

Minnesota Department of Natural Resources
Minnesota Board of Water and Soil Resources

Legacy Fund Restoration Evaluations - LSOHC Update

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To: David Hartwell, Chair Lessard-Sams Outdoor Heritage Council

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The Lessard-Sams Outdoor Heritage Council recently expressed interest in learning more about:

- How the Restoration Evaluation Program improves restoration practices
- How the program's recommendations inform the work of the Council
- How program funds have been managed

Improved Restoration Practices

The Restoration Evaluation Program improves restoration practices by conducting project evaluations, convening technical experts to make recommendations, and conducting education and outreach aimed at restoration practitioners.

Evaluating Projects (Project Level)

One method that the Evaluation Program uses to affect project outcomes is the evaluation process itself. First, simply being aware that there is oversight of restoration projects influences the work that project managers do. Second, these evaluations provide an opportunity for direct one-on-one engagement between project managers and outside technical experts. The process involves the review of plans, documents and decision making related to a project, followed by a site visit discussing outcomes in the field.

These interactions yield constructive outcomes. For example, evaluations have identified previously undocumented invasive plants, recommended the most effective herbicides for specific situations, and improved management practices for invasive plants such as buckthorn.

Expert Recommendations (Program Level)

Project assessors bring a wealth of expertise and experience to evaluating projects and identifying where there are opportunities for improvement. The panel also brings extensive expertise to the discussion of restoration best practices. The knowledge and experience of this community of experts has provided thousands of hours of analysis and discussion over the life of this program to shape recommendations for improving future restorations. Leveraging this expertise through the Evaluation Program has accelerated learning throughout the conservation community from restoration implementation.

Education and Outreach (Community Level)

The panel's recommendations form the basis of the Evaluation Program's communication and outreach. These communications are targeted to restoration practitioners and have focused on specific topics including seed selection, effective project teams, stream restoration process, and buckthorn management. Examples of education and outreach include a series of eight webinars on improving restorations coordinated with University of Minnesota Extension with more than 900 attendees, and several special sessions at the Minnesota Water Resources Conference focused on stream restoration with more than 350 attendees. The Evaluation Program has reached more than 5,000 stakeholders through reports, presentations, and field days. The cumulative impact of these communications helps drive awareness and foster a culture of continuous improvement for restoration practice in Minnesota.

Project evaluations continue to be important learning opportunities for all involved. However, the Evaluation Program cannot evaluate most projects, and evaluations only happen after project work is completed. To achieve broader goals for improving outcomes, the program provides feedback for adapting practices and policies that pertain to all current and future projects. This feedback loop requires effective communication and outreach to the community of restoration practitioners. The Restoration Evaluation Program recognizes the importance of working side by side with agencies and the Council to ensure the best possible outcomes. We welcome the opportunity to engage with the Council in developing an action plan to support maximizing the Evaluation Program's value for the Council's work.

Informing the Work of the Council

Most projects we evaluated were on track to meet their goals and desired outcomes. However, the field of ecological restoration is complex and evolving, and there are always opportunities for improvement. These opportunities are identified as recommendations in the Evaluation Program's annual reports. These recommendations aim to stimulate discussion among the Council and applicants and grantees, to find continuous improvement opportunities.

Since 2012, the Restoration Evaluation Panel made 10 recommendations for improving restoration practices to improve project outcomes. We welcome the opportunity to discuss with the Council how these recommendations can inform their decision-making process:

- Improved Project Review by Technical Experts
- Phased Approach for Buckthorn Management
- Improved Seed Selection and Implementation
- Climate Change Contingency Planning
- Improved Project Teams
- Improved Documentation
- Improved Restoration Training
- Improved Design Criteria for Lakeshore Projects
- Improved Planning for Stream Projects
- Improved Vegetation for Stream Projects

We'd like to highlight two examples from the recently published 2022 Evaluation Report that may be of interest to the Council.

Recommendation 1: Improved Project Review by Technical Experts (2022 report pg. 10)

The Evaluation Program has identified instances where project outcomes would have benefited from review and guidance from outside technical experts. Expert review is particularly valuable for complex projects with multiple habitat types or for projects requiring multiple disciplines in the design. For example, stream habitat projects require expertise in hydrology, geomorphology, engineering, fisheries habitat, and native vegetation restoration to achieve the best outcomes. It is unlikely that one person has expertise in all these areas, therefore an interdisciplinary team approach is needed.

Under this recommendation, there is a suggestion for funding organizations to *“Require funding requests to identify technical capacity needs.”*

The Evaluation Program recommends including additional questions in the call for funding request aimed at identifying the range of technical expertise needed for the proposed project and how these needs will be addressed in the project team. Suggested questions include:

- What technical expertise is needed to plan, design, and implement this project?
- Who has or will provide the identified technical expertise?

An example response could be *“Our staff will work with DNR area wildlife managers and Ducks Unlimited biologists to identify project sites and evaluate the feasibility of the project. Engineering plans and technical specifications will be completed by Ducks Unlimited Engineers. Planning and implementation of the native vegetation restoration will be managed by a qualified native vegetation contractor in consultation with DNR regional ecologist.”*

The report also recommends that funding organizations “*Refer project managers to the appropriate resources for unmet project needs.*”

If a project request has not identified an appropriate technical expert for a project need, the funding body could refer the requestor to appropriate resources. This could be addressed by developing a list of technical resource contacts for specific types of projects including DNR stream habitat specialists and ecologists, BWSR Clean Water Specialists, UofM Extension specialists, and other consulting experts as appropriate.

Recommendation 2: Phased Approach for Buckthorn Management (2022 report pg. 12)

This recommendation applies directly to LSOHC’s expressed interest in durable projects that will continue to support the investment of initial project work. The Evaluation Program has seen several instances where initial buckthorn management actions were not followed-up with adequate maintenance. Therefore, we recommend a phased approach to buckthorn management. The report identifies potential roles for funding organizations to promote this approach.

Under this recommendation, there is a suggestion for funding organizations to “*Request that project managers develop a phased plan as part of funding requirements.*”

LSOHC and the CPL program could leverage the requirements for a Restoration and Management Plan 97A.056 subd. 13 (c) to require project proposers to specifically address the phases and sequencing of their buckthorn management actions. Suggested questions include:

- Does your project involve buckthorn management? Y/N
- What management actions will you take and in what sequence and timeline?
- Please specify plans for buckthorn management under (existing request question): How will you sustain and/or maintain this work after the Outdoor Heritage Funds are expended?

The report also recommends that funding organizations “*Provide project managers with resources for developing a phased buckthorn management plan.*”

If a project request has not identified an appropriate plan for managing buckthorn or has interest in accessing technical resources, the funding body can refer the requestor to appropriate resources. This could be addressed by developing a technical resource outlining specific methods and appropriate applications, as well as linking to technical expertise, as described in the recommendation for technical review. The Evaluation Program could work with DNR, BWSR and University of Minnesota partners to develop targeted practice guidance for this purpose.

Program Funding and Utilization

Funding for the Legacy Restoration Evaluation Program comes from three Funds: Parks and Trails Fund, Clean Water Fund and Outdoor Heritage Fund. From 2012 to 2022, the Outdoor Heritage Fund has provided 51% of the overall program funding, Clean Water 34%, and Park and Trails 15% (Figure 1).

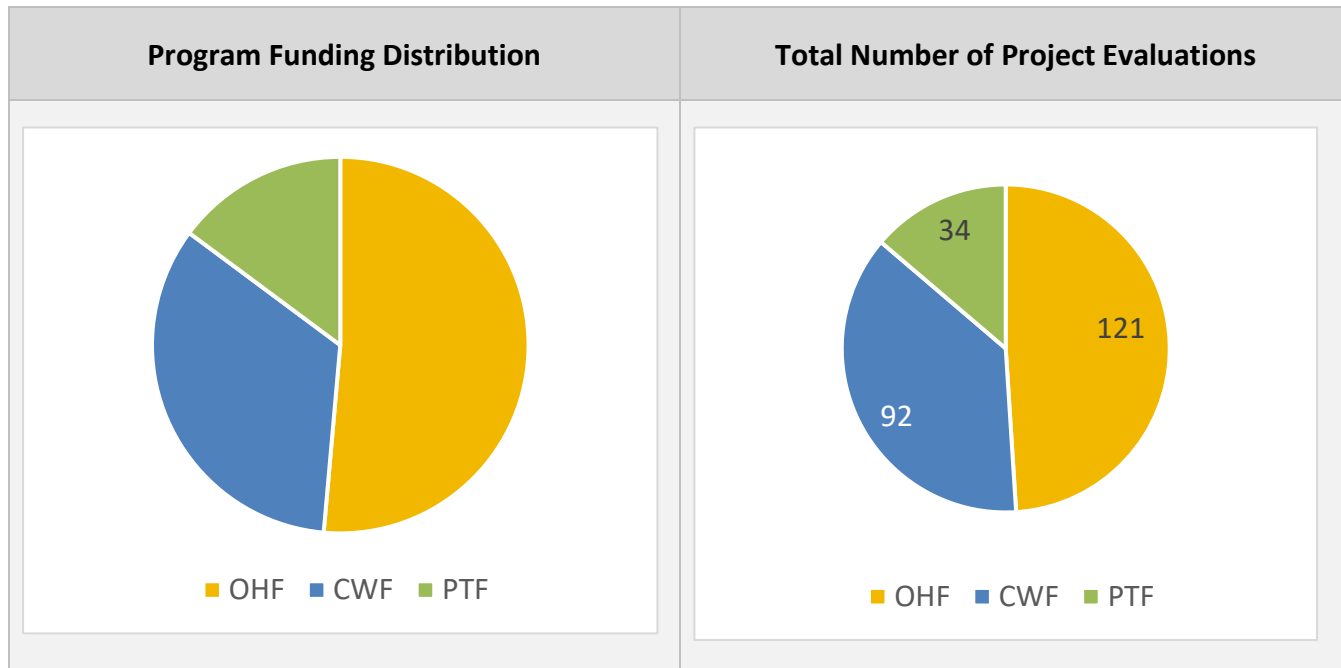


Figure 1: Total program funding and project evaluations 2012 to 2022

From 2012, when the program was initiated, until October 2017, the DNR had a single position, a Program Coordinator. During this period, expenditures were consistently lower than the funding levels (Figure 2). The Council approved that unspent funds be rolled into the next fiscal year, to be used to contract additional project evaluations.

During this period, the program conducted an average of 6 Outdoor Heritage Fund project evaluations per year, 7 CWF projects, and 2 PTF projects (Figure 3). Due to strong interest in completing more evaluations and communicating lessons learned, the DNR added a second position in October 2017, an Evaluation Specialist. The average number of project evaluations increased to 17 Outdoor Heritage Fund evaluations per year, 9 CWF projects, and 4 PTF. Expenditures increased, which gradually spent down the balance from previous years (Figure 2).

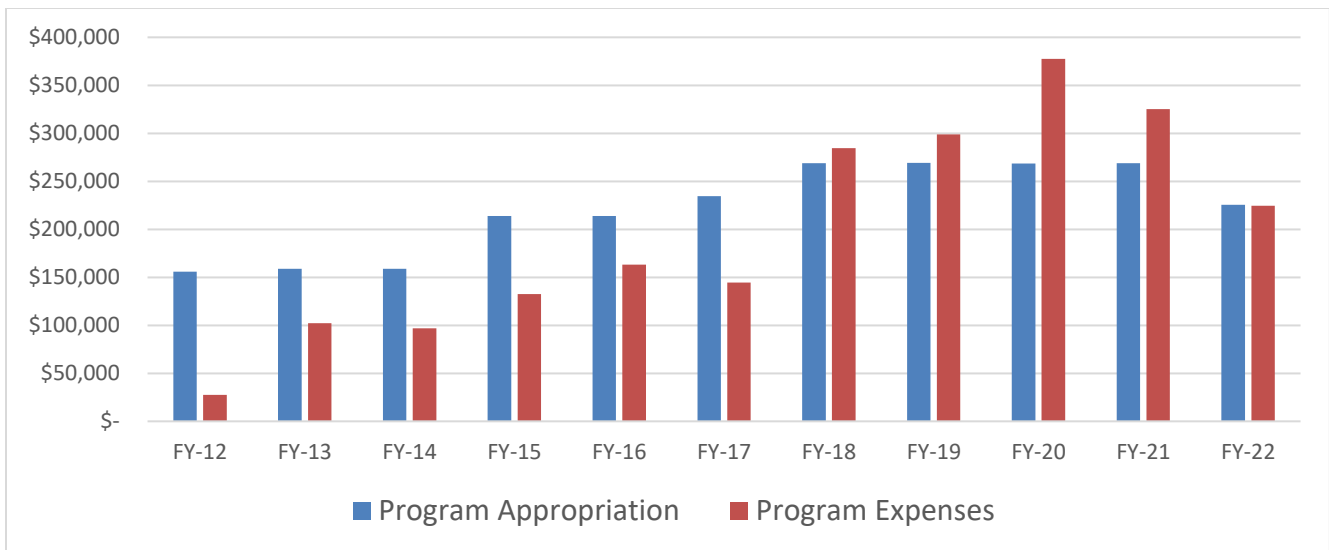


Figure 2: Total program appropriations from all Funds and expenses FY 2012 to FY 2022. Expenses were reduced in FY22 due to staffing shortages and a temporary reduction in Clean Water Funding for FY22-FY23. Project evaluations Figure 3 shows project evaluations were adjusted accordingly.

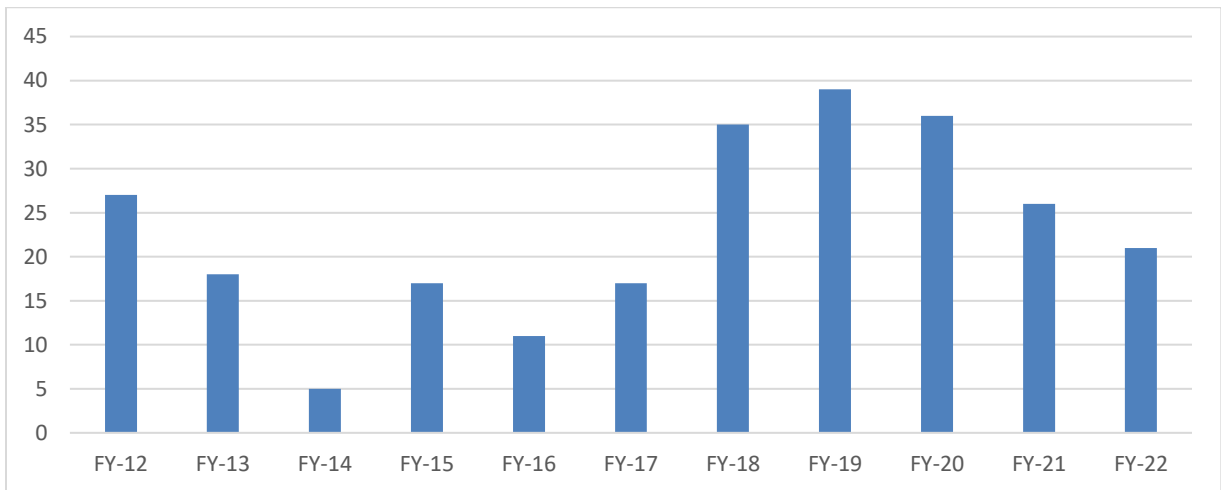


Figure 3: Number of project evaluations for all Funds by fiscal year

The figures above also show that total expenditures and project evaluations declined in 2021 and 2022. During this period, program activities were affected by the pandemic and turnover in staff. The employee in the Evaluation Specialist position left the program to take a different position in the DNR in December 2021. The position was filled in June 2022, but the employee left one year later to take a position in the private sector.

We have hired an employee for the Evaluation Specialist position and anticipate returning to a level of program activity reflective of the period from 2018-2021. The current OHF request of \$200,000 is needed to support this continuing level of staffing and effort.

We look forward to continuing to work with the Council to discuss opportunities to enhance the Evaluation Program's integral work.