

# **DRRP 2015 Core Team Retreat**

## **Mesa County Old Courthouse, Grand Junction, Colorado**

### **January 7, 2015**

*Attendees:* Rusty Lloyd, Kristen Jespersen, Julie Knudson, & Daniel Oppenheimer (Tamarisk Coalition); Peter Mueller (The Nature Conservancy); Mike Wight (Southwest Conservation Corps and rep for all 3 Conservation Corps); Peter Skidmore (Walton Family Foundation, by phone in the morning); Matt Azhocar (Bureau of Land Management, by phone in the afternoon); and Marsha Porter-Norton (Facilitator).

The agenda was agreed to and the meeting opened at 10:00 a.m.

A quick recap of the action items developed and agreed to by topic include (please refer to the notes and what is highlighted in yellow for details):

#### *Communications Plan and Steps*

- 1) The full DRRP Communications Plan will be drafted in-house by March (DO and KJ) with the goal to get the final plan done by June. Past documents, outputs, “thinking,” and work will go into this plan. The general sentiment is the group is close, but just needs to bring everything together into a cohesive plan.
- 2) Steps will be taken to hire a public relations/marketing firm to get our messages out (DO and KJ). A list has been developed of what is needed. Athena Communications will be thanked for what they have done for us so far but the group would like to identify a new provider of this service.
- 3) Work is being done to get a VISTA volunteer on board to handle community outreach, coordinate some communications work and increase engagement (MW).
- 4) MW will order hat gifts for BLM Field Staff and other key partners for distribution at the next DRRP meeting.
- 5) Everyone on the Core Team will make it a point to personally thank the BLM Field Staff.
- 6) A speakers’ bureau will start, with the Core Team being the initial members. Materials will be shored up and a list of who to brief was developed (see chart below) (All).
- 7) The DRRP will meet twice this year, not once. This is a time for high communication and interaction, so two meetings are needed. In 2016, the model could evolve to one “business meeting” a year, with one half day meeting and then an engagement event in the afternoon.
- 8) E-newsletters continue and annual report will be done soon.
- 9) The group will focus on communicating with key audiences for now. The larger “public awareness” piece may come later depending mostly on the scope of the Partnership Fund. In sum, targeted communication is the mode. More broad communication might come later but it has to be strategic. On this note, Rusty will give us some intel from his master’s class.

#### *Fundraising (RL and KJ)*

- 1) Several new grants are in the works, and there is a plan for additional grant requests.
- 2) Kristen continues to develop a vision/framework for a partnership fund. She will report back at the end of April regarding a suggested course of action. It will be vetted by the Core Team and DRRP.

- 3) The development/outreach capacity of the DRRP will be increased either by hiring staff in-house (TNC and TC) or hiring someone new.

#### *Science and Monitoring (JK)*

- 1) Work continues and a communications piece will be completed explaining their results, finding, and work.

#### *Implementation (DO and PM)*

- 1) Work continues for 2015. They will take up the issue of grazing as per Peter S. and the WFF's request.

#### *Outreach and Education (MW)*

- 1) This Subcommittee is mostly on hold until the communications plan specifies roles.

#### *General Core Team Work*

- 1) Everyone needs to send regular email updates when key decisions are made and milestones reached.
- 2) The Funding Subcommittee will more regularly communicate with the Core Team using a reporting function.
- 3) Subcommittee reports will be reinstated, on the phone and at in-person meetings.
- 4) Mike and Marsha will meet with Matt A. to brief him and hear what he needs to keep BLM levels informed/engaged.
- 5) The Core Team will do briefings with key audiences as per list developed by Communications Working Group.
- 6) The list requested by the WFF will be completed.

### **Item 1: Self-Evaluation of Core Team & Subcommittees**

The group did a self-assessment of Core Team and subcommittee work, and suggested areas for improvement. The four Subcommittees are Funding, Science and Monitoring, Implementation, and Outreach/Education. What follows are highlights from this discussion.

- Core Team:
  - It is a good forum for dealing with issues; there is shared trust, flexibility, and good working relationships; everyone is involved and participates; current structure (e.g. number of phone calls, responsiveness to issues) all seem to be working well.
  - There is a representative on the Core Team from each of the Subcommittees. This helps with intra-Subcommittee communication and work. Subcommittees are about the “here and now” while the Core Team can focus on the long-term planning, action and goal setting with direction and vision from the larger Partnership. The group feels this governance structure works while also recognizing there is always room for improvement.
  - Given all the work that has been required during the last about 18 months (not only on-the-ground restoration, but with monitoring, developing the Communications Plan and Long-

Term Funding Strategies), the Core Team feels that the decision to reduce partnership meetings from biannual to annual should be postponed until 2016 (i.e. not this year).

- One action step is that detailed Subcommittee updates will be re-instated during Core Team calls and meetings. The Subcommittee chairs will improve communications by sharing milestones more frequently both through e-newsletters (which go to the entire DRRP) and periodic email updates to Core Team members. Marsha noted that taking full minutes at each Subcommittee has not worked in the past. It was too cumbersome and just was not occurring. However, sending a few paragraphs to the Core Team about key decisions made or intra-Subcommittee matters is easy. Everyone agreed to do this.
- Julie mentioned that having facilitation helped. She said it helps the group “stay out of the weeds” and focus on making decisions.
- The group wants to ensure that Matt has everything he needs to fully participate, as the BLM’s role is so crucial. (Matt replaced Jim Cagney on the Core Team last year and is a liaison to all the BLM Field Offices from the DRRP.)

▪ Funding Subcommittee

- Kristen reported that the Subcommittee has a good team to work with and has stepped up grant writing skills. It has expanded membership to include CCYC and WCCC staff.
- It was identified that the current funding challenges of the DRRP are complex because: a) the amount to raise in the Transition Plan is constantly shifting; b) some funding may be in decline; c) the opportunities with the Healthy Lands Initiative (BLM) are fabulous but the total amount that may be available cannot be gauged over a multi-year period as funding decisions are made annually by Congress; and d) mostly, the DRRP’s needs are known but they do change.

Therefore, the group said that more communication needs to occur about where we are “at” about funding needs in general and any challenges. Additionally, the DRRP is now in a different era than when starting and a new story is emerging that must be told. Peter said he needs the information about “our story” to appeal to private donors.

- The Communications Plan is key to this, Kristen said. The two go hand in hand: raising funds and telling our story by communicating successes and needs.
- Action step: Kristen will send out information about the status of fundraising using a regular schedule. She keeps a detailed spreadsheet that tracks all this and can share it.
- Finally, to formalize the process for identifying needs, perhaps the Funding Subcommittee can send out questions about funding needs for each year. This was generally agreed to.

▪ Outreach & Education Subcommittee

- This Subcommittee has experienced dwindling participation, as it is really down to Mike and Daniel working on any items. The trail was a major accomplishment. However, with the new Communication Plan that will be done this year (read below), there may be some clear needs and strategic directions that come from this planning effort, as well as a need to revisit the role of this Subcommittee.

- Implementation Subcommittee
  - This Subcommittee was created in 2012 to integrate work on public and private lands, create more transparency in terms of planning, and provide a venue for sharing lesson learned. Since then, the Subcommittee has integrated into it the Grazing Management & Private Lands Subcommittees as well.
  - Things seem to be working well, including site visits with partners that work on adjacent public and private lands, and responding to needs (e.g. developing strike teams and formalizing coordination with the Science and Monitoring Subcommittee).
  - Daniel will share the Implementation Overview & Funding Needs Spreadsheet more often with the Implementation SC & Core Team.
  - While there are a few private landowners already on the Subcommittee, hopefully a few more can be recruited to serve.
  
- Science and Monitoring Subcommittee
  - This subcommittee schedules meetings as needed (1-2 per year).
  - Given that meetings are not frequently needed, it was noted that perhaps there is an opportunity to communicate more with the entire DRRP about what is happening with this Subcommittee. A suggestion was made and agreed to (referred to later as well) that the SMS develop a user-friendly communications piece to educate everyone on the current status and findings of their work. This piece can tell the DRRP story from the SMS perspective.
  - There are only a few subcommittee members, but they are highly engaged. More members are needed. Julie said she needs input about what people want, regarding sharing monitoring information.

## Item 2: The DRRP Communications Plan

It was reported that the day before this retreat, a Communications Working Group of Daniel, Kristen, Mike and Marsha met to develop a specific road map for where to go on the Communications Plan. It was acknowledged that there have been some “fits and starts” with getting the Communications Plan done. It’s a brand new area for the DRRP but remains vitally important, all agreed. The Working Group worked for almost six hours and brought recommendations to the Core Team at this retreat for review, vetting, and a decision/direction. The issues the Working Group addressed included:

- The level to which outside experts are needed and if the current firm (Athena Communications) can meet needs.
- The goals of the communications plan and methods for completing it.
- The products necessary to better communicate the work of the DRRP.
- Short-, medium-, and long- term projects, actions and milestones.

As background, in the Transition Plan, the DRRP identified a suite of long-term fundraising strategies and needs. It was determined that a robust communications plan was needed not only to raise money, but to keep everyone motivated, better tell the DRRP story, and generate other support such as volunteers, partners, long term stewards, etc. Also, at the fall 2013 DRRP meeting, more communication and “better telling the DRRP story” were identified as important as we move forward.

It was noted that a lot of work has been done to date (meetings, outputs, documents that set forth DRRP audiences, a summer retreat in Ridgway with Athena, etc.). The Communications Working Group distilled all of this and identified key action items for moving forward.

First, these goals were presented in draft and approved by the Core Team (these are goals for the communications planning effort):

- Gain support and funding from existing and new funders;
  - Outreach to BLM – presentations, meetings
  - Outreach to State – presentations, meetings
  - Develop concept about Partnership Fund
  - Outreach to Donors (individuals, tourists, communities, local businesses)
  - Identify and outreach to potential new grant funders and foundations
- Raise awareness and buy-in among prioritized audiences to establish a lasting constituency of funders, stewards and advocates;
  - Community engagement techniques (e.g. working with schools on learning projects)
  - Speakers Bureau (start one using Core Team and expanding from there)
  - Maximizing the trail
- Establish/develop/use unifying message and tools for targeted audiences (brown flipcharts);
  - Develop products/messages. Here is the prioritized list of what we need:
    - Video
    - Brochure (with inserts that can be added for each audience)
    - Website (with a way to navigate based your interests)
    - Annual Report
    - QR code
    - Stories (success and the restoration story)
    - T-shirts or hats
    - Rack card
- Continue to pursue opportunities to share lessons learned while integrating DRRP expertise into the branding/messaging; and
- Keeping DRRP partners motivated.
  - Speakers Bureau
  - Community engagement event
  - Donor field trips (use the Interpretive trail where we can)
  - Half-day meeting combined with a fun/education event in the afternoon such as a visit to a restoration site, a speaker in the field, etc.
  - Be sure and specifically thank the BLM Field Staff

**Communications and Funding Plans:** A long discussion occurred the day before about the vital intersection of these two efforts. The two plans (funding and communications) need to interweave, link and coordinate with one another.

**Communications Plan:** A recommendation was made and agreed to by the Core Team that we now have enough information and a framework to do the communications plan in-house. **Kristen and Daniel are taking the lead and developing a draft by the end of March and the final document by June.** They will use existing materials produced to date, which include materials from Athena, a spreadsheet of

audiences/messages, etc. produced for the Ridgeway communications retreat, the Transition Plan, and other materials. They will develop a draft plan that is streamlined, clear, and user-friendly. Then, they will bring it back to the Core Team in the spring for vetting. Eventually, the DRRP will need to see it and it would be good to get their review as well. The draft communications plan will set forth goals (already drafted...see above, lay out the audiences and messages for each (mostly done before the Ridgeway retreat), suggest ways to reach each audience (e.g. strategies and tactics), suggest why each audience is important to reach, identify responsibilities, roles and timelines, and note areas where resources might be needed.

**Messaging:** This topic has been a challenging one, but everyone gets why it is so important. Some good work was done in Ridgeway around this topic. The DRRP needs some overall messaging that it always used. This is usually in the form of a tag line(s) and two-three bullet points that are the “elevator speech,” as it’s called. Then, the DRRP needs honed messages for priority audiences such as counties, BLM entities, donors, landowners, etc. It was recommended that an area where experts can help is developing the products arising from the messages (e.g. video, tag line, brochure, Web site, etc.). One example: If one is talking to a County Government, cost is an important message as well as how the restoration work might help their recreation, agriculture or tourism sectors.

Once the overall DRRP messages are honed, products are needed that “flow” from the messages. It was agreed, based on the Working Group’s suggestions, that the products needed include a new brochure (with the message included and with inserts that can be used for specific audiences), an updated Web site that has portals for various interests (e.g. landowners, funders, donors, etc.), videos, rack cards, and packet for speakers bureau members to use. The Core Team agreed with this set of products. They further determined that Mike can proceed with ordering a smaller number of hats (and possibly other items) to recognize the BLM Field Staff and other DRRP key partners at the next meeting.

In this discussion, it was agreed there are still some issues to address: a) There is a need to identify a consulting firm who can help develop products. It could be that more than one firm is necessary. b) A marketing-oriented product from the Science and Monitoring Subcommittee would be helpful in telling the impact story.

**Increasing the Development/Outreach Functions of the DRRP:** The Communications Working Group recommended hiring a development/outreach director using CCA and BLM Assistance funds. They said their reasoning was that to raise the ballpark figure of \$800,000 (again, knowing this is a moving target), implement the communication plan steps, and engage more people in stewardship (e.g. school groups, etc.). Simply put, these activities add up to a need for a position (likely .75 to FTE). The current capacity of the members is not available to do this type of work, nor is the expertise. The Core Team discussed this idea at length. A concern was shared by Peter about hiring a development director. He said that his concerns were that the donors for the transition plan are likely the same donors that are funding the various entities around the table now and/or have already funded the DRRP in the past. He said that the idea of hiring a new person to then be in the mix just didn’t make sense and he questioned the effectiveness of this strategy in the long term. He was also concerned about a new person getting up to speed. Marsha then asked: What are the options given that the Communications Working Group has said more capacity is necessary? The group discussed this at length and determined a plan. Peter will approach TNC about offering in-house development services specifically for the DRRP. TC is hiring a development director and so maybe that person can also assist with duties teaming up with more TNC

help. Peter was thanked by Kristen for making this offer. She said that yes, if development can be stepped up using in-house resources that is better than hiring someone new. TNC and TC will explore this plan. Kristen, Peter, Missy, and Rusty meet by the end of January, then schedule something with Melissa G. (from TNC) in February. This will be a high priority area for the Core Team to track on. Plan B: If it does not work out to secure development resources through TNC and/or TC, then, the plan of hiring someone new can be used.

Securing a VISTA to specifically do more outreach and community engagement projects was agreed upon. The Communications Working Group felt this was imperative. There are so many things the DRRP could be doing, such as more work with schools in the river corridor, coordinating speaking engagements, and more. These are ideal tasks for a VISTA. Mike Wight will develop a VISTA job description by end of January.

By the end of March, Daniel and Kristen will develop an RFP for marketing products and a prioritized table of key audiences to reach out to in the short-term as well as strategies and tactics for reaching them. (Note: Much of this work is already started in the spreadsheet done prior to the Ridgway retreat.)

Mike Wight will start working on t-shirts for recognition/motivation goals with a specific focus on getting thank you items to BLM field staff. A smaller order will be done with no tag line or messaging and can be re-done later with a tag line/messaging. (Note: The group has not determined that new logo is necessary.)

The entire Core Team will be given a list of who to brief immediately. We do not need all the communications planning done before starting to brief key audiences (there was a list developed by the Communications Working Group).

Rusty will send Kristen and Daniel marketing/outreach models from his public administration master's class. He noted that "building awareness" isn't a well-written goal. In his class, he is learning that being very strategic about outreach and communications is important and we must ask ourselves: What are we building awareness for? What result do we want from audiences we talk to? Everyone thought this was a great resource and good input.

**Prioritized Products:** The group, after much discussion and a recommendation from the Communications Working Group, decided the most important products are a video, annual report, new brochure; updated Website, a honed Power Point, and any other materials for the Speaker's Bureau.

How can we use brochures better? We need to know our audience first, then figure out what materials we need to reach them.

It was clarified by the facilitator, that the DRRP is initiating work on parallel tracks and within a six-month time frame these things will happen: internally complete the communications plan; look for and then hire a consulting firm(s) to develop the products needed based on messages; enhance our development capacity by increasing the fundraising and outreach capacity of the DRRP (see below for ways this might be done); and do some short terms projects such as get recognition gifts for partners and do briefings with a list of key audiences (see below).

### Item 3: Long-Term Funding

Several funding updates were covered by Rusty, Kristen, and Peter:

- Colorado Collaboration Award - \$50,000: Based on discussions and agreement, the TC will invest it in a 12-month CD, knowing that if we have to pull some, we will have to pull it all out.
- Peter and Marsha will look into Southwestern Water Conservation District for 2016 work and a community outreach product or strategy.
- Rusty will talk to John Williams. We have encumbered all the Hendricks funds.
- Daniel circles back with Core Team regarding the letter to past/current funders and 2014 annual report. As background, last fall it was decided that a letter would go out to all funders celebrating the CCA. Since then, it was decided that this letter would be more effective if the 2014 Annual Report was included.

In terms of a partnership fund, Kristen had several updates based on initial research she has done since last fall when establishing some type of partnership fund was agreed to by the entire DRRP:

- It will be less focused on partnerships contributing to the fund, and more oriented around having a challenge grant (based on a private donor campaign) that partnerships apply for to leverage other dollars they have garnered on their own.
- It becomes less about a strategy for a given partnership and more about how can we make a coordinated ask of funders for a fund that benefits several watersheds?
- A question was identified: How to sort through management and distribution (e.g. equity considerations)?
- A third party (e.g. community foundation or bank) would need to manage the fund, not a partner
- Kristen will report back at end of April as per the deadline set back in October.

#### Item 4: Finalizing the MOU

Daniel walked through some clarifications in the MOU. He asked that a process be put in place to efficiently get it signed. A decision was made that the MOU will be signed by all parties who wish to participate in six months. The same MOU will be given to each entity. Daniel and Marsha will talk through how best to approach the parties. For some partners, they can just send the MOU in an email and easily get a signature. For other, briefings or formal requests are necessary. It was agreed that coordinating the signings with the briefings that will be occurring so the two tasks are combined and coordinated.

#### Item 5: Upcoming DRRP partnership meeting

- The Core Team decided to have two partnership meetings in 2015 (and possibly still a community event in 2015).
- In 2016, the number will drop down to one partnership meeting and one community event.
- The group felt that still meeting at the BLM FO communities is important as the transition plan occurs. However, at some point, a consideration might be given to having a few meetings more near the river corridor such as in Naturita, Dove Creek or Gateway. This would be a way to “touch” the project perhaps more directly, but also to engage local partners, governments, and players.
- The upcoming Spring meeting will be in Montrose, venue not yet determined. Members said the Fairgrounds, where we met in 2013, was too big and felt impersonal.
- Mike agreed to have t-shirts, hats, and or stickers by the time of the next partnership meeting.
- 4/1, 4/2, 4/9, 4/20, 4/21 were given as possible dates for partnership meeting.

## Item 6: Other Items

- Rusty noted several tasks the Core Team members are working on to help the Walton Family Foundation, which is going through a Strategic Planning process right now, to better understand several components of the DRRP. Rusty reviewed the list of items requested by the WFF. The list was reviewed. It was agreed again that these outputs are important in telling the story. The grazing issue can be discussed by the Implementation Team in terms of possibly defining a way to raise this issue in the DRRP's work. Julie noted that grazing could easily be added to the monitoring checklist related to questions about grazing, grazing impacts, etc. Everyone felt it was important to understand the level of grazing in the corridor and get the facts.
- Marsha asked if the GIS work can be integrated into the speakers' bureau Power Point. Rusty and Mike said yes, easily. This data can paint a very compelling story graphically (e.g. around treatments done over multi years and in which locations).
- For the Healthy Lands Initiative, Matt Azhocar hasn't received a code yet for spending for fiscal year 2015. If these funds are into the existing assistance agreement then they would need to be spent sooner than if we created a new assistance agreement for the funds.
- Given that current Assistance Agreement will expire in 2016, what steps can we start taking to create a new Assistance Agreement? Matt says can start initiating agreement now, even if don't have code for the money yet.
- Marsha and Mike will meet with Matt in Durango to brief him on this retreat and understand his communications needs for talking about the DRRP to the BLM.

The meeting ended by a recap of all retreat action items.

Chart of Key Audience to Brief: (developed by the Communications Working Group)

| Entity                         | Call to Action  | Actions to be Taken  | Timeline                 | Lead(s)  | Resources Needed    |
|--------------------------------|---|--|--------------------------|--|---------------------|
| BLM Field Staff                | Recognition   | Give gift<br>Acknowledge their efforts to higher ups   |                          | Mike Wight   | Hat/t-shirt (AA \$) |
| BLM District Manager NW        | Introduce partners to new manager<br>Seeking ongoing support for DRRP work<br>Secure funding for years out        | Schedule a meet and greet<br>Recognize field staff   |                          | Stacy on NW RAC – she has spoken with him<br><br>Peter, Mike, Daniel (Stacy liaison) |                     |
| BLM District Manager Utah      | Continued engagement and support for project work<br>Status of NEPA   | Schedule meet and engage   |                          | Sue, Daniel, Janet   |                     |
| Utah FO                        | NEPA buy-in<br>Check in   | Schedule meetings  |                          | Sue, Daniel, Janet   |                     |
| Uncompaghre FO                 | Update on project goals   | Schedule meeting with Amanda's replacement (if this happens)   | When replacement arrives | Peter, Mike and Daniel   |                     |
| BLM CO State Office            | Ongoing updates about project status<br>Share success stories<br>How to plug our stories into internal BLM office | Inquire with Matt what he needs (Marsha, Matt)<br>Schedule meetings  |                          | Matt and Bruce   | Ask Matt            |
| DOI                            | Share success stories<br>Solicit ongoing support of the project<br>Thanks for HLI                                 | Strategize message to DOI and who to attend meeting<br>Identify key people to meet with<br>Schedule meetings |                          | Bruce, Harry   |                     |
| NRCS – Conservation Districts  | Discuss opportunities for increased engagement<br>Leveraging of resources<br>RCPP                                 | Present to the State Assn of Conservation Districts?   |                          |  |                     |
| Partners for Fish and Wildlife | Thanks and solicit ongoing support<br>Acknowledge people on-the-ground  | Identify who to meet with  |                          |  |                     |
| Bureau of Reclamation          | Thanks<br>Project updates   |  |                          |  |                     |
| Department of Energy           | Thanks  |  |                          |  |                     |
| CPW                            | Thanks<br>Ask for additional money<br>Demonstrate success   | Schedule meeting   |                          |  |                     |

| <b>Entity</b>                                      | <b>Call to Action</b>                                     | <b>Actions to be Taken</b>            | <b>Timeline</b> | <b>Lead(s)</b> | <b>Resources Needed</b> |
|--|---|---------------------------------------|-----------------|----------------|-------------------------|
|  | Updates on project work                                   |                                       |                 |                |                         |
| CSFS   | Request funding<br>Demonstrate success                    | Schedule meeting with State Forester? |                 |                |                         |
| CWCB   | Thanks and project update                                 | Schedule meeting                      |                 |                |                         |
| Co DoT   | Meet and engage<br>Opportunities for future collaboration | Schedule meeting                      |                 |                |                         |
| University of Utah Rio Mesa                        | Share science<br>Present project successes                |                                       |                 |                |                         |
| Mesa County Commissioners                          |   |                                       |                 |                |                         |
| Dolores County Commissioners                       |   |                                       |                 |                |                         |
| Tres Rios County                                   |   |                                       |                 |                |                         |
| Other County                                       |   |                                       |                 |                |                         |
| Other Enviro Orgs – San Miguel Watershed Coalition |   |                                       |                 |                |                         |
| Local Communities (e.g. Natarita, Nucla)           |   |                                       |                 |                |                         |