



Advancing SHC in the Southeast: Linking our trust resources and natural resource indicators in the South Atlantic LCC geography

Beyond “Selecting” Surrogate Species

July 16, 2014₁

Advancing SHC in the Southeast: Linking our trust resources and natural resource indicators in the South Atlantic LCC geography
Moving beyond selection of surrogate species

Presentation given July 16, 2014

Goal: outline activities within the South Atlantic geography and ask project leaders for input (completion of a survey)



Connecting the Pieces
Making sense of the alphabet soup and your role in our collaborative way of working - 'Conservation Southern Style'

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Connecting the Pieces presentation (June 19, 2014) outlined lots of the pieces to a larger puzzle that is our conservation landscape.

A PDF, including speaker's notes, is available for all:

<http://www.fws.gov/southeast/SHC/pdf/Connecting-the-Dots-06-19-14.pdf>



Advancing SHC in the Southeast

- **Accountability**
- **Context**
- **Engagement**





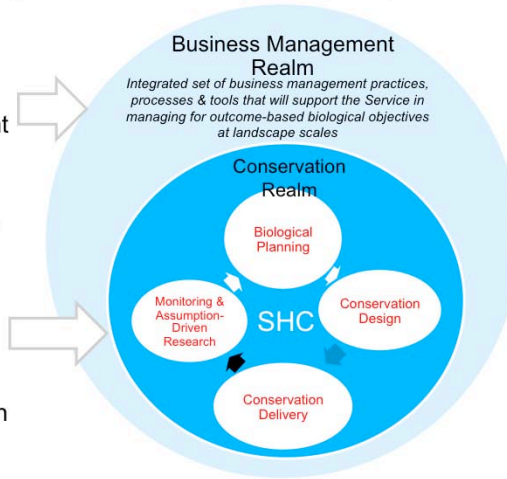
What's Different? Full implementation of SHC includes a Conservation and *Business Management* Realm

Our Business Mgt System is not designed to support an SHC approach to conservation - our way of working together to sustain fish, wildlife, and plants.

"We have not yet implemented the equally critical "management realm, consisting of the suite of management and administrative functions that comprise conservation delivery."

— SHC Handbook – A Guide to Implementing the Technical Elements of SHC (Version 1.0), 2008, pg. 6

SHC asks us to explicitly connect "local" actions across our organization and with others to achieve outcome-based population objectives at landscape scales.





Overview Version 1.0 – Business Support Data Tool

U.S. Fish & Wildlife Service

kristin_shears@fws.gov [log out]



Species Conservation at Landscape Scales

Biological Planning

Consistently identifying common biological outcomes at landscape scales using surrogate species approach, and species of conservation interest, setting population objectives.

- Surrogate Species
- Species of Conservation Interest (Outside of Surrogate Landscape)
- Other Service Priorities

Feb 2014 – Version 1.0

Conservation Design – setting Landscape Objectives

Landscape conservation design includes identifying those factors limiting our species conservation targets from achieving their population objectives, and helps us establish landscape objectives that describe where, how much conservation is needed.

Under Construction

June/July 2014

Conservation Delivery – Landscape Annual Work Planning

Demonstrates the Service's cross-program alignment around common biological outcomes at landscape scales, and enables us to work in concert with partners towards a shared understanding of landscape-scale priorities, roles, responsibilities, work activities, and intended results.

Under Construction

Roadmap: August 2014 (e.g South Atlantic)

Conservation Accountability

Allows the Service to measure our conservation success, in terms of both species outcomes, and the effectiveness of our conservation actions, and adapt over time.

Under Construction

TBD

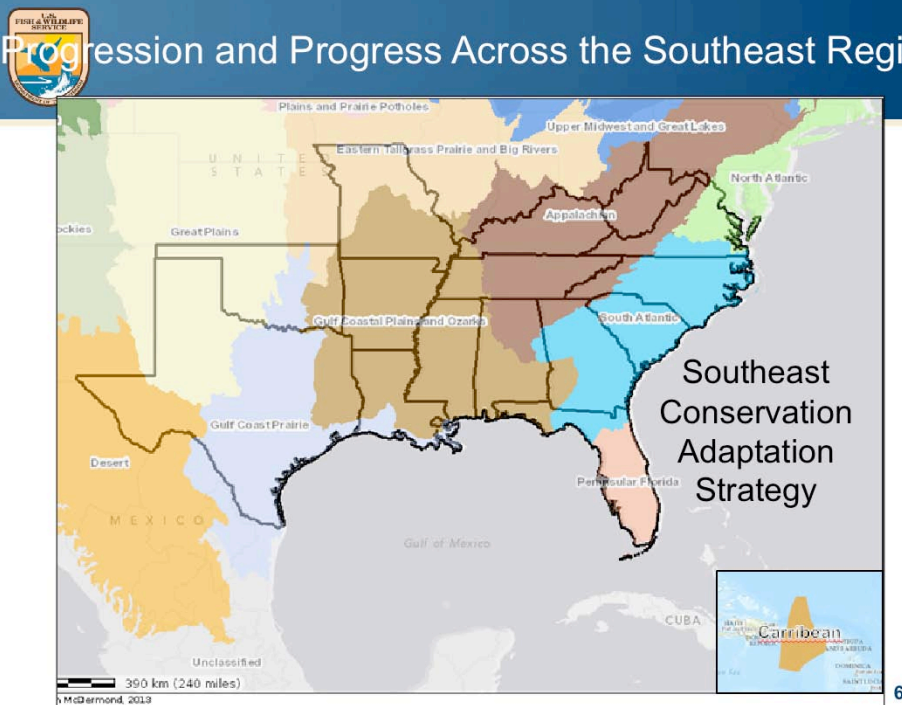
Conservation Investment Strategy – Tying Resource Allocations to Landscape Biological Outcomes

Enables the Service to make well-reasoned, transparent conservation investment decisions based on common biological outcomes at landscape scales and in consideration of the Service's unique capacity to address them.

Under Construction

Roadmap: August 2014

Progression and Progress Across the Southeast Region



Premise and Expectations of FWS joining partners at the LCC table:

- FWS is a vested partner in the LCC Network contributing time, talent, and resources in science, technology, and collaboration capacity to support our ability to achieve our Mission.
- There is a clear and solid intersection between the Vision/Mission of LCCs and FWS Mission.
 - Includes sustaining fish and wildlife: Explicit landscape-scale objectives; Landscape design; Conservation Action supporting objectives; measure success and refine.
- FWS conservation enterprise is fully engaged in the LCC landscape conservation work: RDT members serve on Steering Committees; FWS experts participate in technical processes and forums; LCC forums include our other vested partnerships (e.g., JVs, FHP); and we leverage funds to support landscape scale science priorities.

As of Aug 2014

SALCC – Natural Resource Indicators (which include species and objective levels). 1st generation being evaluated and revised.

GCP (R2 lead) – Focal Species

GCPOLCC – Technical Team has 1st Draft of “End-points” (which include species and some objective levels) for each of the 5 Sub-geographies (East and West Gulf Coastal Plains, Interior Highlands, Mississippi Alluvial Valley, Gulf Coast).

PFLCC – Post-doc working with partners to gather and develop explicit objectives (to include species).

ALCC (R5 lead) – Steering Committee to discuss and provide direction on establishing Natural Resource Indicators (to include species and objective levels) at their Sept 2014 meeting.

CLCC – Priorities and objectives of partners are being gathered and discussions for integrating on going



Advancing SHC: R4 Initial Geography

- SALCC selected as the geography for SE advancing Strategic Conservation Management v 1.0
- SALCC blueprint process has selected and is revising natural resource indicators



--SALCC selected as the geography for SE advancing Strategic Conservation Management v 1.0

--SALCC blueprint process selected indicators (<http://www.southatlanticlcc.org/page/conservation-blueprint>)

Definition: Natural Resource Indicators are measures of conservation objectives identified and agreed upon by partners (to include FWS) in SALCC geography. They include both biotic and abiotic measures which can be easily tied to a biological response. The assumption is that when the collection of indicators are at their target levels, landscape conditions will be supporting sustainable level of natural resources (to include species entrusted to FWS) in the SALCC.

Indicators version 1.0 are based on detailed input from 235 experts in marine, freshwater, and terrestrial resources in the South Atlantic region and 9 experts representing all 5 adjacent LCCs.

Current effort focused on monthly reviews of each indicator group. FWS needs to remain engaged in the on going revision process. Review progress and sign up for a revision team: <http://www.southatlanticlcc.org/page/indicators>



Approach: SALTeam

RDT charged a cross programmatic team of field project leaders and biologists to discuss integration and implementation of natural resource indicators and surrogate species while striving to achieve the mission of the FWS.

Charge: Link FWS trust resources and LCC natural resource indicators in the SALCC geography to articulate our role in contributing/linking our work to the natural resource indicators, and specifically the surrogate species, of the SALCC in support of the mission of the Service.

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- RDT charged a cross programmatic team of field project leaders and biologists to discuss integration and implementation of natural resource indicators and surrogate species while striving to achieve the mission of the FWS.
- Charge: Link FWS trust resources and LCC natural resource indicators in the SALCC geography to articulate our role in contributing/linking our work to the natural resource indicators, and specifically the surrogate species, of the SALCC in support of the mission of the Service.
 - The team with project leader input will collate and help to clarify the FWS's contribution to the SALCC Conservation Blueprint (landscape design) and demonstrate to the broader LCC partners how our Mission-focused work is applying and targeting resources to achieve the shared vision of the SALCC partnership.
 - This is an opportunity to make the linkage of how work we do every day links with the blueprint at a broader scale.
 - The team aims to carefully consider input on draft products with all Service personnel in the South Atlantic LCC geography.
 - The team has the support of leadership to develop the products and make recommendations.
 - The team will use an One Service approach to completing their tasks



Approach: Team Members

- Pete Benjamin, Raleigh Ecological Services Field Office
- Catherine Phillips, Panama City Ecological Services and Fisheries Field Office
- John Stanton, South Atlantic Migratory Bird Field Office
- Craig Watson, South Atlantic, Atlantic Coast Joint Venture
- Wilson Laney, Fisheries/ES, Raleigh Ecological Services Field Office and RO
- Steve Jackson, Edenton National Fish Hatchery
- Mike Bryant, NC Coastal Plain NWR Complex
- Andrew Gude, Lower Suwanee and Crystal River NWRs
- Chuck Hayes, Savannah Coastal Refuges Complex
- Laurel Barnhill, Inventory and Monitoring Network

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Membership of the SALTeam.

Role to engage FWS project leaders in the South Atlantic LCC (SALCC) that will enable the Service to articulate its role in contributing/linking via our trust resource work to the natural resource indicators, and specifically the surrogate species, of the SALCC in support of the mission of the Service.

Critical that all team members are facilitating and carefully considering input on draft products with all Service project leaders in the South Atlantic LCC geography.



Approach: Products

1. Held the first in person team meeting, Raleigh, March 11 and 12, 2014
2. Cross-walk the SALCC natural resource indicators with the current work of the Service on priority trust resources
3. Develop a three year work plan for the Service within the SALCC geography
4. Develop a summary report that articulates the Service's contribution to the Cooperative's Blueprint
5. Provide support to the State x FWS decision framework
6. The team will facilitate and carefully consider input on draft products will all Service Project Leaders in the South Atlantic LCC geography.

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- Held initial team meeting; completed in March 2014.
- Cross walking the SALCC natural resource indicators with the current work of the Service on priority trust resources, identifying what trust resources would be covered by addressing the SALCC natural resource indicators (Due July 1, 2014).
 - Ask today for you to fill out a survey monkey, more in later slides.
- Work with FWS project leaders to develop a three year work plan for the Service within the SALCC geography, that lays out our strategy using a surrogate species approach for conserving our trust resources , and how that work will contribute to natural resource indicators (and the cross walk) (Due September 1, 2014).
 - The initial prototype will take into account the SALCC blueprint, how surrogates link to natural resource indicators, and how our actions address indicators. It will also provide a baseline for how FWS actions could change. Pete Benjamin, Chuck Hayes and Catherine Phillips to lead this effort.
- Develop a summary report for the Service's SALCC steering committee representative (Due October 1, 2014).
 - The initial prototype discussed was a 2 to 4 page summary of the process and products that articulate the Service's trust resources work toward the natural resource indicators of the SALCC as well as achieving the mission of the Service. Laurel Barnhill and Andrew Gude to lead this effort.
 - Objective to communicate steps taken and products developed to articulate the FWS's contribution to the SA Cooperative's Blueprint to sustain natural resources.
- Provide support to the State and FWS decision framework; subsequent versions (Due February 28, 2014). The team recognized the need to provide input on the FWS selection process and finalization of V 1.0. The entire team will provide input to Bill Uihlein to synthesize and integrate into meetings with States Points of Contacts identified by the state Director.
- Team committed to facilitating and carefully considering input on draft products will all Service Project Leaders in the South Atlantic LCC geography.

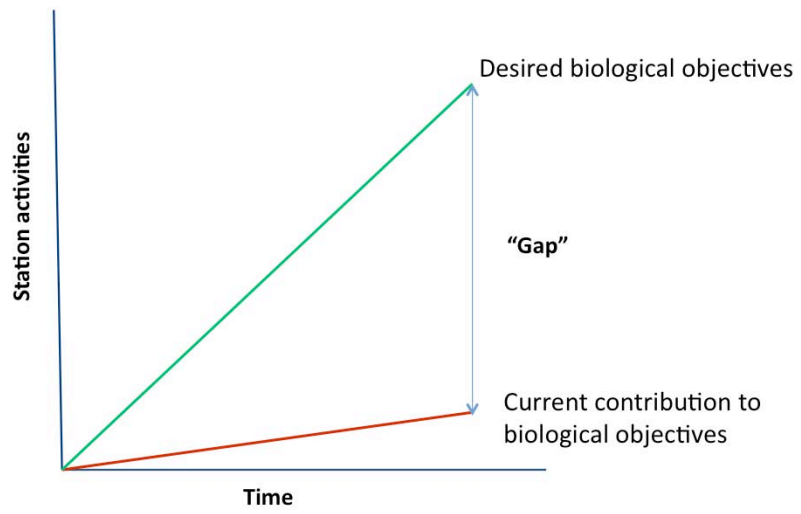


Workplan Development

Year 1/Ver 1.0	Year 2/Ver 2.0	Year X/Ver X
Initial crosswalk and workplan	Station activities	Activities contribute to biological objectives
Baseline		Clear understanding of relationship between objectives and work
		Species are tested and represent what we think they do
		Assumptions are understood and clear

Work with FWS project leaders to develop a three year work plan for the Service within the SALCC geography, that lays out our strategy using a surrogate species approach for conserving our trust resources , and how that work will contribute to natural resource indicators (and the cross walk) (Due September 1, 2014).

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FWS Director Dan Ashe
(his statement to Team member on July 6, 2014)

*“.....assessing existing efforts at the station-level and collectively, examining the “gap” between what we are doing now, and what we need to be doing **to be effective on the landscape**. It puts our efforts into the context of what the Service is doing and **what we and partners are doing together**.”*



Product: Crosswalk

- Task: Develop a cross walk to illustrate present activities of the Service and identify what trust resources would be covered by addressing the SALCC natural resource indicators
- Product: A baseline to identify gaps and determine current work (create a 3D matrix)
- Next steps: Project leaders provide input, review 3D matrix and Team draft a 3-year work plan

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The cross walk prototype is structured around SHC elements, indicators, surrogates (V 1.0), and conservation actions based on the Conservation Actions Taxonomy of the Conservation Measures Partnership, <http://www.conservationmeasures.org/>) to understand current work of FWS for indicators and surrogates (adding a couple actions to account for work on monitoring and research).

Critical to gather insight from project leaders and their staff to fill in the cross walk to identify the conservation actions we are implementing and how those actions benefit indicators and surrogate species.

Next step develop a 3-d matrix that will provide a baseline of the work that FWS staff in the SALCC is involved in with respect to the NRIs and Potential Surrogates list (V 1.0). It will allow us to develop a work plan to align the Services work with our mission (through surrogates) and express the Services role in supporting the Cooperative (through NRIs) that ultimately contribute to sustaining wildlife and habitats in the SALCC. The missions of the partnering agency's together accomplish mission of the Cooperative because each agency contributes based on their individual missions, authorities, and mandates.

From a SHC approach, the baseline will show where we are now working with respect to the 5 elements of the SHC approach. This will allow the Service to better align work to support our mission and identify our role within the Cooperative—a way to be accountable to the public (taxpayers) and a way to be a good partner to the LCC. The work plan will allow us to align the Services work with our mission (through surrogates) and express the Services role in supporting the Cooperative (through NRIs) that ultimately contribute to sustaining wildlife and habitats in the SALCC.



Conservation Actions Taxonomy

- Conservation Actions Taxonomy of the Conservation Measures Partnership, (<http://www.conservationmeasures.org/>)
- This classification system will help practitioners more systematically identify threats and appropriate actions, managers to more efficiently set priorities and allocate resources, and most important, facilitate cross-project learning and the development of a systematic science of conservation.

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Discussed at our face-to-face meeting in March 2014 what list of conservation actions to use? Conservation Actions Taxonomy of the Conservation Measures Partnership has promoted a systematic classification system. This will ensure that we use a consistent list of conservation actions and their definitions so that we can all speak a common language. (is intended to broadly capture all the elements of SHC)



The South Atlantic Leadership Team created “A Crosswalk Approach” (to solicit your input)

- The crosswalk takes into account the SALCC blueprint (Natural Resource Indicators), a list of Surrogate species for SALCC, and our Actions (i.e. Conservation Actions Taxonomy) to help identify what trust resources would be addressed by the SALCC Natural Resource Indicators and/or Surrogate species.
- Completing the crosswalk will provide us a baseline (including “gaps”) of our current FWS actions as they relate to Natural Resource Indicators and list of Surrogate Species.

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Completing the crosswalk will provide us a baseline (including “gaps”) of our current FWS actions as they relate to Natural Resource Indicators and list of Surrogate Species.



Constructing the Crosswalk

- We built a matrix in an EXCEL spreadsheet to construct the crosswalk.
- Then, we used SurveyMonkey to host the crosswalk to gather your input online from FWS staff within the SALCC on **Natural Resource Indicators, Surrogate species, and our current work (i.e. Conservation Actions)**.

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What has been going on behind the scenes:


We built a matrix in an EXCEL spreadsheet to construct the crosswalk.

Then, we used SurveyMonkey to host the crosswalk to gather your input online from FWS staff within the SALCC on Natural Resource Indicators, Surrogate species, and our current work (i.e. Conservation Actions).



Completing the Crosswalk Using SurveyMonkey

- Print out and read the Taking the Survey Instruction sheets.
- Go to SurveyMonkey web link: <https://www.surveymonkey.com/s/RLLXMYM>
- Survey open for 2 weeks (Closes August 1, 2014)
- Survey takes 35 to 40 minutes to complete
- Your “lifeline”- Call any Team member with questions about completing the survey (refer to the list of Project Leaders and Team member assignments).



SALCC Crosswalk: Linking our Trust Resources to the SALCC Natural Resource Indicators and Surrogate Species

+ Add Page

PAGE 1 Edit Page Options Add Page Logic Move Copy Delete Show this page only

Surrogate Species and SALCC Natural Resource Indicators

Place a check in the box beside those SALCC Natural Resource Indicators that you believe would inform the conservation of the Surrogate Species listed (#26-54).

Note: Skip those Surrogate Species that you have not worked on or for which you have no responsibility in your position.

+ Add Question

Q1 Edit Question Add Question Logic Move Copy Delete

1. American black duck?

<input type="checkbox"/> Productivity of loggerhead sea turtles	<input type="checkbox"/> Index of biotic integrity	<input type="checkbox"/> Acres of open canopy habitat that is regularly burned
<input type="checkbox"/> Index of beach birds	<input type="checkbox"/> Index of functional connectivity	<input type="checkbox"/> Occurrence of flatwoods salamanders
<input type="checkbox"/> Miles of altered beach	<input type="checkbox"/> Acres of interior natural communities	<input type="checkbox"/> Index of tidal and nontidal freshwater marsh birds
<input type="checkbox"/> Index of coastal condition	<input type="checkbox"/> Index of structural connectivity	<input checked="" type="checkbox"/> Acres of tidal freshwater marsh
<input type="checkbox"/> Index of estuarine birds	<input type="checkbox"/> Acres of "biodiversity hotspots" in natural condition	<input type="checkbox"/> Acres of invasive species
<input type="checkbox"/> Percent of impervious cover	<input type="checkbox"/> Abundance of gag grouper	<input type="checkbox"/> Acres of "biodiversity hotspots" in natural condition
<input checked="" type="checkbox"/> Acres of forested wetlands	<input type="checkbox"/> Abundance of red drum	
<input type="checkbox"/> Index of forested wetland birds	<input type="checkbox"/> Index of nearshore forage fish	

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Web screen capture of Crosswalk Survey in SurveyMonkey. Surveys consists of 3 pages (SS and NRIs; SS and Conservation Actions; NRI and Conservation Actions)

EXAMPLE: Linking the Surrogate Species American Black Duck to the Natural Resource Indicators. I feel that the following NRIs (Index of forested wetlands and Acres of freshwater marsh) may inform the surrogate species approach for American Black Duck.



Looking Forward

Next steps:

- Project leaders provide input for the cross walk (due August 1)
- Team develops a 3-d matrix
- Team shares matrix with Project leaders and receives additional input
- Team develops a draft three year work plan (September 1)
- Team develops a summary report for Service's LCC representative (October 1)

- The Team is committed to carefully considering input from all FWS staff
- Together move beyond a list of surrogate species
 - Clarify FWS's work to achieve our mission
 - Clarify FWS's contribution to the SALCC

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- Next steps
 - Project leaders provide input for the cross walk.
 - Input from cross walk into a 3-d matrix and shared with project leaders.
 - Team members are available to answer questions regarding the survey monkey or any other aspects of this work.
 - Team develops a draft 3 year work plan in order for us to be in a better position to complete our SALCC multi-year landscape-level work plan that more explicitly links our conservation actions to landscape and habitat objectives that are tied to population objectives. And measuring progress and success in both habitat conditions and species response at the landscape scale.
- Goal: work together to move beyond a list of surrogate species.
 - First objective is to be accountable for the activities that FWS undertakes to achieve its mission. Clarify the FWS's work to achieve our mission.
 - Second objective is to identify the FWS contribution to the LCC; clarify the FWS's contribution to the SALCC Conservation Blueprint (landscape design) and demonstrates to the broader LCC partners how our Mission-focused work is applying and targeting resources to achieve the shared vision of the SALCC partnership.
 - Link FWS trust resources and LCC natural resource indicators in the SALCC geography. Integration and implementation of natural resource indicators and surrogate species while striving to achieve the mission of the FWS.
 - An opportunity to make the linkage of how work done day to day to achieve the FWS mission links with the blueprint at a broader scale. Beyond Surrogate Species effort strives to move toward common and quantifiable biological outcomes in support of sustainable landscapes.
 - FWS is one partner within the South Atlantic LCC, expected to contribute within the scope of our mission while other agencies



What does this mean to me?



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What does this mean to me?
Why is this important?
Where can I contribute?

Laurel provided an example from I&M.

▪ Questions?

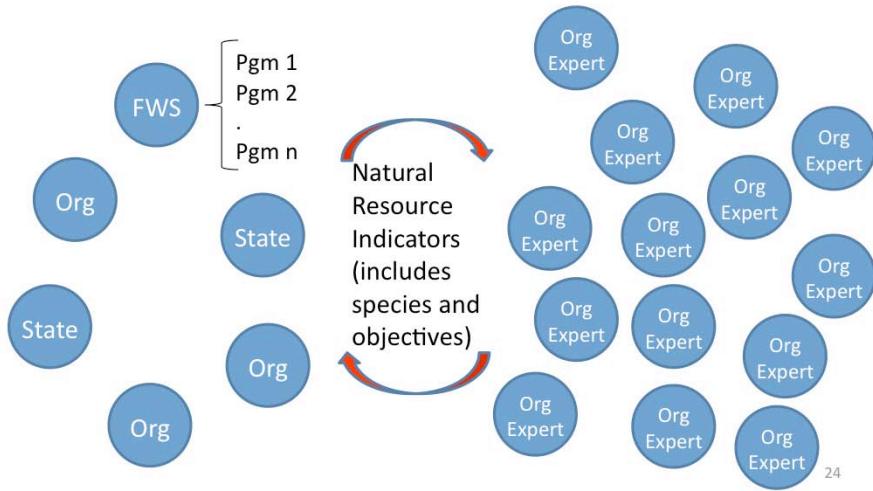


Moon rise Pea Island NWR, photo credit Becky Bartel while assisting with sea turtle nest monitoring.



Clarify Relationship Between the LCC Partnership with FWS as a member and the Internal FWS Business Management System

LCC Forum



Clarify Relationship Between the LCC Partnership with FWS as a member and the Internal FWS Business Management System

State X FWS Decision Framework

