

TO: WACD AND WSCC MEMBERS

FROM: WACD TECHNICAL PROFICIENCY & PLANNING COMMITTEE

SUBJECT: TECHNICAL LEADERSHIP, IMPLEMENTATION EXPERTISE, RESEARCH, & QUALITY ASSURANCE REGARDING 20-21 ACTION PLAN

DATE: APRIL 29, 2014 (V5)

SUMMARY

Presented in this paper are the WACD Tech Workgroup's recommendations to the Washington State Conservation Commission on how to address the Technical Leadership, Implementation Expertise, Research and Monitoring, and Quality Assurance strategic area of the 20-21 Path Forward Action Plan.

These recommendations emphasize the need for a coordinated, statewide effort to continue to both strengthen and develop the quality and professionalism of our technical staff and work products, while also ensuring our work results in meaningful changes in conservation behavior. These goals are more important than ever. Equally important is the documentation and assurance regarding improvements to water quality and other natural resource stewardship outcomes we are targeting for ourselves and for our partners.

The Individual recommendations for **Technical Leadership, Implementation Expertise, Research, and Quality Assurance** fall into six specific strategic sub-areas:

1. Tools, Proficiencies, and Training Opportunities, Needs, and Pathways
2. Certification
3. Quality Assurance
4. Research, Implementation, and Effectiveness/ Outcome Monitoring of Conservation Systems
5. Technical Expertise in Statewide Policy and Programs
6. Workload and Budget

Essential for implementing the following recommendations and vision is dedicated, state-level staffing to lead and coordinate this body of work. In the "Recommendations" section below, goals for each sub-area are described and the core activities for the dedicated, professional staff person are outlined. These recommendations also recognize that great progress will come with continued widespread engagement and leadership from individual Conservation District supervisors, managers, and staff from across the Washington State Conservation District system.

BACKGROUND

The Development of Conservation District technical expertise has long been an important goal of the WACD Technical Employee Work Group ("Tech Workgroup"). Lately, it has gained additional focus as Conservation Districts have begun bringing stewardship solutions into coordinated work with regulatory agency partners - including critical areas codes, Voluntary Stewardship Projects, and technical assistance related to referrals from regulatory agencies. Technical expertise development has also been identified and supported by the 20-21 Action Plan, a document that outlines the future direction of CD work across the State.

The 20-21 Action Plan recommendations are a product from several statewide sessions convened by Conservation Commission staff and WACD leadership, with participation by Conservation District

supervisors, managers, and other lead staff. This plan identifies 14 separate strategy foci that are grouped into four broad, strategic areas:

1. Communications, Partnership Building, and Public Outreach
2. Strategic Direction
3. **Technical Leadership, Implementation Expertise, Research, and Quality Assurance**
4. Policy and Funding

The Commission, at its September 2013 meeting, tasked the WACD Tech Workgroup to develop a pathway toward addressing the following strategic sub-area from the 20-21 Action Plan: Technical Leadership, Implementation Expertise, Research, and Quality Assurance. The WACD Tech Work Group was selected for this work because over the last five years, it has led a number of professional development projects, ranging from standardizing conservation plan formats, inventorying staff proficiencies and training needs, and most recently, piloting a Conservation District professional certification model for Dairy Nutrient Management Planning.

RECOMMENDATIONS

Overall Goal:

The ultimate goal of the Technical Workgroup recommendations is to ensure that Conservation Districts have the proper technical expertise to consistently plan and implement conservation programs.

Vision:

Landowners and their communities will make decisions to meet a higher level of natural resource protection and stewardship based on the technical assistance, programs, tools, and guidance they receive from CDs. Districts are recognized for their professional staff with the necessary technical proficiency, knowledge, and expertise to assist landowners. Districts continually strive to improve technical assistance delivery through research and development. Consistency and performance is promoted among CDs and staff statewide through training and certification. Evaluation of the effectiveness of work and services will demonstrate improvement of natural resources. An overarching structure exists that supports leadership in this area.

Guiding Principles:

1. CD Boards and District managers are responsible, and accountable, for District performance and employee development.
2. Landowners are the ultimate land-use decision makers.
3. CDs actively seek collaboration and partnership, internally and externally.
4. CDs focus on strengths, roles, and motivations of district employees, landowners, and partners.
5. District accountability is recognized by other Districts, commission, and outside partners.
6. Landowner social networks, including peer to peer interactions, are critical to achieving conservation results.
7. Staff are well-trained and proficient in their areas of expertise.

Recommendation Sub-Areas:

1. Tools, Proficiencies and Training

Goal: To ensure that each conservation planner has awareness of and access to tools, expectations, and training opportunities that are used within their discipline.

Exceptional technical staff development begins with a solid commitment from supervisors and district managers to support each technical employee, from before the date of hire. The objectives and activities in this section involve cataloging and communicating existing resources available to technical staff and developing new materials as needed, as well as providing all CD staff with access to high quality training related to their professional development needs and recognize those who complete training. The Tech Work group will commit to supporting CD management and staff by assisting with the implementation of the following objectives and core activities:

Objectives

- a. Developing model job descriptions that clearly outline expectations in the areas of technical knowledge, planning process, social context awareness, and quality and content of work products (see Core Activity #);
- b. Developing and distributing lists of required proficiencies and expectations for each discipline area (see Core Activity #);
- c. Providing materials and support to orient new hires and assess their initial skill levels (see Core Activity #);
- d. Providing information on ethics and liability considerations in planning and technical assistance (see Core Activity #);
- e. Ensuring that technical employees, have convenient access to training appropriate to their discipline, from a variety of sources and delivery methods (see Core Activity #);
- f. Ensuring that technical employees have convenient access to necessary tools for conducting site assessments and evaluations (see Core Activity #);
- g. Coordinating professional development planning toward which all districts shall be oriented and participate (see Core Activity #)
- h. Coordinating other training offerings, including contributions to the annual WADE Conference (see Core Activity #).
- i. Coordinating job shadowing and mentoring opportunities with personnel experienced in their discipline (see Core Activity #);
- j. Providing model training plans and guidance on planning models appropriate for differing land uses, scales of operation, levels of complexity, landowner education, etc. (see Core Activity #);
- k. Providing guidance for following NRCS standards, uses of engineered solutions, innovative adaptations, and demonstrated conservation management practices (see Core Activity #);
- l. Developing and communicating to CD staff the various funding structures, grant opportunities, and ties to good governance procedures to support employee training and certification needs (see Core Activity #);
- m. Developing and communicating model performance evaluation materials, schedules, and incentives for implementing evaluation plans (see Core Activity #);
- n. Creating and maintaining a list of experts by discipline for purposes of mentoring, peer-to-peer training, and technical input on policy and programs (see Core Activity #).

Core activities

1. Model job descriptions. (aligns with Objective #)
2. New hire orientations and related materials. (aligns with Objective #)
3. Coordinate inter-District mentoring and job shadowing opportunities. (aligns with Objective #)
4. Coordinate development and distribution of planning models. (aligns with Objective #)
5. Coordinate development and distribution of proficiency lists. (aligns with Objective #)
6. Provide training for implementation of standards, and conservation practice standards. (aligns with Objective #)
7. Develop, maintain, and communicate model performance evaluations and plans. (aligns with Objective #)
8. Create and maintain list of experts by discipline. (aligns with Objective #)
9. Establish and coordinate a CD professional development orientation process. (aligns with Objective#)
10. Provide professional development planning for employees.
11. Provide professional development awareness training for supervisors. (aligns with Objective #)
12. Provide professional development integration training for managers. (aligns with Objective #)
13. Manage/maintain a training needs inventory of all technical staff and their proficiencies. (aligns with Objective #)
14. Use the inventory to identify training needs and align with professional development opportunities. (aligns with Objective #)
15. Establish and utilize a information clearinghouse about professional development opportunities and to facilitate communication between CDs. (aligns with Objective #)
16. Coordinate training offerings. (aligns with Objective #)
17. Ensure all CD staff have access to training opportunities. (aligns with Objective #)

2. Certifications

Goals: To provide all CD staff with access to professional certification opportunities and a program to support professional development needs and recognize those who complete training.

The Tech Work group will commit to supporting CD management and staff by assisting with the implementation of the following objectives and core activities:

Objectives

- a. Providing certification opportunities to verify skills in particular disciplines (e.g., Dairy NMP, Small Farms) (see Core Activity #);
- b. Coordinating and delivering CD staff professional certifications; (see Core Activity #)
- c. Coordinating peer to peer mentoring; (see Core Activity #)

Core Activities

1. Coordinate basic training and special certification programs and trainings. (aligns with Objective #)
2. Lead collaboration and partnership work. (aligns with Objective #)
3. Coordinate peer to peer mentoring. (aligns with Objective #)
4. Manage certification processes. (aligns with Objective #)

3. Research, Implementation, and Effectiveness Monitoring of Conservation Systems

Goals: To demonstrate change in conservation systems resulting from conservation planning and implementation of programs and practices through effective monitoring. To provide a scientific basis for guidance, supplement our knowledge base, and answer specific conservation questions by conducting or supporting research in accordance with RCW 89.08.220. To address emerging needs and issues through use of high quality data and information collection.

The Tech Work group will commit to supporting CD management and staff by assisting with the implementation of the following objectives and core activities:

Objectives

- a. Identifying techniques for optimizing landowner participation in conservation programs and plan development. (see Core Activity #)
- b. Exploring opportunities to develop monitoring programs to be used by CD's and landowners. (see Core Activity #)
- c. Improving systems for monitoring implementation (see Core Activity #)
- d. Improving monitoring effectiveness for evaluating progress toward goals and outcomes of practices. (see Core Activity #)
- e. Improving tools and protocols for data collection on BMP implementation and program participation. (see Core Activity #)
- f. Developing a system to assist Districts with consistent reporting of information to the Commission, such as participation rates, acres planned, and practices implemented. (see Core Activity #)
- g. Developing an effective monitoring system to show the effect of conservation practices on natural resource outcomes. This may include a variety of levels of targeted monitoring including scales ranging from site, field, farm, sub-basin to watershed. (see Core Activity #)
- h. Developing a framework for how to establish, organize, conduct, and evaluate research/demonstration projects.
- i. Supporting research projects that are identified and implemented by individual Conservation Districts or by interdisciplinary teams. (see Core Activity #)
- j. Providing a central clearinghouse for information on funding sources, technical capacity within districts, resources available for CD employees conducting research (e.g., land, databases, equipment, etc.), capabilities needed for programs, logistics, and liability of partnerships with outside agencies. (see Core Activity #)
- k. Assist coordination with appropriate agencies and institutions on research/demonstration collaboration efforts.
- l. Coordinating efforts to increase the capacity of CD employees to conduct research through training in research protocols and the development of standard operating procedures (SOP). (see Core Activity #)
- m. Coordinating with statewide programs to acknowledge good land owner behavior (certainty program) in various areas of conservation (e.g., nutrient management, stream protection, riparian, etc.). (see Core Activity #)
- n. Identifying sources of funding for research and monitoring efforts. Grant funding can be sought from outside agencies (e.g., DOE, EPA, NRCS CIG) or field trials/demonstrations through CSP. (see Core Activity #)
- o. Exploring with the Commission the establishment of a dedicated funding pool for research. (see Core Activity #)

Core Activities

1. Develop tools and SOPs to support monitoring activities (aligns with Objective #)
2. Provide organizational support for research projects (aligns with Objective #)
3. Identify and coordinate with research partners (aligns with Objective #)
4. Coordinate central clearinghouse for monitoring and research activities and results (aligns with Objective #)
5. Identify and announce sources of funding for research and demonstration projects (aligns with Objective #)
6. Develop templates for outreach and education programs for content delivery to landowners (aligns with Objective #)

4. Quality Assurance

Goals: To promote and maintain a consistently high level of proficiency and quality in programs and technical assistance across districts. To provide a way to demonstrate quality assurance to our partners, including landowners.

Objectives

- a. Developing a Quality Assurance Plan (QAP) (including defined standards) to support and assess each District's performance in the fields of leadership, training, planning, research, and outreach efforts. (see Core Activity #)
- b. Developing a Quality Assurance Reviews (QAR) to evaluate the adequacy of the work being done by District technical staff. (see Core Activity #)
- c. Explore using the Tech Workgroup, along with local District experts in each of the planning disciplines, to assist Districts in setting up, evaluating and adapting plans designed to address the priorities of each District and the needs of the local landowners. (see Core Activity #)
- d. Establishing an internal process by which Districts can consistently ground truth planning and design products. (see Core Activity #)

Core Activities

1. Periodic spot-checks, or QARs, of planning and implementation products will be performed. (aligns with Objective #)
2. Where a deficiency is identified, a pathway will be provided to correct the deficiency. (aligns with Objective #)
3. Assist CDs in developing Quality Assurance Plans (QAP). (aligns with Objective #)

5. Technical Expertise in Statewide Policy and Programs

Goal: Coordinate engagement by CD technical experts in federal, state and local policies and programs related to conservation activities.

Objectives

- a. Developing a protocol by which those with responsibility for conservation policy and program development can access the wealth of knowledge and experience that exists within CD employees, managers, and supervisors. (see Core Activity #)

- b. Developing a process to coordinate District technical engagement in federal, state and local conservation policy and program development. (see Core Activity #)
- c. Establishing a clearly defined communication system to assist Districts in working together with partners on statewide technical activities. (see Core Activity #)
- d. Compiling a database of case studies of successful policy and program involvement by Districts to demonstrate effectiveness. (see Core Activity #)

Core Activities

1. Develop and maintain relationships with partner and stakeholder groups. (aligns with Objective#)
2. Communicate regularly with point people in agencies and CDs. (aligns with Objective #)
3. Keep current on topics, issues, policies, and programs around the state. (aligns with Objective #)
4. Help maintain catalog of experts. (aligns with Objective #)
5. Provide regular feedback to partners. (aligns with Objective #)
6. Strive to continually improve process. (aligns with Objective #)

6. Workload & Budget – FY 2015-2017, TO BE DETERMINED

Goal: Support and staff this effort workload to implement these recommendations. Below is an outline of needs, with some suggestions on how to build out the appropriate staffing: