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Strategy for the Cooperative Recovery of Rare Species Affecting Training Ranges

2005 Annual Report

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The Nature Conservancy
SAVING THE LAST GREAT PLACES ON EARTH

The Nature Conservancy is facilitating cooperative recovery of five rare species throughout their natural ranges to reduce the probability that mandated changes to training activities on Fort Lewis Military Installation and McChord Air Force Base may be imposed for the protection of these species. This proactive project will promote the on-the-ground recovery of these species, and test specific techniques, which can then be transferred to other installations facing similar threats.

Introduction

This report summarizes the products produced and lessons learned through the first year of the Strategy for the Cooperative Recovery of Rare Species Affecting Training Ranges. The project has reported specific progress and provided products on a quarterly basis. This report focuses on an overall summary of the project and success and weakness of the products produced. It does not provide the in-depth descriptions of products that the quarterly reports do. Yet this report does attempt to provide assessment of techniques, discussing aspects others should consider when implementing them on their installations or conservation landscape.

Background

Prairie and oak woodlands are one of the rarest habitats in the Pacific Northwest and the United States. The survival of the species that depend upon these habitats is becoming increasingly more tenuous. Ft. Lewis and McChord Air Base provide large amounts of habitat for these species and may soon be burdened with substantial recovery obligations due to restrictions related to species listed as threatened or endangered under the Endangered Species Act of 1973. Four of our species, the Taylor's checkerspot, Mardon skipper, streaked horned lark and Mazama pocket gopher, were listed as official candidates for designation as federal threatened or endangered species in 2001. The status of the western gray squirrel under federal law is currently in flux. The petition for listing of the western gray squirrel has been ruled as not warranted by the US Fish and Wildlife, but two conservation groups, the Northwest Ecosystems Alliance and Tahoma Audubon Society, have filed an appeal of this decision in the ninth circuit Court of Appeals. That appeal is currently being heard and a decision is expected later this year.

The listing of these candidate species would pose a serious threat to training activities at Ft. Lewis and McChord Air Base. In order to reduce this threat, The Nature Conservancy has initiated a project that promotes pro-active and cooperative recovery of these species throughout their range. This will help distribute the burden of species recovery over a variety of partners and locations. It may also help minimize impacts on military training lands if any of these five species is listed.

The project builds on the regional conservation strategy and cooperative actions suggested in the *Endangered Species Range Action Plan.* It works towards a comprehensive program, encompassing partners acting across the full geographic range of the species. In short, the project promotes cooperative recovery of rare species - working beyond political and geographic barriers to work with as many of the diverse organizations and individuals that will assist in the recovery process as possible. This results not only in efficient, effective recovery with the greatest probability of success, but also accommodates military training and operations.

The project's framework involves a three-tier strategy. The primary components of the framework are Information Transfer, Linking of Entities, and Generating and Promoting Incentives. Efficient Information Transfer allows all partners to utilize the best available practices for specific restoration and recovery actions, directly linking practitioners and the

results of their recovery actions with researchers and other land managers. Information Transfer is also an important step in bringing new partners to the recovery program. Informing organizations of the regional and national importance of potential recovery actions can be helpful in gaining acceptance of recovery goals. Typical techniques used for this component include web sites, one-on-one meetings and large-scale workshops and conferences.

The formal Linking of Entities is important to facilitate production and implementation of regional goals and to share resources. Methods to link entities range from formal US Fish and Wildlife Candidate Conservation Agreements to an informal Statement of Unity. Each of these agreements makes defining goals and sharing resources more efficient because roles and relationships between organizations are predefined.

The third major component of the framework is Generating and Promoting Incentives. While entities may agree with the recovery of rare species, many also require additional, specific incentives to initiate recovery actions. The most obvious incentives are financial resources. The project helps focus funding on priority recovery actions by generating conservation plans and by working with funding agencies to support those plans. Incentives can be non-financial as well. The offer of technical assistance can be critical in getting partners to undertake new recovery actions. Similarly, an offer to supply the skilled labor or materials, such as native plant propagules, needed to complete an action can be a strong incentive for positive action.

The implementation of efforts within this framework will be closely tracked and the success and costs of each technique documented. These efforts will facilitate the sharing of lessons learned during the project to other military installations facing the threat of imposed changes due to the status of candidate or listed species.

Summary of Completed Tasks

Overall the program has progressed successfully and has benefited rare species conservation in the South Puget Sound and beyond. The program has brought partners together, promoted collaborative planning and prompted individual conservation actions. In addition, the project has helped maintain and increase awareness of collaborative recovery efforts and the benefits of this approach.

The majority of products has been completed successfully or are substantially underway, Table 1. Products have been produced under each of the three major components of the project framework, with multiple products completed for some of those components.

The remainder of this report will discuss each of the three components to the project framework and how the products produced assisted rare species conservation. The success, and costs, of related actions will also be discussed, so that other practitioners can evaluate the potential benefits to their programs.

Three products are underway, though behind the initial proposed schedule. These have evolved for initial plans due to further discussions with partners. In each case, substantial effort has been

conducted towards the product, and substantial gains have been made. The best example of an altered product is the MOU integrating planning, which has evolved into the more comprehensive and extensive Candidate Conservation Agreement. While the initial due date has been passed, the end product will hopefully, more than make-up for the delay.

The single product highlighted as incomplete, the Statement of Unity linking land trusts and working groups, is awaiting the completion of the Candidate Conservation Agreement. The pairing of the agreements is seen as complementary as major landowners, including Ft. Lewis and McChord Air Force Base, are signatories of the CCA, while other conservation groups and supporting entities will link together through the Statement of Unity. Announced together the agreements should illustrate the strong partnerships that are building for the recovery of these rare species.

Table 1. Summary of product status Rare Species Recovery Project – January 2005.

Product	Description	Due Date	Status
FY 04			
Technical Demo	Series of workshops	04/30/08	Upcoming
Technical Report	Informal statement of conservation unity	04/30/08	Substantially completed
Publication	Website, meetings and other techniques for information transfer	12/15/04	Completed
Management plan	Review of local partner's rare species plans	09/15/04	Completed
Operations	Outreach to new regions, partners.	12/31/04	Completed
Technical report	MOU integrating DoD, State and NGO planning (Candidate Conservation Agreement)	4/15/05	Underway
Technical report	Annual report	4/15/05	Completed
FY 05			
Management Plan	Short-term conservation plans	06/01/05	Substantially completed
Briefing	Workshops to determine short-term conservation actions	03/01/05	Completed
Publication	MOU/Statement of Unity linking land trusts and working groups within recovery areas.	12/31/05	Incomplete
Briefing	Linked set of field trips	08/01/05	Complete
Progress Report	Annual Report	12/31/05	Complete
Fact Sheet		12/31/07	Upcoming

Information Transfer

Information transfer is the easiest component of the framework to move forward. Most current partners and especially new partners, desire to obtain the latest information about the status of species and the best techniques to recover the species. With proper encouragement these desires creates an atmosphere where information is freely shared and exchanged.

This said there can be some recalcitrance from individuals or agencies when information transfer steps into their perceived mandate. Unfortunately, some individuals can feel threatened by open exchange of information. While there are several methods to mitigate this problem, an overall open community of professional conservationist all striving for shared goals is the best remedy.

The Rare Species Project affected information transfer with multiple techniques and products, Table 2. These ranged from providing infrastructure for transfer, such as a website, to developing and coalescing information by developing new reports. Each of the techniques has strengths and weaknesses. None of the techniques were ineffective.

Table 2. Summary of Information Transfer techniques and products.

Technique	Project Product	Strength	Weakness
Local Working Group	none	Allows one-on-one conversations and partner development. Creates forum for rapid information transfer (3 meetings a year).	Leadership of group is critical. Time needed to plan and implement.
Websites	South Sound Prairies and Rare Species Project websites	Good forum for transfer of written information (technical documents). Allows some 'pushing' of information to partners. Broad availability can help recruit new partners.	Development and maintenance efforts required. Not a good technique for transfer of sensitive information.
Species Conservation Workshops	Taylor's Checkerspot Workshop	Formal forum to bring partners, including new partners, together. Highlights urgency of conservation actions. Gaining consensus on needed actions can be facilitated in group format.	Individual conflicts can arise. Focus of workshop can drift if 'pet' issues overwhelm workshop.
Conservation Assessments and Species Summaries	Taylor's checkerspot and streaked horned lark assessments and summaries	Focus on single species provides forum for complete range of information transfer – from status to conservation techniques. Can provide concise delineation of needed actions in prioritized format. Quick summaries that can be read and digested easily and communicates beyond the technical community.	Sensitivity in relation to formal state recovery plans noted. Trade-off between 'rigor' and timeliness can be complicating. Summaries not a substitute for complete assessment.
Conservation Action Summary	Recovery of Candidate Species In the South Puget Sound Region - Summary of 2004 Completed Actions and 2005 Projected Actions	Brings together all conservation actions to generate the broad, overall picture of recovery actions. Can highlight areas of need, as well as, current actions. Provides forum for review of progress by entire conservation community.	Some diligence and effort needed to obtain information from all participants. Sensitivity over crediting actions/participation noted. Sensitivity over results noted.
Ecoregional Field Trip	Ecoregional Field Trip	Brings together partners that may not interact regularly. Can highlight specific needs or areas of interest. Illustrates the range of conditions and challenges throughout the range of the species.	Range of conditions in different parts of region can make finding shared theme difficult. Logistics, including recruitment, can be difficult.

Local Working Group – The South Puget Sound Prairie Landscape Working Group has been functioning for more than a decade, under the guidance of The Nature Conservancy. This group has been a key component in the growth of prairie and rare species conservation over that period.

The group provides a forum for information sharing, developing partnerships and even creating incentives. The development and fostering of such group is critical in giving focus to the problems and solutions of the region. The benefits of the group to rare species conservation are tremendous.

Websites – Websites can be very efficient communications tools, reaching out to diverse groups, especially those that are separated geographically. The South Sound Prairies website has served as a central communications vehicle, especially for working group members between group meetings. While the site has several differing goals, the most pertinent to short-term conservation action is the repository of technical information. This not only allows for wide distribution, but also allows continued distribution of items that are physically out-of-print.

The website also offers the opportunity to 'push' information to users, by highlighting articles on the website. This can lead discussions into new conservation areas, helping to stimulate discussion throughout the overall community. The site can also help highlight conservation success and credit organizations, critical for continuing partnerships.

One negative aspect of producing the website is the technical production and upkeep of the site. While the Project was successful in obtaining assistance through a local technical school, initial production was a significant hurdle. Interestingly, although the production of a website was enthusiastically supported by working group members, their contribution to the site has been less than anticipated, in both the development and ongoing phases.

A continuing effort is updating and maintenance of the site, see sidebar.

Website Development and Maintenance

Enthusiasm for websites can be high. Yet the expense to develop and maintain them should not be underestimated. Development requires delineating goals, bringing together considerable information and meshing these with the technical development of web site structure and style. While this commitment is substantial it is the on-going update and maintenance of the site that is of greatest importance and cost.

Website maintenance requires expertise in multiple areas. Knowledge of conservation project and its future direction is needed to guide selection of articles and information posted. Design skills are needed to ensure content is engaging. Technical competence is required to alter the site and to maintain logical site structure. The combination of these skills is difficult to obtain on a limited budget or as an added duty.

Ensuring that adequate funding is available to maintain a dynamic functioning website is critical to long-term success. The difference for conservation success between an on-going communications tool and a static dead-end site is tremendous.

Species Conservation Workshops – These workshops can be very effective. They serve to bring together partners and focus on specific species or aspects of conservation. They have been key to concentrating energy on conservation priorities for the recovery of several South Sound species, most notably the Taylor's checkerspot. Without the workshop, and subsequent reports, efforts were diffuse and scattered. With the workshop, conservation actions have improved and funding has become available for key efforts that were previously unfunded. We anticipate that efforts to establish new populations of Taylor's checkerspot will be implemented for the first time this spring. This represents a huge step forward for conservation efforts of this species.

The need and effectiveness of workshops varies with the amount of expertise and interest in the species. While the butterfly workshop attracted a large group of practitioners, similar conservation results were obtained for the streaked horned lark through small group discussions. A large workshop takes considerable effort to organize, facilitate and report effectively. Alternative efforts should be evaluated for effectiveness or occur in sequence prior to a large, multi-partner workshop.

Conservation Assessments – Conservation assessments communicate the results of species workshops, they are essentially limited recovery plans. The Project and associated partners have produced both formal assessments and short summary brochures. The full assessments are best for communicating with conservation practitioners that are interested in the full details of threats and needed actions. The shorter brochures are best for communicating to a broad audience including installation managers, or the general public.

As evidenced by the name, conservation assessments, the project has used for these documents there is some sensitivity concerning their relationship with official state and federal recovery plans. The assessments do not need to contain all of the mandated sections that an official recovery documents require. In fact the short-term focus of the assessments was chosen to explicitly sidestep some of the difficult questions, such as recovery goals, that a formal recovery plan must address. This is a specific strength of the assessment. They can focus solely on the priority actions needed for immediate conservation results.

As seemingly with all collaborative efforts, some difficulties can arise integrating differing viewpoints or emphasis. This is especially true when a large, diverse set of experts is brought together. They each have areas of specialty which they feel needs to be addressed within the assessment. For instance, experts on surveys and monitoring may believe additional resources should be focused in that area, while experts on captive propagation and introduction wish those programs move forward. An overall sense of urgency and cooperation within the group, along with active moderation of conversations, can hopefully minimize the potential conflicts.

Conservation Action Summary – Understanding the full suite of conservation actions taken within a region for rare species recovery is a critical first step towards enhancements. The Conservation Action Summary achieved this goal, and communicated that

Adequate Credit

A sensitivity that arose for both the conservation action summary and the species assessments is adequate crediting of actions or expertise. This sensitivity varied greatly between entities and individuals.

While this could be expected, 'solutions' such as limiting crediting throughout a summary, did not eliminate concerns. This was somewhat surprising since it was assumed that the overarching goal of species recovery would minimize the concerns for personal recognition. This was untrue even when The Nature Conservancy, Ft. Lewis and others tried to lead by example and did not focus on recognition of their efforts.

Unfortunately, no positive solution was found to alleviate the problem without making the summary unwieldy with personal and organizational credits – how do you adequately credit cooperative actions with multiple partners planning, implementing or providing resources?

One suggested solution is ensuring that adequate recognition is made through alternative sources, such as the website or working group meetings. Such recognition can help maintain partnerships and promote an overall atmosphere of cooperation and collaboration.

understanding to partners. Results from the summary were intriguing to both managers and practitioners. It highlighted the success to date and areas where improvement was needed.

The summary is also a tool, which can help assess overall improvements to the rare species conservation effort. If compiled periodically, such as every two or five years, it will showcase where success has been made and where efforts need to be enhanced. This monitoring of the overall accomplishments of recovery efforts is critical – it is again a function that falls between organizational mandates when dealing with candidate species, rather than federally-listed ones.

Ecoregional Field Trip – Field trips, like free time at working group meetings, are a great opportunity to build or support partnerships. The opportunity to spend time with colleagues allows wide-ranging discussions, many times yielding new solutions to stubborn problems. The ecoregional field trip built on this assumption to bring together individuals that share conservation goals and problems, yet rarely have the opportunity to see each other and discuss them. This effort was successful.

Several enhancements are possible for future trips. The selection of an overarching theme may help to focus discussions and visits, though sacrificing interest and possibly participation. Similarly, it was suggested limiting travel by having the trip occur in a single region. Yet this might limit the local participation, which was a key to the success of the first trip. The range of suggestions shows the enthusiasm for the concept, and underscores the dynamic nature and need for an adaptive approach to many rare species conservation efforts.

Linking Entities

The formal or informal linking of entities can help solidify partnerships and collaborations. These agreements can help delineate the role of organizations in the conservation effort. This is especially important when issues are broad in scope or for the long-term. Agreements can also link entities for planning efforts. This type of agreement allows shared, collaborative visions right from the beginning and can lead to extremely beneficial partnerships.

The Rare Species Project has focused on two types of agreements to link entities, the informal Statement of Unity or Cooperation and the formal Candidate Conservation Agreement, Table 3. Neither agreement has been signed, but considerable effort has been placed into the agreements. We anticipate that both the Statement of Cooperation and the Candidate Conservation Agreement will be completed early this summer.

Several lessons have emerged as these agreements have developed. First is that multiple party statements, even an informal statement of cooperation can be difficult to culminate. This has been true even when the Statement of Cooperation is essentially a non-binding restatement of shared values between the partners. Difficulties can arise due to word-smithing between partners, or due to political concerns about all ‘MOU’s’ within a single important partner agency.

In some ways the more formal Candidate Conservation Agreement has met less difficulty. The rigid goals and legal oversight of the US Fish and Wildlife Service has helped to keep partners

aligned. Yet the production of a multi-species, multi-partner Candidate Conservation Agreement is an enormous task. The use of project funds to contract a consultant to facilitate the production of the Agreement has been immensely helpful. Without this assistance it is doubtful the Agreement would be completed.

Table 3. Summary Linking Entities techniques and products.

Technique	Project Product	Strength	Weakness
Statement of Cooperation	Draft Statement of Cooperation	Informal agreement explicitly states shared values and goals. Statement is good to bring disparate partners, in size, contribution or outlook together and highlight shared needs. Can be positive media event.	The weakness of the non-binding Statement can reduce incentives for completion. Can exaggerate minor differences in conservation philosophy or direction.
Candidate Conservation Agreement	Agreement under production	Can formally dictate conservation actions over extended areas and periods of time. 'Assurances' for non-federal entities forms strong incentive for completion of adequate agreement. Requires partners to explicitly evaluate their holdings and future conservation actions.	Complexity of agreement is daunting. Substantial resources from all partners are needed. Process can highlight differences in perspective or aggressiveness of conservation strategy.

Statement of Cooperation – Expressing the conservation values and goals shared between multiple partners would seem to be an easy task. Unfortunately, that has not been the case for the Statement of Cooperation, which was previously known as the Statement of Unity. In fact, the change in the name of the document illustrates some of the contortions that the Statement has undergone. While the intent and basic content of the Statement has remained the same over the last year and a half, there have been at least half-dozen iterations discussed by partners. Wordsmithing by both conservationists and lawyers have taken a toll on the enthusiasm for the Statement, since all parties must review alterations. This workload, combined with the diffuse benefits of the Statement has stalled its implementation. While the benefits of linking a wide variety of entities through the Statement is still a goal, and will produce benefits, its completion is currently on hold as effort is focused on the Candidate Conservation Agreement.

Candidate Conservation Agreement –This formal document will guide rare species conservation in the South Sound for multiple years. Its development is a critical step, which shows the commitment of the participating entities to rare species conservation. The concrete incentives of 'assurances' for non-federal entities and the delineated plan for federal agencies are huge. While partners were dedicated to producing the agreement, the scope of the project was larger than the resources the partners could apply to the project. Progress was slow until funds from the Project hired a consultant to support production. This has jumpstarted the process, helping to keep partners together, and has lead to an aggressive schedule for completion. Without this infusion of assistance the project would have likely remained bogged down and may not have been completed by all partners.

Generating Incentives

Generating incentives has been difficult to achieve since no direct funding for incentives has been requested for the project, Table 4. We have seen the importance of transferring and interpreting technical information to spur projects onward. In addition, the use of summary information, such as the Recovery Action Summary, has been central to developing funding proposals for broad initiatives.

The project has also learned that incentives can be ineffective if sufficient background is not prepared. A formal collaboration with Natural Resource Conservation Service led to placing rare butterflies as a priority for Wildlife Habitat Incentive Program. Unfortunately, several potential partners were not yet prepared for restoration of butterfly habitat, and new targets did not utilize the funding. This illustrates the need for success on all three components of the project is needed to obtain dramatic improvements in conservation actions over large landscapes.

Table 4. Summary of Generating Incentives techniques and products.

Technique	Project Product	Strength	Weakness
Indirect Influence	none	Development of summary information can help partners target use of funds or seek additional funds. Helps focus funding on priority actions.	Linkage between actions and results is difficult to assess. Without distinct workplan overall success can be spotty.
Direct Solicitation	None	Direct solicitation can take advantage of established partnerships, creating conditions for success of applicants. Can target specialty need not covered by more general goals.	Requires meeting funding source's requirements – may lead to adaptation of original need.

Indirect Influence – Many of the products produced through the Information Transfer efforts have direct impacts on delineating priority conservation actions and influencing partner actions. The increased partner awareness, generated through the information products, can lead to enhanced priorities and provide justification for the funding. This is true for information products that focus on single species, as well as, the overall conservation program. These products have been influential in highlighting shortfalls in funding and technical needs. They have helped lay the foundation for directing new funds and seeking additional funds towards those priorities.

Two significant funding opportunities have been influenced by the information and culture generated by the Rare Species Project. Mitigation for the Cross-Base Highway has been discussed for at least a decade. Yet it was only recently that those discussions shifted focus to off-site mitigation, including the funding of needed conservation actions for species throughout the South Sound region. Currently, the WA Dept. of Fish and Wildlife has considerable funding, 1.7 million, that is being allocated to rare species conservation actions. This includes a wide variety of actions that have been highlighted through the rare species workshops, species assessments and overall conservation summary. Similarly, Ft. Lewis' application for funding through the Army Compatible Use Buffer program has been refocused to include priority rare species actions. This application originally focused on ecosystem management on buffer lands

partners, including The Nature Conservancy, has recently obtained. Yet, through discussions and analysis spurred by the Project, this application now includes species-specific actions that directly compliment the original proposal. This shift in focus will help increase the overall success of these actions as buffers to Fort Lewis and McChord Air Force Base.

Direct Influence – Direct discussions with partners that fund conservation actions has proven difficult. This is not due to the desire of the partners to fund priority conservation actions, but due to limitations imposed by their programs or agencies. The best example of this is the US Fish and Wildlife Service. While that agency has become increasingly involved in the conservation of these species, as evidenced by their support for the Candidate Conservation Agreement, they have been unable to back that enthusiasm with funding. This has been true for both conservation actions and planning. Funding to assist in the development of the Candidate Conservation Agreement was solicited, but not available. This lesson illustrates that local influence may be insufficient, when national priorities or trends have not caught-up with the progressive thinking and actions of the local conservation effort.

The other Incentive lesson learned through the Project, occurred when funding was made available, but insufficient groundwork was laid to adequately utilize the funding. This is the case described above, concerning the Natural Resource Conservation Service and butterfly habitat restoration. Unfortunately, moderate amounts of funding alone cannot drive conservation actions if insufficient information, expertise and infrastructure are in place. Our enthusiasm for the conservation actions, and the ability to enact those in South Sound, over shadowed the limitations other practitioners faced in other parts of the conservation area. Steps to build support and resources for these new partners are underway and will hopefully result in new sites being restored for rare species in the near future.