**Considerations for Bird Conservation Planning Standards1/**

**Introduction.** Recommendations provided herein are intended for consideration by the North American Bird Conservation Initiative (NABCI) U.S. Subcommittee and other parties interested in developing or promoting bird conservation planning frameworks. While this synthesis was compiled exclusively by Migratory Bird Habitat Joint Venture (JV) Coordinators1, the authors’ experiences extend well beyond JV-scale planning to include significant involvement in national/international bird conservation plans (e.g., NAWMP, PIF, etc.), conservation business plans, site-specific conservation plans, and others. These guidelines are intended to be applicable at all spatial scales and for a variety of bird plan types and purposes.

**Governing Body “Partnership”.** The success of conservation planning at all scales depends on the direct involvement of diverse partners. Participation by partners with biological, financial, management and socio-political expertise are important from the smallest (local) to largest (continental) scale planning efforts. Well-defined partnerships are critically important to address ecoregional level conservation issues.. Once the partnership has formed it must be led by a strong and engaged governing body. Representation from the primary land management/stewardship entities, natural resource agencies, and diverse stakeholders is essential, including direct links to communities and decision-makers. Such representation is essential to providing the pragmatic elements which will ensure success in conservation delivery.

* Is representation on the governing body at the highest level of their respective organization so they have the authority to commit financial and staff resources to achieve the goals and objectives outlined.
* Are there technical teams in place to support the governing body that represent a spectrum of biological and sociological expertise? Today, technical teams with a propensity for innovation and using the latest tools are needed.
* Within technical teams, is there sufficient capacity (i.e., funds, personnel, logistics) to develop the plan and support the governing body through implementation phases?
* Although the governing body is charged with executing the plan, have they remained flexible enough to drive new opportunities and address emerging threats?

**Pre-Planning Assessment.** Recognizing that accumulation of a plan does not itself lead to meaningful conservation, several pre-planning assessment steps are vital to a successful conservation plan. These ensure that the overarching conservation goal drives the plan through its impact on target audiences, and that there is a sufficient base of support and ownership to maintain credibility and relevancy.

* Is the purpose and scope of the plan identified?
* Is the audience for the plan identified?
* Is the spatial and temporal scale of the plan identified?
* Is there an identified mechanism and commitment to obtain appropriate levels of peer review by academicians and practitioners of relevant disciplines, including both biological and socio-political?
* Is there a governing body of diverse representation positioned to provide guidance and ownership to the plan, and ensure a commitment to its fulfillment?
* Is there sufficient capacity (i.e., funds, personnel, logistics) to develop the plan, including provision of appropriate levels of technical/analytical support?

**Linkages Among Plans at Different Scales.** A notable strength of the North American-based bird conservation enterprise is the expectation and capability to link objectives (for populations and habitats) at multiple spatial scales. For example, national/international plans (e.g., U.S. Shorebird Conservation Plan, Waterbird Conservation for the Americas, North American Waterfowl Management Plan, Partners In Flight, and species-specific rangewide plans) exist with the primary audience of national-level decision makers, while also serving to inform conservation planners developing plans at regional spatial scales. Regional geographically focused plans based upon political boundaries and/or ecoregions (e.g., JV Implementation plans, BCR plans, bird sections of State Wildlife Action Plans) exist with the primary audience of state, federal, and private wildlife conservation organizations making decisions at regional scales, while also serving to inform conservation planners developing plans for specific sites. Site-specific bird conservation planning is often nested within planning for broader taxonomic and other objectives for a specific land tract (e.g., National Wildlife Refuge System Comprehensive Conservation Plans or state Wildlife Management Area plans), with a primary target audience of the local land manager responsible for decisions at that specific site.

Because planning at each of these scales typically represents a suite of priorities and objectives that are broadly vetted by the conservation community, linkages across each of these spatial scales strengthens credibility and buy-in, thereby increasing the confidence with which partners can make decisions and investments at each scale.

* For regional or local scale plans, are objectives (for populations or habitats) explicitly and quantitatively linked to objectives articulated in relevant conservation plans for broader spatial scales?
* For rangewide species plans, are objectives linked and/or consistent with objectives articulated in national/international plans?
* For national/international scale plans, are objectives articulated in a manner that facilitates linkages to planning at finer spatial scales?
* Does the plan consider annual life cycle needs and identify priority habitats for each life cycle stage that is relevant for the geography and species for which the plan is developed?
* Does the Plan have measurable habitat objectives for each relevant life cycle stage for the geography and species for which the plan is developed?
* Are all relevant linkages to bird plans at other scales explicit (i.e., referenced)?

**Biological Foundation.** Beyond linkages to plans at other spatial scales, and issues of spatial and temporal scale addressed in pre-planning, other facets of biological foundations are important technical elements of bird conservation plans. The degree to which these elements are explicit and transparent is key to future refinement and plan improvement.

* Have elements of scale been appropriately considered, such that implementation (i.e., “focus”) areas are identified as appropriate, with similar treatment options and geologic/physiographic, climatic, and ecological settings?
* Are priority species identified with explicit carrying capacity or population objectives for each implementation area?
* Is the complexity of the priority species portfolio appropriate to guide conservation actions for the implementation area(s) (i.e., is the number of species limited enough to comprehensively address via these standards, yet extensive enough to meet the priority needs for the landscape)?
* Are habitat objectives (related to both quantity and quality) in place that explicitly link to population objectives for priority species and address their presumed limiting factors within the implementation area?
* Are well-developed conservation strategies and actions identified that abate any identified deficits of habitat quantity or quality objectives?
* Are key assumptions in the population-habitat linkage explicitly identified?

**Human Dimensions/Societal Considerations.** Beyond biological considerations, the science of other disciplines is also relevant and important to successful bird conservation plans. The degree to which these steps are explicit and transparent are also key to refinement through application of social science tools.

* Have the key societal drivers of habitat change been identified and quantified (social, political, economic)?
* Have the key audiences that influence the different societal drivers been identified?
* Have key resource benefits/outputs (e.g., ecological goods and services beyond habitat and population objectives) that resonate with key audiences been identified?

**Plan Communication.** Many planning efforts fall short only because they may fail to communicate priorities and direction. Careful consideration must be given what entity will handle communications and effective use of proper tools (newsletter, e-newsletter, web sites, etc) to transmit messages.

* Have messages been identified that highlight the benefits/outcomes in ways that are broadly accepted by the key audiences?
* Have targeted communication strategies been incorporated throughout the planning, delivery and evaluation process?
* Have resources been identified to implement a sufficient marketing communication effort?

**Plan Implementation.** Lofty and/or esoteric objectives are not likely to induce action without clear implementation guidance. The following considerations are intended to evaluate whether the plan provides a clear conceptual overview of the threats that are affecting the conservation targets and the strategies that will be used to address those threats.

* Are clear and measurable objectives established for each strategy at the appropriate implementation scale (i.e., “focus” area)?
* Do population and habitat objectives match the implementation area(s)?
* Does the plan present a portfolio of projects recommended for immediate/next step implementation?
* Are annual goals (e.g., acres) quantified for each focus area and the resources (financial, human capital, technical) to successfully achieve the goals identified and available?
* Is project implementation tracked in a geospatial environment to evaluate delivery and report (gross) success?

**Monitoring and Evaluation.** Monitoring/evaluation frameworks are important elements of bird conservation plans. Like the research and development component of any business production enterprise, this element ensures that the product (i.e., plan) continues to improve in credibility and relevance, yielding increased confidence from potential decision-makers and increased investments from potential resource sources.

* Is there monitoring (i.e., a framework for repeated assessments) in place to track progress toward the population objective at the scale of the implementation area(s)?
* Is there monitoring in place to track progress (i.e., net landscape change) toward the habitat objective at the scale of the implementation area(s)?
* Is there an iterative mechanism in place for refining population and habitat objectives and their linkage(s)?
* Are monitoring and/or research efforts designed to effectively address key uncertainties at the local (project) and landscape (implementation area) scales?
* Are monitoring and/or research efforts designed such that spatial analysis can refine focus areas, better elucidate priority species habitat relationships, and/or refine conservation delivery strategies?
* Is future scenario planning informed by monitoring, research, and associated models that evaluate past delivery actions and quantify past success?
* Do models predict results that are measurable for the purposes of model evaluation?
* Is social monitoring and/or research in place to refine human-related assumptions and track relevant changes in the social landscape?

**Strategic Co-funding.** Conservation success will in large part depend on the availability and diversity of funding sources. Insufficient capital is one of the major reasons why new small businesses fail, and this also applies to new conservation initiatives. As with investment in individual retirement accounts, diversifying the “portfolio” of conservation investment is also recommended based upon factors like the urgency of the conservation need and availability of funding.

* Has the plan included an a priori assessment of the most likely opportunities for cost-sharing, leveraging, or incentivizing conservation actions?
* Does the planned conservation funding match the scale of the conservation targets, or else is it clearly articulated that initial efforts are expected to be only proof-of-concept pilot projects?
* Does the plan assess investment risk and reward to evaluate alternative conservation strategies or actions (e.g., low risk-low yield vs. high risk-high yield)?
* Are non-traditional partners identified for pursuit to establish common ground, build trust, and develop mutually beneficial opportunities?
* Is past success quantified and used to demonstrate expected success?

**Foundational Plan Elements.** Additional basic plan elements are necessary to ensure that the associated governing body follows through on its responsibilities to maintain and shepherd the plan.

* Does the plan provide a brief implementation calendar?
* Does the plan articulate a mechanism and schedule for regular reporting of delivery accomplishments and scientific improvements (i.e., gleaned through monitoring or research)?
* Does the plan define responsibility (who), a mechanism (how), and a schedule (when) for, evaluating and revising future versions of the Plan?
* Does the plan define how its actions and their impacts will be monitored?

1 Compiled March 2015 by Mike Carter, Barry Wilson, Dan Casey, Jim Giocomo, Andy Bishop and Jane Fitzgerald.