

**EXECUTIVE OVERVIEW**  
**Assessment of Alternatives for Future Administration**  
**of the Montana Natural Heritage Program**

**Introduction & Background**

The Montana Natural Heritage Program (NHP) was established by the Legislature in 1983 (90-15, MCA) as part of the Natural Resource Information System (NRIS). The NHP was created for “information acquisition, storage, and retrieval for data relating to the flora, fauna, and biological community types of Montana.” Since the first staff were hired in the fall of 1985, the Montana Natural Heritage Program has logged a 20-year record of success. It has grown into as a highly respected, service-oriented program with an annual budget of over \$800,000 and a staff of eighteen professionals with expertise in zoology, ecology, botany, database management and GIS. The Program is widely recognized as one of the most advanced and effective in the Natural Heritage Network, which includes over 70 separate programs throughout the U.S., Canada, Latin America and the Caribbean.

The enabling legislation placed the Natural Heritage Program in the State Library, with a special provision allowing the state to contract for its operation and provide state resources and facilities in order to minimize costs (see Appendix 2). This provision acknowledged The Nature Conservancy’s work with state governments in creating and implementing Natural Heritage Programs. Starting in the mid-1970’s, state governments contracted with The Nature Conservancy (TNC) to set up Natural Heritage Programs, hire and train staff, and oversee the development of a functional database and information service. This was typically done with a combination of federal funds and private matching funds raised by TNC, which covered initial costs under an “establishment contract.” This public-private approach resulted in a remarkable network of Natural Heritage Programs, covering all 50 US states and Canadian provinces, as well as the District of Columbia, the Navajo Nation, Puerto Rico, and various Caribbean and Latin American nations.

The establishment contracts generally lasted two-years, with the partners noting a mutual intention that ongoing operation of the NHP’s be assumed by state governments. A few programs made this transition after two years, and many programs completed it within 6 years. Where states wished to continue the NHP but were unable to assume full fiscal and management responsibility (for financial or political reasons), the Conservancy agreed to continue as a contractor, operating with state funds and supplementary grants and contracts. Because of these programs’ continued emphasis on grants and contracts, and as well as the continued nurturance and support from TNC, many grew to become among the most robust and successful in the network (e.g., New York, Michigan, Colorado and Florida). Such has been the case in Montana, where the State Library has continued to contract with the Conservancy for operation of the program – now in its 20<sup>th</sup> year and very successful.

**Purpose of the Assessment**

Late in 2004, the managing partners – TNC and the State Library – began an Alternatives Assessment to evaluate options for future administration of the Montana Natural Heritage Program. Issues driving this assessment included administrative and political concerns with continued TNC administration, changes within Montana Fish, Wildlife & Parks, and the advantages of being proactive rather than reactive in planning for the program’s future.

The goal of the Alternatives Assessment is to examine the viability of different administrative structures for the Montana Natural Heritage Program. Specific objectives are to:

1. Review the current operation of the Natural Heritage Program (NHP), identifying advantages/strengths and disadvantages or areas for potential improvement;
2. Identify key goals and desired outcomes for future administration of the program;
3. Identify all reasonable institutional options for future administration, and evaluate the feasibility and advantages/disadvantages of each with respect to desired outcomes;
4. Solicit and integrate input from partners, stakeholders and staff; and
5. Identify the best alternative(s) and recommend strategies to address key issues.

### **Guiding Principles**

A set of five Guiding Principles was drafted through consultation among managing partners at the outset of this process. The purpose of these Principles was to describe an optimal outcome that would guide the evaluation of options. Stakeholder input (described later) was incorporated and is reflected in the final Guiding Principles presented in Appendix 1. Below is a brief list, based on the Guiding Principles, of requirements for the ideal outcome to this process.

- No change in NHP products and services (including field services) to partners and users.
- Retain all existing staff talent and expertise.
- Keep all components of the program together as a unit under single management.
- Retain all funding sources and levels, and increase financial security.
- Maintain diversity of partnerships and flexibility in partnering, with no increase in administrative costs.
- Maintain the program's political neutrality and autonomy, and its focus on providing high quality scientific information.
- Keep the program within NRIS.
- Provide a managing institution that really wants and values the program, will advocate effectively for it, and is committed to sustaining it.

### **Operational Structure**

The annual budget of the Montana Natural Heritage Program currently totals around \$900,000. Of that, just over \$300,000 (about 33%) is provided by the State Library contract. These funds are appropriated as part of the NRIS core funding from several sources: four state agencies (DEQ, FWP, DNRC, MDT), the University system, the Resource Indemnity Trust (RIT) Fund, and state General Fund. The balance of the NHP operating budget – about two-thirds – comes from 30-40 grants and contracts (secured by NHP staff and administered through TNC) with over a dozen partner agencies and organizations. Additional, more detailed information on NHP finances and operations is provided in Appendix 2.

Staff knowledge, dedication and expertise are among the program's greatest assets, and have been central to its success. Current staffing consists of 15 full-time and 3 part-time employees, including some of the most experienced and highly respected zoologists, ecologists, botanists and information managers in the state. Ten FTE are essential to maintaining core functions and services: Director, Systems/Services Manager, Senior Zoologist, Senior Ecologist, Program Botanist, Aquatic Ecologist, Databases Coordinator, Data Assistant, Data Technician, Finance/Grants Administrator and Web Programmer (currently supported at only .5 FTE due to limited funding). The State Library contract currently provides support for 4.5 or just under half of these essential FTE. The balance comes from partner funding for core services (especially federal agencies that rely heavily on these services), and for specific projects that contribute to the overall mission.

Perhaps the most important aspects of the Montana NHP's operations, for the purposes of this assessment, are those conditions that have contributed to the program's great success. Key elements of that success have been:

- The neutral setting and information-service orientation provided by the State Library
- The technical and programmatic direction of The Nature Conservancy
- The advanced IT environment provided by NRIS
- The great diversity of partnerships and funding
- The highly dedicated and entrepreneurial staff

The last two elements noted above have been related to the unique public-private nature of this program. Having one foot in the private sector, outside the constraints of government, has provided the operational agility to create and capitalize on diverse opportunities. It has also provided a large degree of autonomy and fundraising responsibility that have resulted in exceptional staff commitment and motivation. Stakeholder comments, summarized below, reflect the importance of these factors as key "conditions for success."

### **Experiences in other States**

Ten of the eleven heritage programs that have transferred from TNC in the past 20 years have been placed in Universities. These include three of the largest and most effective programs in the Network – Michigan, Florida and Colorado – as well as two of Montana's neighbor programs – Wyoming and Oregon. The Delaware program, with a staff of five, transferred into the state fish and game agency, where it was housed under TNC contract.

Major reasons cited by program directors for transferring to a University included:

- Ability to maintain political neutrality.
- Credibility and perceived objectivity of scientific data.
- Greater flexibility to work with and accept funding from a variety of partners.
- Relatively high level of autonomy.
- Low negotiated overhead for public agencies facilitates partnerships and project funding.

### **Partner and Stakeholder Input**

Input was gathered from over 200 individuals representing some 30 stakeholder groups through meetings and a web survey. Respondents included multiple individuals from all major partners and funders, as well as a broad cross-section of users. A full list of respondents is provided in Appendix 3.

Stakeholder input did not provide clear direction about which institution should assume administrative responsibility for the NHP. They did, however, provide very clear messages about what qualities and services of the NHP that are valued and should be retained, as well as issues of concern in any prospective change of NHP administration.

Messages that were repeatedly emphasized by stakeholders included:

- There is great satisfaction with and support for this program; don't change it
- Keep the core functions of data acquisition, analysis, updating & dissemination strong
- Retain all components/functions/services of the program and keep them together in NHP – ecology, botany, zoology (including invertebrates), and data management
- Keep the program as part of NRIS, within the State Library.
- Retain all staff; ensure that transition does not result in staff losses – they are valuable expertise, irreplaceable resource
- Maintain scientific data quality, objectivity and integrity

- Maintain political neutrality and insulation from politics
- Maintain autonomy, which is key to effectiveness
- Maintain (or strengthen) the continuity and reliability of funding; protect core funding
- Maintain accessibility of information & services
- Continue strength in field expertise and services
- Maintain and improve coordination with and among partners/stakeholders and ability to exchange funding with partners
- Parent organization must have strong commitment to program and its mission and ability/willingness to defend it with Legislature
- Continue the excellent record of service

Staff are key to the past and future success of the NHP, and will be most immediately impacted by any change in administration. Staff input was solicited through a survey, meetings and discussions. Major concerns and priorities of staff are:

- Keeping the program politically neutral and focused on information.
- Keeping the program intact, with all the current components & disciplines.
- Retaining a strong Heritage Program identity and the conditions that have made this program so successful.
- Retaining existing staff/positions and comparable salaries and benefits.
- Remain in Helena and at NRIS/MSL regardless of administering institution.
- Retaining the current diversity of partnerships and ability to work with diverse partners.
- Increased opportunity for additional space and funding – the ability to grow to meet partner/user needs.
- Increase opportunity to partner with universities.

### **Analysis of Alternatives**

Five alternatives were identified and evaluated with respect to the Guiding Principles. One key factor shared by all options is that the Natural Heritage Program would remain part of the Montana State Library, which has statutory authority to administer the program. This cannot be changed without amending the enabling legislation, a change that was not supported by stakeholders. Under the statute law, only the *contract* for operating the NHP can be transferred. All options presented are based on this premise.

The five identified alternatives are described below, with summaries of strengths and weaknesses, based on stakeholder input, as well as information on administrative issues and possible strategies to address concerns.

1. ***Maintain the Status Quo*** – The NHP would continued to be located with the State Library, and operated through the contract with TNC.

Strengths: This satisfies most of the Guiding Principles in that it maintains current conditions within which the NHP is thriving and minimizes the risk of unfavorable changes. There was strong stakeholder support for continuing the status quo.

Weaknesses: This option does not resolve the political risk that comes from the program being managed by a conservation organization. In addition, TNC does not wish to continue operating the program for the long-term, as that function is no longer part of the organizations “core business.” However, the biggest disadvantage of this option is a major increase in operating costs, described below.

Administrative issues: Changes within TNC would result in a new annual operating “tax” on the Montana NHP totaling 25% of personal services expenses. There are no sources of revenue to cover this major additional expense. A one-time 50% reduction in this levy was negotiated for the Montana NHP for FY06, in light financial constraints and the process underway to identify administrative alternatives.

Strategies: An attempt could be made to secure a complete, ongoing exemption for the Montana NHP from TNC internal assessment. No strategy has been identified that would eliminate the political risk of being associated with TNC.

- 2. *Transfer the NHP staff and operations into Montana State Library*** - The Montana State Library would create state positions for NHP staff and would assume sole responsibility for managing and funding the program.

Strengths: Stakeholders expressed a very high priority on keeping the NHP as part of NRIS and located at the State Library. Keeping the NHP at the State Library would maintain the political neutrality that has been a key element in the Program’s success, as well as the focus on information and service. Stakeholders also wanted the NHP to remain part of NRIS, to provide “one-stop shopping” for natural resource data.

Weaknesses: Stakeholders expressed concern about whether MSL is effectively positioned to administer the NHP and assume full responsibility for its financial support, including effective defending and advocating for it in the Legislature (TNC has provided strong lobbying support in the past). Concerns were expressed about maintaining current levels and diversity of funding and about continued private funding. Questions were also raised about reduced autonomy that would accompany a move into full state government management. The agency has not embraced this option, which causes concern among staff and partners.

Administrative issues: Staff transfer would require legislative action to create staff positions and to exempt them from open competition, which would generate significant concern among staff and likely result in attrition. Staff would not be vested in state pension plan for 5 years. There would be significant costs and effort required of the State Library to secure the special conditions required for a smooth transfer, to implement that transfer, and to assume full responsibility for program funding and administration, including the 30-40 grants and contracts (in addition to the core) that support the current level of operation and services.

Strategies: An act of the Legislature would be required to transfer staff without open competition; comparable pay and credit for time worked to qualify for vesting in state pension plan would also need to be secured for a smooth transition that minimizes staff losses.

- 3. *Transfer the NHP into another State Agency*** - NHP staff positions would be created by another state agency, which would manage the program either under contract to MSL (at least until the 2007 Legislative session), or directly if/when the enabling legislation was amended to reassign the program to that agency. Montana Fish, Wildlife & Parks was the primary agency actively considered, because of strong interest and the good “fit” of at least the zoology aspects of the NHP with the wildlife management mandate.

Strengths: Stakeholders felt that MFWP had the strength to effectively advocate for the Program in the Legislature, and that the zoology component of the NHP could be a good fit

with the wildlife management mandate of FWP. There was considerable enthusiasm among many FWP staff for taking over management of the Program.

Weaknesses: Stakeholders expressed concern that the NHP might be exposed to political pressures, and that there could be a perception that its information was not objective and unbiased. There was also concern about the “fit” and continuity of the botany and ecology components of the NHP, and that the program might evolve toward the needs of MFWP, at the expense of services valued by other partners. There is also concern that the program’s relative autonomy, seen as one of the keys to its success, would be lost.

Administrative issues: Administrative issues would be similar to those described above for transfer to the State Library.

Strategies: In any transfer to a state government agency, an act of the Legislature would be required to transfer staff without open competition; comparable pay and credit for time worked to qualify for vesting in state pension plan would also need to be secured for a smooth transfer that minimizes staff attrition.

- 4. *Transfer to a University (under contract to the State Library)*** - The contract for operation of the NHP would be transferred from TNC to a university (specifically UM), and the program would be administered by the university under contract to MSL.

Strengths: Stakeholders considered a University affiliation to be consistent with the NHP’s reputation for objectivity and scientific credibility and felt that it provided adequate political neutrality. They also saw the University as a strong institution able to advocate effectively for the NHP. A number of stakeholders identified the university as providing the best opportunity for increased funding and growth. The University of Montana is enthusiastic about partnering with MSL/NRIS in operating the Natural Heritage Program, at the level of academic departments and senior administration.

Weaknesses: Stakeholders had concerns about whether the NHP would continue its focus on applied research and information service (vs. shift to academic research). There were significant concerns about whether the NHP would be afforded enough priority and funding within such a large institution to ensure its long-term security. There were also concerns about the potential for increased overhead costs to funding partners.

Administrative issues: The University has the advantage of being able to create positions and transfer existing staff into those positions at current salary levels. Where would it operate not to “get lost” and to have good access to advocating for its survival within the U?

Strategies: Continued focus on core mission and services could be ensured through the new 5-year strategic plan, the biennial state core contract, and the Partners Committee (comprised largely of funders). Under the contract with MSL, the NHP could remain part of MSL and integrated with NRIS, resulting in no apparent change and no impact on services to stakeholders and other users. The program contract would be administered directly by the Office of the VP for Research and Development, providing a relatively high-level of visibility and access within the university administration.

- 5. *Management by another non-profit organization*** – Staff positions would be established in another non-profit organization that would administer the program under contract to MSL. This option was not actively investigated early in the evaluation process (or through the

Survey), because no appropriate organization other than TNC had been identified. Later in the process, the Montana Natural History Center (MNHC) was investigated as possible option.

Strengths: The mission of MNHC is education-focused and highly compatible with MTNHP. The organization remains carefully neutral, and has existing partnerships and grants with state and federal agencies. Continued administration by an independent non-profit would maintain autonomy and staff motivation, and would support maintaining current identity, functions and structure.

Weaknesses: This option does not offer the financial or administrative stability of a larger institution. Currently, MNHC has only 5 employees, and offers no retirement plan and limited benefits. Although its stated mission is statewide, it currently operates mostly in the Missoula area. Transfer of the NHP would require a major commitment by the organization's management & board of directors and significant organizational development.

Administrative Issues: The required organizational development would take time as well as an investment of expertise and resources.

Strategies: Further development of MNHC could lead to greater feasibility of this option in the future.

## **Appendix 1. Guiding Principles for Future Administration of the Montana Natural Heritage Program**

### **1. Maintain the Natural Heritage Program identity, mission & key functions.**

The statutory function and longstanding role of the Natural Heritage Program (NHP) – as the State’s primary source for information on animals, plants and natural communities, emphasizing those of conservation concern – should be maintained, regardless of institutional affiliation. This includes its focus on information collection, integration, management and dissemination, its compatibility with the Natural Heritage Network (specified in the enabling legislation) and its well-established identity, including all major functional components (zoology, botany, ecology, information management).

### **2. Maintain or strengthen the Program’s financial and political security.**

Any change in management arrangements for the NHP should, ideally, result in greater financial and political security, and should, at a minimum, not weaken the program by reducing its funding, capacity, effectiveness or by exposing it to greater political risk. Financial security is linked to the diversity of funding sources (including state agency core funding) and overall funding level, both of which have been trending upward. This funding diversity not only helps reduce the impact of cuts from any single funding source, but also produces high financial leverage for the contributing partners and benefits all partners with better data and services.

Political security is strongly linked to the program being insulated from the sometimes very negative politics associated with sensitive species – this has been achieved to date by the program’s location within a politically neutral agency (the State Library, which has a focus on information and no regulatory mandates or controversial activities) and by ensuring a strict “arm’s-length” relationship from The Nature Conservancy’s conservation activities. Also key to this perceived neutrality has been the program’s relative autonomy from political influences and politically influenced agencies and organizations.

### **3. Maintain the program’s effectiveness.**

The current effectiveness of the NHP derives from its focus on service to a broad range of users, its commitment to diverse partners, the credibility of data, the practical utility of its products, the quality and expertise of its staff, and the trust of information users in the objectivity of its services. This effectiveness translates to efficiency and cost-savings in the public and private sectors, as well as a broad positive impact on the conservation and sustainable management of Montana’s biological resources. Ensuring maintenance of this effectiveness will require retaining the staff talent that has been carefully built over the past several years, the range and quality of services to Montana agencies (state and federal), organizations, businesses and citizens. This includes information products and services as well as expertise and the capacity to provide field services such as inventory and research.

### **4. Ensure strong institutional support from the managing agency or organization.**

The mission and services of the Natural Heritage Program should be important to the mission of the housing institution and its functions viewed as integral to that institution’s mission and its success. The housing institution must be strongly committed to maintaining effective funding levels for the program, even in times of fiscal constraint, and for advocating effectively on behalf of the program. This will require a personal commitment from executive managers as well as a clear perception of the program’s value to the managing institution. (Note: There is currently no state agency or institution with a legislative mandate that encompasses for what NHP does, other than the State Library, which has the statutory authority for the program. MFWP has a wildlife management mandate that could incorporate NHP responsibilities for vertebrate animals and

potentially habitat (though not currently for plants or invertebrates), however MWFP had not been actively focused on non-game wildlife or habitats until very recently.)

**5. Build on the past success and current strengths of the Natural Heritage Program.**

The Montana Natural Heritage Program has an excellent reputation and track record of success. Maintain the program's excellent reputation, track record of success and high level of trust in the reliability and objectivity of information and services; these are built on staff expertise and experience, as well as the program's relative autonomy, scientific credibility, political neutrality, service orientation, diversity of partnerships/users, and responsiveness to partner/user needs. Also important is the affiliation with NRIS, with its emphasis on broad access to information services, and its outstanding IT infrastructure that benefits the NHP and is in turn strengthened by the substantial contributions of the NHP.

## **Appendix 2. Operational Structure of the Montana Natural Heritage Program**

### **Basis in Statute**

The Montana Natural Heritage Program was established by statute in 1983, under the enabling legislation for the Natural Resource Information System. Key portions of the statute, pertaining to the NHP, are provided below. (MCA2-15-1514):

90-15-101. Purpose.

It is the purpose of this chapter to establish a planning framework for the development of a natural resource information system, to implement the system, and to establish and ongoing Montana natural heritage program.

90-15-102. Definitions.

"(3) Natural Heritage Program means a program of information acquisition, storage and retrieval for data relating to the flora, fauna and biological community types of Montana.

90-15-103. Funding.

"The library and each principle data source agency may apply for and may receive funding from private and public sources for the purposes of this chapter.

#### ***90-15-301. Establishment of Information System***

"The system is to be a comprehensive program for the acquisition, storage and retrieval of existing data relating to the natural resources of Montana.

#### ***90-15-302. Natural Heritage Program***

(1) There is a Montana natural heritage program to be operated by the library. In order to establish the program, the library may contract with an independent contractor or may employ necessary staff.

In order to minimize costs, the library or other state agencies may make available state resources and facilities to an independent contractor as part of a contract for services. (2) The Montana natural heritage program shall be designed to be compatible with similar programs in other states. This program is to be an initial step in the formulation of the comprehensive natural resource information system referred to in 90-15-301 and is to be considered a part of the system.

#### ***90-15-301. Availability of Information.***

(1) Except as provided in subsection (3), the library shall make information from the natural resource information system available to local, state, and federal agencies and to the general public... (3) If necessary, the library shall establish procedures to protect confidential information in the possession of state agencies.

Because the enabling legislation created the NHP as part of NRIS in the State Library, any option other than transitioning the program to full integration in the State Library would either require either continued operation under contract to MSL or a change in statute that reassigns the program to another unit of state government. The next time such changes could be made would be 2007. The statutory option for contracting for operation of the program would, however, make it possible for an institution other than The Nature Conservancy to serve as the contractor. Under such an arrangement, existing staff, assets and funding agreements might be transferred to a new parent organization, with all other aspects of the program's operation (its location in the State Library, services and priorities) remaining unchanged.

## Organizational Structure

As stated in the statute above, the Natural Heritage Program was created as part of the Natural Resource Information System (NRIS) Program of the Montana State Library. The State Library contracts with The Nature Conservancy on a biennial basis to operate the Natural Heritage Program, an arrangement that was intentionally provided for in the enabling legislation. Staff are located within the State Library, and function as an integral part of the Natural Resource Information System. State facilities and resources are made available to minimize operating costs, as provided for in statute and outlined in the attached contract. In light of the value of these services, the Conservancy has not charged administrative overhead on the NHP contract. This arrangement has made it possible to apply all of the state's contract funds to the actual work of the Natural Heritage Program and thereby maximize the return on the state's investment.

## Financial Structure

The annual budget of the Montana Natural Heritage Program currently totals around \$900,000. Of that, just over \$300,000 (about 33%) is provided by the contract with the State Library. These funds are appropriated as part of the NRIS core support, which in turn comes from four state agencies (DEQ, FWP, DNRC, MDT), the University system, the RIT Fund and state General Fund.

The balance – about two-thirds – of funding for the Natural Heritage Program comes from a variety of grants and contracts (secured by NHP staff and administered through TNC) with numerous partner agencies that require and utilize services provided by the NHP. Over a dozen different agencies and organizations currently contribute to funding the NHP, which operates between 30 and 40 separate grants and contracts at any given time.

**Figure 1. Annual Income Sources**  
(Total annual budget: \$800,000 - \$900,000)

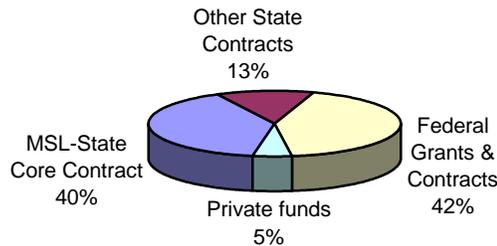


Figure 2. Funding Structure

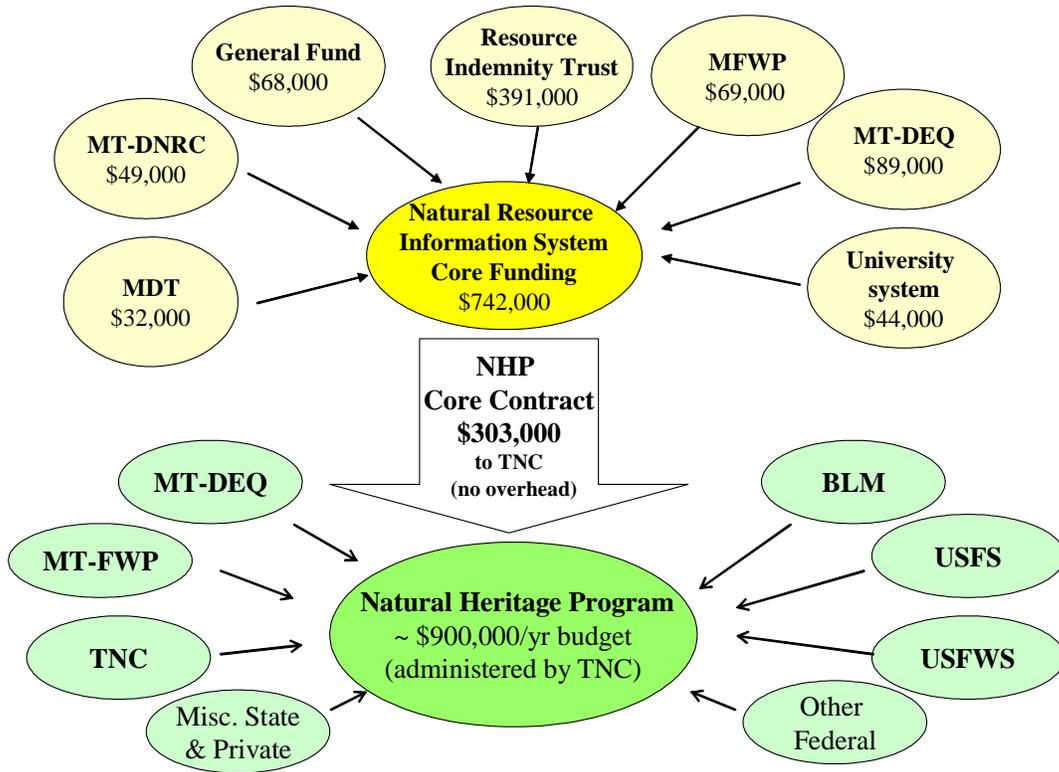
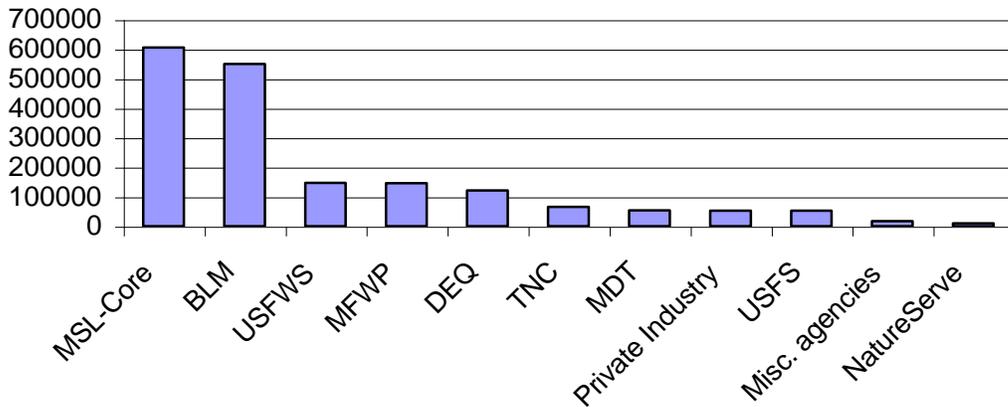


Figure 3. Current NHP Funding Agreements

(total = about \$2 Million, as of Jan-05 )

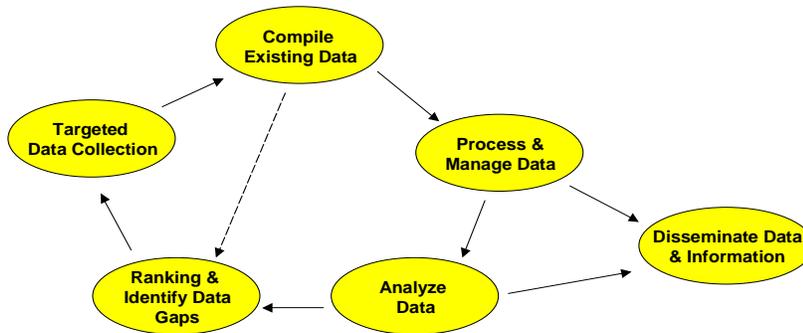


## Strategic Focus & Priorities

Under the current strategic plan, *The mission of the Montana Natural Heritage Program is to be Montana's source for reliable, objective information and expertise to support stewardship of our native species and habitats, emphasizing those of conservation concern.*

The principle focus and activities of the Program are established by the Statement of Work in the State Library's biennial contract for operation of the program. As required in statute, the Program follows methodologies of the Natural Heritage Network, to ensure compatibility with NHP databases in other jurisdictions throughout North America. The basic Natural Heritage Program methodology is illustrated in the Figure 5, which shows a continuous cycle from gathering and compiling data to analysis, dissemination and active data collection to address identified data gaps.

**Figure 5. Functional Overview of the Montana Natural Heritage Program**



Each biennial contract for operation of the NHP includes a Scope of Work outlining major activities and outcomes. The Scope of Work for the FY06-07 biennium is provided below. Note that while the State Library provides some support to most of these activities, many are funded substantially – and some, entirely – through supplementary contracts with federal and state agencies or private organizations, as described above under “Program Finances.” In this fashion, the state’s core funding is leveraged to achieve provide enough resources to operate a functional and highly effective program. Currently, this supplemental funding amounts to nearly double the amount of the state contract, effectively leveraging the state’s funding by 200%. While much of this additional funding goes to data collection projects, a substantial amount, especially from federal agencies, contributes to core data management and information services (identified in the Scope of Work as “supplemental core funding”).

## **Appendix 3. Sources of Input on MTNHP Future Administration**

### **Web Survey**

A web survey was developed using SurveyMonkey, to solicit input from NHP users on services, priorities, needs, and potential changes in future administration of the Program. The survey was emailed to 260 individuals representing all partner agencies and organizations, as well as major data providers and users of services. The survey was also prominently posted on the NRIS and NHP web pages for over a month. The response rate was extremely high, with 125 (nearly 50%) of solicited individuals responding. In total, we received 171 completed surveys. Responses came from: 60% state and federal agencies, 20% private businesses, organizations or individuals, and 6% from educators.

### **NRIS Advisory Committee Meetings**

To solicit detailed input from major partners, including those providing significant funding to the program, we held a half-day meeting of an expanded NRIS Advisory Committee (NAC). In addition to those state agencies named in the statute, we invited representatives of major federal partner agencies, as well as representatives of the private for-profit and non-profit sectors. A total of 21 individuals attended this meeting, as well as nine MSL staff, one MSL Commissioner, and an independent professional facilitator, John Munding.

### **TNC Board of Trustees Committee**

The Nature Conservancy (TNC) has invested in and nurtured the NHP to its current success over the past 20 years. However, since TNC transferred support and coordination of the Natural Heritage Network to NatureServe several years ago (to focus on its conservation mission), it has not been involved in management of the Montana NHP, beyond contract administration. To ensure the Conservancy's thoughtful -- and support of its Board of Trustees in a final decision -- a committee of the Board was formed to assist in the assessment process. Former Board member and Chair of the Fish, Wildlife & Parks Commission, Stan Meyer, was asked to chair this committee. Other members were Randy Gray (mayor and attorney) of Great Falls and Dick Hutto (ornithology professor), of Missoula. This committee met twice to review information and input, and discuss options and issues with managers of the State Library, the Conservancy, the Heritage Program, Montana Fish, Wildlife and Parks, and the University of Montana. At the conclusion of the second meeting, in July 2005, with support from all principle partners, they recommended that the Conservancy move forward with a more detailed investigation of what appeared to be the most favorable option -- the University of Montana.

### **Staff Input**

Staff of the Natural Heritage Program are critical to a successful outcome of any decision, because it is through their efforts, expertise, and personal commitment that the program succeeds in serving the needs of partners and other beneficiaries. In addition, most of the program's "soft" funding (which comprises over 50% of the budget) is essentially raised through the efforts and professional relationships of these individuals. For this process to succeed at any level, staff must remain intact, willing and able to perform effectively. Because of this pivotal role, and because staff will be by far most personally impacted by any decision to change NHP administration, input was solicited both through a survey and through a structured discussion.

### **Input from NatureServe**

In the late 1990's, the Nature Conservancy transferred its role in supporting and coordinating the Natural Heritage Network to NatureServe, a new organization that it had helped to create, in partnership with over 60 network programs from Canada to South America. Since that time, it

has been NatureServe that develops and provides the technical support, shared database standards and structures, data exchange, and coordination that is essential for so many programs to function effectively as an information network. NatureServe also provides access to data compiled from the network, through its NatureServe Explorer website. Just as the natural heritage programs rely on NatureServe for support and coordination, so does NatureServe rely on network programs for the “compiled” data services that it provides at the national and regional levels, and to the public via its website. Thus NatureServe has a strong vested interest in the viability and effectiveness of its member programs.

For these reasons, NatureServe was asked to provide the only national/international input to this process. Their comments reflected not only that organization’s needs of for data and other contributions from Montana NHP, but also a broad perspective on what has or has not worked well in other states.

### **Other Input from the Individuals**

Input was also solicited individually from:

- Directors some 10 other heritage programs that have transferred administration from TNC to state agencies and universities in the past 20 years;
- TNC staff who have been involved in transfers of natural heritage programs in other states; and
- Managers at NatureServe who have worked with other state heritage programs as they went through administrative transfers.

## **Agencies & Other Stakeholders Providing Input**

### **Montana State Agencies**

Department of Transportation – at least 7  
Department of Environmental Quality - at least 7  
Fish, Wildlife & Parks – at least 17  
Natural Resources & Conservation – at least 16  
Montana State Library - several  
Department of Agriculture –  
Montana Legislature (staff)  
Montana Historical Society  
Department of Administration

### **Federal Agencies**

Bureau of Land Management – at least 30  
U.S. Forest Service – at least 15  
U.S. Fish & Wildlife Service – at least 6  
Natural Resource Conservation Service  
Environmental Protection Agency  
National Park Service  
U.S. Geological Survey – Wildlife Research  
Dept. of Energy – Bonneville Power Corporation  
U.S. Department of Agriculture

### **Education**

Montana State University – at least 4  
University of Montana – at least 8  
Salish-Kootenai College  
Elementary school

### **Other**

Fort Peck Tribal government  
Salish Kootenai tribal government  
Saskatchewan provincial government  
Westech Environmental  
Tetra-Tech  
Several other private businesses (anonymous, responding to the web survey)  
NatureServe  
Montana Audubon  
Several other non-profit organizations (anonymous, responding to the web survey)

### **Individuals**

Stan Meyer, Great Falls – former chair, MT FWP Commission  
Randy Gray – TNC Board of Trustees, mayor of Great Falls  
Dick Hutto – TNC Board of Trustees; ornithologist, University of Montana  
Several other private individuals (anonymous, responding to the web survey)  
All MTNHP staff