EPA’s University-Based Environmental Finance Centers: Working on the “How to Pay” Issues of Environmental Compliance
EPA Environmental Finance Partners

- Environmental Finance Advisory Board [FACA]
- Environmental Finance Center Network
- Public Finance Groups
- Regional, State and Local Clients
- USEPA Washington, DC Chief Financial Officer Environmental Finance Team
- EPA Program Offices Federal Agencies
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
Micro – Environmental Finance Programs

- Utility Rate Setting Training and Technical Assistance
  RateCheckup™
- Infrastructure Financing Assistance
  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
- Brownfields Project Assistance
- SDWA Implementation: TFM Strategies and Tools
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
  Plan2Fund™
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,
  EPA Region10
Building Financial & Management Capacity Through Research, Training and Assistance

Welcome to the Environmental Finance Center at Boise State University. To find out more about us, please click links below or to the left to navigate through our site.

http://sspa.boisestate.edu/efc
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 public 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 broader collection of terms can broaden the sources of funding for your source water protection plan.
- Identify land owners and land uses within a watershed to create a patchwork of funding opportunities.
Creating the Quilt

- Federal, State and Local programs *plus*
- Financing techniques such as innovative rate structures
- Public-private partnerships
- Storm water utilities
Each land use and activity has different funding options.

**Forests**
- Forest Stewardship Program
- Forest Legacy Program
- American Forest Foundations

**Urban**
- Community Development Block Grants
- Greenspaces Program
- Alaska Conservation Foundation
- Sustainable community grants

**Agriculture**
- EQUIP
- Alaska Commercial Fishing and Agriculture Bank
- 319 Non Point Source Grants
A Holistic approach...

Broad-based sources of funding leads to broad-based support for your objectives.

Think creatively about issues related to finance.

Create a visionary strategic funding plan that relies on diverse sources of funding.
Questions
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 to Implementation Transition

Mission
Goals
Objectives
Tasks
Reduction

Transition Point

Mission
Goals
Objectives
Tasks
Construction
Using the Business Cycle Model to Turn the Watershed Plan into Reality

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 future 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

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

Goal

Objective

Task

Task

Task

Task

Task

Task

Objective

Task

Task

Task

Task

Task

Labor

Materials

Contracts

Administration

Other

= $ for Labor, $ for Materials, $ for Administration...
Mission Statement

Goal
- Objective
  - Task
  - Task
  - Task

Goal
- Objective
  - Task
  - Task
  - Task

Goal
- Objective
  - Task
  - Task
  - Task

Goal
- Objective
  - Task
  - Task
  - Task
What do we do first?
Which task do we **fund** first?
How do we pay for all this?
Since tasks can’t be accomplished simultaneously, tasks should be assigned to different years...
<table>
<thead>
<tr>
<th>Year</th>
<th>Task</th>
<th>Task</th>
<th>Task</th>
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<tr>
<td>2007</td>
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Priority Order:
- High
- Low
Demonstrate Plan2Fund™
Highlight the Database you would like to open.

When you open Plan2Fund, the Data Source screen will appear.
Then click on “Select and Open”
To enter your program planning data, click on “Input Program Planning Data”.

PLANNING AND BUDGETING DATABASE

☐ Input Program Planning Data
☐ Input Task Financial Information
☐ Contact List
☐ Report Menu

Quit
Each screen in Plan2Fund has a help file located at the top of the screen. Click on ‘Help’ for information about using Plan2Fund.
The help file brings up information for the screen you are working on as well as a table of contents that can be used to locate information for other sections of Plan2Fund.

PROGRAM GOALS FORM

This form allows users to enter program information, mission statement and goals for the program.

Entering Program Information
When data is entered into a field, the Save and Reset button will appear. To save the data, click Save, or to undo the input or changes, click Reset.

Entering Goals
Enter a Goal Number and a description for each Goal.
Enter program information including program name, location and mission statement.

Enter Goals

Once all goals have been entered, click on “Go to Objective Input” to enter objective information.
Enter the objectives for each goal.

When the objectives for that goal has been entered, Click on “Go to Next Goal” to move to the next goal.
Once all the objectives have been entered for all the goals, click on “Go to Task Input” to enter the task information.
The Goals and Objectives will appear at the top of the page.

Enter the task description, responsible entity and start year for each objective of each goal.

Click “Go to Next Objective” to move to the next objective.
The next objective will appear at the top of the page.

When all the tasks have been entered for all the objectives for each goal, click on “Prioritize Tasks” to enter the priority ranking for each task.
Enter the priority number for each task in the listed start year.

Click on “Go to Next Start Year” to move to the next year.
The next start year will appear at the top of the page with the tasks for that year listed below.

Enter the priority number for each task.

Once the priority numbers have been entered for each task, you are done entering the planning data. Click on the "Return to Plan2Fund Main Page"
After the planning data is entered, Click on “Input Task Financial Information” to enter the budget information.
Goal, objective and task information are listed at the top of the page.

Budget categories are listed to the side.

Enter overall expenses of the task into the expense budget column.
When you click on a cell to enter financial contributions, a new form will appear.
In the Financial Contributions Form, enter the name of the contributor, the date and amount pledged, and the date and amount received.
When you click on a cell to enter non-financial contributions, a new form will appear.
For each budget category, enter the contributors name, a description of the contribution, the date and estimated value pledged, and the date and estimated amount received.
When you click on a cell to enter grant information, a new form will appear.
Enter the grant name, sponsor and the contact information for the grant. Also enter the information on the application deadline, date submitted, amount requested, the date and amount awarded.
When you click on the received and awarded amount field, a new form will appear. Enter the grant budget information for each budget category in the new form. The totals will automatically be entered in the grant tracking sheet.
You can use the “Task Notes” form to add additional notes and detailed information for each task.
Once all the budget information has been entered, a balance needed amount will be totaled for the task.

To enter budget information for the next task, click on “Go to Next Task”
When the budget information has been entered for all the tasks, you are done entering the financial data. Click on “Return to Plan2Fund Main Page” to return to the main page.
To add or edit a contact, click on “Contact List”.
You can scroll through the contacts entered, edit information, delete contacts or add a new contact.
To view reports, click on “Reports Menu”
Click on the reports to the left to view each report
The Comprehensive Planning Summary Report lists all (completed and uncompleted) Goals, Objectives, and Tasks in numeric order of Goal, Objective, and Task.
For the Tasks by Responsible Entity Report, select the entity you would like to run the report for from the drop down menu.
The Task by Responsible Entity Report creates a report of all the tasks that the entity you selected is responsible for.
Grants by Status Report lists grants being pursued for each Task in the following order: Awarded, Submitted, and Remaining.

This report also lists any task notes. Tasks are listed by priority (highest to lowest).
Grants by Deadline Date Report lists grants being pursued by submittal deadline date.

### Grant Tracking - By Deadline Date

**Goal:** Improve infrastructure and stormwater systems to reduce point source pollution.

**Objective:** Work with the county to develop a community sewage system in densely populated areas within the county where city services are not available.

**Task:** Work with the county to design a community sewage system.

**Task Start Year:** 2007

**Task Priority No.:** 4

<table>
<thead>
<tr>
<th>Grant Program Name</th>
<th>Sponsor</th>
<th>Contact Name</th>
<th>Application Deadline</th>
<th>Submit Date</th>
<th>Amount Requested</th>
<th>Amount Awarded</th>
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<td>[Redacted]</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
</tr>
</tbody>
</table>

**Task Notes:**
Contributions by Task Report lists the financial and non-financial contributions by Task. Tasks are listed in numeric order of Goal, Objective, and Task.

<table>
<thead>
<tr>
<th>Contributor</th>
<th>Financial Contributions</th>
<th>Non-Financial Contributions</th>
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<tr>
<td></td>
<td>Amount Pledged</td>
<td>Date Pledged</td>
</tr>
<tr>
<td></td>
<td>$500.00</td>
<td>11/17/2002</td>
</tr>
<tr>
<td>Totals</td>
<td>$500.00</td>
<td></td>
</tr>
</tbody>
</table>

Task: 1. Provide one workshop on proper chemical handling and application.
The Comprehensive Budget Summary Report is a budget summary for each Objective (completed and uncompleted), followed by the budget detail for each corresponding tasks within that objective.
The Current Budget Summary Report gives a budget summary for each uncompleted Objective, followed by the detailed budget for each corresponding uncompleted tasks within that objective.
The Total Balance by Year Report presents the total balance of Expenses, Financial Contributions, Non-Financial Contributions, Grants, and the Balance Needed, by budget category for each start year.
The Contact List Report gives a list of the contact data for each responsible entity.
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
Questions
Chehalis Basin Partnership
Who We Are

- Partners and Members
- Watershed Characteristics and Location
Washington Watershed Planning Process

- Phase 1: Organization
- Phase 2: Assessment
- Phase 3: Watershed Plan Development
- Phase 4: Implementation
Chehalis Basin Partnership

Chehalis Basin Watershed Management Plan

Golden California -- March 2007 -- This document is prepared with assistance from the Department of Agriculture.
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
<table>
<thead>
<tr>
<th>Decision Rules</th>
<th>Definitions</th>
<th>Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Is it a primary objective?</td>
<td>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.</td>
<td>Value added independent (high) Independent (medium) or dependent (low) variable.</td>
</tr>
<tr>
<td>2. How many planning categories does the objective meet?</td>
<td>Accomplishes one or more of the four categories (wq, wq, h, isf) This assumes that all objectives that protect or enhance instream flows get four points because all planning components apply. Run this as a separate rule.</td>
<td>1-4 weighting</td>
</tr>
<tr>
<td>3. Is the objective time sensitive (deadline)?</td>
<td>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.</td>
<td>Short term (3 years or less) – long term</td>
</tr>
<tr>
<td>4. How achievable is the objective?</td>
<td>Do we know the resources (people, data, public support, and money) are available to do it?</td>
<td>High-Medium-Low</td>
</tr>
<tr>
<td>5. Is it a long term or short term benefit to the Basin’s health?</td>
<td>Limited resources</td>
<td>No long term or unknown benefit (0)</td>
</tr>
<tr>
<td>6. Required by local, state, or federal law or other agreements.</td>
<td></td>
<td>Yes (1) or No (0)</td>
</tr>
</tbody>
</table>
### Chehalis Watershed Partnership Decision Model: WMP Actions (Objectives)

<table>
<thead>
<tr>
<th>VMP Action #</th>
<th>Score</th>
<th>Score</th>
<th>Score</th>
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<tbody>
<tr>
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<td>3</td>
<td>0.170</td>
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<tr>
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<td>0.255</td>
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<td>0.227</td>
</tr>
<tr>
<td>31</td>
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</tr>
<tr>
<td>63</td>
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<td>1</td>
<td>0.010</td>
</tr>
</tbody>
</table>

**Decision Rules**

- **Weight (%)**
  - Decision Rule 1: 17%
  - Decision Rule 2: 17%
  - Decision Rule 3: 17%

- **Ranking**
  - Weight
    - High: 3
    - Range: 4 High
    - Short-term: 1
  - Medium
    - 2
  - Low
    - 1
    - 10

**Objectives** (action items)

**Score**
## Chehalis Basin Prioritization Process

### Equal Weight

#### Chehalis Watershed Partnership Decision Model: WMP Actions (Objectives)

<table>
<thead>
<tr>
<th>Weight (%)</th>
<th>Basis of Ranking</th>
<th>High</th>
<th>Medium</th>
<th>Low</th>
<th>Total Weight/Score</th>
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<tr>
<td>17%</td>
<td>High = 3</td>
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<tr>
<td>17%</td>
<td>Range = 4 stages</td>
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<tr>
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<tr>
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#### WMP Actions and Scores

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<tr>
<th>Score</th>
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<th>Score</th>
<th>Score</th>
<th>Score</th>
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</table>
## Chehalis Basin Prioritization Process

### Higher Weight For Decision Rule 1 & 2

#### Chehalis Watershed Partnership Decision Model: WMP Actions (Objectives)

<table>
<thead>
<tr>
<th>WMP Action #</th>
<th>Decision Rule 1</th>
<th>Decision Rule 2</th>
<th>Decision Rule 3</th>
<th>Decision Rule 4</th>
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<td>1</td>
<td>0.100</td>
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</tr>
</tbody>
</table>

### Decision Rule 1: Is it a primary objective?

### Decision Rule 2: Number of planning categories the objective meets
### Chehalis Watershed Partnership Decision Model: WMP Actions (Objectives)

<table>
<thead>
<tr>
<th>WMP Action #</th>
<th>Decision Rule 1</th>
<th>Decision Rule 2</th>
<th>Decision Rule 3</th>
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### Chehalis Basin Prioritization Process

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?
Chehalis Watershed Partnership Decision Model: WMP Actions (Objectives)

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<th>Decision Rule 2</th>
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Chehalis Basin Prioritization Process

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.
## Prioritization Results

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# How Prioritizing Objectives Helped to Clarify Tasks

<table>
<thead>
<tr>
<th>WMP Actions (Objectives)</th>
<th>Proposed Tasks</th>
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<tbody>
<tr>
<td>36 Develop approaches to keep livestock and agriculture on the land.</td>
<td>1. Inventory of properties where are designated ag lands (and) mapping. 2. Determine which lands are at risk and provide opportunity for protection. 3. Gap analysis of existing activities and programs. 4. Public Outreach 5. Define program activities 6. Outcome measurement (Program database (approved))</td>
</tr>
<tr>
<td>3.1 Protect healthy waters of the Chehalis Basin as they do not become impaired or exceed Total Maximum Daily Load (TMDL) reporting.</td>
<td>(Refer to 40, 41, 42, 43, 57, 58, 59, 60, 61, 70) Inventory of all waters. 2. Establish monitoring and gaiter and interpret data. 3. Determine which waters are at risk and provide opportunities for protection. 4. Gap analysis of existing programs and determine their effectiveness. 5. Identify activities that would reduce risk to waters becoming unhealthy. 6. Improve stormwater functions 7. Public Outreach 8. Define program activities 9. Outcome measurement (Program database (approved))</td>
</tr>
<tr>
<td>53 Current regulatory rules should be reviewed; the Partnership works to persuade the WDF to lower permit fees for these low levels. Goals would fall under Water Quality Goals.</td>
<td>Send Letter to Department of Ecology (Completed), GO TO Action #4</td>
</tr>
<tr>
<td>7 Recommend adequate funding level for water resources management (costs to be determined, funding to be distributed to those entities involved in water resources management).</td>
<td>(Refer to Action #18, 20, 37) 1. Plan 2 and Development is clearly required funding to accomplish WDF 3. Decide whether to establish a suspension legal organization capable of recovering public and private funds (such as a SDI/G organization, or Lower Columbia Basin Commission) for functions and activities. 4. Establish MOUs and MOAs for enhancing partnerships. 5. Develop strategies for maximum coordination with partners and for leveraging financial and political resources. 6. Expand the public information strategy (see #17 Art 127)</td>
</tr>
<tr>
<td>28 Prevent the introduction of dinitrogen plant and animal species (aquatic and terrestrial) and control or eliminate species designated by the state or county as noxious, invasive, or nuisance species.</td>
<td>(Refer to #27 1. Gap analysis of existing activities and programs (e.g., WDF County Revegetation Incentives) 2. Obtain and develop mapping of current infestations 3. Determine which waters are at risk and provide opportunity for protection 4. Support Public Outreach 5. Define program activities 6. Outcome measurement)</td>
</tr>
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Chehalis Basin Partnership

Where they are now....
Questions
Now that we know what we want to do…

How do we pay for it?
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 and 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.
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
Search for Funding

Search our Database

Home | Search our Database | Contact Us | About Us | About the Directory | Watershed Facts and Links | Add or Update Program Information

Search our Database

The Directory of Watershed Resources is a searchable database of resources available to assist with watershed 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 in the following states: Alaska, Connecticut, Illinois, Maine, Massachusetts, New Hampshire, Oregon, Rhode Island, Vermont, and Washington. To view funding information for states not included in this database, visit https://www.epc.org/Tools/Tool3/update/SearchFunding.htm or contact an EFC in your region.

Select the Type of Searches:

- Targeted Search
- Keyword Search
- Index of Federal - Interstate Agency Sources
- Index of State Agency Sources
- Index of Private - Foundations Sources
Search for Funding

Search our Database

Home | Search our Database | Contact Us | About Us | About the Directory | Watershed Tools and Links | Add or Update Program Info

1/20/93 Nonpoint Source Pollution (NPS) Assessment Grants, Rhode Island Department of Environmental Management - Office of Water Resources
1/20/93 Nonpoint Source Pollution Grants, New Hampshire Department of Environmental Services
1/20/93 Nonpoint Source Pollution Grants, Vermont Agency of Natural Resources
A. V. Dust Fund
Abandoned Mine Lands Reclamation Program, U.S. Dept. of Interior
Animal Laboratories Fund
Apprentice Program West / Common Source Foundation
Assist & Habitat Program, Oregon Department of Fish & Wildlife
Avalanche Drainage Grant, U.S. Dept. of Interior
Avon Foundation/Common Cause Foundation

Next >>
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.
Questions

- Plan2Fund
  [http://sspa.boisestate.edu/efc/Tools_Services/Plan2Fund/plan2fund.htm](http://sspa.boisestate.edu/efc/Tools_Services/Plan2Fund/plan2fund.htm)

- Environmental Finance Center
  Directory of Watershed Resources
  [http://efc.boisestate.edu/](http://efc.boisestate.edu/)

- EPA’s Catalog of Federal Funding Sources for Watershed Protection
  [www.epa.gov/watershedfunding](http://www.epa.gov/watershedfunding)
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