



Iowa Association of Naturalists

Iowa State University, 339 Science Hall II, Ames, IA 50011

www.iowanaturalists.org

Executive Committee

Michelle Berns

Amy Loving

Emily Ostrander

Brianne Blom

Chelsea Ewen Rowcliffe

IAN Fall Business Meeting November 5th, 2020 10:00 AM Via Zoom

I. Call to order - Michelle Berns

The meeting was called to order by President Michelle Berns at 10:00 AM via Zoom. There were 55 members identified on the Zoom interface, but may have been more listening on shared accounts. In attendance were:

Heidi Anderson	Signey Hilby
Lilly Jensen	Abbey Conrad
Heidi Reams	Katie Healy
Brianne Blom	Kristen Bieret
Chelsea Ewen-Rowcliffe	John Laird
Jessica Malecek	Clay Steele
Michelle Berns	Aaron Askelson
Emily Herring	Laura Semken
Emily Ostrander	Dakota Popp
Victoria DeVos	Lisa Ralls
Mary Bulger	Rene Stroud
Julie Fosado	Heather Hucka
Christina Roelofs	Bryanna Kuhlman
Andria Cossolotto	Lori Foreman-Kirpes
Emily Roediger	Heather Gamm
Amy Loving	Jess Lancial
Faith Henrichs	Sarah Subbert
Paige Owings	Cassandra Alfstad
Dave Murica	Sunday Ford
Karen Johlas- Szalkowski	Dawn Snyder
Kelsey Longnecker	Katie Struss
Lora Kanning	Jessica Wagner
Jennifer Meyer	Tyler Flammang
Tony Vorwald	Madalyn Hewitt
Cecelia Dirks	Kari Standage
Matt Crayne	

Britney Snell—Clay County
AmeriCorps
Chris Wheating - Thrivent Rep.
“RAW”
“Katie”

II. Secretary's Report - Chelsea Ewen-Rowcliffe

The secretaries report was sent out via email to membership prior to the meeting. The minutes were read by Secretary Chelsea ER. Victoria DeVos motioned to approve. Dawn Snyder seconded. Motion approved as submitted.

III. Treasurer's Report – Emily Ostrander

Not too much has changed in the accounts except there are no more CD's. We haven't pulled in a lot due to COVID and Workshop income has been down. D. and Emily O. pulled them out in September and October per membership request and they have been deposited into the main IAN checking account awaiting membership decision on what to do with that investment. The other change is on the \$10,000 idea project. Lilly Jensen will only be using around \$2500 for the \$10,000 idea due to restrictions with COVID, so membership should think of some other ideas on what to do with the remaining money. Sarah Davelaar moved to approve; Katie Struss seconded. Motion carried.

IV. Executive Committee Reports

a. Professional Development – Katie Struss

Katie Struss is the new Prof Dev chair. The website has been updated with all of the new information and links. Professional development awards are still due in December like usual. The committee understands that it has been a little difficult for some to get those standards, so they are accepting any virtual training as counting toward total hours. Katie S. will put together a list of free training resources and send it out to membership next week. Any awards will be given to Brianne Blom to give out at Spring IAN. If you are not able to make it to Spring IAN, awards will also be mailed out. Please contact Katie S. with any questions.

b. Junior Naturalist – Michele Olson

Jennifer Meyer commented that there is nothing to report other than the patches are cool and to keep up the good work.

c. Joe Halbur Scholarship – Lora Kanning

Allison Scheel was awarded a \$500.00 re-apply grant and the 2020 \$1000 recipient is Avery Keenan. Joe Halbur Committee is looking for one or two new committee members, please let Lora know

d. IAN Scholarships - Jessica Steines

Aaron Askelson reporting for Jessica S. There have been no scholarships given out and no applications due to COVID. She encourages members to search for virtual opportunities and ideas for things to develop.

e. Membership - Victoria DeVos

As of this meeting, there are 184 registered members for 2020 and 2021.

Memberships are still coming in and she has not finished accounting for memberships that came in with Fall Workshop registration. If you have questions on your membership, please email Victoria D.

About a month ago, Yahoo Groups announced that it will no longer be hosting the Listserv. Victoria D. has been working on switching membership over to a new Google

Listserv. Please do not use the new Listserv yet as not all members have been added. The goal is to have it up and running before Thanksgiving. She will have some emails sent out to make sure everyone is able to receive the messages on the new platform, but please be patient with the transition. President Michelle B. thanked Victoria D. for all her work keeping IAN connected as the Listserv is one of the more important aspects of IAN that we get to utilize.

f. Welcoming Committee - Lilly Jensen

Nothing new to report now, but if you are new to IAN and want to be part of the mentorship program, or have general questions, please contact Lilly J.

g. ICEC/IAN Awards - Sarah Subbert

Awards have been handed out however possible, through pickups, drop offs, and mailing. The new award applications are due on December 1st, so please get them in before the cutoff date. Sarah S. has received one so far and looking forward to seeing all the applications. There are 12 awards total, so please email applications and any questions to Sarah S.

h. Traveling Exhibits Committee – Jennifer Meyer

The panels of the Prairie Exhibit need to be reviewed and updated and we need to think about long term storage. A storage unit in Jackson County might be more reasonably priced than in some other areas. Those are things Jennifer M. will be compiling for ExCom to review. She will try to find a digital copy of the Prairie panels for memberships to look over and edit. Please give Jennifer M.'s information to any schools or libraries or other entities that may be interested in hosting the exhibit.

i. Fundraising - Mary Bulger

The fundraising committee has been working with the Joe Halbur fundraising committee to come up with a virtual fundraising idea. An email was sent out on the Listserv for a Virtual Fundraising Pledge. The pledge is an online square space with an assigned pledge dollar value. Sign up for a square and you will be awarded a prize accordingly that was donated from counties across the state. Prizes include cabin stays, programs, and goodie baskets. The pledge drive will continue through the end of the week.

j. IAN Website/Social Media – Cari Nicely

Michelle Berns commented that there has been some sorting out of guidelines and information for the new website and social media aspects of our digital presence. Lilly J. touched on the website component. The main overhaul is done, but if there are any questions please contact Cari. Heidi will check up on the Facebook page for any updates needed.

k. Wilderness Trips - Emily Herring

An email was sent out to the committee a while back about possibly helping with MEEC and I need to touch base with Lilly J. on that. The Wilderness First Aide might not be an option due to the time frame, but Leave No Trace ethics, or basic gear supplies might fit better. Emily H. will send out an email on what trainings membership would like to see and the main interest areas for wilderness trip information. If anyone

has any questions or would like to join the Wilderness Trip committee, please let her Emily H. know.

V. Administrative Reports

a. IACCB Liaison - Christina Roelofs

Winterfest 2021 is cancelled due to COVID. The contract with the Marriott has been extended and hopefully everything will be back on track in 2022.

b. NAI Liaison - Heather Hucka

The 2021 NAI Heartland region conference has been postponed to 2022. Illinois (east Peoria) will be hosting in 2022 instead. The Heartland Region is looking to host an online “get together” on March 26th, so keep your eyes open for updates on that. The NAI Heartland region has gained some new states and provinces, which throws off the hosting order. Iowa is now on the docket to host a regional conference in either 2023 or 2024. Currently, Iowa does not have a state representative for NAI, so if anyone is interested in getting more active in NAI, please give Heather a call and she can help inform what the state rep does. Laura Semken asked if the State Rep helps put regional workshops together. Heather H. replied that she and the state rep work together to find a committee to put on the workshop.

c. DNR Liaison – Holly Schulte

No report

d. REAP-CEP Liaison – Victoria DeVos

The REAP-CEP is the Resource Enhancement and Protection - Conservation Education Program which provides \$350,000 in grants to be used for environmental education in the state of Iowa. Charlene Elyea stepped down and Victoria D. took the position over in August. The committee just received grants and have until November 23rd to score them. The next board meeting is on December 2nd and that is when the grants will be awarded. The next grant cycle is due in May.

e. ICCS Liaison – Victoria DeVos

The Iowa County Conservation System has never had an IAN representative. To have IAN present in ICCS happenings, and make sure ICCS is running smoothly, Victoria agreed to be the representative. ICCS did not have the fall conference due to COVID. The next board meeting is November 24th. Tom Hazelton is the CEO of ICCS and was planning to retire from the position, but due to 2020 craziness, he has signed on for another 18 months to smooth the transition.

f. REAP – Alliance – Amy Warnke

No Report

g. ICEC Liaison - Lilly Jensen

The Midwest Environmental Education Conference (MEEC) is moving forward as if it will be an in-person conference. The conference will be held in July 2021 at Luther College in Decorah. The call for program submissions deadline was November 1st but that has been extended to November 15th. There have been lots

of great programs submitted, but not many from the naturalist community, so she encourages naturalists to submit a presentation proposal. The ICEC Winter workshop will be virtual in January. It will be a series of sessions, presentations, and discussions discussing equity and inclusion in environmental education. ICEC will be launching the annual Game Jam program next week. Game Jam is a program project where students put together a game based on environmental concepts. This year's theme is soil. Game Jam is a really cool way to connect with students in a new way. Watch for more information on this subject. Please contact Lilly J. with any questions or interest in ICEC.

V. Workshop Committee Report – *Brianne Blom*

The Virtual Fall 2020 workshop is in full swing. She will continue to send out session recordings via email

- a. Spring 2021- Ringgold County, March 17th-19th Unless Governor mandates that we cannot meet in large groups, we are planning an in-person workshop. The Prairie Chickens should be booming at that time, and there will also be some human prairie chicken dancing. A question was posted in the Zoom Chat about the schedule for Spring 2021 IAN being the same as had been planned for Spring 2020. Brianne B. answered that some presenters have changed, so she is working with Ringgold county to do a little rescheduling.
- b. Summer 2021 - MEEC- Winneshiek County. July They are also planning for an in-person conference.
- c. Fall 2021 - Woodbury County, November 3rd-5th.
- d. Spring 2022 - Jackson County
- e. Summer 2022 - Clinton County
- f. Fall 2022 - Mahaska County
- g. Spring 2023 - Muscatine County
- h. Summer 2023 - Open

Brianne B. encouraged naturalists to get together in their individual regions in small, spaced groups, or for outside activities to stay connected. President Michelle B. thanked Brianne B. for adapting to changing workshop situations and keeping us all connected virtually.

VII. Discussion/Action Items (5 minutes each)

a. Investments – *Chris Wheating – Financial Consultant w/Thrivent/Pine Lake Financial Association.*

The two CD's that were pulled out totaled \$10,610.89. The investment and saving world is difficult, especially with low interest rates, specifically CD rates. He met with ExCom last fall to discuss to provide some education and provide some options for investing. Today, he is bringing some options from Thrivent's partner organizations that may be a fit for our group. These "social guided investments" fall under the "ESG" (environmental, social, and governance) driven funds. There is are a number of companies doing this and it uses traditional values and pricing of investments, but overviews a layer of environmental, social, and governance considerations. One of the companies that specializes in this is Calbert funds. I can get all the informational materials to ExCom to be disseminated to membership as requested. Calbert's funds have an ESG filter in place. From an environmental standpoint, they are looking at companies that focus on reduction of carbon and greenhouse emissions, water scarcity, energy management, environmental impact, environmental supply chain; social filters for privacy and data

security, workplace safety, and workplace diversity; and from a governance standpoint, issues like structure and diversity of boards, and CEO pay spread monitoring. I thought this would be a good fit for this group. Calbert has a number of funds available and based on what you have done with your funds before, my recommendation is to stay very prudent and put that money to work. There is always an element of risk with investing, but we can take a very value based and diligent approach on how we are doing that and not putting things at too much risk. With this environment of low interest rates doesn't tend to lean toward a full conservative, all bond driven portfolio and I think a good mix would be good fit. A lot depends on the purpose of the funds and the time frame of when you might need those funds, but to also produce and income for you greater than what you might be able to get through a bank. The template of portfolio that I would be recommending from Calbert has three funds that I think would be good fit:

1.) Green bond fund. Bonds are conservative, but still produce an income. This bond looks at companies focused on sustainability and renewable energy, green building, low carbon transport, waste management, carbon transition research, etc. With this investment, we are still tied into environment of the market and low interest rates, with this currently producing a rate of 1.4% , but if you went to a bank to get a CD, you are probably tying your money up for 1-2 years. But this type of investment is about creating liquidity and putting your money to work for the group.

2.) Balanced fund - I like to build a diversified model and having some growth associated with that, but staying with an overall portfolio of 30% stocks and 70% bonds has been our recommendation for similar groups. Calbert has a balanced fund that I would say would be a good one to add to the mix. It's not fully focused on environmental, but it has the ESG filters in place.

3.) Conservative bond fund to fill out the remaining portfolio. I have an analysis for this, and I can share with ExCom to be shared with the group.

Victoria DeVos asked, "What is the track record on those funds"? Chris answered that Thrivent uses Morningstar, an independent investment platform for evaluation. There is only a 7 year track record for these funds as they are fairly new to Calbert, but I did a portfolio of \$5,000 in the balanced fund, that's 60% stocks and 40% bonds, \$2500 in the green bond, and \$2500 in the short duration bond, and the 7 year track record was a 4.67% return. It had two negative years, in 2015 down 1.5% and 2013 was down 3%. It's a portfolio that could fluctuate somewhere between 4-6%, but over the last 7 years hasn't done that. It did dip in March, but that's investing, and you need to hold the course to let the market come back. Victoria D. asked what amount of time we need to set money in and let grow with reasonable confidence that we are not losing money. Chris answered, that with the size of the account (\$10,000), we are little bit more limited with options. With \$10,000, we are going to have use an A-class share. This type of share comes with a front end load. With the three funds we are discussing here, the balanced fund has the most stocks in it. It has the largest load, or fee (purchase fee) and that is 4.75%.

The green bond fund has a 3.75% load and the short duration fund is 2.75%, so we want to at least make up for that. We can make it up in a year if the market is good, but typically we say 1-3 years should produce to make up for the loads. However, that doesn't mean you need to keep the money in for that long. The short duration fund is an income producer and is a fairly stable producer around 1.9% yield. If we would need to pull out money for something, if it's not the whole thing, for instance 1-2,000 to help with

something like a workshop, I as an advisor and you as a client would have a stable place to pull that money from. IF the markets are up, we could pull that from the equity driven fund, like the balanced fund.

Lilly Jensen asked if any of the green bonds have access to businesses and corporations are being helped by this investment. Chris answered that yes, he can provide a list and we can see what the underlying holdings are for any of these investments. ESG investments are becoming very popular and companies are starting to structure themselves to be in these purpose driven investment filters. That's why I picked Calbert, it seems to put the tightest filters to match the ESG purpose.

Michelle B. asked for some feedback on how membership is feeling about proceeding to set up a meeting with Chris to get more specific information. Victoria D. comment that if Chris could get us a list of the companies that we would be investing in, and the track record and information on each of those funds, that we could move on. Chris agreed and reiterated that his job is to provide as much education as possible for these investments and would be happy to provide that information. You might be surprised on some of the companies that are on the list, so let's have a full discussion before making your decision, but I believe Calbert is the best to go with from an environmental standpoint.

Laura Semken, what would be the benefit of this investment over a CD. Chris answered that CD's are an investment in the bank, basically what they are able to loan that out for and the interest rate they can get back. It also ties your money up for a long time to gain any interest. There isn't any risk, but the return is often much less. With investments there is the potential for a bigger return, and your investment is purpose driven.

b. Joe Halbur Scholarships – *Lora Kanning*

Since our last meeting, the Joe Halbur Scholarship committee worked on refining the guidelines and so what we are proposing is increasing the High School scholarship to \$1000, and to keep the reapply scholarship at \$500. The committee was unsure if they wanted to delve into college scholarships, so they thought that increasing the amount and seeing how it affected application would be the best choice. The reapply scholarship is technically a collage scholarship since they must be a past winner. As of right now, there could be up to four people applying for the \$500 reapplication scholarship throughout their college career. We have successfully given that out twice in the last 5 years, and that was at only \$150. As the budget sits, we have \$5000 in the fund and we would be asking to increase the budget by \$500. We do offer the winners to come to IAN with a \$150 stipend. That \$150 was not coming out of the Joe Halbur fund, but workshop/conference money instead. We thought that was still valuable to offer for the high school student/reapplicant. We wanted to get membership thoughts on the dollar amounts and the college scholarship.

Michelle B. added that one of the reasons for upping the scholarship is just a function of changing times and increased costs of college. Being able to increase the scholarship was also the reason for combining the fundraising and Joe Halbur fundraising committees. By combining the fundraising efforts, and possibly through investments, IAN will be able to have an increase of funds into those accounts and we'll be able to "spread the joy" further through our organization. Victoria D. added that if we were ever to get audited, we would have to produce a paper trail for each specific item fundraised for. When we set up the Joe Halbur scholarship it was an endowment and that is not how it is working now. It will be so much easier to combine them and just "generally fundraise" and then the funds can be disseminated as seen fit. It will be much less of a headache

to put money in the general fundraising account instead of keeping it separate between Joe Halbur and something else. Dawn Snyder added agreed and she believed that the scholarship fund should be able to go to college students and thought that it was perhaps more valuable in the hands of college students. It is difficult for college students to get scholarships after their freshmen year. It's a valuable thing, and I did know Joe Halbur and appreciate the efforts of IAN continues to do. Victoria D. stated she would rather see \$1,000 in the hands of any college student in the field that is from Iowa because they know they are going to stay in the field, instead of a high school student that might not end up continuing in the field, or with college in general. Her vote would be to give the \$1000 to the college student, \$500 to the high school student. Victoria D said she votes on raising the amounts and to stop separating the fundraising and Joe Halbur fundraising efforts. Chelsea ER. added that ExCom would like some clarification on whether the student must attend an Iowa school, or if schools that offer in-state equivalent tuition are also considered. Lora K. answered that preference may be given to in-state colleges. In the last 5 years the scholarship was given to two out-of- state college applicant, but it really depends on the quality of the applicant. Jess Wagner asked if \$650 is the current budget and that the Joe Halbur committee is asking to increase that to amount to \$1000 and the workshop fee. Lora K. confirmed raising the scholarship to \$1000, but the \$150 workshop stipend would remain the same and does not come from the actual Joe Halbur budget. The second increase would be to increase the reapply scholarship to \$500. Jessica W suggested that we offer two scholarship since IAN has some extra money this year. She also agreed with combining the fundraising efforts. Katie Struss also agreed on and made a motion to have both the high school and reapplication scholarship to be increased to \$1000. No second. Victoria D. asked if it had to be the reapplication as the college scholarship or if we could just do \$1000 for college and \$1000 for reapplication. Lora K. commented that the high school vs. college issue was what the committee was turning to membership for advice. Jessica W. motioned that it should be two \$1000 scholarships, but leave it up to the Joe Halbur committee on if it is specified for college or high school, but that she would prefer college. (No second) Lora K. suggested that we need a motion to change the Joe Halbur scholarship to have just college scholarships mentioned and to increase the amount. Michelle B. said we could make a motion to change to college scholarships and increased award amount. Katie S. said that the reason she liked having a high school option was that she generally was seeking scholarships more in high school than during college. Jessica W. added not to call it a high school be cause even though a high school student is applying, they will be using it towards college, so calling it a college scholarship would be fine. Jessica W. then made a motion to raise the Joe Halbur committee's fund to \$2000 for two \$1,000 college scholarships, seconded by Dawn Snyder. Motion carried via thumbs up or audible "aye".

c. Honorary Members

Michelle B. informed membership that we have inducted an honorary member for the last five years, but for some reason did not do it in 2019, so ExCom is suggesting two people be awarded honorary members for 2020. There is a list of people, which is continually being added to, so if anyone has any suggestions please contact an ExCom member. This year Mark Wagner and Linda Zalatel were selected to be honorary members. Matt Crayne motioned to make Mark Wagner and Linda Zalatel honorary IAN members for 2020. Heather Gamm seconded. Motion passed via thumbs up and audible "aye".

d. Host County Recognition

Michelle B. wanted to say a big thank you to Indian Creek Nature Center and Brianne B. for working together to help bring the Fall IAN workshop to all of us virtually.

e. Statewide Virtual Fieldtrips

Emily Herring started the idea and sent it out on Listserv of having statewide virtual field trips. Counties would record a program then share it with others to use for virtual programming or to taking a “field trip” to another county. Emily H. had about 40 counties say they would participate and there is a spreadsheet on the IAN Google drive outlining the different subjects. She got together with Lilly J., Heidi, and Andrea Porter to create a basic intro and ending to make the videos consistent to be on their own, or to compile into a longer video. She has four people that volunteered to help edit, and she thought it would be easier to get the same editing equipment for them so it’s all the same, especially when sharing files back and forth. It would cost around \$200 to get this editing software. Please let her know if there are any questions or comments about Statewide Virtual fieldtrips.

Because of COVID, it has been difficult to get the interviews to complete the \$10,000 idea, so there is “leftover” money from that project. Emily H. was wondering if she could use some of the extra money from the \$10,000 idea to purchase the video editing equipment to be use for the Statewide Virtual Fieldtrips project. Matt Crayne made a motion to purchase the editing software for the statewide virtual fieldtrips. Tony Vorwald seconded. Motion passed via thumbs up sign or audible “aye”.

g. Other

- Results of ExCom Election – Rene Stroud and Heidi Reams are the new 2021 ExCom members
- Victoria DeVos said a thank you to Amy L. and Michelle B. for their work and contributions to ExCom!
- Annette Wittrock requested via Brianne B. that any county information changes be emailed to her. The email is her personal address since she’ll be moving counties (Wapello CCB to Bremer CCB)
- Chelsea ER. asked about any rare sightings or interesting tidbits from counties
 - Katie Struss – rescued a Broad-winged hawk yesterday (November 4)
 - Christina Roelofs – saw three funnel clouds yesterday (November 4) in Shelby County
 - Kristen Bieret and Abby Conrad – there was an Elk spotted near Lake City
 - Kelsey Longnecker – otter roaming through town in Warren county
 - Tony Vorwald saw a bobcat on the Maquoketa river while paddling with a group of college students. He also heard there was an alleged Sasquatch sighting at White Water Canyon, and he’s pretty sure it was a sighting of him! Matt Crayne vouched for the “sasquatch-ness” of Tony V.
 - Aaron Askelson saw a leucistic Goldfinch
 - To reiterate what Brianne B. said about getting together with your local naturalist “peeps”, Michelle B. wanted to send out a thank you to her Eastern Iowa naturalists for getting together and sharing over the summer. It was fun and we learned a lot as well.

- Laura S. – Report from a coworker that this morning they saw a Bald Eagle on the Iowa River try to snatch a Great Blue Heron out of the sky, both fell into the water, heron fought back, then they both flew off.
- Chelsea ER. rescued a stunned Fox Sparrow from the road, which then proceeded to fly around her car on her drive into work this morning.

VIII. Adjourn – Katie Struss moved to adjourn the meeting. Emily Herring seconded. Motion approved via audible “aye” or “thumbs up” sign. Motion passed. Meeting adjourned at 11:34 AM.