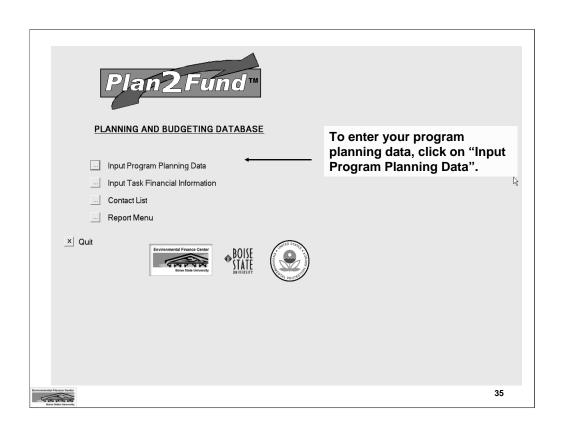
Demonstrate Plan2FundTM

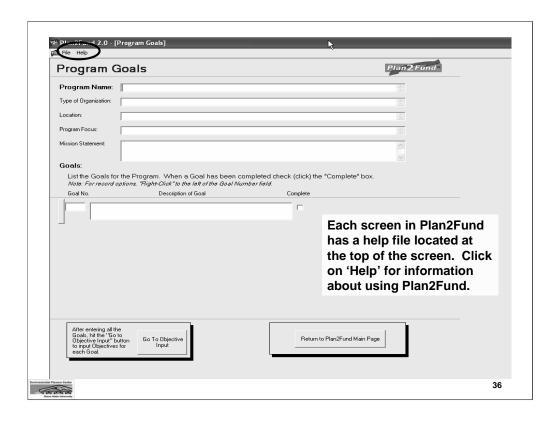


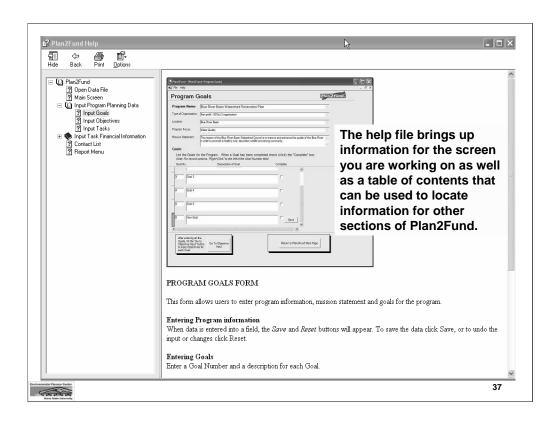
Environmental Finance Conto

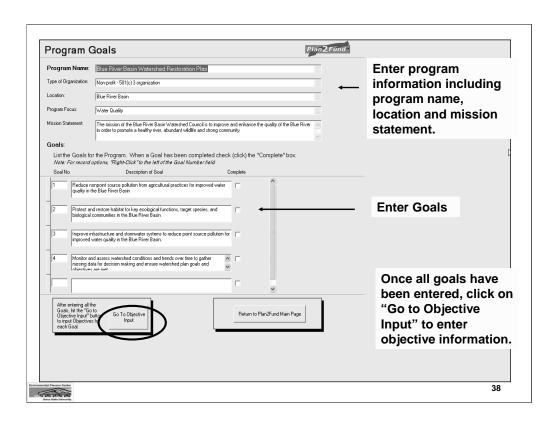


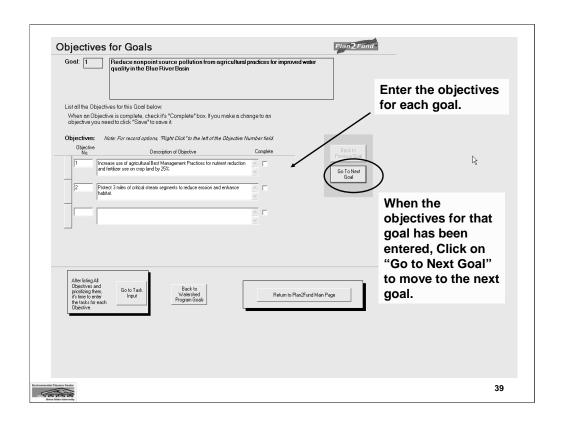


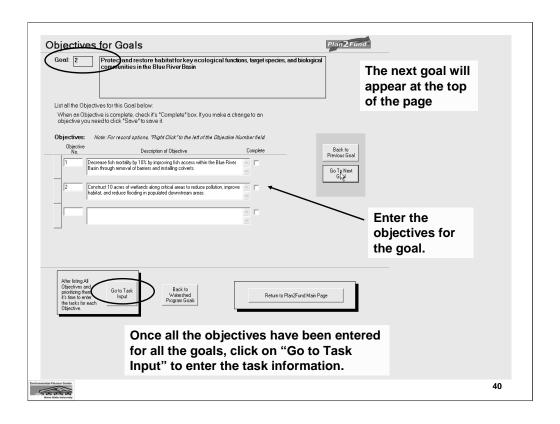


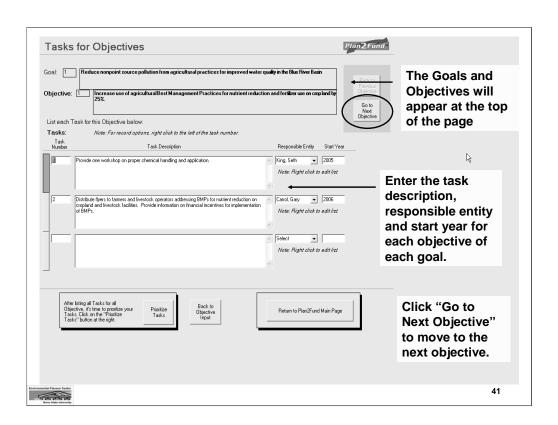


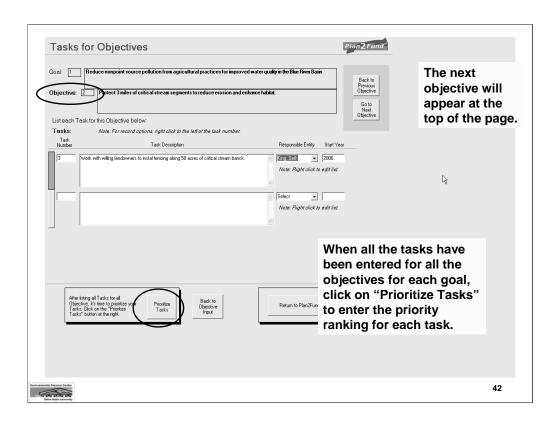


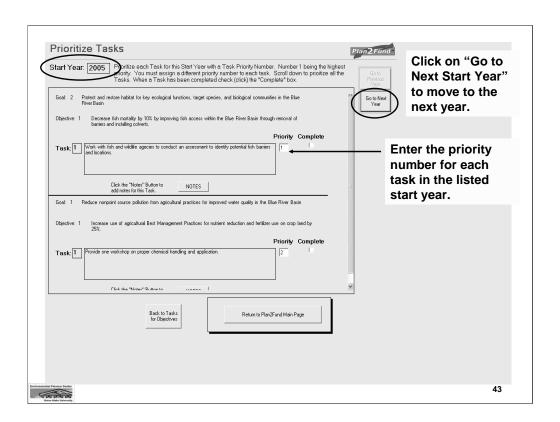


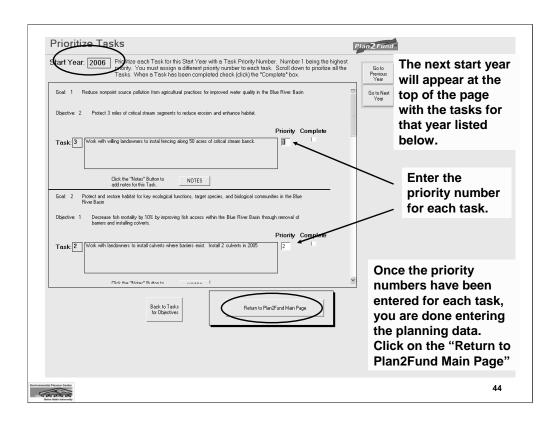


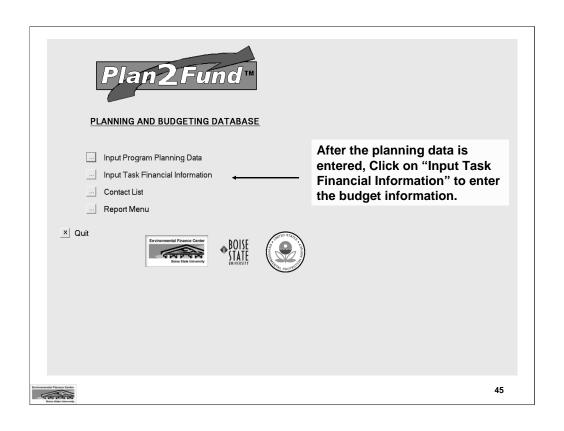


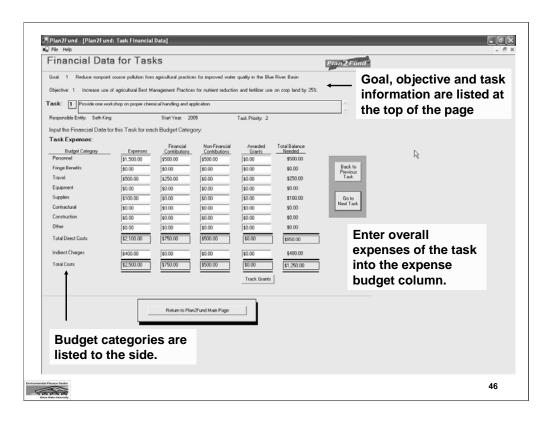


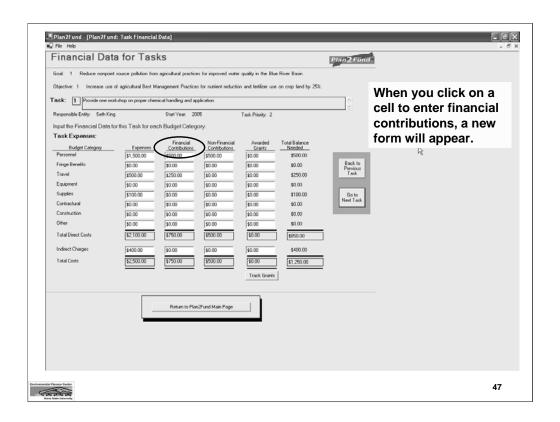


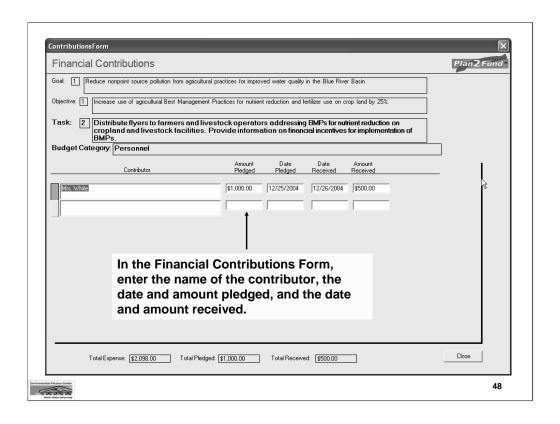


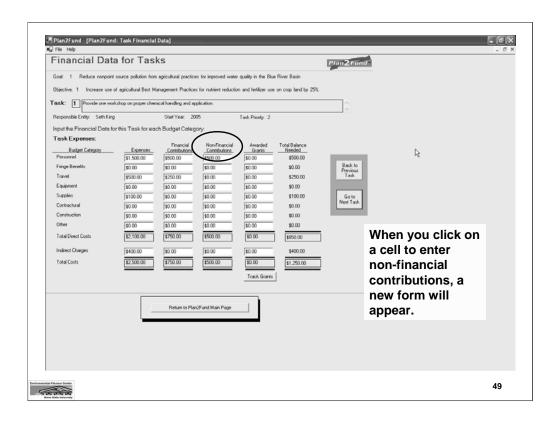


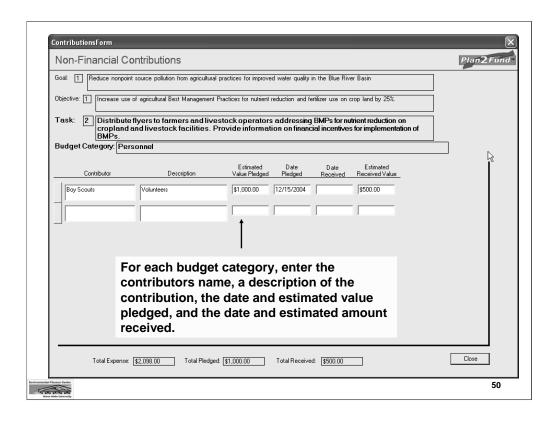


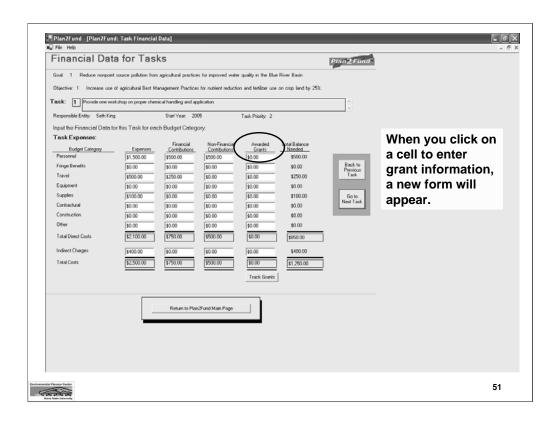


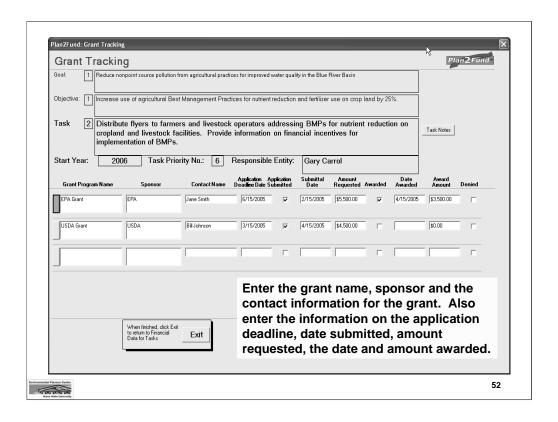


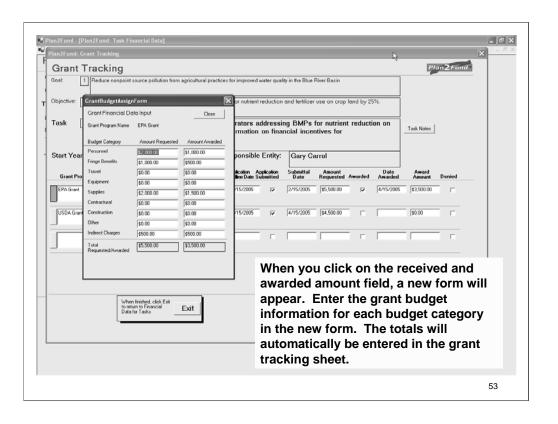


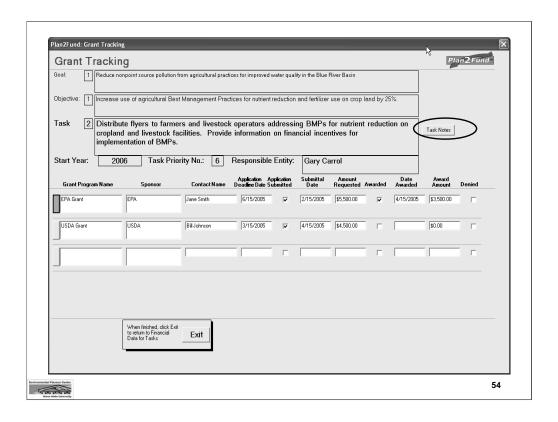


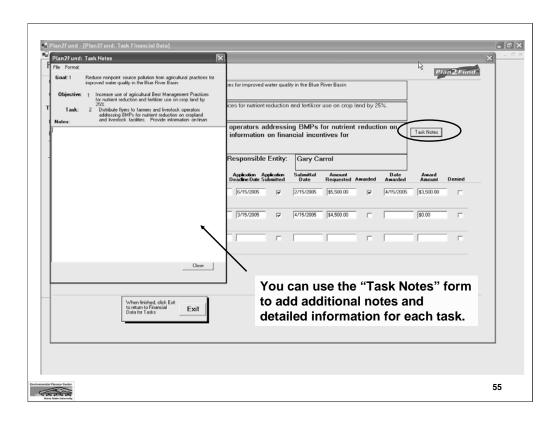


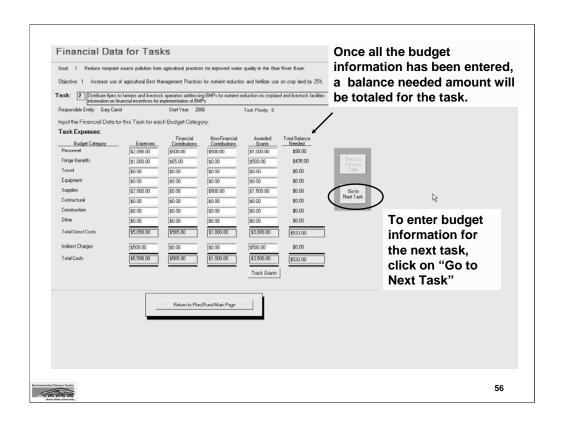


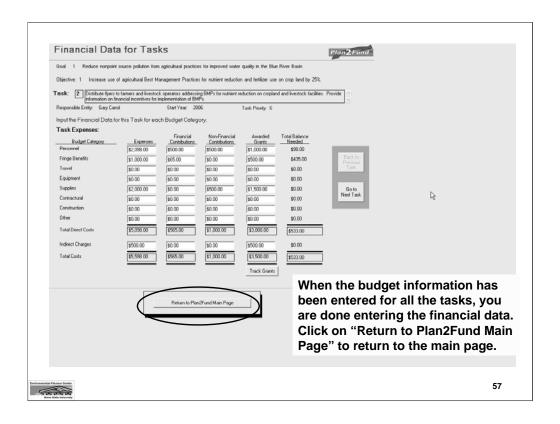




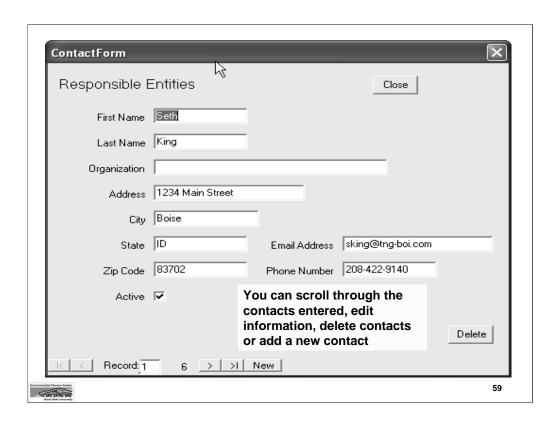


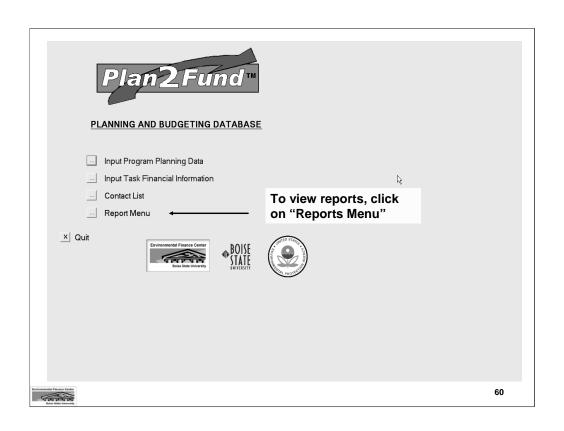


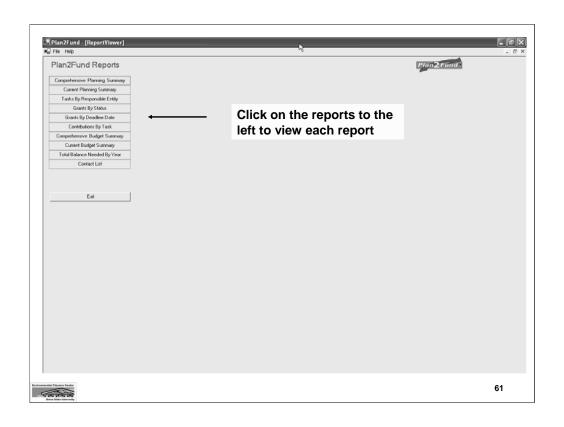


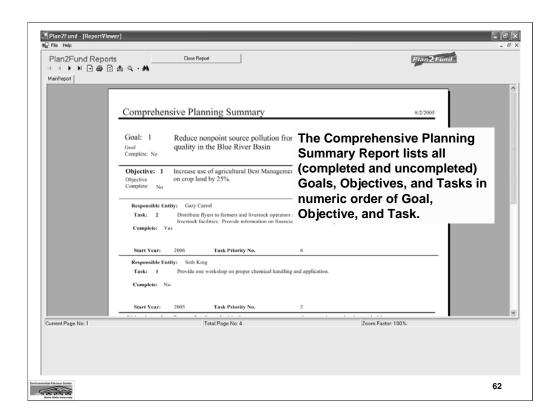


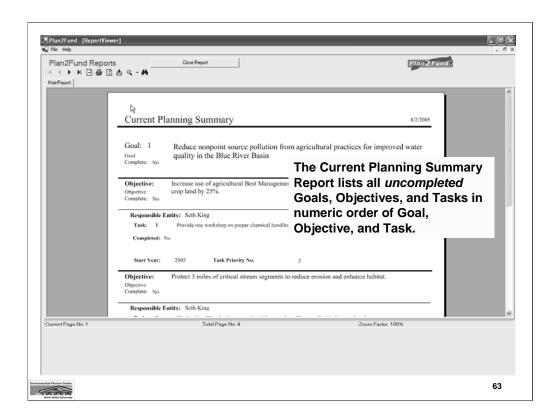
PLANNING AND BUDGETING DATABASE Input Program Planning Data Input Task Financial Information Contact List Report Menu X Quit To add or edit a conclick on "Contact List Environmental Finance Certain Significant State Sta	
Convening Cutte	58

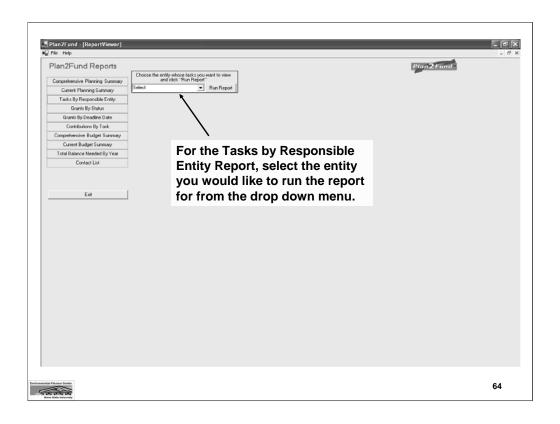


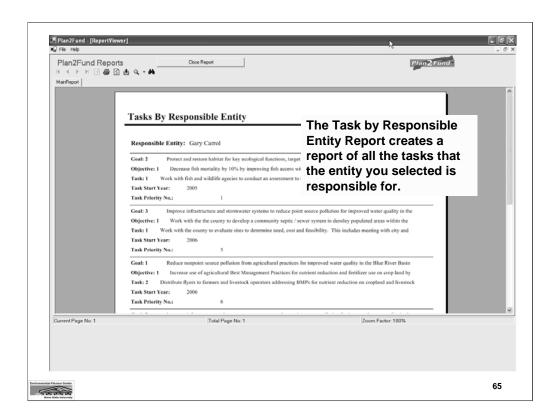


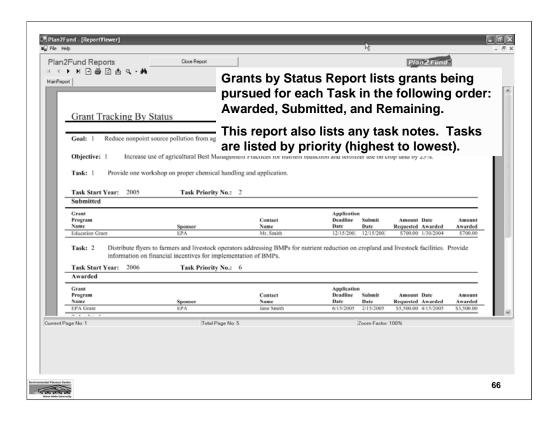


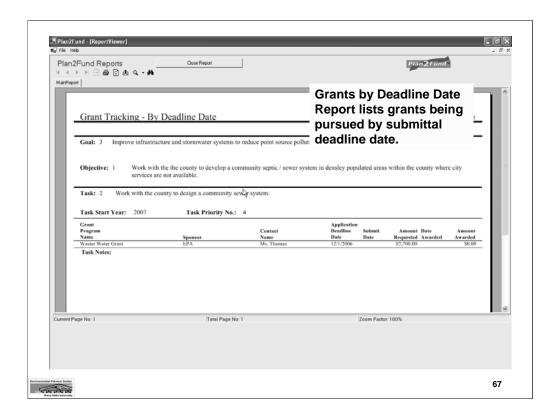


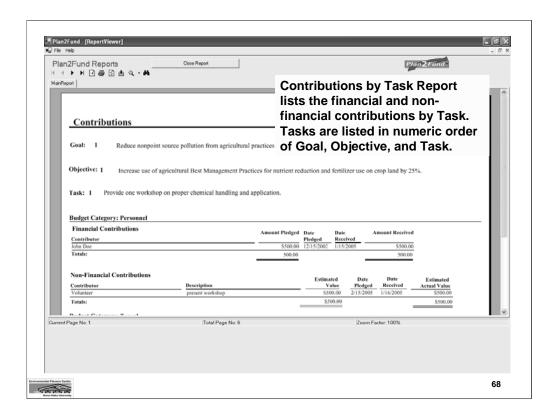


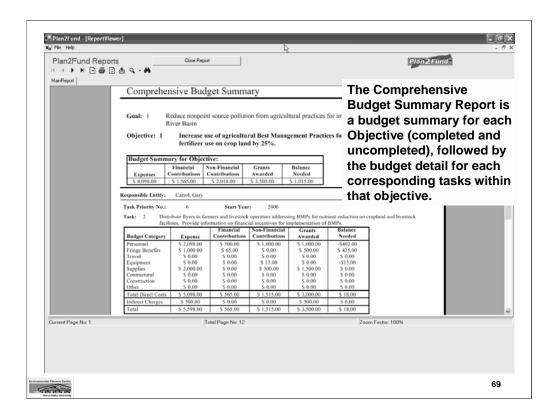


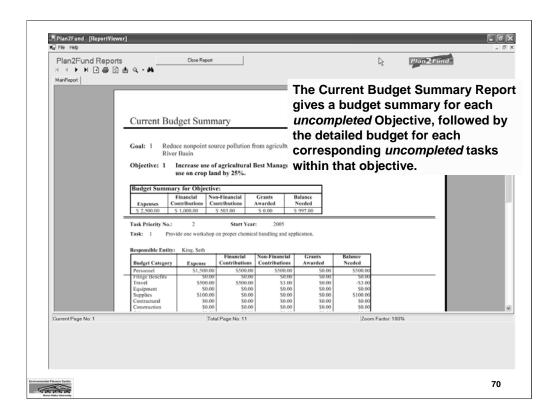


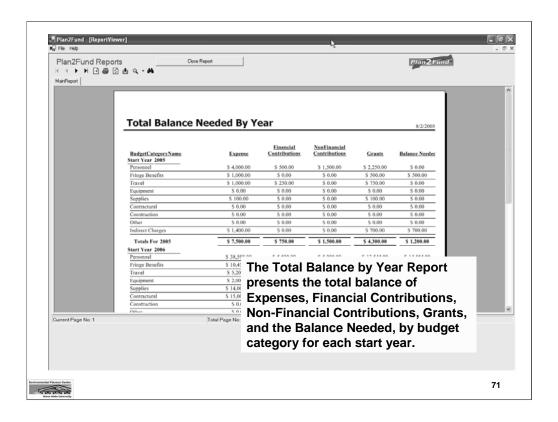


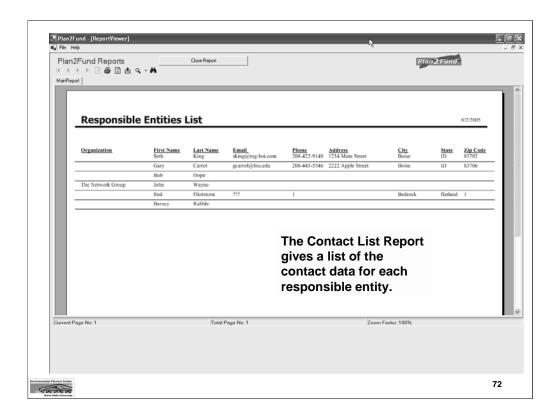






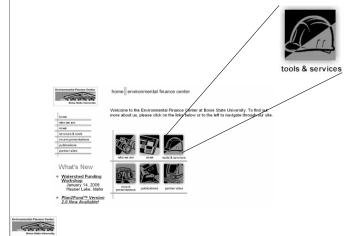






How Do I Get Plan2Fund?

1. Download From EFC Website



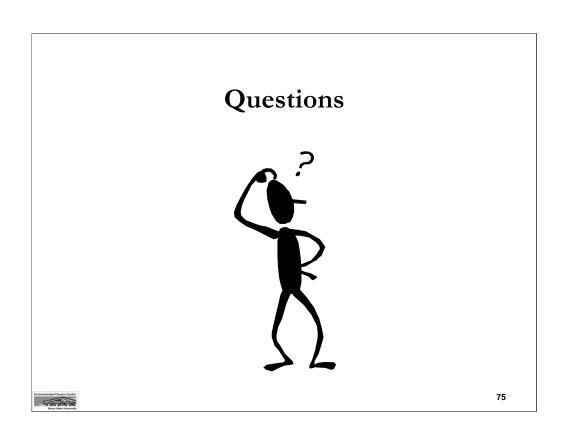
Click on "Tools and Services"

How Do I Get Plan2Fund?

- 1. Download From EFC Website
 - Requirements:
 - Must have .NET Framework (download free)
 - Must have WinZip or a similar program (download evaluation version free)
 - Detailed Instructions on Website
- 2. Request a copy on CD-ROM





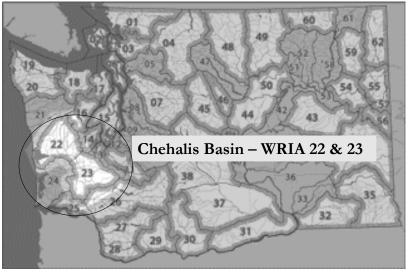


Chehalis Basin Partnership Who We Are

- Partners and Members
- Watershed Characteristics and Location

A POPULATION OF THE PARTY OF TH

Chehalis Basin Partnership



Washington Watershed Planning Process

■ Phase 1: Organization

■ Phase 2: Assessment

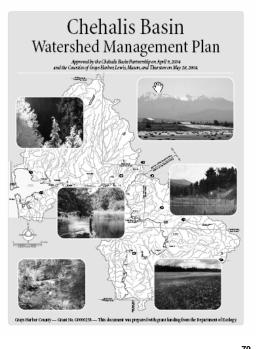
■ Phase 3: Watershed Plan Development

■ Phase 4: Implementation

(AND N



Environmental Finance Center



Chehalis Basin Partnership



Using Plan2Fund: entering planning data from the Chehalis Basin Watershed Management Plan



What to do first?



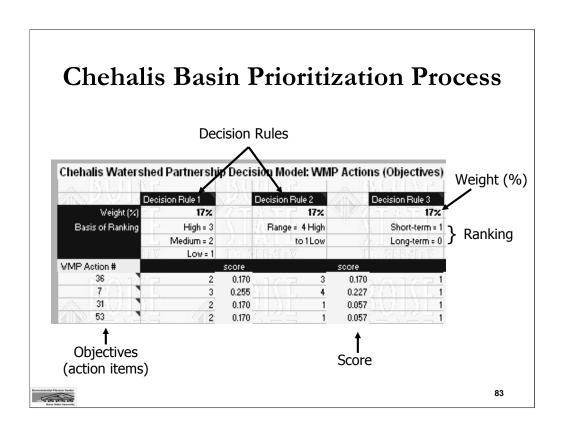
Demonstrate Chehalis Basin Partnership Prioritization Process



Chehalis Watershed Partnership: Decision Rules for Prioritization of Objectives

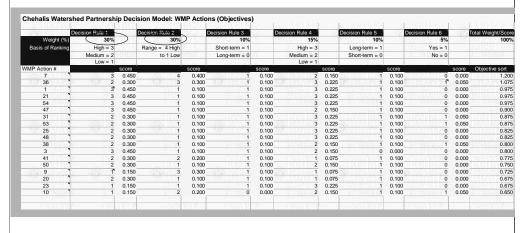
	Decision Rules	Definitions	Range	
1	Is it a primary objective?	Does something else need to happen before something else? Value added creates the potential for any other objective to be accomplished. Value added includes satisfying data gaps.	Value added independent (high) Independent (medium) or dependent (low) variable.	
2	How many planning categories does the objective meet?	ategories does the assumes that all objectives that protect or enhance instream flows get		
3	Is the objective time sensitive (deadline)?	Does this have to be done within a specific or critical time period? Each item can have its own critical time period based on experience.	Short term (3 years or less) – long term	
4	How achievable is the objective?	Do we know the resources (people, data, public support, and money) are available to do it?		
5	Is it a long term or short term benefit to the Basin's health?		No long term or unknown benefit (0)	
6	Required by local, state, or federal law or other agreements.		Yes (1) or No (0)	





Chehalis Basin Prioritization Process Equal Weight Chehalis Watershed Partnership Decision Model: WMP Actions (Objectives) Weight (3) Basis of Rawley Weight (3) San Company of Company (Company (C

Higher Weight For Decision Rule 1 & 2



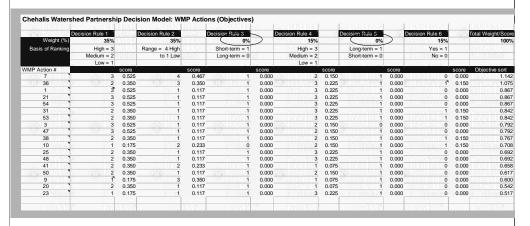
Decision Rule 1: Is it a primary objective?

Decision Rule 2: Number of planning categories the objective meets

85

(A)

Decision Rules 3 & 5 = Zero Weight

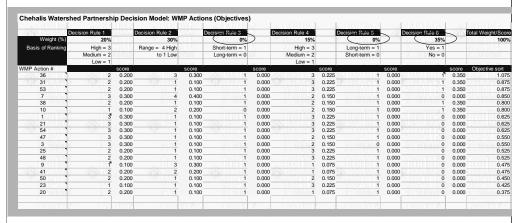


Decision Rule 3: Is the objective time sensitive (deadline)?

Decision Rule 5: Is it a long term or short term benefit to the Basin's health?



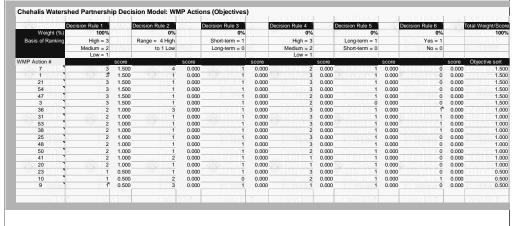
Zero Weight for Rules 3 & 5 Highest Weight to Decision Rule 6



Decision Rule 6: Required by local, state, or federal law or other agreements.



100% Weight to Decision Rule 1



Decision Rule 1: Is it a primary objective?

Environmental Finance Conto

Prioritization Results							
Weight (%)		Weight (%)	Weight (%)	Weight (%)	Weight (%		
•	Basis of Ranking	•	Basis of Ranking	Basis of Ranking	Basis of Ranking		
Equal Weight	Weights 2	Weights 3	Weight 4	Weight 5	Weight 6		
	1> and 2>	3 and 5 = 0	3 and 5 = 0, 6 >	increase 6	100% rule 1		
WMP Action #	WMP Action #	WMP Action #	WMP Action #	WMP Action #	WMP Action #		
36	7	7	7	36	7		
7	36	36	30	31	1		
31	1	1	1 1	53	21		
53	21	21	21	7	54		
1	54	54	54	38	47		
21	47	31	31	10	3		
54	31	53	53	1	. 36		
38	53	3	47	21	31		
47	25	47	25	54	53		
25	48	38	48	47	38		
48	38	10	38	3	25		
50	3	25	9	25	48		
23	41	48	41	48	50		
41	50	41	3	9	41		
10	9	50	50	41	20		
9	20	9	23	50	23		
20	23	20	20	23	10		
3	10	23	10	20	9		

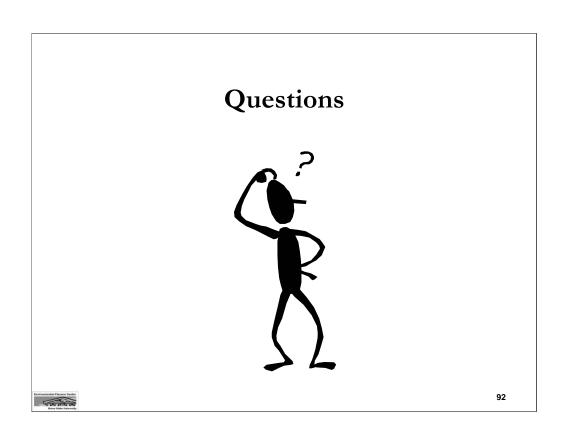
How Prioritizing Objectives Helped to Clarify Tasks

WMP Ac	tions (Objectives)	Proposed Tasks		
WMP Ac	tion # [Column B Priority = Highest to Lowest]			
36	Develop approaches to keep forestry and agriculture on the land. Clarifying point that this is more an issue about infiltration than runoff.	Inventory of properties (where are designated as lands?) and mapping. 2 Determine which lands are at risk and/or provide opportunity for protection. 3 Gap analysis of existing incentires and programs. 4. Public Outreach 5. Deliver program activities. 6. Outcome measurement. (Requires database capabilities)		
31	Protect healthy waters of the Chehalis Basin so they do not become impaired or need Total Maximum Daily Load (TMDL) reporting.	[Refer to 45, 44, 43, 41, 42, 37, 35, 34, 32, 31, 8]1. Inventory of all waters. 2a. Establish monitoring and gather and interpret data. 2b. Determine which waters are at risk and/or provide opportunity for protection. 3. Gap analysis of existing programs and determine their effectiveness A. Identify activities that would reduce risk of waters becoming unhealthy. 5. Improve stormwater functions. 6. Public Outreach 7. Deliver program activities 8. Outcome measurement. (Requires database capabilities)		
53	Current regulatory flows should be retained; the Partnership wishes to preserve the 1976 priority date for those flow levels. Goals would fall under Water Quantity Goals.	Send Letter to Department of Ecology (Completed), GO TO> Action #64		
7	Recommend adequate funding level for water resources management (source to be determined, funding to be distributed to those entities involved in water resources management). What activities does this encompass and what will be done? Who would be involved? This is similar to Action 1? Made both actions objectives because they are general and then identify tasks.	Refer to Action 18, 22, 37] 1. Plan 2 Fund Development to identify required funding to accomplish VMP 2. Decide whether to establish a separation capable of receiving public and/or private funds (such as a 501c3 organization, or Lower Columbia Basin Commission) for functions and activities. 3. Establish MOUs and MOAs for enhancing partnerships. 4. Develop strategies for maximum coordination with partners and for leveraging financial and political resources. 5. Expand the public information strategy (see P. IV-127).		
38	Prevent the introduction of detrimental plant and animal species (aquatic and terrestrial) and control or eliminate species designated by the state or county as noxious, invasive, quarantined, or nuisance species.	[Refer to 31] 1. Gap analysis of existing incentives and programs [e.g., Multi-County Noxious Weeds Coalition] 2. Obtain and/or develop mapping of current infestations. 3. Determine which waters are at risk and/or provide opportunity for protection. 4. Support Public Outreach 5. Deliver program activities. 6. Outcome measurement.		

Chehalis Basin Partnership

Where they are now....

Carronnell Philips Control



Now that we know what we want to do...

How do we pay for it?



GRIP CO

Community Assets and Local Resources



Who are the different stakeholders who can contribute to a watershed financing plan?



Local Fundraising



- Local fundraising campaigns have the dual benefit of raising revenues <u>and</u> raising awareness of the watershed initiatives.
- Since administrative costs seem to be the hardest to meet, local fundraising efforts can raise the funds needed for administrative purposes.



(All Parks)

The Guidebook of Financial Tools

- ■Tools for Raising Revenue
- ■Tools For Acquiring Capital
- ■Tools For Enhancing Credit
- ■Tools for Building Public Private Partnerships





Directory of Watershed Resources

Federal Funding Programs State Funding Programs Private Funding Programs



The Park

Directory of Watershed Resources Pirectory A Searchable Database of Funding Sources Search Our Database Contact Us About Us About the Directory Watershed Tools and Links Add or Update Program Information

Search for Funding





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Search our Database

The Directory of Watershed Resources is a searchable database of resources available to assist with a variety of environmental projects. The database includes information on federal, state, private, and other funding sources and assistance. Users can search for programs through a targeted search, keyword search or through an index of federal, state and private sources.

The Directory currently includes funding information for the following states: Alaska, Connecticut, Idaho, Maine, Massachusetts, New Hampshire, Oregon, Rhode Island, Vermont and Washington. To wiew funding information for states not included in this database, visit http://sspa.boisestate.edu/et/offoils_Services/Directory/funding.htm or contact an EFC in your region.

Select the Type of Search:

- Targeted Search
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- Olndex of Federal / Interstate Agency Sources
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319(h) Nonpoint Source Pollution (NPS). Abatement Grants, Rhode Island Department of Environmental Management - Office of Water Resources

319(h) Nonpoint Source Pollution Grants, New Hampshire Department of Environmental Services

319(h) Nonpoint Source Pollution Projects, Vermont Agency of Natural Resources

A. V. Stout Fund

Abandoned Mine Land Reclamation Program, U.S. Dept. of Interior

Abbott Laboratories Fund

Abelard Foundation West / Common Counsel Foundation

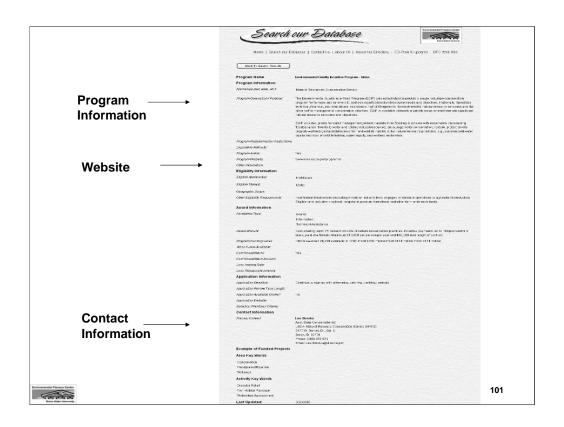
Access & Habitat Program, Oregon Department of Fish & Wildlife

Acid Mine Drainage Grant, U.S. Dept. of Interior

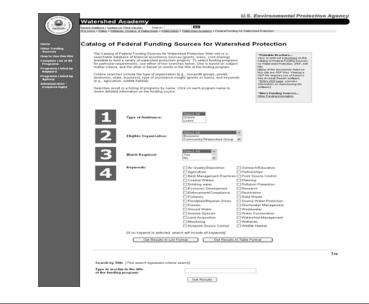
Acorn Foundation/Common Counsel Foundation

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Catalog of Federal Funding for Watershed Protection



Our belief is that even if one innovative financing idea may not be appropriate for a community, it may spark ideas, and discussion about priorities and needs and other ways of addressing issues.













Environmental Finance Conter

Questions



■ Plan2Fund

http://sspa.boisestate.edu/efc/Tools Services/Plan2Fund/plan2fund.htm

- Environmental Finance Center Directory of Watershed Resources http://efc.boisestate.edu/
- EPA's Catalog of Federal Funding Sources for Watershed Protection www.epa.gov/watershedfunding

Plan2Fund: A Tool to Organize Your Watershed Funding



Bill Jarocki Environmental Finance Center Boise State University

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