

## **Bird Partnership Workshop**

Migratory Bird Joint Ventures · Bird Conservation Plans Partnerships · North American Bird Conservation Initiative

Tuesday – Friday, 20-23 January 2015  
South Padre Island, Texas

## ACKNOWLEDGEMENTS

### **Workshop Planning Team:**

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**Workshop facilitation and summary report provided by the Keystone Policy Center.** The Keystone Policy Center (Keystone) is a Colorado-based non-profit organization founded in 1975 to drive actionable, shared solutions to contentious environment, energy, education and public health issues. Keystone bid on this work through an open bid process and was hired by the USFWS to facilitate this Workshop.

**Funding for the Workshop** provided by the U.S. Fish and Wildlife Service Migratory Bird Program, Division of Bird Habitat Conservation and Division of Migratory Bird Management.

## Workshop Summary

### I. Overview

The Bird Partnership Workshop brought together key personnel from the bird conservation community to discuss needs for promoting more effective coordination, collaboration, and integration of priorities and activities among three networks—Migratory Bird Joint Ventures (JVs), the four major Bird Conservation Plan Partnerships (BCPPs) and the North American Bird Conservation Initiative (NABCI). The four major BCPPs were Partners In Flight (PIF), the U.S. Shorebird Conservation Plan (USSCP), the Waterbird Plan, and the North American Waterfowl Management Plan (NAWMP).

The idea for the workshop originated at the January 2013 JV Coordinators meeting held in Spanish Fort, Alabama as part of a discussion on improving collaboration and integration among JVs and BCPPs. Previously, a 2008 Cavallo Point, CA, meeting between JV Coordinators, BCPP Coordinators, and NABCI highlighted many needs and opportunities to improve coordination across the bird conservation community. Subsequently, the need to develop population objectives at regional scales was addressed by JV staff and BCPP associates at a workshop in St. Louis, MO, during the fall of 2009. This Bird Partnership Workshop built on the accomplishments of the Cavallo Point and St. Louis meetings, with the goal of the Workshop being to improve and institutionalize long-term coordination and communication among the JVs, BCPPs, and NABCI.

This Workshop was organized by a Planning Team consisting of members from the three networks. The Keystone Policy Center was contracted by the U.S. Fish and Wildlife Service to facilitate the workshop and produce a summary report. Members of the Planning Team developed the agenda for the Workshop and worked with the Keystone Policy Center staff throughout the workshop to ensure well-coordinated meeting facilitation including refinements to the agenda, assistance with facilitation, taking notes for the breakout sessions, and daily synthesis of information generated each day. Workshop attendees were identified and nominated by each of the JVs, BCPPs and NABCI. This Workshop is viewed as a first step in an on-going process among the greater bird conservation community towards achieving more effective and efficient bird conservation. (*See Appendices 1 and 2 for Workshop agenda and participant list.*)

### II. Workshop Objectives

1. **Priority Needs & Capacity Gaps** — identify the greatest needs and capacity gaps limiting more effective bird conservation and develop immediate and long term strategies for working together to address these needs.
2. **Sharing of Tools & Resources** — share and promote tools, resources, and other products or efforts with potential universal appeal and identify opportunities for broadening their use and applicability.
3. **Responsibilities & Expectations** — clarify roles and expectations of JVs, BCPPs, and NABCI and identify opportunities to improve integration, avoid redundancy, enhance communication and collaboration, and better achieve bird conservation outcomes.
4. **Enhancing Commitments** — identify efficient options for enhancing levels of commitment and accountability among JVs, BCPPs, and NABCI in order to address gaps and capacity needs and achieve national-scale bird conservation achievement.

### III. Major Emergent Themes

The following themes regarding needed changes to improve and enhance coordinated bird conservation developed during the course of the Workshop and were generally supported by the majority of attendees. These themes should not be considered as final decisions or conclusions, but rather as guiding concepts or initial steps that will facilitate longer-term actions to be taken by the bird conservation community.

- **Explore the unification of all science capacity** within the bird conservation community (e.g., Tri-Initiative Science Team (TriST), NAWMP Science Support Team (NSST), PIF Science, waterbird and shorebird science).
  - Huge interest and commitment to have joint meetings and figure out how integration can happen.
  - Suggestion of uniting science capacity under a NABCI umbrella.
  - Suggestion that social science should be included.
  - Interest in coordinating population objective setting and tracking progress on objectives for all bird taxa.
- **Fill the empty coordinator positions**—NABCI, PIF, and Waterbirds.
  - Include operational funding to support BCPP activities.
  - Increase capacity for bird conservation.
- **Identify strategy to increase communication** among the National JV Coordinator, Bird Conservation Plan Coordinators, and NABCI.
  - JVs, BCPPs, and NABCI coordination should be collaborative and integrated, but more discussion is needed about how that can best be achieved organizationally and geographically.
  - Develop and endorse a series of standards that exemplify high quality bird conservation plans.
- **Build social science capacity** within the bird conservation community.
  - Begin by educating existing staff about how human dimensions (HD) and social science tools can be used to plan and implement bird conservation.
  - Incorporate social science throughout the Strategic Habitat Conservation model.
  - Consolidate and coordinate existing HD capacity under NABCI.
- **Build communications capacity** within the bird conservation community.
  - Create a national communications strategy.
  - Consolidate and coordinate existing communications capacity under NABCI.
- **Promote a NABCI with strong, driving leadership.**
  - Comprehensive reconsideration of NABCI committee membership.
  - The Association of Joint Venture Management Boards (AJVMB) might consider aligning funding strategy more closely with NABCI.

### IV. Next Steps

This section describes what the Workshop Planning Team believes should be the next immediate steps following the workshop. **NOTE:** These items are a compilation of the views and ideas of individual Planning Team members and do not necessarily reflect the opinions of all the attendees at the workshop or even other Planning Team members.

- The Workshop Planning Team will transition into a Workshop Outcomes Oversight Team (WOOT). This team would work with organizations to broadly encourage continued steps and actions on themes identified at the Workshop as well as facilitating feedback and communication back to the bird conservation community regarding progress. The Team membership would change as needed to best accomplish these tasks.
- Integrate recommendations of this report with recommendations from February 2015 US-NABCI meeting.
- Keep the themes and action items from the Workshop (especially those that were discussed within organizational groups during the Friday breakouts) as focal topics in the agendas of the next JV coordinator meeting, BCPP meetings, NABCI, etc. Each entity should identify point people or groups responsible for advancing some of the recommendations, as well as keep a record of achievements that are happening to track progress and identify bottlenecks. These point people could serve as members of the WOOT.
- Engage game bird organizations and initiatives (e.g. Ducks Unlimited, National Wild Turkey Federation, National Bobwhite Conservation Initiative, Pheasants Forever) to discuss their regional-level involvement with JVs and BCPPs and where/how they can best contribute to the needs and themes identified at the Workshop.
- Engage the Flyway Councils, potentially identifying a point person for the Flyways to coordinate engagement and communications. Discuss their regional-level involvement with JVs and BCPPs and where/how they can best contribute to the needs and themes identified at the Workshop.
- Create an Action Committee representing the 4 Flyway Councils, with each Flyway represented (at a minimum) by a state agency. In addition to working within the Flyway Council, this Action Committee would engage both AFWA and NABCI to facilitate improved coordination between those two entities, the state agencies, and the Association of Joint Venture Management Boards.
- Consider creating a national social science coordinator position that could take the lead in advancing the social science themes and actions identified at the Workshop.
- Form teams from various breakouts from the Workshop, especially those where some recommendations were not fully explained or communicated to continue conversations, to further refine ideas and make recommendations for actions to be taken by the bird conservation community.
- Members of the WOOT, working with all organizations, prepare an interim (e.g. six-month) report on how organizations (e.g. JVs, BCPPs, NABCI, TriST/PIF Science/NSST) are addressing overall and specific recommendations from the Workshop.
- JVs should endeavor to bring together all JV staff (at least once every two years) to share ideas across JVs. Newer JV staff members would benefit from hearing discussions of the more established JV staff, and the generally established JV staff need to plan for the "institutional knowledge" and foundational principles of JVs to be passed on to our next set of leaders.
- The bird conservation community strives to develop a desired future condition that is fully integrated across scales and functionally removes existing organizational, bird group, or

other “silos” with the overall goal of supporting healthy bird populations (see Figure 1 and explanatory notes below).

- There is no hierarchy to the structure or top/bottom, just different scales for accomplishing conservation.
- Complete vertical and horizontal **integration**.
- Bird Groups/subject areas respond to needs requested from NABCI and JVs.
- Coordinators work across their respective bird groups/subject areas, coordinating responses within their groups as well as to NABCI and JVs.
- **Integrate** science groups with JV science staff across bird groups/subject areas (e.g., TriST, TriST+NSST)
- Where it is working and relevant, maintain existing bird conservation plan executive level and science level bodies.
- Augment science level bodies where necessary with JV science staff and other interested parties within North America.
- Where it is needed and beneficial, work towards blurred lines and busted silos over time, pulling various groups together with the overall goal of supporting healthy bird population, mostly through habitat management.
- Recognize there are other layers at smaller scales and many more people working at these scales that are being supported by the relatively small group of people at the larger scales. Ask ourselves: “what can we do at our scale to help them do their job with limited resources.”

# Proposed Desired Future Condition

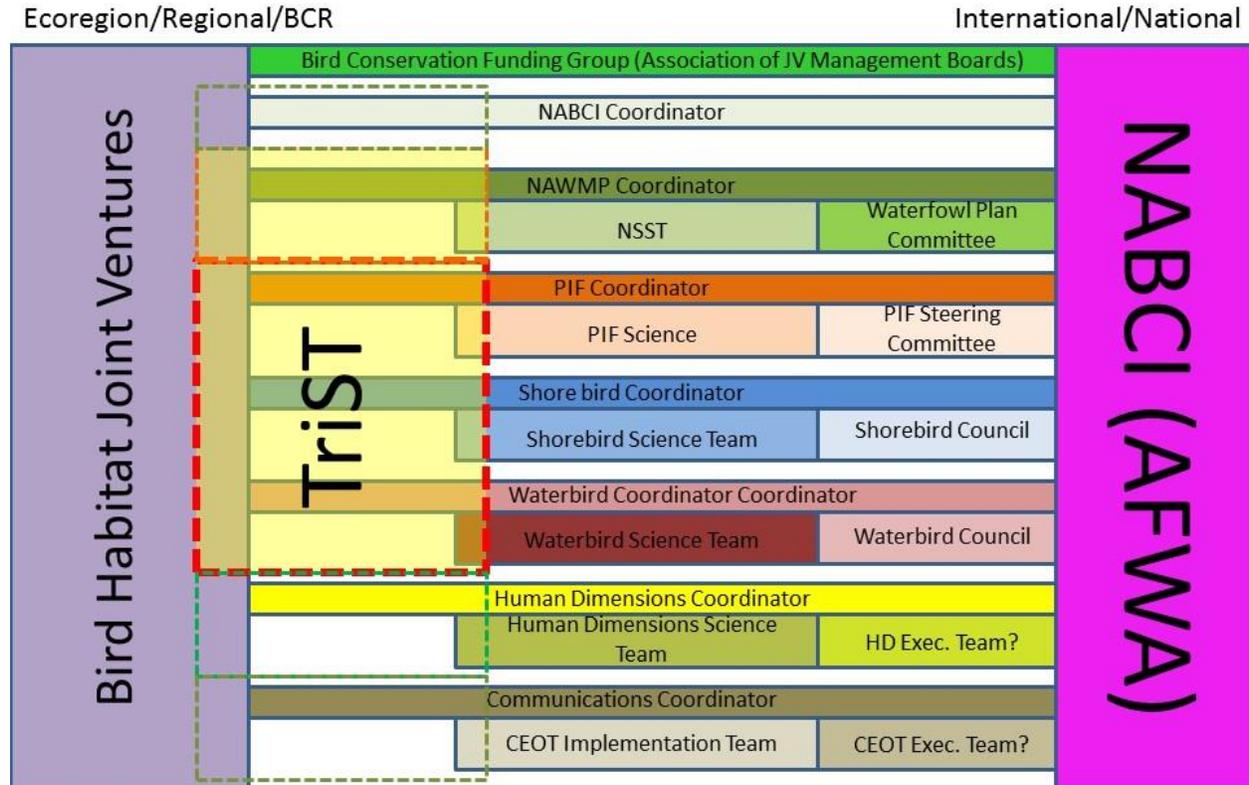


Figure 1. A proposed conceptual diagram illustrating the desired future condition of the Bird Conservation Community. Note that this is one proposed concept from members of the Planning Team and alternatives exist that also could be effective.

## V. Discussion Summary: Tuesday - Friday

**Tuesday, January 20, 2015**

### ***Introductory Plenary Discussion***

Todd Fearer, Appalachian Mountains Joint Venture Coordinator and lead for the Workshop Planning Team, welcomed the participants and provided a brief introduction and overview to the Workshop. Todd described the background and goals of the Workshop, explaining that the overall goal was to improve and promote effective bird conservation and enhanced coordination and communication across bird conservation efforts.

### ***Organizational Summaries***

A representative of each organization at the Workshop provided introductory presentations that intended to convey the organizations' vision, mission, organizational structure, and basic concerns. Brief descriptions are provided below.<sup>1</sup>

<sup>1</sup> Descriptions derived from the representatives' remarks and/or the slides or the written summaries provided in advance with Workshop materials.

- **Migratory Bird Joint Ventures**

*Ken Kriese*

Joint Ventures (JVs) are a collaborative, regional partnership of government agencies, non-profit organizations, corporations, tribes, and individuals that conserve habitat for priority bird species, other wildlife, and people.<sup>2</sup> Joint Ventures bring diverse partners together under the guidance of national and international bird conservation plans to design and implement landscape-scale conservation efforts. Feedback from the Joint Venture staff confirm that there are strong ties between the JVs and North American Waterfowl Management Plan, but that engagement between the JVs and the other bird plan coordinators and bird conservation plan partnerships (BCPP) members is somewhat limited. The January 2014 Joint Venture Coordinators meeting brought forward the idea of this joint JV/BCPP workshop to address strengthening ties and relationships.

- **NAWMP**

*Jorge Coppen<sup>3</sup>*

The North American Waterfowl Management Plan (NAWMP) was developed by the waterfowl management community in the United States, Canada, and Mexico to restore waterfowl populations through habitat protection, restoration and enhancement. NAWMP is innovative because its perspective is international in scope, but its implementation functions are at the regional level through the Joint Ventures which were established by the signing of NAWMP in 1986. NAWMP implementation is dependent upon the success and strength of the JV partnerships that involve federal, state, provincial, tribal, and local governments, businesses, conservation organizations, and individual citizens. The international NAWMP Committee maintains strong and direct ties to the JVs by involving the JVs in NAWMP committees and activities, and through an ongoing review process related to JV contributions to implementation of NAWMP but also other bird conservation plans. Since its creation, NAWMP has been revised and updated multiple times to “strengthen its biological foundations, expand and redefine its habitat restoration goals, and forge broader alliances with other bird conservation initiatives.” A major revision to the Plan completed in 2012, aims to achieve broad consensus on the fundamental goals of waterfowl conservation through stakeholder consultation and, for the first time, include explicit goals related to people.

- **U.S. Shorebird Plan (USSCP)**

*Brad Andres*

The initial national plan was published in 2000, with concurrent development of 11 regional plans. Since 2000, a multi-agency council has overseen implementation of the USSCP. Subsequent revisions of regional plans have involved working more with JV partners to integrate into JV implementation plans. USSCP partners have been very involved with NABCI since its inception, contributing to sub-committees working with NABCI, serving on JV technical committees, and providing input and review for implementation plans. They are regular participants on TriST and have been increasing participation on JVC calls.

- **Partners in Flight**

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<sup>2</sup> U.S. Fish & Wildlife Service. Division of Bird Habitat Conservation. Migratory Bird Joint Ventures. Retrieved February 4, 2015 from <http://www.fws.gov/birdhabitat/JointVentures/index.shtm>

<sup>3</sup> Jorge Coppen, representative from the North American Waterfowl Management Plan, was not present at the time the summaries were given, so there was no NAWMP presentation during the organizational summaries.

*John Alexander*

Partners in Flight (PIF) is an international bird conservation initiative established in 1990 in response to growing concerns about declines in populations of many landbirds. PIF is committed to maintaining the science and planning base for the hundreds of landbird species representing the most diverse and abundant group of birds in North America and to working closely with all bird conservation initiatives to ensure efficient and effective conservation efforts. PIF's organizational structure is scaled and vertical with international working groups, a high level council, national steering committee, science committee, and other topical, state, federal and NGO committees. Currently, PIF is working to develop full life cycle conservation business plans, and has recently finished a strategic plan, which includes specific goals around better alignment with Joint Ventures. PIF wants to garner efficiencies, develop new partnerships, bring opportunities to integrate partnerships with a non-regulatory approach, and take an all-bird approach to conservation. (See Appendix 3 for written summary of PIF).

- **Waterbird Conservation Plan**

*Charisa Morris*<sup>4</sup>

The Waterbird Conservation for the Americas (WCA) was the last of the four bird plans to be developed. The WCA focuses on waterbirds other than waterfowl and shorebirds. The WCA is facilitated by the Waterbird Conservation Council, and there is currently an opening for the Waterbird Conservation Plan coordinator, which the Waterbird Conservation Council plans to fill soon. Joint Ventures greatly support WCA regional planning efforts, providing financial support and staff or technical group member involvement.

- **North American Waterfowl Management Plan (NAWMP) Science Support Team (NSST)**

*Mike Brasher*

The purpose of NSST is to strengthen the biological foundations of NAWMP, including providing technical input to the committee and serving as a place where members of the bird community can come together to address problems requiring broad expertise to solve. The origin of NSST was to evaluate the biological accomplishments of the conservation plans. The team developed evaluation strategies, recommended consistencies in planning, and made the progress it has due to several dedicated members. Originally, however, strong partnerships with the Joint Ventures community did not exist, which prompted NSST to change their continental science team to have more diverse partners, including flyway councils and Joint Ventures. These partnerships allow NSST, NAWMP, Flyway Councils, and Joint Ventures to share challenges, create continuity, and leverage capacity; NSST would like to continue to improve this collaboration.

- **Tri-Initiative Science Team (TriST)**

*Tom Will*

TriST was created after a population objectives workshop in October 2009 to facilitate scientific communication and collaboration among the bird habitat Joint Ventures (JVs) and the landbird, shorebird, and waterbird conservation partnerships. TriST is governed through a combination of voluntary participation and an effort to achieve equal representation across JVs and BCPPs; leadership of the group rotates annually among BCPPs and JVs. TriST's current science efforts focus on developing a more consistent approach to species prioritization, setting population and

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<sup>4</sup> Rob Clay, the originally scheduled speaker, was not present. Charisa Morris from the USFWS spoke on behalf of the Waterbird Conservation Plan.

habitat objectives, and tracking progress on objectives using metrics that translate from local to range-wide scales. From an organizational perspective, TriST is working to build participation, increase information sharing between Joint Ventures, and facilitate regular interaction between BCPP coordinators and JV coordinators.

- **North American Bird Conservation Initiative (NABCI)**

*Tammy VerCauteren and Greg Butcher*

The U.S. NABCI Committee was established to organize bird conservation across the United States. NABCI comprises representatives from federal agencies, flyways, state technical committees, bird conservation plan partnerships, and non-governmental bird conservation organizations, and its subcommittees focus on different aspects of bird conservation. NABCI's vision is to have healthy populations of North American birds that are valued for generations to come, and their mission is to facilitate collaborative partnerships that advance biological and social priorities for North American bird conservation. NABCI'S current and future priorities include developing a three-year strategic plan, filling the vacant NABCI coordinator position, and clarifying relationships with Joint Ventures, BCPPS, and others.

- **USFWS and ad-hoc Committee to Advance Bird Conservation**

*Brad Bortner*

The U.S. Fish & Wildlife Service is the lead Federal agency for managing and conserving migratory birds in the United States. The mission of the Fish and Wildlife Service's Migratory Bird Program is to conserve migratory bird populations and their habitats for future generations, through careful monitoring, effective management, and by supporting national and international partnerships that conserve habitat for migratory birds and other wildlife.<sup>5</sup> With many Service programs actively involved in migratory bird conservation activities, the Service wants to consider and improve how they integrate across all the bird groups and at the various levels. The Service is also interested in understanding how the cycles of conservation business planning and strategic habitat conservation can intersect.

**Wednesday, January 21, 2015**

## **Breakout Sessions**

### ***Purpose***

The focus of the breakout sessions addressed Workshop Objective 1: identify the greatest needs and capacity gaps limiting more effective bird conservation and develop immediate and longer term strategies for working together to address these needs. *(See Appendix 4 for the introductory slides from Wednesday morning).*

Creating a mechanism for a two-way transfer of information from JVs to the BCPPs and vice versa was a key discussion topic at the Cavallo Point meeting and was addressed in the St. Louis meeting. The formation of TriST was one of the outcomes from those discussions; however, despite some successes, fully shared science capacity and engagement remain limited across the bird conservation community. Prior to this Workshop, the Planning Team requested that each organization complete an assessment of the state of its bird conservation work. The results of this assessment also indicated that the

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<sup>5</sup> U.S. Fish & Wildlife Service. Migratory Bird Program. Retrieved February 5, 2015. from <http://www.fws.gov/migratorybirds/AboutUS.html>

relationship and communication among JVs and the BCPPs can be improved. The results of this assessment and the Cavallo Point meeting informed the development of the Wednesday breakout sessions.

Participants were asked to focus on the following overarching questions as part of their discussions during both the morning and afternoon breakouts:

- *What opportunities currently exist to modify (slightly or significantly) the current structure of this community to address limitations and develop long-term solutions?*
- *What are the regular interactions and engagement among the JVs, BCPPs, NABCI, and committees like the TriST and NSST?*
- *How can these interactions be enhanced and strengthened? What opportunities exist for new engagement?*
- *How well do the science tools and resources that have been developed by the BCPPs, JVs, and other entities meet the needs of the bird conservation community?*
- *What new tools are needed, and how might we enhance existing mechanisms for sharing and exchange of these resources?*
- *How can the bird conservation community be more strategic in developing tools that benefit multiple groups/geographies?*

### **Process for Breakouts**

Participants were divided into facilitated breakout sessions Wednesday morning and afternoon based on their interests (conveyed to the Planning Team prior to the Workshop.)

Participants were asked to answer the following questions in breakout discussions:

- *What are the most critical obstacles to address in the next several years?*
- *What are some potential strategies for addressing those obstacles?*
- *Identify your **TOP THREE strategies, innovations, insights, or recommendations**. These are the items that you will report back to in plenary at the end of the breakout sessions.*

After another hour of discussion, the breakouts were each given six minutes to present their top three to five recommendations, strategies, or insights to the group. The process was the same for both Wednesday morning and afternoon discussions.

### **Morning Session Breakouts**

Breakout sessions on Wednesday morning were developed to consider the question: *How can we meet science needs and exchange relevant information across multiple scales?*

In addition to the overarching questions above, each breakout was charged with the following questions that corresponded to the specific topic area addressed by each session:

- **GROUP 1: Population and Habitat Objectives.** How do we create—at the JV scale—realistic bird population and habitat objectives for all bird taxa? How can we coordinate and collaborate so that individual JV objectives and accomplishments can be effectively rolled up to range-wide scales in order to track progress toward meeting continental bird plan objectives?
- **GROUP 2: All Bird Technical Knowledge.** How do we ensure that the supporting biological and ecological knowledge needed for implementing conservation for all birds—waterfowl,

waterbirds, shorebirds, and landbirds—is represented on Joint Venture technical teams, coordinated among neighboring JVs, and shared at broader (range-wide, full life cycle) scales between all JVs, BCPPs, state agencies, Flyway Nongame Tech Sections, and other partners?

- **GROUP 3: Social Science.** How do we ensure that the human dimensions and social science knowledge needed for effective bird conservation is represented on Joint Venture implementation teams, coordinated among neighboring JVs, and shared at national and international scales between all JVs, BCPPs, and other partners?

### **Report Outs**

High-level descriptions of report outs follow (*see Appendix 5 for full summaries*).

#### **GROUP 1: Population and Habitat Objectives.**

This group identified the obstacles to achieving clear, consistent, and effective population and habitat objectives. The group noted that population objectives have multiple purposes and audiences, partly political, social, and biological; within a user group, there is inconsistency on how to measure success towards objectives. Population objectives are not relevant to many audiences outside the bird conservation community and do not drive action. To address these obstacles, the group recommended that the bird conservation community [1] develop objectives that move beyond just biology and are relevant to Congress and people; [2] continue to improve science capacity at all levels of bird conservation, bringing science and technology into bird conservation; [3] address population objectives as one bird conservation community moving forward; [4] achieve clarity on the definition and measure of population objectives; and [5] further define the roles and responsibilities of JVs, BCPPs, and NABCI.

#### **GROUP 2: All Bird Technical Knowledge.**

This group identified several obstacles to attaining all-bird technical knowledge. In particular, capacity challenges, including shortages, inequitable distribution, and inefficient use of current capacity (i.e. data, human resources, technical expertise, and funding) were identified as the biggest barriers. The group noted strategies to overcoming capacity challenges, such as [1] identifying overarching regional priorities and addressing them in tandem to reduce redundancy; [2] developing similar structures and accountability for shorebirds, landbirds, and waterbirds; [3] clarifying expectations/roles of initiatives and joint ventures; [4] exploring less taxonomic-based alternative approaches to conservation at the appropriate levels; and [5] consolidating technical teams at relevant scales.

#### **GROUP 3: Social Science.**

This group identified the need to update the Strategic Habitat Conservation Model so that social science is integrated throughout the functional elements and to investigate how to integrate social science (i.e. *Open Standards*, NAWMP Human Dimensions Workgroup recommendations). The group recommended [1] developing a capacity plan that will maximize the capacity and knowledge network to integrate social science and, in turn, maximize success; [2] promoting grassroots engagement to increase the number of social scientists involved in the Bird Conservation Community (e.g. JV Tech Committees, PIF Science Team,); and [3] developing and measuring integration strategies.

### **Plenary Discussion**

- An individual expressed a concern that the group is not looking beyond their comfort zones for innovative solutions. It was proposed that the group continue to have open discussions that involved “out-of-the-box thinking” that challenge existing paradigms and conservation structures. There was a positive overall reaction to this comment.

- An individual commented that the group could focus the discussion on priorities that could garner funding for bird conservation.

### **Afternoon Session: Breakouts**

Breakout sessions on Wednesday afternoon were developed to consider the question: *How do we effectively communicate—internally and externally?*

In addition to the six overarching questions provided during the Wednesday morning introduction, each breakout was charged with the following questions corresponding to each topic area:

- **GROUP 1: Effective and consistent communication and planning.** How can we develop effective, consistent, and permanent communications between the JVs and BCPPs? What is needed to establish a common and agreed upon foundation for strategic conservation and business plans? What frameworks/communication tools are needed that articulate the cumulative outputs and outcomes from JV conservation delivery (including identification and development of projects and achievements toward implementation), especially as it relates to BCPP objectives?
- **GROUP 2: Unified voice for bird conservation.** What is needed to ensure a unified voice exists for bird conservation that targets federal and state agencies, Congress, conservation organizations, and outdoor corporations? How can we enhance the ability of NABCI and the Association of Joint Venture Management Boards (AJVMB) to successfully advocate for JVs, BCPPs and associated programs (NAWCA, Neotropical Migratory Bird Conservation Act (NMBCA), etc.) to all federal agency directors, funders (National Fish and Wildlife Foundation (NFWF), Corporations) and Congress?
- **GROUP 3: Coordinated communications and products for bird conservation community.** How can we enhance coordination between Bird Education Alliance for Conservation (BEAC), JV communications/outreach staff (and JV Communication Education and Outreach Team (CEOT)), and NABCI to develop and promote communication/outreach products for the entire bird conservation community?

### **Report Outs**

*High-level descriptions of report outs follow (see Appendix 6 for full summaries).*

#### **GROUP 1: Effective and consistent communication and planning.**

This group discussed the needs and strategies for communication among JVs, including the need to communicate about planning, delivery, full cycle modeling, and other activities, and developing multi-JV proposals. The group indicated that improved communication would enable greater cross-JV collaboration, proposal development for projects, and sharing of technical capacity. The need to develop a common language and strategy and/or protocols to provide updates among JVs and BCPPs was also discussed.

#### **GROUP 2: Unified voice for bird conservation.**

This group discussed the need to assess the state of the bird conservation community and identify where there are successes, struggles, gaps, and redundancies. The group proposed that streamlining organizational structure and focusing on successes would make the bird conservation community more effective and relevant, which would in turn attract high-level decision makers and allow for a unified

voice to garner resources and support. Although there was not consensus around the following ideas, the group suggested that possibilities for streamlining could include merging bird conservation partnerships and/or game and non-game. The group also posed the following questions regarding NABCI's scope and role: *Are we all part of NABCI? Is it the ultimate umbrella? Will it take on the results of this conference?* Finally, the group recommended exploring the idea that the Council for Migratory Birds could be a mechanism to reach high-level agencies beyond USFWS.

### **GROUP 3: Coordinated communications and products for bird conservation community.**

This group discussed the challenges and potential strategies to coordinate communications and products for the bird conservation community. Highlights from this group include a recommendation to develop messages at the national level that capture or highlight broad priorities or successes that can be easily maintained over time but also are relevant at regional (e.g. JV) scales to facilitate integration of more specific regional or local messages and success stories. The group recommended the bird conservation community develop a national communications strategy, with NABCI serving as the umbrella for coordinating messaging, and discussed the need for a graphic depiction of the bird conservation community and the relationships among bird conservation partnerships, agencies, and organizations.

#### ***Plenary Discussion***

- An individual commented that there is a clear need to simplify organizational structure in the bird conservation community.
- An individual asked if the group considers it a failure or falling short if the group does not propose re-organizing the structure. The question was posed whether tweaking the existing structure and clarifying roles and responsibilities, particularly for the organizations in leadership positions (i.e. Association of Fish and Wildlife Agencies (AFWA), NABCI, and the AJVMB), would address some of the needs and capacity gaps identified Wednesday morning.

**Thursday, January 22, 2015**

#### **Morning Session: World Café Discussion Tables**

##### ***Purpose and Process***

The discussion tables on Thursday morning were developed to focus on sharing tools and resources across organizations and individuals. This focus addressed Workshop Objective 2: Share and promote tools, resources, and other products or efforts with potential universal appeal and identify opportunities for broadening their use and applicability.

This session provided an opportunity to share and discuss existing tools and resources being used for bird conservation efforts as well as to introduce tools and concepts in progress. Themes were brought forward from Wednesday afternoon's breakout sessions –Populations, Communications and Social Science. The goal of this session was to provide attendees the opportunity to discuss existing tools, how they currently serve bird conservation efforts, and how these tools may be improved if necessary. For tools and concepts under development, this session provided a time for those developing these tools to receive ideas and suggestions to maximize the effectiveness and benefits of the tools to the bird conservation community. Attendees rotated among tables during the session.

##### ***List of actual tables and facilitators:***

- *Conservation Business Plans* – E.J. Williams

- *Atlantic and Pacific Shorebird Plans* – Brad Andres
- *PIF Continental Plan and Current Revisions* – Ken Rosenberg and Kacie Miller
- *PIF Species Assessment and Population Estimates Databases* – Randy Dettmers and Carol Beardmore
- *NAWMP Revision, IIC, and Human Dimensions Work* – Jorge Coppen and Dave Gordon
- *JV CEOT Recent Survey and Communication Tools*– Jennie Duberstein and Matt Cimitile
- *NABCI Strategic Plan* – Tammy VerCauteren and Greg Butcher
- *RWB/PLJV Conservation Design Modeling Tools* - Andy Bishop and Mike Carter
- *Waterbird Capacity in the U.S.* – Ken Kriese, Brad Bortner, and Charisa Morris
- *Monitoring: Applying NABCI goals for improved monitoring, assessing demographic parameters, and use of the Avian Knowledge Network* – David Pashley and John Alexander

### ***Outcomes of World Café Tables***

Discussion leaders for the world café tables were not asked to take notes or report out on their conversations. Informal feedback about these table discussions was positive, indicating that participants found the session to be useful. One table – the JV CEOT Recent Survey and Communication Tools – submitted notes from their discussion. (*See Appendix 7 for these notes*).

### **Afternoon Session: Breakouts**

#### ***Purpose***

Based on analysis of Wednesday’s major themes and insights, as well as the energy of the group, the Planning Team and Keystone refined the agenda and discussion questions for Thursday afternoon breakouts. Given that Wednesday’s discussion brought out the fundamental issue of challenges around organizational structure, breakout groups were asked to address how the bird conservation community might move forward functionally and organizationally, focusing in particular on inefficiencies and barriers of the current organizational structure of the bird conservation community, what the functions of the bird conservation community should be, and at which levels in the organizational structure those functions should take place. (*See Appendix 8 for the introductory slides from Thursday afternoon*).

#### ***Process***

The group was divided into the following four breakout sessions:

- **GROUP 1. Entire Strategic Habitat Conservation (SHC) Loop**
- **GROUP 2. Biological Planning and Conservation Design**
- **GROUP 3. Program Delivery**
- **GROUP 4. Evaluation**

Each breakout group was intended to have similarly structured discussions, but focused on either the whole Strategic Habitat Conservation (SHC) Loop or a part of the whole. Each group was asked where the current pinch points are in the organizational structure to achieve successful biological planning, program delivery, and evaluation. It was recommended that the groups consider how communications and social science can alleviate or address some of the pinch points that had been mentioned during the Workshop, such as organizational capacity, advocacy, and other issues that emerged in Wednesday’s discussions.

The Planning Team requested that groups avoid initially discussing existing entities and organizations, and focus at first on what they perceived as necessary functions, regardless of whether that function

was currently being fulfilled. After the break, groups then considered how the functions identified could be addressed through the existing (or new) organizational structure. *(See Appendix 9 for the synthesis.)*

### **Outcomes of Breakouts**

The report outs below reflect a synthesis of the report out summaries that the facilitators and note-takers of each breakout group provided to the Keystone Policy Center. *(See Appendix 10 for full report-outs).*

#### **GROUP 1. Entire Strategic Habitat Conservation (SHC) Loop**

This group established the vision for the desired future condition of the entire SHC loop: A well-oiled, fully sustainable bird conservation network that supports future healthy bird populations throughout their full life cycles, with accountability to a society that demands bird conservation. The group saw a need to [1] ensure that human dimensions are incorporated into biological planning, conservation design, delivery, and evaluation; [2] address the lack of social science expertise representation with JVs and BCPPs; and [3] understand social science at the local and regional scales. The group recommended a range of strategies to address these issues including developing a shared understanding and common language of social science, building a formal expectation and accountability for incorporating human dimensions into conservation design, addressing the social science gap, and enabling access to a cadre of available social science professionals.

#### **GROUP 2. Biological Planning and Conservation Design**

This group focused primarily on the need to have consistent population and habitat objectives for select species that are comparable vertically (such as within BCPP and at different scales) and horizontally (across initiatives and, maybe across JVs) and applicable to conservation design products. The group recognized that currently it is difficult to apply population and habitat objectives to conservation design for several reasons, including that population and habitat objectives as a metric are not consistently applied at national, regional, and local levels. This group recommended that there needs to be consistency across spatial scales when applying population and habitat objectives to conservation design.

#### **GROUP 3. Program Delivery**

This group identified three key functions of better linked bird conservation related to implementation at all scales: capacity, communication, and science (biological and social). Group members prioritized five obstacles to program delivery: [1] social science to help inform implementation efforts; [2] inadequate long-term funding for staff and projects; [3] scientific guidance and methods to merge all bird taxa and other relevant taxa spatiotemporally; [4] relevance to a variety of audiences through messaging; and [5] multiple partners (in bird conservation and beyond) working together on shared goals. The group identified key strategies to address these obstacles: [1] social science research projects at local and regional levels; [2] a national fundraising strategy to raise regional funds; [3] regional landscape design tools for all taxa and integrating social science; [4] a national communications strategy; and [5] targeted meetings to engage key partners (e.g., NRCS-JV national meeting). They also discussed responsibilities for these action steps, measures of success, and what the ripple effects on other stakeholders might be.

#### **GROUP 4. Evaluation**

This group delineated the functional elements of the evaluation component of the Strategic Habitat Conservation loop. After specifying a range of functions, including setting evaluation standards, monitoring outcome-based contributions of projects to expected bird populations, and evaluating unintended consequences and results of projects, the group decided to focus on creating a plan to

achieve the following the functions: [1] monitoring tied to funding/operational success; [2] developing common metrics that scale up and down; and [3] establishing a minimum set of standards. Recommended actions included changes in legislation, hosting an operational monitoring workshop, linking evaluation to relevant funders, and including monitoring as a part of existing collaborative efforts. A barrier to monitoring and evaluation was the general lack of emphasis or importance placed on this part of the SHC wheel, and lack of funding to accomplish monitoring/evaluation. The example of NAWCA funding that cannot be directed toward monitoring was given. This was a large part of the discussion.

**Friday, January 23, 2015**

### **Morning and Final Session: Organizational Affiliation Breakouts**

#### **Purpose**

Todd Fearer introduced Friday morning's session, summarizing the major themes that emerged from the previous two days of discussion:

1. **Social Science:** The recommendation to integrate social science into all the components of bird conservation including the SHC wheel, the JV matrix, and others was a common theme in the workshop. It was recommended that the JVs look at how to integrate social scientists at the technical committee level and consider which types of questions the community needs to address. What are the next big steps to integrate social science?
2. **Communications:** It was recommended that a very strong, national communications team be created to develop a national communications strategy. This strategy could be scaled down or up. It could be an advocacy tool that tells the bird conservation story in a unique way that informs our constituency about the importance of what we do. How can this team be formed given our existing structure and communications team? How can we move forward on a strategy that has scalability? This recommendation could help develop a unified voice.
3. **Funding Coalition:** A funding coalition is needed that pulls together AFWA, the AJVMVB, NABCI, etc. to diversify support. This needs to be a concerted and proactive effort to identify more funding opportunities whether from partnerships, industry, or other sources. This could help develop the "bird conservation enterprise," and link into the communications recommendation.
4. **Support from Leadership:** How does the bird conservation community bring new partners as well as existing partners that are tangentially involved to the table, recognizing that being part of the community adds value for everyone? It was recommended that the bird conservation community look for opportunities to develop and present our collective stories to engage leadership.
5. **Population Objectives:** This topic was discussed enthusiastically. It was suggested that TriST (or a group within TriST) develop a framework to present at the NABCI committee meeting. If this cannot occur, what other forum or opportunity exists to move the ball on population objectives?

Todd presented the charge for the morning breakout sessions as an opportunity to take the first steps in determining what can actually be done in the following weeks, months, and years. The group was asked to identify specific action items and steps that will enable the group to, a year from now, look back and see progress from the preliminary work accomplished at this Workshop. Todd reminded the group to consider in their breakout discussions the out-of-box ideas that have been mentioned and the

overarching theme of building a bird conservation community. (See Appendix 11 for introductory slides from Friday morning).

### **Plenary Group Discussion**

The plenary discussion following Todd's synthesis and charge to the organizational affiliations focused on the need to continue to build trust in the community by changing the organizational structure (see Appendix 12 for complete comments). It was recommended that individuals divide into their organizational affiliations, develop a set of recommendations regarding their own activity and the restructuring of the organizations as a whole, and bring these recommendations back to the larger group.

**Breakout Groups:** NABCI, JVs, NAWMP/NSST, PIF, USFWS, and USSCP

### **Report Outs by organizations** (see Appendix 13 for full summaries)

Meeting participants were divided into their organizational affiliations where they developed a set of recommendations and endorsements regarding their own activity and the organizational structure of the bird conservation community as a whole. Each organization presented their recommendations and endorsements, listed below, to the larger group.

#### **NABCI**

- Need to engage the executive leadership with the NABCI committee. As a leadership body, it is not as effective as it can and should be without executive leadership.
- Need to improve communication within the NABCI committee and outreach from the NABCI committee. Let senior level engagement know why it is important for them to be involved.
- Address trust issues in order for NABCI to be effective; the partners and the plans need to see the value and no threat of being involved in NABCI.
- Endorse the national communication strategy and consolidate communication arms, including CEOT, BEAC, and State of the Birds (who are already part of the communication sub-committee).
- Help create team of science (PIF, NSST, TriST), including social science, and determine that role at national level. Look into what role NABCI can play to enhance social science at the national level need.
- Be more encouraging in facilitating a unified voice for advocacy efforts. Enable AFWA to be more involved and advocate for bird conservation programs. Re-invigorate the NABCI funding committee.

#### **JVs**

- JVs and the broader bird conservation enterprise will rebrand themselves as the 21<sup>st</sup> century conservationists (addressing climate change, social science, and human dimensions) resulting in a return of high level leadership.
- Comprehensive reconsideration of NABCI committee membership (for example, participation of at least four state directors).
- Promote a strong driving NABCI that JVs can support.
- Move BCPP coordinators under NABCI to integrate initiatives.
- Refrain from forming the Integrated Bird Conservation Team (IBC Team).
- Reorganize migratory bird FWS organizational chart with the BCPP coordinators under a common supervisor and with JV national coordinator.
- TriST is integrated or aligned better with NABCI.

- TriST is recognized as the science forum for the three initiatives (PIF, shorebird, waterbird) and the Joint Ventures.
- AJVMB considers aligning funding strategy more closely with NABCI.
- Develop and endorse a series of standards representing high quality bird conservation plans.

#### **NAWMP/NSST**

- Incorporating social science into overall NAWMP efforts
  - There is a missed opportunity to incorporate a larger bird conservation message with NAWMP public engagement. We need a national bird conservation human dimensions/public engagement working team.
- Incorporating social science specifically into NAWMP technical groups
  - Bring social science expertise into NSST. Commitment expressed to having that conversation at upcoming NSST meeting in February.
- NAWMP governance should be/will be reconsidered, as the NAWMP revision calls for this.
- Explore consolidation of technical teams, NSST, TriST, and PIF. NSST will commit to discussion of this idea at upcoming meeting.

#### **PIF**

- Support the JVs in their desire to be all-bird. PIF is there to help.
- Hire the PIF coordinator. Leverage that coordinator for additional national level positions from other federal agencies.
- Endorse the Integrated Bird Conservation (IBC) team at a NABCI level.
- Endorse the integration of the science teams and support nongame science.
- Support revisiting population objectives and ensure ability to roll population objectives up and down.
- Reinvigorate NABCI at a very high level and ensure engagement by agencies and foundations that are necessary for landbird conservation. Engage directors at a high level (state, BLM, USFS, foundation) and engage as a management board team.
- Engage social science for our conservation plan and work with stakeholders, e.g. land managers. Identify key stakeholders/audiences and prioritize research questions and the target audiences.

#### **USFWS**

- FWS regions will seek integration at the regional office level. Work with regions to engage them at the regional office level and facilitate that discussion.
- Move forward with hiring two initiative coordinators and support staff.
- Internal assessment of FWS Migratory Bird Program support of integrated bird conservation. Look at structural changes to further bird conservation.
- Will take action to ensure the integrated bird team, so that those coordinators serve as an integrated body and provide support for NABCI. We need integrated bird team to carry forward at an executive level.
- We will do what we can to advance leadership participation in NABCI with AFWA.
- FSW MPB HQ leadership members present (at Workshop) are committed to advancing results from this workshop and invite participants to hold them accountable with recommendations from this workshop.
- Will work with partners to identify and seek additional funding support. (Agree with recommendations to seek alignment between JV and NABCI for funding support for integrated bird partnerships).
- Report on progress from this meeting at various meetings at NABCI, JV, BCPP meetings.

## **U.S. Shorebird Conservation Plan Partnership**

- Support increased use of social science in addressing bird conservation issues. Work on the definition and applicability at the US-NABCI level.
- Support increased communication and collaborative via current (e.g., TriST) or enhanced channels (e.g., NABCI Science Team).
- Develop clear messaging for Pacific and Atlantic Flyway Shorebird Conservation Business Plans and ensure appropriate JVs are aware and involved (e.g., communicate current status, invite to workshops).
- Keep abreast of flyway-scale programs developing at the hemispheric scale (e.g., Western Hemisphere Migratory Species Initiative, Convention on Migratory Species, Arctic Migratory Bird Initiative) and represent Pacific and Atlantic partners' interests.
- Assess technical and management board capability of JVs to plan and deliver shorebird habitat conservation. Work with JVs to build capacity strategically within JVs. Discuss interest/need of periodic meetings between USSCP National Coordinator or Council member with JV Coordinators. Develop objective and outcomes for meetings.

### ***Final themes discussed in plenary***

Recommendations developed in organizational affiliation breakout groups were reported out, in turn, during plenary session. For one of the report outs - that produced by the JV affiliation breakout group, the largest affiliation breakout group - participants in plenary session indicated by show of hands whether they "strongly supported the recommendation as written," or thought the recommendation was "interesting, but needed further refinement or clarification." It is important to note that even with the "strongly supported" statements, time constraints prevented a detailed discussion of the actual wording (and meaning) of the statements. Therefore, all recommendations listed below warrant additional discussion, refinement, and vetting before they can be considered truly reflective of the depth of discussion that took place during the week.

**Themes that received 85-95 percent support.** These themes were generally prevalent throughout the workshop and consistently emerged as important needs or concepts. These themes were highlighted during the group plenary session Friday morning as receiving the greatest support of the workshop attendees. While they may still require some clarification to fully reflect the discussions at the workshop, they warrant the development of more specific next steps that will facilitate their implementation.

- Comprehensive reconsideration of NABCI committee membership (for example, participation of at least four state directors).
- Promote a strong driving NABCI that JVs can support.
- AJVMB consider aligning funding strategy more closely with NABCI.
- Develop and endorse a single series of high quality standards that can be applied to all types of bird conservation plans.
- Explore unification of all science capacity in bird conservation community.
  - Combined science capacity is integrated or aligned better with NABCI.
  - TriST is recognized as the science forum for the three initiatives (PIF, shorebird, waterbird), and NSST.
- Fill the empty coordinator positions – NABCI, PIF, and waterbirds.
- Better integrate or coordinate human dimensions capacity under NABCI.
- Better integrate or coordinate communications capacity under NABCI.

**Themes that were of interest but the group felt required further refinement or consideration.** These themes were discussed at length over the course of the workshop and considered important by the majority of attendees during the Friday plenary. However, opinions about each of these themes varied among the attendees, precluding a majority consensus about any one theme. Attendees agreed that each theme warrants further discussion and consideration by the broader bird conservation community to clarify and form a consensus around (or discard) before considering next steps.

- JVs and the broader bird conservation enterprise will rebrand themselves as the go-to 21<sup>st</sup> century conservationists (addressing climate change, social science, and human dimensions) resulting in a return of high level leadership.
- Move BCPP coordinators under NABCI to integrate initiatives.
- Refrain from forming the Integrated Bird Conservation Team (IBC Team).
- Reorganize migratory bird FWS organizational chart with the BCPP coordinators under a common supervisor, along with the JV national coordinator.

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