

Illinois Native Plant Society 2023 Survey Grant: For Listed and Rare Species Program Explanation and Guidelines

The Illinois Native Plant Society (INPS) Survey Grant for Listed and Rare Species is intended to: 1) assess the status of Illinois Endangered and Threatened species through comprehensive field surveys in order to determine whether populations (Element Occurrences or EOs) are extant and provide information to help determine whether their listing status warrants change; 2) determine whether non-listed species of conservation concern warrant listing; 3) suggest possible recovery strategies for extant populations. The reports resulting from these surveys will be shared with the Illinois Department of Natural Resources Natural Heritage Database and the Illinois Endangered Species Protection Board.

***Note:** Persons interested in conducting surveys for any of the species on the priority list, but who do not wish to apply for a grant, are encouraged to consult these Guidelines, but are advised to submit their survey results through the Plants of Concern website, for both listed and non-listed species, as described below, upon approval by POC staff (contact info@plantsofconcern.org).*

Availability of Funding

Grants are available for up to \$5,000 each.

Eligibility and Conditions

Any individual or non-profit institution/group having professional experience conducting botanic field surveys can apply, with the exception of INPS State Board officers and Board members. Only one award will be given to any applicant and applicants are not able to receive both an INPS Survey Grant and a Research Grant in the same year. Applications from for-profit groups, or individuals working with for-profit groups, will be considered based on their merits. Of these, for-profit group applications involving partnerships with non-profit groups will be given preference.

Note regarding special consideration. Because Plants of Concern (POC) is actively submitting EO reports in six counties of NE Illinois and 12 counties in Southern Illinois, special consideration will be given for applications covering the other portions or counties in the State. Where species occur in both covered counties and other counties, supplementing POC searches to achieve complete coverage for a species would be beneficial.

Budget Considerations: Stipend, Salary, and Indirect Costs

A stipend of up to \$2000 can be included as part of the budget, for the Principal Investigator (PI), or shared with a Co-PI. The Stipend is intended to acknowledge time spent in organizing and planning the project.

Alternatively, some institutions may require, or prefer, to support grant applications by their employees or students that allow for **salary compensation** and/or for an **indirect cost** allowance. In this case, the stipend allotment of \$2000 may be used for salary compensation. The applicant may also include an indirect cost of up to 10% of the direct costs of the grant (maximum \$450) within the total budget. If this option is chosen, the institution is likely to be the recipient of the grant funds which would be distributed according to their procedures.

However, applicants who do not have this institutional requirement for salary compensation and indirect cost can apply for a personal stipend of up to \$2000 and waive the indirect cost requirement.

The budget portion of the application will provide for all of these options.

Project funds may also be used for qualified interns or student assistants. (Volunteer or unpaid assistance by qualified individuals may also be utilized for the surveys. Volunteers are encouraged where appropriate, when they are trained or have adequate prior experience.)

Each of these assistants, by name or by position, and their qualifications and tasks must be identified in Section 9 of the application form. The PI is responsible for distributing any funds to the Co-PI or paid assistants.

No matching funds are required, but listing funds from other sources that support the project, including grants will merit extra consideration (but excluding grantee salaries and institutional indirect costs over and above what is allowed in the grant budget described above),

Grant Duration

Grants are for one year in duration, with the option of receiving a no-cost extension at the end of the grant year, upon request and if justified. Applicants are strongly advised to choose a species or multiple species reflecting a realistic assessment of what they will be able to achieve in a single field season, based on the number of sites, travel distance, and research involved. A no-cost extension request beyond the first season will be considered, but must be submitted in writing with a detailed rationale for the request by **March 1, 2024**.

Alternatively, an applicant may choose a species or multiple species having numerous Element Occurrences (EOs) that will clearly involve more than one season of effort. In this case the applicant should indicate the intention to devote two seasons to the project and that they will do so by submitting a second application for a funded grant in the following year. A second year application will be considered, but funding is not guaranteed; it will be reviewed equitably with all other applications. Substantial progress during the first year's efforts will be given special consideration.

In the case of a second year application, the first season's final report must be submitted by **January 31, 2024**, in order for reviewers to properly assess a second grant application.

Survey Priorities and Categories

Refer to the [Survey Grant Plant Priorities 2023](#) spreadsheet.

The priority spreadsheet is divided into two sections: Listed Species and Non-listed Species of Conservation Concern. Applicants may choose one or more species from the priority list. Species may be grouped by habitat type or by geographic proximity within a county or region.

Note: This list is continually evolving as EO reports are submitted to the Natural Heritage Database and rankings may change. When considering undertaking a Survey, applicants must consult with the Illinois Natural Heritage Database for the most current information.

Note: Species highlighted in red on the Priority List have either been covered or are already included in a Survey Grant or by Plants of Concern searches and are no longer eligible for grant applications. They remain on the list to show progress being made on these priorities.

1. Listed Species

All listed species are arranged in order of the priority number assigned by IDNR, and alphabetically within those having identical numbers

1a: Listed Species, IDNR priorities column, refers to those listed species having only 1 to 9 (one with 15) Element Occurrences (EOs) on record.

This list, provided by IDNR, ranks species according to their survey priorities. Except for already covered species indicated in red, species ranking from 7-11 have not been searched for or observed in several to many years; they may be extirpated, or they may have gone unnoticed. Either way, the lack of information makes identifying conservation actions difficult. Information on the extirpation or continued existence of these populations is critical. When populations are found to be extant, reports should include recommended recovery actions (a full recovery plan is not required). Applicants are encouraged to search for these very rare species before they are considered only historic.

1b: Listed Species, ESTAC/INPS column, refers to species recommended for further surveys by the Endangered Species Technical Advisory Committee for plants (ESTAC), during its deliberations for the 2020 State listing process of the Illinois Endangered Species Protection Board (ESPB). The list includes Endangered and Threatened species below the # 7 rank for which additional information is needed to determine possible change of status.

Note: The eight listed species targeted by the Endangered Species Protection Board included in previous Survey Grant priority lists have been removed. The ESPB has decided to align with the IDNR priority list in order to be consistent among agencies. However, the [*Recovery Outlines with Status Review Triggers*](#) created for each of the ESPB species can serve as partial models for the Survey Grant reports.

2. Non-listed Species of Conservation Concern

(Note: Illinois does not currently have an official “Watch List or Special Concern List” so the designation “species of conservation concern” is merely descriptive.)

The non-listed Species of Conservation Concern list refers to those species identified by ESTAC for the Endangered Species Protection Board during its 2020 listing review process. This list was supplemented in 2022 by polling several experienced field botanists/ecologists (labeled INPS in Column 3). These species, arranged alphabetically by scientific name, are deemed to be in need of surveys to determine whether they should be listed, or placed in a conservation concern category. These species are ranked high or medium in priority on the spreadsheet.

NOTE: Additionally, applicants may make a case proposing a survey or surveys of listed or non-listed species not included in this priority list, based on demonstrated need. To be eligible for Survey Grant funding, applications involving these species must demonstrate that the species is sufficiently rare or threatened, for which comprehensive documentation is needed to warrant either listing or placement in a conservation concern category.

To obtain information for updated and full EO records for your chosen listed species, contact Natural Heritage Database manager Tara Kieninger (tara.kieninger@illinois.gov) and explain your proposal interest and the species involved. Upon approval by the Database Manager, applicants will be issued a Data License Agreement. Depending on the species chosen, additional information may be made available from former surveyors' notes in the EO record.

Permit Requirements for Funded Surveys

Survey Grants require research permits for all field work, because they normally involve off-trail searches, moving among populations, flagging, etc. Permits include: endangered species permit, nature preserves special use permit, or permit to conduct research on federal, state, county, or local public properties. Applications will not be considered unless copies of permit applications or permits already in place are included as part of this application. Permits must show permission from the landowner to collect plant specimens (*only if specimens are needed, see voucher section below*). INPS will not submit permit applications.

(To facilitate the permit process, it is recommended that applicants contact landowners directly simultaneously with submitting permit applications to the Illinois Nature Preserves Commission or other public agency, and provide any resulting correspondence to the agency.)

Additionally, permission to survey on private lands must be documented either by letter or email from the landowner.

A listing of species, their status (E/T/CC) sites, landowners and counties must be uploaded as a separate attachment with the application form.

Grant and Funding Cycle: Submission, Review and Reporting

Proposals are due by January 31, 2023, and must include copies of any applicable permits, permit applications or written permission of private landowners, as discussed above. Permits and, if applicable, evidence of private landowner permission must be in place before funding is released. Late or incomplete applications will not be considered.

Confirmation of receipt of application will be made automatically by email upon submission. Applicants will be notified by March 31, 2023, of the outcome of their application and successful recipients will be asked to confirm via email that they agree to accept funding and will comply with Survey Grant requirements and with the proposal outlined in their application. Upon receipt of this confirmation, a contract will be issued. Successful applicants will be asked to supply a Social Security number or FEIN (Federal Employer Identification Number) on the contract, if an institution or other entity will receive the funds. When signed by the recipient of the funds and by the President of INPS, 50% of grant funds will be disbursed by separate USPS mail. PI recipients should provide the name and address of the person or entity who should receive the funds, if not themselves. If the application provides for sharing the stipend between Co-PIs, or for hiring of assistants, the PI is responsible for distributing these funds.

Final reports are due to INPS by or before March 31, 2024, unless an extension requested in writing **by March 1, 2024** is granted. Upon approval of the final report and budget report, the remaining 50% of funds will be disbursed, but not before January 1, 2024.

Reports from those intending to submit a second year grant application involving additional searches for the same species, for research augmenting the original grant, or for those applying for a new grant to survey for different species, are due by **January 31, 2024**. (These reports must be approved before a new grant is awarded.)

Approved projects are considered contractual arrangements between the Illinois Native Plant Society and the individual or group who submitted the application – the Principal Investigator (PI) or the institution represented by the PI, if applicable. Funds designated for a Co-PI or other project assistants must be distributed by the PI.

INPS will issue a 1099-MISC form to the PI for tax purposes in January of the year following receipt of \$600 or greater.

FINAL REPORT REQUIREMENTS

A final report must be submitted only electronically to the INPS website by **March 31, 2024** (or by other dates stipulated above for extension requests or a second application) (Microsoft Word or PDF format and Excel spreadsheet only). A budget report must demonstrate alignment with the budget submitted on the original application. Volunteer and paid assistant contributions must be reported.

Each species surveyed requires a separate report. Report(s) should minimally include:

(see samples from [Recovery Outlines with Status Review Triggers](#) for guidelines - these do not need to be precisely duplicated)

- Title: include species surveyed (scientific name, author, and family; common name) and whether surveys are for listed or non-listed species
- Summary statement of project activities and results, including pre-survey research, methodology and contributions of paid or volunteer assistance
- For each species surveyed: species description, life history/ecology, and habitat. Current listing status (or any former listing status): Illinois, Federal (including Regional Forester Sensitive Species), other states, NatureServe G listing
- IDNR Ranking from Priority List or whether non-listed species is on ESTAC list
- Species total range
- Species' Illinois distribution by County and Natural Division, both historic and current
- Complete Element Occurrence history, received from the IL Natural Heritage Database, including new EOs submitted with this project. Discuss any notable trends (e.g. increase/decrease in numbers of populations, sizes of populations, number of counties represented, extirpations, etc.)
- Overall threats to populations of each species
- Reasons for recommending status change, or for retaining species with its current status
- For extant populations, suggestions for recovery strategies (not to be considered a fully developed recovery plan), including management, monitoring, protection, population enhancement, translocation.

Reports of negative searches (populations not found) must give an indication of the confidence in the results: *i.e.*, was the survey comprehensive and exhaustive, how much time was spent, and how much habitat was searched

Five (5) or more digital images of the project as separate attachments are required. Last name of grantee should begin the image title. *Unless the grantee requests otherwise, submitted images*

may be used for INPS platforms such as the INPS website, The Harbinger, or Facebook page (without specific location information).

Vouchers. Species at each location surveyed must be photo-vouchered through digital photographs that show the entire plant (habit), the inflorescence (in flower or seed; spores for ferns) and any diagnostic features. A physical herbarium specimen should be collected **only** when diagnostic characteristics are hidden, ambiguous or somewhat subjective and, even then, only above-ground portions of the plant should be collected and only when the population is large enough to warrant collection. (For example, populations with counts of fewer than 25 individuals, or with other factors negatively impacting population viability, should not be collected). If a physical specimen is deemed necessary, the landowner, and the Nature Preserves Commission for a nature preserve, must be contacted for a collection permit if one is not already in place. Consideration will be given by the Nature Preserves Commission if applicants show that they are updating historic Element Occurrences (EOs) or reporting new EOs through the support of an INPS grant. Finally, information about which Herbarium the specimen will be deposited in must be included in the report.

Excel spreadsheet or other listing format: To provide an overview of the report data, a separate spreadsheet or Word list of all species and individual sites surveyed should be attached, to include: Scientific Name and Common Name, EO# for E/T species, and Status (E/T/CC); Site Name; County; Landowner; Population GPS coordinates; Population size; Date of Survey; Surveyor Name(s).

Plants of Concern (POC) Rare Plant Monitoring Form Submission

INHS is partnering with POC for the field form portion of the Survey Grant, which will be used as EO submissions. All forms must be submitted online via the POC portal.

Plants of Concern is a community science rare plant monitoring program working with INPS and IDNR. To fulfill the Field Form Submission requirements, INPS Survey Grantees will submit rare plant data using the POC protocol and data collection tools. Grantees will:

- Complete the [Plants of Concern Online Training](#).
- Contact [POC](#) to have appropriate sites, species and subpopulations assigned (info@plantsofconcern.org).
- Sign the POC rare plant location Confidentiality Agreement, available online during account setup.
- Submit data from the field through the POC mobile app (preferred method), downloaded from Google Play or Apple App Store, OR complete a paper data form and enter data through the POC web app.
- Download resulting PDF monitoring reports from the POC web app and submit PDF reports as part of the final grant report to INPS.

Plants of Concern will share all POC reports with the Illinois Natural Heritage Database so that they may update listed species records as well as gain information on Species of Conservation Concern. Therefore, **Natural Heritage Database Element Occurrence (EO) report forms are NOT required to be submitted as part of the Survey Grant report.**

Presentation and Publication Requirements

Grantees are required to present a summary of their project findings either at the INPS Annual Gathering as complimentary guests (preferred), to a local INPS chapter meeting, or to another conservation group. On-line presentations are acceptable.

Grantees are also required to submit short, popular-type article to the INPS member newsletter, *The Harbinger*, or to an INPS Chapter newsletter, which describes the project, its results, its importance to the listing process for Endangered and Threatened species. Alternatively, a scientific article may be submitted to the INPS professional journal, *Erigenia*, or to another peer-reviewed journal to fulfill this requirement. **Note that specific locations, including site names, should not be given in presentations or popular-type articles, or via social media platforms such as iNaturalist.**

In the report submission portal, grantees must provide the name of the publication where the article will appear, whether the article has been submitted, or when the article is expected to be submitted (within three months). Links to any future publications resulting from the grant project research (apart from those appearing in *The Harbinger* or *Erigenia*), must be sent by email to INPSGrants@gmail.com. Unless the grantee requests otherwise, these may be referenced or linked on the INPS Grants website or social media sites, with appropriate credits or permissions as applicable.

All publications and presentations must include a statement that the project was funded by the Illinois Native Plant Society Grant Program. Notification of any publications must be sent by email to INPSGrants@gmail.com, and should include a link to the article, if acceptable to the publisher. Unless the grantee requests otherwise, these publications will also be linked on the INPS grants web page.

Grantees will be invited, as complimentary guests, to present their research project findings at the INPS Annual Gathering and are encouraged to present to a local INPS chapter meeting or to another conservation group. Grantees are also offered a complimentary membership in INPS for the year after their project is completed and final report approved.

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