

#1

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Wednesday, March 18, 2020 10:54:38 AM  
**Last Modified:** Wednesday, March 18, 2020 11:05:42 AM  
**Time Spent:** 00:11:04  
**IP Address:** 71.179.55.157

Page 1

**Q1** Please write your name:

Olivia Wisner

**Q2** Please write your email address:

wisnero@chesapeake.org

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

GIT 5

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

8

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

5 (as expected)

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

The vocabulary sheet on the table was helpful. The oyster theme was helpful. I struggled to connect the social sciences to a return on investment.

**Q7** Out of the presentations, which two did you find most useful? **In search of cost-effective nutrient loss reductions**

**Q8** What did you like/dislike about the breakout sessions?

We needed more assistance connecting the financial topics to social sciences.

**Q9** How appropriate was the time allocated for the breakout sessions?

**About the right length**

**Q10** How might you be able to apply the information learned at the Forum?

I'll be looking for opportunities for return on investment.

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

**4**

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

**4**

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

Are there investment opportunities for social sciences where the return is diffuse

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q15** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q17** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q19** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q20** Please provide any general comments or feedback here:

**Respondent skipped this question**

#2

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Wednesday, March 18, 2020 10:59:17 AM  
**Last Modified:** Wednesday, March 18, 2020 11:09:12 AM  
**Time Spent:** 00:09:55  
**IP Address:** 74.96.238.170

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Page 1

**Q1** Please write your name:

Erik J. Meyers

**Q2** Please write your email address:

emeyers@conservationfund.org

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Climate Resiliency WG

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

8

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

8

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

Oyster investment and financing pilot was informative and potentially replicable. Final panel (Dan Nees, et al.) and Ashley Allen Jones overview were well done. Break out sessions were good opportunity to raise level of general understanding of market motivations with scientists/ tech experts. As a 101, did a very good job.

**Q7** Out of the presentations, which two did you find most useful?

**Finance 301,**  
**Oysters Etc. Panel**

**Q8** What did you like/dislike about the breakout sessions?

see above -

**Q9** How appropriate was the time allocated for the breakout sessions?

**Too short**

**Q10** How might you be able to apply the information learned at the Forum?

The Conservation Fund is constantly looking for innovative conservation funding and financing opportunities. Tends to be more terrestrial in its projects tied to land conservation/working conservation lands but this was useful in adding ideas about aquatic/marine zone opportunities

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

**9**

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

**7**

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

Exploring blue carbon investment from ESG sources

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**David Tepper**

**Q15** How many hours of consulting time would you like?

1 -2

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q17** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q19** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q20** Please provide any general comments or feedback here:

Respondent skipped this question

#3

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Wednesday, March 18, 2020 1:20:17 PM  
**Last Modified:** Wednesday, March 18, 2020 1:27:53 PM  
**Time Spent:** 00:07:36  
**IP Address:** 167.102.37.34

Page 1

**Q1** Please write your name:

Christine Conn

**Q2** Please write your email address:

christine.conn@maryland.gov

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Habitat GIT/Wetlands Workgroup

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label) 6

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label) 6

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

Finance 301 very helpful.

**Q7** Out of the presentations, which two did you find most useful? In search of cost-effective nutrient loss reductions, Finance 301

**Q8** What did you like/dislike about the breakout sessions?

It was an interesting discussion. I enjoyed it. DId not arrive at any particular new strategy though. It's important to have the interaction time and informative to meet with finance expert.

**Q9** How appropriate was the time allocated for the breakout sessions?

**About the right length**

**Q10** How might you be able to apply the information learned at the Forum?

We spent a lot of time talking about funding. In fact, I heard a few times...figure out the funding first, then the financing will follow. I think this will take a nuts to bolts review of existing funding sources, new potential sources, funding efficiencies and how financing can help getting more projects in the ground in the places that we need.

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

**6**

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

**2**

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

still need to review funding sources. not ready for financing

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**None**

**Q15** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**None**

**Q17** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**None**

**Q19** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q20** Please provide any general comments or feedback here:

I can't answer this yet as the Habitat GIT co-chair. The wetlands workgroup chairs and team members will need to decide if they have the interest and capacity to pursue this.

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#4

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Wednesday, March 18, 2020 2:51:04 PM  
**Last Modified:** Wednesday, March 18, 2020 3:06:07 PM  
**Time Spent:** 00:15:03  
**IP Address:** 167.102.37.34

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Page 1

**Q1** Please write your name:

Elliott Campbell

**Q2** Please write your email address:

elliott.campbell@maryland.gov

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Group 6-Healthy Waters and Land Preservation

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

10 (excellent)

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

9

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

The finance 301 was an excellent overview, the conversation with the finance expert was the most productive.

**Q7** Out of the presentations, which two did you find most useful?**In search of cost-effective nutrient loss reductions,  
Finance 301****Q8** What did you like/dislike about the breakout sessions?

Overall I thought the length was appropriate. The conversation could have been more directed, but that was on me as a moderator.

**Q9** How appropriate was the time allocated for the breakout sessions?

**About the right length**

**Q10** How might you be able to apply the information learned at the Forum?

I had a really good conversation with our expert on other work he had done combining nutrient and carbon credits for agricultural BMPs in the mid-west, made plans to follow up on ideas for MD/Ches. Bay watershed.

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

**9**

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

**8**

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

We focused on land conservation benefits and how those stack with other forms of credits. Standardization of nutrient credit markets across the watershed would go a long way to accelerating that market, with conservation a piece of the puzzle.

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q15** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q17** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q19** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q20** Please provide any general comments or feedback here:

As a moderator from the BFWG I didn't think it was appropriate for me to answer the questions about further coaching, but I would be willing to participate in some way with the coaching going forward.

#5

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Wednesday, March 18, 2020 4:12:00 PM  
**Last Modified:** Wednesday, March 18, 2020 4:36:51 PM  
**Time Spent:** 00:24:50  
**IP Address:** 155.206.80.224

Page 1

**Q1** Please write your name:

Morgan Corey

**Q2** Please write your email address:

morgan.corey@noaa.gov

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Sustainable Fisheries - breakout group 1

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label) 8

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label) 7

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

The introduction and getting everyone on the same page was helpful. Panel was well done, building on everything learned in the morning sessions.

**Q7** Out of the presentations, which two did you find most useful? **Finance 301,**  
**Oyster Ignite Talks**

**Q8** What did you like/dislike about the breakout sessions?

Flipcharts were helpful. We did not use the worksheets as the conversation was more broad.

**Q9** How appropriate was the time allocated for the breakout sessions?

**About the right length**

**Q10** How might you be able to apply the information learned at the Forum?

the main application for oysters would be nutrient crediting following the approval of BMPs for restoration/aquaculture

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

**5 (familiar)**

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

**6**

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

**Respondent skipped this question**

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q15** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q17** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q19** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q20** Please provide any general comments or feedback here:

the forum was a very interesting and informative learning opportunity!

#6

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Thursday, March 19, 2020 11:07:19 AM  
**Last Modified:** Thursday, March 19, 2020 2:41:37 PM  
**Time Spent:** 03:34:18  
**IP Address:** 73.213.96.14

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Page 1

**Q1** Please write your name:

Dinorah Dalmasy

**Q2** Please write your email address:

dinorah.dalmasy@maryland.gov

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Forestry

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

8

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

8

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

Finance course, Conservation finance presentation

**Q7** Out of the presentations, which two did you find most useful?**In search of cost-effective nutrient loss reductions,  
Finance 301**

**Q8** What did you like/dislike about the breakout sessions?

We were kicked out of the main room and I didn't get my seat back when we returned :( Our coach was not available and it disrupted slightly how the session was moderate, although the substitute coach did a good job for jumping in at the last minute.

**Q9** How appropriate was the time allocated for the breakout sessions?

About the right length

**Q10** How might you be able to apply the information learned at the Forum?

Not sure yet. But understanding better how conservation finance works, will help us in creating the necessary policies to achieve our pollution reduction goals.

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

6

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

6

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

Still not sure how to make restoration practices profitable to attract private investors.

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

George Kelly

**Q15** How many hours of consulting time would you like?

4

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

Ben Guillon

**Q17** How many hours of consulting time would you like?

4

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

Respondent skipped this question

**Q19** How many hours of consulting time would you like?      Respondent skipped this question

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**Q20** Please provide any general comments or feedback here:      Respondent skipped this question

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#7

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Thursday, March 19, 2020 4:54:13 PM  
**Last Modified:** Thursday, March 19, 2020 5:08:56 PM  
**Time Spent:** 00:14:42  
**IP Address:** 96.244.141.8

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Page 1

**Q1** Please write your name:

Jennifer Greiner

**Q2** Please write your email address:

jennifer\_greiner@fws.gov

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Habitat GIT / Wetlands

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

8

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

7

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

Crash course in Finance, oyster example set the tone nicely; worksheets and intended outcomes for breakouts seemed a bit unclear; folks seemed 'jumbled' in afternoon

**Q7** Out of the presentations, which two did you find most useful?

**Finance 301,**  
**Oyster Ignite Talks**



**Q8** What did you like/dislike about the breakout sessions?

Good diversity of participants at our table. Coach seemed focused on one aspect (wetland mitigation) rather than scoping the larger picture and brainstorming broadly

**Q9** How appropriate was the time allocated for the breakout sessions?

**About the right length**

**Q10** How might you be able to apply the information learned at the Forum?

CBP wetland staff are already working with CBP forestry staff on a concept paper for a program to create new market incentives for riparian buffers & wetlands, which together are "Nature's Flood Insurance"!

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

**6**

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

**9**

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

How do insurance companies value natural infrastructure? Do they currently, or would they consider, offering cheaper flood insurance policies for property that is buffered, or connected to floodplain?

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Leonard Shabman**

**Q15** How many hours of consulting time would you like?

20

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Ashley Allen Jones**

**Q17** How many hours of consulting time would you like?

10

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**George Kelly**

**Q19** How many hours of consulting time would you like?

6

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**Q20** Please provide any general comments or feedback here:

Great work bringing together diverse expertise to tackle a tough subject in a single day! Really appreciate the follow-up options to ensure that hard work pays off...literally!

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#8

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Friday, March 20, 2020 9:03:51 AM  
**Last Modified:** Friday, March 20, 2020 9:16:48 AM  
**Time Spent:** 00:12:56  
**IP Address:** 71.204.223.30

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Page 1

**Q1** Please write your name:

Matthew Pennington

**Q2** Please write your email address:

mpennington@region9wv.com

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Forestry

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

**10 (excellent)****Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

**10 (beyond expectations)****Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

I enjoyed the break out sessions with the coaches!

**Q7** Out of the presentations, which two did you find most useful?**Finance 301,  
Oyster Ignite Talks**

**Q8** What did you like/dislike about the breakout sessions?

No designated space to have these discussions. The Venue was not suitable, our group located an unused dance hall to conduct our session where we could hear.

**Q9** How appropriate was the time allocated for the breakout sessions?

**About the right length**

**Q10** How might you be able to apply the information learned at the Forum?

Seeking out off-takers to finance longterm environmental assets and verify their on-the-ground effectiveness.

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

**5 (familiar)**

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

**5**

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

yes. More info on:

- 1) Feasibility
- 2) Development
- 3) Off-Takers (Marketing)
- 4) Finance

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Ashley Allen Jones**

**Q15** How many hours of consulting time would you like?

20-40, or As many as possible she was great

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Ben Guillon**

**Q17** How many hours of consulting time would you like?

15-20, or as many as possible his perspective is excellent

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below: **Dylan Jenkins**

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**Q19** How many hours of consulting time would you like?

15-20, or as many as possible. Carbon markets are key crossovers with Bay Nutrients

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**Q20** Please provide any general comments or feedback here:

The Forum was great. The Venue was poor. Several of us who attended were pulled over by Campus Police while exiting the parking garage. Coming all the way from West Virginia, this experience with Univ. of Maryland Police was inconvenient after volunteering my time all day in Maryland.

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#9

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Friday, March 20, 2020 12:12:51 PM  
**Last Modified:** Friday, March 20, 2020 12:25:12 PM  
**Time Spent:** 00:12:20  
**IP Address:** 134.67.29.70

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Page 1

**Q1** Please write your name:

Amy Handen

**Q2** Please write your email address:

handen.amy@epa.gov

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Conservation / Healthy Watersheds

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

8

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

8

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

The presentations were most helpful to me. I am still learning these concepts so hearing the knowledge and perspective from the experts was most beneficial to me.

**Q7** Out of the presentations, which two did you find most useful?

In search of cost-effective nutrient loss reductions,  
Oyster Ignite Talks

**Q8** What did you like/dislike about the breakout sessions?

The breakout session was less structured than I would have preferred. There was a large variety in knowledge and expertise at our table so we were all coming from different places which was nice but did not allow us to concretely take an issue and work it through. Our expert was able to provide overview of concepts which was helpful but was not able to get into the details which I think could have been more helpful to us taking on our topic.

**Q9** How appropriate was the time allocated for the breakout sessions?**Too long****Q10** How might you be able to apply the information learned at the Forum?

The information I learned at the forum was helpful in increasing my general awareness of markets and financing mechanisms.

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

**7****Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

**7****Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

I would like to continue to be a part of the strategy development for healthy watersheds / conservation and learn more as the team develops their strategy. I still have a lot to learn!

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:**Respondent skipped this question****Q15** How many hours of consulting time would you like?**Respondent skipped this question****Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:**Respondent skipped this question****Q17** How many hours of consulting time would you like?**Respondent skipped this question****Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:**Respondent skipped this question****Q19** How many hours of consulting time would you like?**Respondent skipped this question**

**Q20** Please provide any general comments or feedback here:

Respondent skipped this question

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#10

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Sunday, March 22, 2020 3:57:22 PM  
**Last Modified:** Sunday, March 22, 2020 4:45:39 PM  
**Time Spent:** 00:48:17  
**IP Address:** 96.234.213.22

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Page 1

**Q1** Please write your name:

John Griffin

**Q2** Please write your email address:

jgriffin@chesapeakeconservation.org

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Healthy Watersheds, Land Protection

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

7

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

8

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

The am sessions were very instructive and the breakout table was ok but less helpful. The breakout session I was assigned to had a range of knowledge and exposure to private capital investment and this slowed down the pace in developing proposals. This is not a criticism of anyone just a fact. Our finance consultants are very innovative but their company does not focus on land conservation.

**Q7** Out of the presentations, which two did you find most useful?

**Finance 301,**  
**Oyster Ignite Talks**

**Q8** What did you like/dislike about the breakout sessions?

I liked the interest and excitement among all the participants to learn more and contribute ideas. The limitation is many of the participants were trying to absorb the am presentations which was understandably difficult to do quickly.

**Q9** How appropriate was the time allocated for the breakout sessions?

**Too short**

**Q10** How might you be able to apply the information learned at the Forum?

Need to focus with finance consultants on specific policy proposals eg, state and local " enabling conditions" necessary to attract a fair share of growing voluntary carbon offset markets for conservation of forests and ag lands in the Bay watershed.

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

**4**

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

**9**

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

A number of policies, including incentives to attract increasing levels of private capital investment in the conservation and restoration of " working lands".

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**David Tepper**

**Q15** How many hours of consulting time would you like?

10 to 15 hours

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Dylan Jenkins**

**Q17** How many hours of consulting time would you like?

10 to 15

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Ashley Allen Jones**

**Q19** How many hours of consulting time would you like?

10 to 15 hours

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**Q20** Please provide any general comments or feedback here:

The forum was a very good way to start to build knowledge, understanding and the possible applications of private investment to environmental restoration and land conservation among the government officials in attendance; and exposing the private capital investors to the scope of ideas seeking possible investments. Recommend that the most promising ideas be pursued in an attempt to build on a more limited set of proposals. So it might be instructive to consult with the private companies and ask them what 2 or 3 proposals hold the most promise. And remember that the companies are competitors in certain categories and will only divulge so much before they back away and request that solicitations be issued.

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#11

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Monday, March 23, 2020 8:27:02 AM  
**Last Modified:** Monday, March 23, 2020 8:36:58 AM  
**Time Spent:** 00:09:55  
**IP Address:** 134.67.29.93

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Page 1

**Q1** Please write your name:

Julianna Greenberg

**Q2** Please write your email address:

greenberg.julianna@epa.gov

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Habitat/Wetlands

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

8

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

7

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

I think that the Oyster Ignite talks were helpful for understanding how environmental financing works and what it is. I think I personally would have benefited from discussing a different example where the resource being financed was not a physical item that would later be sold. I think I have trouble making the connection between how this works with oysters and how it would work with a more abstract concept like clean air.

**Q7** Out of the presentations, which two did you find most useful? **Oyster Ignite Talks**

**Q8** What did you like/dislike about the breakout sessions?

In my breakout session we did not talk much about actual financing strategies. I think it was a very interesting discussion, but our expert was not an expert in financing wetlands specifically. While he was very knowledgeable about financing in general, I think that in order to actual come up with strategies to finance wetlands we would need to work with someone who has expertise in that specifically.

**Q9** How appropriate was the time allocated for the breakout sessions?**Too long****Q10** How might you be able to apply the information learned at the Forum?

Right now, I'm still not sure how I am going to apply the knowledge I gained at the forum. The groups that I work with were not specifically discussed so I'm going to need to spend more time understanding the underlying concepts of financing to understand better how to apply the information. While I think I learned a lot at the forum, I am having trouble expanding the information we talked about beyond the specific cases we talked about at this point.

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

**3****Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

**6****Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

I feel like I need a lot more information to make my financing strategy investment ready. We did not really reach the point of financing strategy in our breakout group discussions and mostly talked about funding opportunities and very broad strokes of financing. I am still at the point where I "don't know what I don't know".

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:**George Kelly****Q15** How many hours of consulting time would you like?

10

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:**Respondent skipped this question****Q17** How many hours of consulting time would you like?**Respondent skipped this question**

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

Respondent skipped this question

---

**Q19** How many hours of consulting time would you like?

Respondent skipped this question

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**Q20** Please provide any general comments or feedback here:

Respondent skipped this question

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#12

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Tuesday, March 24, 2020 5:06:33 PM  
**Last Modified:** Tuesday, March 24, 2020 5:21:32 PM  
**Time Spent:** 00:14:58  
**IP Address:** 71.200.103.21

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Page 1

**Q1** Please write your name:

Amy Jacobs

**Q2** Please write your email address:

ajacobs@tnc.org

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Wetlands

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

8

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

6

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

The working sessions with the group was incredibly helpful to develop new ideas and gain new perspective on opportunities.

**Q7** Out of the presentations, which two did you find most useful? **In search of cost-effective nutrient loss reductions****Q8** What did you like/dislike about the breakout sessions?

Having the participation of someone from the private sector brought new ideas and enhanced the conversation.

**Q9** How appropriate was the time allocated for the breakout sessions?

**Too short**

**Q10** How might you be able to apply the information learned at the Forum?

I would like to continue to engage in dialogue with the private sector on bringing in their experience to advance Bay goals.

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

**6**

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

**5**

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

Yes - our group did not have enough time to get into the details of what the opportunities are or what we need to do to advance.

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**George Kelly**

**Q15** How many hours of consulting time would you like?

20 hours

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**None**

**Q17** How many hours of consulting time would you like?

20 hours if Jon Winsten is available

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q19** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q20** Please provide any general comments or feedback here:

Thank you for hosting and convening this forum - it was refreshing to bring together partners with new faces and explore new ideas.



#13

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Thursday, March 26, 2020 9:17:04 AM  
**Last Modified:** Thursday, March 26, 2020 9:40:14 AM  
**Time Spent:** 00:23:09  
**IP Address:** 167.102.37.34

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Page 1

**Q1** Please write your name:

Dave Goshorn

**Q2** Please write your email address:

david.goshorn@maryland.gov

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Fostering Chesapeake Stewardship

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

9

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

8

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

I found the two morning presentations and the oyster panel to be most useful. The breakout sessions were interesting but I don't feel like we accomplished a whole lot. My one recommended change would have been to spend less time in breakout and more time in wrap-up after the breakouts on collectively identifying next steps.

**Q7** Out of the presentations, which two did you find most useful?

**In search of cost-effective nutrient loss reductions,  
Finance 301**

**Q8** What did you like/dislike about the breakout sessions?

I liked talking in small groups, but I don't feel like we accomplished much. We seemed to be floundering with no real direction.

**Q9** How appropriate was the time allocated for the breakout sessions?

**Too long**

**Q10** How might you be able to apply the information learned at the Forum?

Maybe apply to developing the finance strategy for the Conowingo WIP?

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

**4**

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

**3**

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

Yes, but I'm not sure what I need beyond more time sitting down and talking to SEVERAL finance experts. One thing I learned was that you should not depend on just one expert as there really is no one expert - they all have different areas of expertise.

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q15** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q17** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q19** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q20** Please provide any general comments or feedback here:

I didn't fill out the above because I really don't know where to start. Not sure that my GIT (GIT 6) should be at the top of the list for this. I would rather "donate" our time to developing a comprehensive approach that could be applied across the program. My suggestion would be to make finance coaches available to review, critique, and adapt what is being developed for the Conowingo WIP as a model for watershed wide implementation.

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#14

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Thursday, March 26, 2020 9:25:34 AM  
**Last Modified:** Thursday, March 26, 2020 9:44:12 AM  
**Time Spent:** 00:18:38  
**IP Address:** 170.144.235.136

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Page 1

**Q1** Please write your name:

Katie Brownson

**Q2** Please write your email address:

katherine.brownson

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Forestry

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

**5 (average)****Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

**4****Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

I think the general conservation finance sessions at the beginning were helpful and well-done. I didn't really get much out of the time we spent on oysters. I understand the intention to do a deep dive on a particular case study, but I think that time could have been better spent on a more cross-cutting topic or going into detail on a better-developed case study where conservation finance is being used effectively.

**Q7** Out of the presentations, which two did you find most useful?

**In search of cost-effective nutrient loss reductions,  
Finance 301**

**Q8** What did you like/dislike about the breakout sessions?

We spent a lot of time getting on the same page about what we were trying to accomplish, rather than really using the expertise in the room to flesh out viable conservation finance models to pursue further.

**Q9** How appropriate was the time allocated for the breakout sessions?

Other (please specify):

It wasn't enough time without any pre-forum work as a group, but could have been enough if we had an intro call or some orientating material distributed before the Forum.

**Q10** How might you be able to apply the information learned at the Forum?

As Ashley mentioned, these sorts of projects really need managers with experience managing for profitability (which most of us conservationists don't have). Part of how we are applying this information is just bringing in this outside expertise and trying to maximize our consultation hours to better understand what we need to do to transform our status quo way of trying to get buffers in to better attract private investors.

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

6

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

4

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

One of the biggest takeaways from my conservation finance learning so far is just how much expertise and work is really needed before a finance strategy will be investment ready. Doing the due diligence, demonstrating ROI, developing the business model and transaction structures all require a lot more work.

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

Ben Guillon

**Q15** How many hours of consulting time would you like?

As many as we can get

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

Respondent skipped this question

**Q17** How many hours of consulting time would you like?

Respondent skipped this question

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

---

**Q19** How many hours of consulting time would you like?

**Respondent skipped this question**

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**Q20** Please provide any general comments or feedback here:

One general observation is that since all of these experts compete for projects, it may have been counterproductive to have multiple experts working with the same groups. I know one of the experts we are working with (outside the forum) mentioned he wouldn't want to go into specifics about models or potential investors in our project with his competitors in the room.

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#15

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Thursday, March 26, 2020 9:17:16 AM  
**Last Modified:** Thursday, March 26, 2020 9:46:50 AM  
**Time Spent:** 00:29:34  
**IP Address:** 166.67.66.243

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Page 1

**Q1** Please write your name:

James Martin

**Q2** Please write your email address:

james.martin@deq.virginia.gov

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Water Quality

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

7

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

7

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

Interaction time with finance experts

**Q7** Out of the presentations, which two did you find most useful?**In search of cost-effective nutrient loss reductions,  
Finance 301****Q8** What did you like/dislike about the breakout sessions?

They were good discussions, really liked the opportunity to interact with the finance experts

**Q9** How appropriate was the time allocated for the breakout sessions?

**Too short**

**Q10** How might you be able to apply the information learned at the Forum?

Hope to explore the Pay-for-performance approach for agricultural implementation.

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

**5 (familiar)**

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

**3**

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

Yes. Need to continue the discussion with finance experts to narrow and focus on a specific pilot project design.

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Ashley Allen Jones**

**Q15** How many hours of consulting time would you like?

24 to start

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q17** How many hours of consulting time would you like?

Jon Winsten - 24 hours

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q19** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q20** Please provide any general comments or feedback here:

Initial thought would be to have the WQGIT leadership work with the experts to frame a presentation to the WQGIT. Then work with interested WQGIT members to design a pilot project that could be tested in multiple jurisdictions.



#16

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Thursday, March 26, 2020 2:48:59 PM  
**Last Modified:** Thursday, March 26, 2020 3:22:37 PM  
**Time Spent:** 00:33:37  
**IP Address:** 170.144.218.235

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Page 1

**Q1** Please write your name:

Sally Claggett

**Q2** Please write your email address:

sally.claggett@usda.gov

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Forests

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

7

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

7

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

Most: Finance 301 and Dan Nees' panel

Least: Oysters and focus group discussion

(the focus groups had a lot of potential but people came at them with such varied levels of expertise. Ours was frustrating.)

**Q7** Out of the presentations, which two did you find most useful?**In search of cost-effective nutrient loss reductions,  
Finance 301**

**Q8** What did you like/dislike about the breakout sessions?

as already mentioned

**Q9** How appropriate was the time allocated for the breakout sessions?

Other (please specify):

As they were, too long. We did not have effective facilitation.

**Q10** How might you be able to apply the information learned at the Forum?

We are ready to go-- in the middle of pitching a plan to the PSC but want some consv finance advice and PSC help to build it.

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

8

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

8

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

Yes. As mentioned, we are working to build a program using CF. The target is amplification of Riparian forest buffer and wetland restoration.

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Ben Guillon**

**Q15** How many hours of consulting time would you like?

20

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Leonard Shabman**

**Q17** How many hours of consulting time would you like?

10

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q19** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q20** Please provide any general comments or feedback here:

Forestry and Wetlands are working together on a specific proposal and would like to coordinate on our finance expertise access.

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#17

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Thursday, March 26, 2020 5:38:04 PM  
**Last Modified:** Thursday, March 26, 2020 5:43:27 PM  
**Time Spent:** 00:05:23  
**IP Address:** 71.246.218.70

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Page 1

**Q1** Please write your name:

Julie Reichert-Nguyen

**Q2** Please write your email address:

julie.reichert-nguyen@noaa.gov

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Climate

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

8

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

8

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

I liked the direction that the Finance Forum took in bringing finance and natural resource experts together and presenting a tangible natural resource example. I suggest re-organizing the day though. I would have benefited with the Finance 301 presentation being first. Also, having two relevant subjects as examples would have been nice (this could be accomplished by shortening the last breakout group session, which felt a bit too long). After the 301 Finance presentation, follow with ignite talks for the first topic with panel discussion immediately afterwards. Before lunch, have the breakout group session 1 with clear objective. Afternoon - ignite talks with second relevant topic and panel discussion followed by one hour breakout group session with clear objective. Finish with report outs and lessons learned.

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**Q7** Out of the presentations, which two did you find most useful?

**In search of cost-effective nutrient loss reductions, Finance 301, Oyster Ignite Talks**

**Q8** What did you like/dislike about the breakout sessions?

I liked that we were given time with the finance experts to ask specific questions. We had fruitful discussions that gave us some ideas to pursue when we update our next Climate Resiliency Workgroup work plan.

We were confused on who would be facilitating the discussion and whether we should use the worksheets and when. We just ended up having an open discussion during both break out sessions and didn't use the worksheets. Some instruction before breaking out into groups may have helped alleviate this confusion. I ended up facilitating the discussion even though I was assigned as the note taker. However, we did end up having meaningful discussions. Also, the 2nd break out group session was a bit too long. An hour would have been enough time. By the second hour people became distracted and were doing other things.

**Q9** How appropriate was the time allocated for the breakout sessions?

**Too long**

**Q10** How might you be able to apply the information learned at the Forum?

The Climate Resiliency Workgroup is interested in incorporating a finance action item in our next work plan. We have some ideas from our discussion with the finance expert, but would benefit from additional consulting time.

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

**6**

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

**2**

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

We need a better understanding how insurance companies may value projects that minimize flood risk to prevent damage to properties and potential investment mechanisms.

We need a better understanding how blue carbon could compete with terrestrial carbon sequestration. Currently, it sounds like the terrestrial market is well established and unlikely that investors will take a risk with blue carbon unless there are other sources of revenue. Also need to quantify the carbon benefit of marshes, wetlands, SAV to see it can even compete with the terrestrial (e.g., trees) market. Sounds like bundling benefits may be more worthwhile from a investment risk standpoint. Would like more information on how bundling works.

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**David Tepper**

**Q15** How many hours of consulting time would you like?

8

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**George Kelly**

**Q17** How many hours of consulting time would you like?

4

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Josh Parrish (did not attend Forum)**

**Q19** How many hours of consulting time would you like?

4

**Q20** Please provide any general comments or feedback here:

I really didn't know what to expect from the finance forum, but really glad I attended. I felt it was worthwhile and a great starting point for newbies like me to improve my understanding of natural resource financing options.

I would have liked to be able to talk with more of the finance experts. Maybe for the next one there can be an hour session that mimics "speed-dating" where the finance experts switch tables every 15 minutes. I'm wondering if there may have been some different perspectives we missed out on by not talking with multiple finance experts.

#18

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Thursday, March 26, 2020 8:44:38 PM  
**Last Modified:** Thursday, March 26, 2020 8:52:24 PM  
**Time Spent:** 00:07:45  
**IP Address:** 71.244.145.202

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Page 1

**Q1** Please write your name:

Greg Busch

**Q2** Please write your email address:

gregory.busch@maryland.gov

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Agriculture and stormwater

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

7

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

5 (as expected)

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

I found the breakout group helpful

**Q7** Out of the presentations, which two did you find most useful? **Finance 301**

**Q8** What did you like/dislike about the breakout sessions?

Like: There were great ideas and some knowledgeable people. Most of the valuable discussions were did not necessarily follow the prescribed topics, which was not a bad thing. I like the more free flowing conversation. Dislike: A lot of the talking was done by a few strong voices in the group. Would have been nice to hear from everyone.

**Q9** How appropriate was the time allocated for the breakout sessions?

**Too short**

**Q10** How might you be able to apply the information learned at the Forum?

Since leaving the meeting I have been pushing my organization to adopt some of the innovative financing approaches we discussed.

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

**7**

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

**5**

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

Not sure what this question means

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Ashley Allen Jones**

**Q15** How many hours of consulting time would you like?

4

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q17** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q19** How many hours of consulting time would you like?

**Respondent skipped this question**



**Q20** Please provide any general comments or feedback here:

Respondent skipped this question

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#19

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Friday, March 27, 2020 11:11:54 AM  
**Last Modified:** Friday, March 27, 2020 11:18:55 AM  
**Time Spent:** 00:07:01  
**IP Address:** 98.192.224.65

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Page 1

**Q1** Please write your name:

Debbie Herr Cornwell

**Q2** Please write your email address:

deborah.herrcornwell@maryland.gov

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Healthy Watersheds GIT

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

9

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

7

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

Respondent skipped this question

**Q7** Out of the presentations, which two did you find most useful?

Finance 301

**Q8** What did you like/dislike about the breakout sessions?

Respondent skipped this question

**Q9** How appropriate was the time allocated for the breakout sessions?

**About the right length**

**Q10** How might you be able to apply the information learned at the Forum?

By learning about the various types of financing options/techniques, more robust conversations can be had with various stakeholders to advance our efforts. Having a basic understanding of terminology is very helpful and enables folks from varying backgrounds to participate in discussions.

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

**6**

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

**6**

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

**Respondent skipped this question**

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q15** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q17** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q19** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q20** Please provide any general comments or feedback here:

**Respondent skipped this question**

#20

COMPLETE

**Collector:** Web Link 1 (Web Link)  
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**Last Modified:** Friday, March 27, 2020 11:41:50 AM  
**Time Spent:** 00:11:35  
**IP Address:** 167.102.37.34

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Page 1

**Q1** Please write your name:

Megan Granato

**Q2** Please write your email address:

megan.granato@maryland.gov

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

climate/SAV

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

10 (excellent)

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

7

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

I really liked all of it! I thought it was a good balance of getting everyone on the same page in terms of financing concepts and examples and then providing time for group conversations. I don't know that all of the pre-meeting materials were very helpful or particularly necessary though. The lists of definitions might have intimidated some of the participants who were less familiar with financing concepts.

**Q7** Out of the presentations, which two did you find most useful? **Finance 301**

**Q8** What did you like/dislike about the breakout sessions?

I thought the breakout sessions were really informative. Our group didn't really follow the worksheet like other groups did, but I think we had a very productive conversation. I do think my group benefited from having a few folks who had well defined financing issues to work through. Without that, it might have been less of a dynamic discussion.

**Q9** How appropriate was the time allocated for the breakout sessions?**About the right length****Q10** How might you be able to apply the information learned at the Forum?

I manage state and federal funds and participate in the Budget and Finance Workgroup, so it is helpful for me to be aware of the financing needs and potential solutions for a variety of watershed-related topics. Its also very helpful for me to have better insight into how private capital firms are involved, and could be more involved, in Bay-related financing in the future.

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

**9****Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

**5****Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.**Respondent skipped this question****Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:**Respondent skipped this question****Q15** How many hours of consulting time would you like?**Respondent skipped this question****Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:**Respondent skipped this question****Q17** How many hours of consulting time would you like?**Respondent skipped this question****Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:**Respondent skipped this question****Q19** How many hours of consulting time would you like?**Respondent skipped this question**

**Q20** Please provide any general comments or feedback here:

I am not a GIT member, so I left questions 14-19 blank.

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#21

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Friday, March 27, 2020 12:06:26 PM  
**Last Modified:** Friday, March 27, 2020 1:01:45 PM  
**Time Spent:** 00:55:18  
**IP Address:** 71.121.131.246

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Page 1

**Q1** Please write your name:

Paul Emmart

**Q2** Please write your email address:

paul.emmart@maryland.gov

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Forestry

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

8

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

9

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

It was really very successful to meet our experts and have them assigned to our tables. I had watched several YouTube videos done by the experts named on our agenda to prep before coming to the forum and it helped start up conversations easily. Informal chat and exchanges were terrific. The break out sessions were necessarily a bit messy. The group had difficulty being systematic in identifying various solutions to the question of how to make forestry profitable, desirable and sustainable. I felt there was a bit of role confusion in the sense that the experts thought we would provide solutions and we (non-experts) thought they would.

**Q7** Out of the presentations, which two did you find most useful? **Finance 301**

**Q8** What did you like/dislike about the breakout sessions?

We spent a lot of time hearing what the experts had done in their past. I think that part was interesting but there was a bit of dislocation in the discussion to move from hearing that biographic info to turning to the problem and formulating a way forward.

**Q9** How appropriate was the time allocated for the breakout sessions?

**About the right length**

**Q10** How might you be able to apply the information learned at the Forum?

We could look at different financing models; the discussion ranged from small farmers getting tax incentives to keep and grow forests/buffers to large corporations investing in forest assets under a buy-mitigate-sell model. We had a lot of perspectives about stimulating a market rather than from traditional state led mechanisms related to grants and state purchases.

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

**7**

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

**5**

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

Yes, we needed more information. Although we heard about some examples, it was hard to relate those to Maryland. I think a narrative of various successful finance strategy examples would be helpful to crystalize what the expected outcome would be and what mechanical procedures were used to achieve it. Even if those mechanisms are not yet in public policy, it would help direct changes.

For example, Dylan Jenkins seemed very knowledgeable about large scale compliance drivers in carbon markets and how corporations might be enticed to use his organization to satisfy those regulatory requirements. We had a hard time linking that work to Maryland's forestry/tree planting or buffer needs for the TMDL so the discussion endpoint wasn't clear. His example was one of the carbon neutral development in CA which would correspond somewhat to accounting for growth in the CBW.

Ben Gullion spoke about the practice of "working buffers" which also had some application but pragmatically, we didn't follow it down to evaluate it enough and the take away was that investors may not be inclined to participate because the profit would be too little after too long.

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Ellen Kohler**

**Q15** How many hours of consulting time would you like?

Not sure what hours would be appropriate. She seemed to have the best familiarity with Maryland's situation and a legal sense of which parties would have responsibility for implementing changes to increase forestry.



**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

Respondent skipped this question

**Q17** How many hours of consulting time would you like?

Respondent skipped this question

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

Respondent skipped this question

**Q19** How many hours of consulting time would you like?

Respondent skipped this question

**Q20** Please provide any general comments or feedback here:

It was a really innovative, good opprotunity to meet a variety of people.

If there is a post-forum report, it would be benficial to see the final table-by-table summaries of ideas generated for creative solutions.

Thank you!

#22

COMPLETE

**Collector:** Web Link 1 (Web Link)  
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**Last Modified:** Friday, March 27, 2020 1:25:39 PM  
**Time Spent:** 00:22:39  
**IP Address:** 68.134.216.198

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Page 1

**Q1** Please write your name:

Tuana Phillips

**Q2** Please write your email address:

phillips.tuana@epa.gov

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Stewardship

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label)

7

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label)

8

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

It was really great to hear from finance experts. I liked Ashley's presentation a lot, though there did seem to be a sort of contrast between what she was presenting vs. what the first presenter was talking about. The first presenter seemed to be focused on how do we pay farmers to put conservation practices on their land? Whereas Ashley was more about how can the private sector invest in opportunities to, e.g., get the farmer to put conservation practices on their land. I believe we congregated that day to talk more about the latter but because of the contrasting approaches it set the stage for the day in a way that was a little confusing to me.

**Q7** Out of the presentations, which two did you find most useful? **Finance 301**

**Q8** What did you like/dislike about the breakout sessions?

Having the finance experts were great. At our table the experts both came from the non-profit sector, so it would have been neat to have a finance expert from the private sector as well but that is okay. I think the Stewardship table struggled a lot with what to focus on, it was difficult to apply stewardship ideas to finance. Maybe instead of grouping by Goal Team in the future we can think about grouping teams another way (e.g., have one team focused on how insurance companies can invest in parks as a way to promote people going outside and receiving health benefits from doing that, one team on how private companies can invest in landowner actions that happen on the land, one team focused on how private companies can make investments to promote oyster/aquaculture practices, maybe even one team on how tourism companies can play a role. Each team would be made up of different GIT representatives for a cross-outcome benefit discussion on finance.

**Q9** How appropriate was the time allocated for the breakout sessions?

**About the right length**

**Q10** How might you be able to apply the information learned at the Forum?

**Respondent skipped this question**

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

**4**

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

**1 (not ready)**

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

**Respondent skipped this question**

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q15** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q17** How many hours of consulting time would you like?

**Respondent skipped this question**

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

**Respondent skipped this question**

**Q19** How many hours of consulting time would you like?      Respondent skipped this question

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**Q20** Please provide any general comments or feedback here:

I really appreciate all of the hard work that went into this! It was a bit challenging to be a part of the stewardship table but I still learned a lot. One other comment - I did think one of the panel moderators made some inappropriate remarks that rubbed me the wrong way. Of course, this is not something you could have controlled. But also - it was great to have Ashley, a woman, as one of the presenters! In the future, it would be great to have some more women and diversity within the presenters and moderators.

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#23

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Friday, March 27, 2020 2:00:32 PM  
**Last Modified:** Friday, March 27, 2020 2:04:35 PM  
**Time Spent:** 00:04:03  
**IP Address:** 134.67.29.64

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Page 1

**Q1** Please write your name:

Hilary Swartwood

**Q2** Please write your email address:

swartwoodh@chesapeake.org

**Q3** Please write the name of the Goal Implementation Team (GIT) or breakout group in which you participated during the Forum:

Breakout Group 5: Forestry

**Q4** How would you rank the Finance and Investment Forum overall on a scale of 1 to 10, with 1 being poor and 10 being excellent?

(no label) 8

**Q5** How would you rank your learning from the Finance and Investment Forum and pre-meeting materials on a scale of 1 to 10, with 1 being below expectations and 10 being beyond expectations?

(no label) 8

**Q6** During the Finance and Investment Forum, what parts of the agenda were most helpful? What worked well and what could have been improved?

The presentations were most helpful, particularly the panel and discussions as a whole group.

**Q7** Out of the presentations, which two did you find most useful? **Finance 301,**  
**Oyster Ignite Talks**

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**Q8** What did you like/dislike about the breakout sessions?

I staffed the Forestry group, which I don't have any experience with, so I felt a little out of my depth in terms of being able to contribute effectively.

**Q9** How appropriate was the time allocated for the breakout sessions?

About the right length

**Q10** How might you be able to apply the information learned at the Forum?

Useful tool to at least get you to think outside of the box depending on the project.

**Q11** After attending the Forum, how would you rank your familiarity with the markets and financing mechanisms available to your topic of interest, with one being not familiar and ten being very familiar?

(no label)

4

**Q12** After attending the Forum, how would you rank your marketable environmental good or service in terms of investment readiness with one being least ready to ten being most ready?

(no label)

5

**Q13** Do you need additional information to make your finance strategy investment ready? If possible, please specify.

Respondent skipped this question

**Q14** Please select the finance coach(es) you would like to consult with using the dropdown box below:

Respondent skipped this question

**Q15** How many hours of consulting time would you like?

Respondent skipped this question

**Q16** Please select the finance coach(es) you would like to consult with using the dropdown box below:

Respondent skipped this question

**Q17** How many hours of consulting time would you like?

Respondent skipped this question

**Q18** Please select the finance coach(es) you would like to consult with using the dropdown box below:

Respondent skipped this question

**Q19** How many hours of consulting time would you like?

Respondent skipped this question

**Q20** Please provide any general comments or feedback here:

Respondent skipped this question