

## 2024 INPS Survey Grant: 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:** *Those 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 for listed species to the Illinois Natural Heritage Database through an Element Occurrence (EO) form (<https://naturalheritage.illinois.gov/dataresearch/how-to-contribute-data.html>) and for non-listed species through the Plants of Concern (POC) website, upon approval by POC ([info@plantsofconcern.org](mailto: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.

### **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 required by the institution. 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. 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.

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.

**Matching funds** are not required, but listing funds from other sources that support the project, including grants, will merit extra consideration (but not to **include** grantee salaries and institutional indirect costs over and above what is allowed in the grant budget as described above).

### **Grant Duration: Extensions and Second Year Applications**

Grants are for one year in duration, with final reports due by **March 31, 2025**. However, there is the potential for 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, 2025**. 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 in their proposal the intention to devote **two years** to the project, with the understanding that they will submit 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 must be demonstrated.

In the case of a second year application (involving additional searches for the same species, or for those applying for a new grant to survey different species), the first season's final report must be submitted by **January 31, 2025**, in order for reviewers to properly assess a second grant application.

### **List of Priority Species for Survey Grants**

Refer to the [Survey Grant Plant Priorities 2024](#) document.

### **Permit Requirements for Funded Surveys**

Survey Grants require research permits for all field work, because they normally minimally 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. Additionally, permission to survey on private lands must be documented either by letter or email from the landowner.

*(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 to provide any resulting correspondence with the agency with their grant application.)*

## **Application Process and Funding Cycle**

1. Proposals are due by January 31, 2024, and must include copies of any permit applications, or copies of permits already in place. Late or incomplete applications will not be considered.
  2. Permits must be in place before funding is released.
  3. Automatic confirmation of receipt of application will be emailed upon submission.
  4. Applicants will be notified by March 31, 2024 of the outcome of their application – whether successful, successful providing certain conditions are met, or unsuccessful. 50% of grant funds will be disbursed to successful grant recipients by separate USPS mail, upon fulfilling the conditions described in # 5 and # 6 below. The PI is responsible for providing funds to any Co-PIs or assistants included in the budget.
  5. Recipients will be asked to confirm via email to [inpsgrants@gmail.com](mailto:inpsgrants@gmail.com) that they agree to accept funding, and that they will comply with the award criteria as outlined in these Guidelines and with the project proposed in their application.
  6. Following receipt of this confirmation email by INPS, recipients will be sent a contract to be signed and returned to INPS for the President's signature. Approved projects are considered contractual arrangements between the Illinois Native Plant Society and the PI (individual or group who submitted the application or the institution represented by the PI, if applicable.).
- On the contract, recipients are asked to provide a Social Security number or, if applicable, an institutional Federal Employer Identification Number (FEIN), and also to provide the name, address and phone number of the person or entity who is to receive the funds. When the contract is completed and fully signed by the President, it will be resent to the grantee and a check for half the grant amount will be issued by the Treasurer.
7. INPS will issue a 1099-MISC federal tax form to grant recipients in January of the year following receipt of \$600 or greater in the previous year.
  8. Final reports are due to INPS by March 31, 2025 (unless an extension requested in writing **by March 1, 2025** is granted). Reports from those intending to submit a second year grant application as described above, are due by **January 31, 2025** to allow for review and approval before a second grant decision can be made by March 31, 2025.

Reports are to be submitted only to the [2024 Grant portal on the INPS website](#). Upon approval of the report, the remaining 50% of funds will be issued, but not before January 2025.

9. 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, 2025** (or by other dates stipulated above for extension requests or a second application) (Microsoft Word or PDF format and Excel spreadsheet only). A separate budget report must demonstrate alignment with the budget submitted on the original application or any variance explained. Paid assistant contributions must be described. Although not paid, volunteer contributions, if applicable, must be described.

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

- 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 the ESTAC or INHS "Watch List" Species of Conservation Concern 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, or from other sources for non-listed species, 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, or for listing in the case of non-listed species.
- For extant populations, suggestions for recovery strategies (not to be considered a fully developed recovery plan), including for example 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, followed by a descriptive phrase. *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 Word doc list:** 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**

Plants of Concern is a community science rare plant monitoring program working with IDNR and many other conservation organizations and agencies throughout the State. INPS is partnering with POC for the required field form portion of the Survey Grant, which will be used as a preferred option for EO submissions. These forms are submitted through the POC mobile app or on the computer via the POC web app once the species and site have been assigned by POC. The advantage of POC submission is that non-listed species can be reported in the same format as listed species. *Note: POC monitors numerous rare but non-listed species and may have data on non-listed species on the Priority List. They should be contacted for information for the proposal as well as for the final report.*

The alternate report option is the on-line Element Occurrence report form of the Natural Heritage Database (for listed species). (<https://naturalheritage.illinois.gov/dataresearch/how-to-contribute-data.html>) If the POC submission option is chosen, Natural Heritage Database Element Occurrence (EO) report forms are NOT required to be submitted as part of the Survey Grant report.

Grantees choosing the POC option will:

- Contact [POC](mailto:info@plantsofconcern.org) to have appropriate sites, species and subpopulations assigned ([info@plantsofconcern.org](mailto:info@plantsofconcern.org)) and to set up an account. (newly discovered populations will need to be created in the database by POC).
- Sign the POC rare plant location Confidentiality Agreement, available online during account setup.
- Review the POC training guidelines which include instructions on the monitoring protocol and for completing and submitting EO reports.
- 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 these as part of the final grant report to INPS.

Plants of Concern will share all POC reports from the Survey Grants with the Illinois Natural Heritage Database so that they may update listed species records as well as gain information on Species of Conservation Concern.

### **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, but **within three months of the final report**). Links to any future publications resulting from the grant project research (apart from those appearing in *The Harbinger* or *Erigenia*), must be emailed to [inpsgrants@gmail.com](mailto:inpsgrants@gmail.com). Unless the grantee requests otherwise, these may be referenced or linked on the INPS 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.

Grantees will be invited, as complimentary guests, to present their Survey project findings at the INPS Annual Gathering following their report submission, 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.