

Partners in Flight Implementation Committee

Minutes - DRAFT

15-16 March 2009
BLM Eastern States Office
Springfield, VA

Attendees: Tony Melchiors, Randy Gray, Ed Laurent, Laurel Moore-Barnhill, Dan Casey, Dave Mehlman, David Pashley, Ken Rosenberg, Geoff Geupel, Terry Rich, Deb Hahn, Guy Foulks, Janet Ruth, Ashley Dayer, John Alexander, Chris Eberly, Brad Jacobs, Carol Beidleman, Geoff Walsh, Jim Wagoner(N VA Audubon), Dave Smith (Coord of IWJV), Randy Dettmers, C.J. Ralph, Tim Jones

Geoff Walsh provided an introduction to the BLM Eastern Region and we did introductions all around and reviewed the agenda.

Next PIF Implementation Committee meeting will be in September 2009 in the Austin, TX area in conjunction with the AFWA meetings (14-18 September). We had some discussion about the best way to schedule the IC meetings and possibly PIF Science Committee meetings prior to the AFWA meetings and about locations for the meetings. The Crossings which is near Balcones Canyonlands (TNC) was mentioned but it is quite expensive. Other possibilities mentioned – U of TX field station on the river just out of town; any FWS facilities near? Any World Birding Center locations? Bat Conservation International? Check with TX Parks and Wildlife?

ACTION ITEMS: (1) We will plan for meetings on Saturday-Sunday-Monday (12-14 Sept), with Saturday being for the PIF Science Committee, Sunday being a joint Science Committee-IC meeting, and Monday being IC. If the Science Committee needs more time, it will be tacked on before these three days. (2) We will not pursue The Crossings since budgets are so tight for many people this year and it's important to get as much attendance as possible.

Fundraising Idea - Chris Eberly presented some information about a project in Maine where they have created “birder bands” that are mock-ups of bird bands. They have the person's name and phone number on them and can be put on binocular straps, etc. so that people would return them if lost. They are sold to raise money. Just an idea for a way to raise money for PIF, some particular project, and/or through IMBD.

State of the Birds - Ken Rosenberg summarized the plans for the release of State of the Birds this week. The official release will be on Thursday afternoon at the National Press Club in Washington, D.C. The Secretary of the Interior will make the presentation and the agencies that were involved in developing it will be present. It is not so much for the general public. It will be announced at the North America plenary session and at the FWS Director's Reception on Thursday night. It will also be discussed at the Bird Conservation Committee meetings. On Friday it will be presented to the Senate and House in briefings.

NABCI Update - Deb Hahn and others summarized various NABCI events/issues.

Last meeting of the U.S. NABCI Committee was in January 2009. They focused on the strategic vision of committee - where are we going? should the committee vision or structure change? what is its role? should it go away? This is the 10 year anniversary of NABCI and the landscape is completely different. They are trying to put together a strategic plan for the next time period (5-10 years?). The strategy will include concepts like: (1) being more supportive of JVs as delivery mechanisms; (2) influencing policy, legislation, and the new administration; (3) providing leadership on monitoring (but in what direction?); (4) develop a communications strategy so that NABCI can speak with one voice; (5) State of the Birds – short-term (how to use most effectively) and long-term (better timeline for the future reports); and (6) wildlife conservation guidelines for the Farm Bill – they are updating the web-based Farm Bill guide to provide more information about the agencies and programs involved and who's eligible.

Farm Bill - The importance of influencing the current Farm Bill rulemaking process was emphasized. It happens every 5 years or so and submitting comments from your organizations is important. Although there has been some bad news about Farm Bill programs like CRP and Sod Saver, major progress that should benefit birds has been made on other programs. The U.S. NABCI Committee will be submitting comments. There was some concern expressed that separate comments from different agencies or organizations would have more effect, rather than one single, joint statement. More is better – delivers a stronger message.

Southern Wings project – Brad Jacobs, Dave Mehlman, and David Pashley have been working on the project and now a brochure has been developed to show states how to get involved in conservation in Latin American and the Caribbean. The brochure (targeting the State directors) will be rolled out at the N American this week. There has been progress in the project – the Western and Southern regional AFWA groups have agreed to collect money into 2 pots. ABC will help facilitate by passing the money through to ensure a low overhead. Pashley and Mehlman worked up some case studies showing the types of projects that could be done, esp. benefiting wintering migrants.

ACTION ITEM: There will be a PDF of the Southern Wings brochure and a link to it will be posted on the PIF Website in the Making Connections section.

Interactive Map Tool - Terry Rich talked about an interactive mapping tool being developed by Doug Miller, at Penn State. It will allow a user to go online and overlay up to 70 or so bird range maps (e.g. a combo of Mexican residents and continental migrants) and look for patterns, hot spots, etc. The bottleneck has been doing the map overlays. Connections have been made between him and PIF folks like Pete Blancher and Andrew Couturier. They are using NatureServe range maps. It is intended to be a tool for the Avian Knowledge Network. They continue to work on this. Doug has a paper in the McAllen proceedings.

PIF Representative to the U.S. NABCI Committee - Gary Meyers, recently retired, has been the PIF Representative on the committee for 10 years and now we need a new representative. It was suggested that the PIF Implementation Committee should make a recommendation on who that representative should be, and that this process has to happen ASAP! We had a lengthy discussion about the conflicting needs associated with a PIF rep. (1) We want someone who can strongly represent PIF. (2) There are some political reasons to name a “high level” person who brings weight to the position. (3) It is often the case that a person with the necessary “weight” is not very familiar with PIF. (4) If we name someone without a lot of PIF background (like a State Director), there will need to be someone in that state to staff (support) the person and it will be the responsibility of the PIF IC Committee and Terry as the PIF National Coordinator to keep that person more involved and informed than we have in the past. (5) We need to be better at getting PIF issues to the NABCI table – our representative should be saying “here’s what PIF has asked me to say”; (6) There are benefits to having a representative that doesn’t need to be educated about PIF. (7) The U.S. NABCI Committee in the past has emphasized that they want someone with “weight” in their agency someone who can go to the Hill to promote NABCI/PIF priorities (e.g., Director of FWS or State Director or..)

It was observed that there are other people on or at the U.S. NABCI Committee with strong PIF ties (Dave Mehlman, David Pashley, Chris Eberly, etc.), but it was also noted that they have to wear other “hats” and therefore cannot always serve our needs. There was a proposal that Terry Rich should be that representative. There was a proposal that we identify an appropriate State Director to be the representative; this could ensure that that person becomes more engaged with PIF and NABCI. State Directors from Wisconsin, Georgia, North Carolina (?); Colorado, etc.

ACTION ITEM: Deb Hahn and Terry Rich were given the authority to consult with some potential PIF representatives, work together, and make a decision on who the PIF Representative to the U.S. NABCI Committee should be.

Joint Venture – PIF Interaction

Terry introduced the topic by reporting on the meeting in December 2008 between the JV Coordinators and the bird initiative coordinators in Marin County, California. First and important observation - how little the JV coordinators knew about what was happening in PIF – we had assumed way too much knowledge. They walked through the Desired Characteristics for Habitat Joint Venture Partnerships matrix cell by cell. This was a very useful way to discuss what the bird initiatives expected from the JVs and what the JVs needed from the bird initiatives. The two-way conversation was very enlightening, and the matrix really helped structure the discussion.

We (PIF IC) have had these discussions before – the need to get the IC more involved in what JVs are doing and figuring out what they need from us (back to the meetings in Snowmass). We’ve talked about the need to often do this JV by JV because of the significant differences in where they are in the process and what they need. We’ve talked

about having specific individuals assigned to work with particular JVs. Maybe we can revisit this at the end of the discussion. **NOTE: We did NOT get back to this particular subject.**

Following are a few subjects from a rather broad-ranging discussion:

- PIF Regional Working Groups – These WGs could be useful in providing regional structure to both continental and regional discussions about things like population objectives, etc. But WGs operate very differently – the Western WG is very engaged, some of the others are struggling.
- Evaluation of success – both the JVs and PIF need to evaluate how they are doing. NAWMP has done a major evaluation recently. But the idea of reporting accomplishments in a meaningful way is complex and perplexing. Some argue that having individual JVs (or initiatives?) try to do self-evaluations every 5 yrs is impossible. Perhaps we can do a continent-wide, initiative-wide periodic assessment to see what we've gained and what we've lost. FWS Migratory Bird leadership is getting more and more anxious to get some kind of report card from the other bird initiatives.
- The reason for this conversation today is that we each need to find out what the other needs/expects from us. We (PIF) need to be more directly engaged in the JVs' efforts to deliver all bird conservation on the ground and become more relevant to the effort.
- Genesis of the “matrix” – from Guy - the NAWMP NSST identified the characteristics (the elements seen in the left hand column of the matrix) – the ideal components that a JV should aim for – using the Strategic Habitat Conservation (SHC) framework. The JV Coordinators determined that this matrix approach could be expanded upon and applied to all bird conservation and help them describe what JVs should be doing. We refined the matrix more at the Dec 08 meeting. We described a minimal level of accomplishment and a comprehensive level of accomplishment for each of the sub-elements in the matrix. Clearly not any one JV is, or will do all of these things. But it can be used to evaluate our needs and progress; use as a diagnostic tool and a means of determining how to allocate funds to JVs (those meeting these characteristics would be more likely to be funded). It will provide a common language and a common set of priorities.
- Dave Smith had looked through some of our draft Needs Assessment documents from McAllen in the context of the matrix and felt that by following the matrix, we can address some of the needs in the PIF Needs Assessment.

Intermountain West Joint Venture - Dave Smith, JV Coordinator for the Intermountain West Joint Venture (IWJV) gave a powerpoint presentation about the IWJV and these

larger questions. Below are some summary bullets from his presentation and resulting discussions:

- History – NAWMP developed the JV concept as delivery for waterfowl – put conservation on the ground – but was opportunistic and not coordinated. Eventually, with the other bird initiatives, it was decided that JVs would be the delivery mechanism for all birds. Because NAWMP was around at the beginning, the links between JV and NAWMP are better. NAWMP has set up a regular (every 3 yrs) review process for each JV to come to them with an update – a rotating schedule. There is a lot to be gained by setting up something similar for the other bird initiatives – perhaps the JVs should come to the PIF IC. Observation – the NAWMP NSSTs are a bit parallel to the PIF Science Committee. If not a strict review schedule, PIF and JVs do need to be in closer communication.
- IWJV is the largest JV geographically – parts of 10 BCRs; 37 state/BCR polygons; there are 17 groups on the IWJV Board; there are 11 states (?) involved. From 1994 – 2005 it has been doing more all bird planning. Question: is the IWJV too big? Would it be more effective to split? Answer: we are large; we are not going to be able to do the level of detailed planning that someone like Jane Fitzgerald can do in a smaller JV; but there is a problem with how to split it apart – BCRs would be split and states would have to be involved in more separate JVs.
- IWJV has reorganized in the last few years. They have realigned along science and habitat delivery focuses; they will begin to link bird population objectives and habitat objectives with a basis in SHC. They have developed science teams with representatives from the bird initiatives – Dan Casey is leading the landbird team. They are allocating more money to science and will be advertising for a IWJV Science Coordinator position and a geospatial modeler position in the very near future, as well as an Assistant Coordinator. They are also consolidating their habitat delivery system – Randy Gray (was from NRCS), a state wildlife action plan coordinator and a communication specialist.
- Funding pyramid with Conoco Phillips at the top, NRCS in the middle, and FWS at the base.
- Habitat delivery funding partners include land trusts, state wildlife agencies, NGOs, state wildlife grants, NMBCA, NAWCA, Farm Bill, FWS Partners for Wildlife, etc.
- Reference to the Matrix – The matrix gives us credibility, priorities, and logic. On the Biological Planning element – They are in good shape on these sub-elements: biological planning units and priority species; they are “getting there” on: population objectives and limiting factors; species/habitat relations are high priority. We need to develop the models for most landbirds.

- Having model-based objectives (using bioenergetics models) is VERY valuable to getting resources; we were able to say we need XXXXX pounds of food for these birds. It got the attention of funding sources – making a link between populations and habitat. Models and habitat objectives allow us to determine what needs to be done – restoration? Acquire land? Protect private land through easements?
- Coordinated bird monitoring is a solid idea. We know we have a long way to go. For the most part we are not doing site-based and/or post-project monitoring. Rather we're doing larger scale habitat monitoring (like the waterfowl 4 sq mile surveys).
- We are supporting capacity building where that is the limiting factor and not funding.
- Assumption-driven research is the most important.
- Communication/education/outreach is important to our ability to deliver conservation. Katie XXXXX [sorry, missed the last name] is the new communications person, located in Missoula; she will be available to participate in PIF communications efforts.
- We are not abandoning habitat work but we are trying to be more strategic.
- We are planning to release an IWJV Implementation Plan in 2010 with 4 chapters written by the Science Teams – Dan C will be involved in the landbird chapter.
- Farm Bill programs provide a massive opportunity for bird conservation in the IWJV. State wildlife action plans will also be important.
- IWJV would like to get on a regular schedule to meet with PIF for discussions, assessments, planning, and implementation.
- Both PIF Western WG and IWJV are using bird-habitat models from ReGAP (SW and NW) and working with ReGAP.
- Working with landbirds is most daunting; there is a world of research results, spatial data, and monitoring data. IWJV is trying to take a systematic approach. We need input from the technical members of the PIF community to help us.
- The PIF Western WG is providing much valuable information/guidance to IWJV. WWG monitoring efforts will inform IWJV monitoring efforts or support for monitoring. The IWJV Landbird chapter in the Implementation Plan will look a lot like the WWG strategic operating plan.

Landbird Science and Delivery Approaches – Powerpoint by Dan Casey

Below are some key points from Dan's presentation:

- In the first iteration of the IWJV exercise to identify bird habitat conservation areas, people in the various states met to jointly identify priority geographies.
- In the next iteration, we plan to have a model-driven prioritization process. IWJV has 37 state/BCR polygons. They developed a long matrix of 180 bird species that were identified as priority in at least one of the bird plans within IWJV boundaries; they chose about 20 species to use as focal species for model development. The list of 20 included: Grasshopper Sparrow, Sage Sparrow, Brewer's Sparrow, Grace's Warbler, Virginia's Warbler, Sage Thrasher, Bendire's Thrasher, Pinyon Jay, Gray Vireo, Gray Flycatcher, Willow Flycatcher, Olive-sided Flycatcher, White-headed Woodpecker, Red-naped Sapsucker, Lewis' Woodpecker, Rufous Hummingbird, Band-tailed Pigeon, Flammulated Owl [and I missed the last 2]. A subset of these 20 are chosen as representative of priority habitats (e.g. grassland, sagebrush, ponderosa pine). They will continue working with the PIF WWG. They plan to develop a matrix of these priority species with state X BCR population objectives. They are mining the literature for information, but there is little on vital rates.
- They plan mathematical models that tie population response to limiting factors. The habitat types will be quite broad so that they can be most useful for managers. They are working with ReGAP and will be emulating the HABS database approach from the Playa Lakes JV. They plan to engage with the PIF folks wherever possible. Example: IWJV has a contract with Jon Bart, Bob Altman, and Dan Casey using Grasshopper Sparrow and Long-billed Curlew to develop a model for population estimation for different types of habitat – looking at different types of grasslands – their estimate for LBCU is about 2X as many as the recent published LBCU population estimates. This gets back to the need to test assumptions. But more important is the relationship of population estimates to different types of habitat.
- Are looking at ways to influence bird habitats. We look at how much of the range of the species is in the IWJV and what activities would be most effective (CRP? Managing for grass types?). Come up with estimates of what kind of population increases we can produce. For example, by treating XX% of targeted habitat, we can increase the population of species YY by ZZ%.
- Sagebrush example – money from BLM to look at sagebrush species. Overlay species range for Sage Sparrow, Brewer's Sparrow and Sage Thrasher to look for areas where they are sympatric. Could use an ecological integrity rating (low, medium, and high) like ICEBEMP, lay it over sagebrush habitat and compare with bird data. This could be used to develop population estimates for these 3 species and help identify where you could get the most bang for your conservation buck.

- Having a decision support tool to address limiting factors, like the PLJV HABS tools will allow you to quantify the effects of habitat change – enter how many acres you are going to treat and it will spit out predicted results. You can work it backwards and put in the desired population response and have it tell you what/how much would be required. It allows you to optimize between habitats and species. IWJV is currently building a HABS database for BCR9 – hope to have done for 21 species this summer. We will be able to compare this with objectives in the continental plan to see if it matches up (or not). Also, we think that some of the same modeling can be used for some shorebird species that use upland habitats (maybe Wilson’s Phalarope, Willet, Sandhill Cranes).
- Farm Bill programs can help deliver biologically derived landbird habitat objectives. A CEAP (Conservation E..... Assessment Program) agreement for BCR9 is looking at past implementation of CRP, EQIP, WRP to inform future applications. They have interacted with the CRP SAFE program, and are doing education with farmers on the ease of restoring Palouse prairie. We can influence grazing systems in sagebrush and riparian.
- This work is big on assumptions and research is needed to test them.

How to use the Farm Bill for Bird Conservation – Power Point by Randy Gray
Following are key points from his talk:

- Everything we do must lead to protecting, restoring or enhancing habitat
- Farm Bill Programs represent a LOT of available money! For purposes of comparison: (1) NAWCA about \$70M a year; (2) NMBCA \$6M a year; (3) SWG \$75M a year; and (4) Farm Bill program (wildlife part) is \$700M a year plus CRP? The total Farm Bill is \$4B a year. We all need to be using/affecting the allocation of that money!
- There are Three general types of Farm Bill Programs:
 - (1) Easements which are permanent (e.g. WRP [Wetland Reserve Program], Grassland Reserve Program, Farm & Ranchland Reserve Program);
 - (2) Cost-share programs which are not permanent (e.g., EQIP [Environmental Quality Incentives Program \$1.3B], Wildlife Habitat Incentives Program \$80M); and
 - (3) Green Payments (e.g. Conservation Stewardship Program which pay land owners to “do the right thing”, CRP, whose acreage is declining). The problem with CRP is that it is ephemeral; habitat has produced lots of birds but may not be there in 10 years.
- Cooperative Conservation Partnership Initiative – in this new Farm bill – anyone can submit a proposal – you deliver the landowners to NRCS and money is guaranteed (I’m not sure I got this?)

- IWJV is working closely with NRCS – they are working to deliver capacity by paying for NRCS positions; partnership contributions to help landowners. NRCS has limited resources and people on the ground to meet large demand.
- WRP – there is substantial difference among states in the use/applicability of this program. This program is relatively “small potatoes” in the west compared to other regions. Many ranchers are not inclined to give these kind of easement rights to the government.
- EQIP – it will have \$1.7B by 2012. Although a lot goes to unpopular projects (e.g. animal feed lots), one of the EQIP priorities is wildlife; how much is spent on this depends on who submits proposals. Example in MT – a project paying for riparian fencing and revegetation in riparian areas. Can be used to help with capacity building.
- IWJV Capacity Grants – provide funding to states within the IWJV. Some of these have been tied to NRCS positions – benefit is that NRCS knows the local situation. RMBO oversees biologists in NRCS to deliver Farm Bill program funding. They do workshops, habitat projects, networking, festivals, etc. AND there is a clear relationship between where these workshops were held and where projects are on the ground. We (IWJV and PIF) can help NRCS by providing the geographic prioritization to direct their focus. In AZ they support a state game and fish person; have 2 state coordinator positions that they support, etc.
- NOTE: Although much of this funding is for work on private land, there is a window for funding work on public lands IF it can be shown that a private landowner would benefit (e.g., water development on public lands). AND there are limitations to what landowners can do in response – can’t add more cattle after these projects are done (but they might get fatter cattle).
- Money matters, and people (capacity) matters even more. We can help landowners learn about and apply for funding.
- Goal is to move away from “random acts of conservation” and do things in a more coordinated fashion.
- IWJV wants to create a dialogue with PIF and work together to be more relevant to each other. Much of what PIF has done (e.g., McAllen) has not been relevant to the person applying things on the ground.
- One way PIF could influence USDA programs is to be there when state technical committees meet. Most people there are not focused on nongame.
- Observation – 10 years ago the IWJV was focused on waterfowl conservation. Since then PIF has “infiltrated” the JVs with landbird people like Dan Casey,

Mike Carter, Carol Beardmore, Jane Fitzgerald, etc. and we have a much better relationship. Now we just have to figure out “what’s next?”

Atlantic Coast Joint Venture – Power Point presented by Tim Jones – ACJV, Science Coordinator. Following are some key points from his presentation:

- ACJV has taken a different path – they have almost completed their Biological Planning Element (from matrix) and are now focusing their efforts on the Conservation Design Element (from matrix).
- We are looking to PIF to help us; we’ve had lots of input from NAWMP.
- ACJV has started work on a proposal for a large, holistic landscape conservation design approach. They received an AFWA multistate grant and are developing a consistent methodology. It’s a 3-year project; assessing the carrying capacity of the landscape, predicting the impacts of landscape level changes, including stressors like urban growth and climate change. They are modeling landscapes forward 100 years in decadal time steps. They are using SW ReGAP, adding climate models, urban growth models, management practices, and will marry these with avian models. They want to use spatially explicit models to develop decision support tools to focus on future habitat conditions and avian populations so that they can compare outcomes (bird populations and habitat) depending on inputs (management or conservation actions). They are trying to explicitly incorporate tradeoffs (e.g., different effects on different species with different needs) and to identify the most important factors. For example, in the Charleston area, a comparison of potential effects of climate change (sea level rise) and urban growth are indicating that urban growth is by far the most important driver/threat.
- Decision Support Tools – These will involve multiple habitat types, complex and dynamic landscapes. We want to map the highest priority areas in which to protect or enhance specific habitat types. We want a map of where we should work on the landscape. There are computational limits; ACJV is large, with parts of 7 BCRs. We hope to do this for full BCRs.
- Most DSTs are either for breeding birds or for wintering waterfowl. This leaves out spring and fall migration. ACJV is working with a group of JVs and the D.C. Migratory Bird Office to develop a migration model based on energetics. This should eventually work for any species, assuming that the parameters for that species are available.
- ACJV is also investing heavily in new monitoring programs because we don’t have a way to measure effectiveness.
- We have not yet included human dimensions factors in our models.

- There was a discussion about the value of historic and current monitoring data in parameterizing the models. To do that, much of the historic data needs to be entered into usable databases. It is also important to have management/habitat data to go with the bird data.
- Much of the effort has focused on habitat protection, not as much on restoration as in the past. Observation that in the draft McAllen Needs Assessment papers, there was little emphasis on the protection of the best functioning habitats – if we don't protect them now, they will be gone.
- Question: what were the general broad data needs and limitations? Answer: the species models are based on raw data from BBS. Issues: (1) detecting signal of how birds are responding to habitat condition; (2) not knowing the data quality and if there are differences; (3) don't know where all the protected habitats are (sharing of some data is prohibited); (4) we don't have all the information about species-specific habitat associations or diets.
- Question: What discussions/efforts are occurring for ramping up the pilot effort to cover the entire region? Answer: We are talking with the PIF Northeast Working group; we've submitted a proposal to the Wetland Habitats section to expand this capacity to the entire ACJV. There is a capacity issue for developing these tools – there are only a handful of people pushing this forward.

Discussion Session on JVs and PIF – led by Terry Rich and David Pashley

The general idea for this discussion session is to go through the Desired Characteristics matrix looking at needs/expectations from both the JVs and PIF. We particularly want to identify those elements and sub-elements that PIF can provide or contribute to for the JVs.

The group looked at the Desired Characteristics for Habitat Joint Venture Partnerships Matrix and David Pashley handed out a one-page sheet that showed some informal scoring that he'd pulled together with a few others (Deb Hahn, Terry Rich, Seth Mott, Guy Foulks) to look at the elements and sub-elements in the matrix and score how NABCI, PIF, and the "old" and "new" JVs were doing in meeting the goals. It was a rough, subjective assessment using the following scores: 0=below minimal; 1=minimal; 2=above minimal but not comprehensive; and 3=comprehensive. Different people scored these a bit differently – David P weighted his scores by 2 factors (1) do we have the knowledge base to help; and (2) do we have the manpower and structural apparatus now to make it happen? Terry scored based on whether we had the ability to set up the structure to contribute, even if we didn't have the structure currently. It was noted that "knowledge base" might be data rich knowledge (e.g. AKN, KBO, etc.) or it might be the expert knowledge in someone's head.

We used the matrix and this score sheet during subsequent discussions to try to get at which of the elements and sub-elements PIF could best help the JVs. We had extensive discussions about what the different scores meant and where PIF could best engage. The result was a general outline of the Elements and Sub-Elements from the Matrix in which PIF could best engage. **See Randy Dettmer's separate Outline for a summary of this.** There are two purposes for the outline: (1) In a narrow sense it will be the outline for a proposal we can write Thurs if the NCN is selected by BCC, or a proposal to other funding sources (Randy Gray mentioned some) if that is not successful. (2) It will also define how PIF will apply to our work in the future one way or the other – regardless if we get additional funding

NOTE: The minutes below capture/combine details of these discussions (both Sunday afternoon and Monday morning).

DECISION: We chose to focus our discussion on the following 4 major Elements in the Matrix: Biological Planning; Conservation Design; Monitoring; and Communication/Education/Outreach.

BIOLOGICAL PLANNING Element

DECISION: The JVs and PIF have done a good job on the Biological Planning Unit and the Priority Species Sub-Elements and we should NOT be spending a lot more time and resources on those efforts. We agreed that we should focus our discussions on the Population Objectives, Limiting Factors, and Species/Habitat Relationships Sub-Elements.

Population Objectives Sub-Element

- Question: where is PIF on population objectives? Answer: this is a very active areas of work for the PIF Science Committee; a subgroup is working on refining the population estimates and doing a “bottom up” calibration piece. We could make this more of a priority.
- The NSST has tasked the Population Objectives working group with developing a workshop.
- Discussions at the PIF McAllen session indicated that JVs and others were doing all kinds of different things with regard to setting objectives. Some were taking continental objectives and stepping them down to the geography of the JV and others were organizing their own population objectives with a goal of adding them up to continental objectives. Although different approaches are not necessarily problematic, there has been a push to develop a more coordinated approach to developing population objectives so that we can add them up to see how they relate to continental objectives. The same idea for a workshop was discussed at the PIF McAllen session, but the workshop has not yet occurred.

There was a handout for a proposed (potential) workshop on developing population objectives at regional scales to occur in the fall – all bird focus.

- PIF Conservation Design Workshop in St .Louis in 2006 – That one was focused on species-habitat relationships. Jane Fitzgerald is really interested in expanding on those concepts to look at models that relate population objectives with bird-habitat relationships and ultimately on habitat objectives. The idea is to build models that will allow JVs to set population objectives AND move beyond bird-habitat relationships to setting habitat objectives. There is disagreement on how to proceed – some wanting to focus on population objectives and others wanting to get to habitat objectives and not get stuck on population objectives.
- The smaller and/or newer JVs with small staffs are REALLY in need of all kinds of assistance. They could use help on population objectives.
- Dilemmas on what kind of models (level of technical detail) are best. Some feel that if you make the models too technical, you will turn people off without modeling experience. Others are concerned about the implications of “dumbing down” models. Planning of any workshop will need to address in some way, these different levels of need and this continuum of opinions about modeling.
- The waterfowl folks have recently tried to work through these issues on population objectives with not much success on how to role up regional population objectives to a meaningful continental scale. The data on which such objectives are based are biased; there are difficulties with breeding vs nonbreeding objectives. There is resistance to changing current monitoring systems and considering the full annual cycle.
- Discussions about Workshop – a 2 and ½ day workshop on population objectives and species/habitat relationships. Could be done on a national level, or could be done on a JV level. Comment – the IWJV is working with the PIF Western WG and it’s a natural partnership for these kinds of discussions. Appears that there is not the same level of activity in the other PIF Regional WGs. There was some discussion about the possibility of funding through a multistate – there is an NCN that matches up perfectly if it is approved in the next few days at the North American. It is a great combination of JV and bird initiative joint efforts; we could put forth a bold proposal modeled after the matrix. If done at a regional rather than national level, there are some natural connections between JVs (e.g. IWJV and PLJV) and PIF could provide help at the regional scale as well. Consider an NCN proposal on the regional scale to address these needs. Observation from multistate grant perspective – if you design an NCN proposal to get at ALL the things needed in the matrix, it won’t fly. They are looking for more focused proposals.

Could the potential workshop currently described as about population objectives in October 2009 work for this larger workshop idea? What about timing/funding

to attend/JV's appetite for another workshop? As long as it is rolled over into the next fiscal year. If we don't get all JVs to attend, that's not a tragedy. There will be plenty (esp the new JVs) who will be interested. We could cover some aspects of the three sub-elements: population objectives; limiting factors; and species/habitat relationships – the whole suite of biological planning issues. There was some concern about whether this was too much material for a few days. One solution would be to touch just enough on each subject to put it into context for JVs. We want this to be a functional workshop – not just presentations from “experts”.

Goals of the workshop could be: (1) inspire JVs to think more about these issues and in a better way; (2) set future directions for PIF in working with JVs; and (3) setting the direction for spending a multistate grant if/when we get it in January 2010. We could also aim to develop a unified model framework that is general enough and could be applied to any species.

Selling these concepts – There is an historical parallel here – in the first decade of PIF we worked through the first 3 sub-elements under Biological Planning – coordination/partnerships, biological planning units, and priority species. Now we want to advance biological planning to address the last three. Taking the concept of biological planning to the next level for states and JVS should be a big seller. ALSO, by presenting this in the framework of the JV matrix – this is something that the JVs are asking for, they are at the table with us in developing it; this should give us more leverage than in the past. This is the logical next thing for PIF to do. Reminder – this concept is not just for the proposal but to identify future PIF activities.

ACTION ITEMS: (1) Develop a workshop for this fall (October 2009) to bring together interested JV folks and PIF to talk about the following Biological Planning subjects - population objectives, limiting factors, and species/habitat relationships.

(2) If the NCN is approved this week at the North American, we will develop a proposal focused on PIF and JVs working together on population objectives and species/habitat relationships; it will involve modeling, on-the-ground work, and communications. Find out what the process and deadlines are for submitting a letter of intent, and hopefully eventually developing a full proposal for the NCN (Deb Hahn)

Limiting Factors Sub-Element

NOTE: The following notes were not specifically, or always identified as about “limiting factors” but they seemed to fit as well here as anywhere.

- Full Life Cycle Modeling – We haven't thought enough about how to deal with nonbreeding (winter and migration) modeling and estimates. It has been difficult to get agreement on the assumptions (quite general) on which such estimates are based. We have had tunnel vision focused on breeding issues. Tim Jones is more

and more interested in figuring out what we can do about winter issues for all birds (Wood Thrush example – plans don't work with only a focus on breeding). This brings us back to thinking about where/what the limiting factors are for these species of concern.

The Mallard is the species on which we test most of this. Perhaps we should take a few landbirds (like Wood Thrush and perhaps a western species .. a grassland bird) and apply the “mallard approach” to see if we could push our knowledge. PIF has never really tried to think through a single species like this – the whole life cycle. Which species do we know enough about?..... Black-throated Blue Warbler ... American Redstart.

Doing full life cycle modeling would allow us to know what to do where. Where to focus our resources. How much habitat do we need for migrating Wood Thrush to keep it from being the limiting factor? Do we need to buy wintering habitat in Mexico? Do we need to change habitat structure on the breeding grounds?

NAWMP is trying for full life cycle models for 3-4 species – Mallard, Northern Pintail, Black Duck, Scaup (which one?). What if PIF did this for 3-4 landbird species? It was suggested that a protocol (organized process) be set for identifying which species to address, rather than a simple discussion around the table.

Institute for Bird Populations (IBP) has pretty strong opinions on this. They think they have pretty good ideas about what is affecting a large group of birds – their data/results are on their web and updated annually. If we write this proposal, we could work with IBP to develop life cycle models for 30 N American landbirds.

They (**who?**) have done this for Cerulean Warbler – it is overwinter survival (or migration) that is driving the system. They have not really gone back to that to say what it means for conservation.

All of this must be linked back to habitat in order to inform what the JVs need to do. Most think that this is an academic exercise that will not be useful to JVs. Also, it will be important to make the case that no one can stop working on breeding habitat, even if some other part of the life cycle turns out to be important. Breeding habitat is an important JV role.

- We have not really compiled our knowledge on winter and migration habitat use as we have for breeding habitat. Synthesis will be needed. Identifying winter objectives is something that PIF Science Committee can do. Identify the % of the population in different wintering locations. It will be important to provide this information to JVs – they are supporting X% of the wintering range of these Y species and you're not focusing at all on winter habitat. We should concentrate on providing this kind of winter and migration data – range, habitat use,

concentration, area importance, demographics (esp overwinter survival). There was also mention of MOSI work in the south and work in the west. Tim Jones said this would be immensely helpful.

- Observation – in the eastern U.S., you have Puerto Rico – a unique opportunity to look at full life cycle stuff in the U.S. and territories.

ACTION ITEMS: (1) Accumulation of information about full life cycle, especially nonbreeding (winter and migration); this responsibility is mostly that of the PIF Science Committee; and (2) Creating full life cycle models for some subset of high priority birds that we have a good knowledge of, representing a diverse geography and set of habitats. Money will be needed to contract out on this project.

If we do those two things, we'll have made a significant contribution to thinking about limiting factors.

NOTE: See the Action Items in the previous Sub-element – workshop is to cover all three sub-elements.

Species/Habitat Relationships Sub-Element

PIF has extensive knowledge of species/habitat relationships (much of it in our heads) that JVs need. Right now it exists as unrealized potential. We need to figure out how to structure ourselves to deliver this to the JVs. Below are some points made during the discussion of this sub-element:

- Conceptual modeling is an adequate start for looking at species/habitat relationships and more empirical modeling is the direction we want to go in the future. It may be a bit artificial to draw a line between conceptual and empirical models. For some species we will have lots of data to create empirical models and for others we won't and the models will be more conceptual. JVs are at various places along this continuum.
- Where is the info on species/habitat relationships? (1) some of the pocket guides being developed by RMBO, PRBO, etc. (2) there is some in the PLJV HABS database and Dan Casey with the IWJV has been developing a pilot of the same; (3) Ed Laurent has developed a database to begin gathering these data, but it requires a lot of assistance to populate the database; (4) NatureServe; (5) GAP and ReGAP; and (6) TNC.
- PIF Science Committee has talked about developing a species/habitat matrix; the idea was to mine as many sources as possible to put together in one matrix (database) the information that is out there on bird-habitat associations. One of the stumbling blocks to building such a matrix has been the lack of a standard, accepted set of habitat classifications. There has been work on this: someone mentioned that there is a “new one” that is stitched across the landscape but it is

This may be of interest to some JVs, while others have developed the bird-habitat resources that they need. But there was a feeling that something which benefitted a lot of JVs with one action was a good thing. There was some discussion of whether to start developing such a matrix for only priority species, with the assumption (to be tested) that it could represent the whole community. Others thought that it should be done for all species. It was also suggested that such a matrix could also include information on stressors/threats.

- We need to provide the expertise to help the JVs with the first steps of conceptual species/habitat models.
- Observation: We should NOT operate under the assumption that we can only make progress if we get funding; we can just do it faster if we get lots of money.
- Ed Laurent's project on species-habitat relationships – he read through the literature and entered data saying that this species occurs in this location, habitat type, elevation; it provides a link to the literature. A problem – there is lots of missing info and the more comprehensive the review, the more you find what you don't have. There is also lots of conflicting information; they have used a Bayesian approach – (e.g. Wood Thrush in N Hardwood forest with nesting affects of X - three papers with varying data) – they use info from existing studies to figure out why nesting success is different; now you have confidence interval and mean, you put it into Bayesian model and try to arrive at values for existing landscape conditions. The benefit of this project is that it reduces the amount of time/resources for people to start up a modeling process. [NOTE: would be good to get info from Ed on the extent of the project currently]
- Is it feasible to do a comprehensive literature review on habitat relationships of the 100 WatchList species as a pilot? Not for one person to do. There are lots of resources available; the challenge is getting them into a central location where it's easier to access them – a digital library database with facts available and linked to their literature – like Ed's project described above.
- There was a short discussion about involving the AKN but the bird data needs to be tied to the habitat data to get at this need. Then it can be used to quantify the relationship of species to cover types for example.

ACTION ITEMS: (1) Raise money to do something on a grand scale to develop the bird-habitat relationship matrix, with the goal of compiling the data all in one place, making it available in a useful manner. [NOTE: this was in my original notes but I'm not sure if we agreed to this]

ALSO, See Decision above in Populations Objectives with the proposal for a workshop on both of these subjects.

CONSERVATION DESIGN Element

Landscape/Habitat Characterization Sub-Element

- Landscape/habitat characterization has such a local context, perhaps it does not require a national level consideration? BUT smaller or newer JVs might be interested in help with this. Is there something for PIF to do? Perhaps there is a role to play in looking at what JVs come up with and being a check/balance/review to see if their characterizations makes sense. Is this a PIF Regional Working Group task? Unless there are technical pieces on which JVs need help?
- Need for relevant landcover mapping - Any leverage we could have in trying to push USGS into creating and regularly updating landcover maps that are consistent across species ranges (at a finer level than NLCD) would be very useful. The maps need to be functionally relevant. NLCD maps are updated at 10 year intervals and use a limited set of land classifications. The biggest limiting factor is the need for ground truthing data. Is it possible to have the people collecting bird data also collect data to allow regular updating of these maps?

ACTION ITEM: Terry said that this was a good issue for FWS to push. We should further develop a needs statement on this to present to Paul Schmidt and go to USGS to lobby for this.

- Another possibility is to develop a system whereby every eBirder was given a set of landcover classifications and asked to collect/record these data for any records they enter in eBird. (e.g. which habitat/classification was bird species X found in?) If there is a simple set of classes, then it might be easy to do.
- Need for a standard taxonomy of habitat types - Coming up with a standard taxonomy of relevant landcover classifications is the purpose of the big NatureServe – TNC (others?) project. Dan Levin is working on this. At the macro level there are 120 landcover types and at the divisional scale there are 44...Some mention of imbedding into 12 biomes [but I didn't get this]. If we come up with 100 types of bird habitat, then that can lead to the next State of the Birds – it would reflect a finer level of detail AND these classifications could be used in an eBird context (as mentioned in the previous bullet). Question – Has this project included work with Canada and Mexico? If not, this is not worth very much. Answer: not sure.

ACTION ITEM: Find out more about this project, whether Canada and Mexico are involved, and how it might meet our needs and be used by PIF and JVs. When

Dan Levin completes a draft on this project, it will be circulated for comments; PIF should be prepared to engage on this.

- There was a re-emphasis on the value of providing this sort of systematic and agreed-upon process and taxonomy of landcover/habitat classifications. It will be valuable to PIF, JVs, and citizen science.

Decision Support Tools (DST) Sub-Element

- The first thing that is important in developing DSTs is relationships – establishing relationships between info providers and users. It is important for us to be at the table during the discussions, which costs money.
- Some argued that DSTs should be something very simple. Others suggested that some DSTs might need to be complex (for large scale planning for example), while simple ones might suffice for addressing specific issues. J
- We need more specificity on what kind of DSTs are needed; what are the intended outcomes? We need to be very clear on this.
- There are multiple audiences (users) in JVs and we need to try to design DSTs to meet as many needs as possible
- Traditional Best Management Practices (BMPs) are NOT useful to managers or private landowners.
- Decision Support Tools are a means of packaging the information discussed in the previous Elements and Sub-Elements to show people how they can be used.
- The PIF Making Connections migration connection maps are DSTs; we looked at the data and figured out a cool way to present the information in a useful way.
- In some cases DSTs can be developed in a way that is applied consistently at national levels; in other cases DSTs need to apply to local situations and consistency across larger scales is not so important.
- The PIF Western WG and AKN are working on some DST ideas. There is an AKN list of DSTs [didn't get all of this, something about targeting USFS and BLM???] Also, a focus group at a PIF Western WG meeting was used to develop an online survey targeting federal management agencies to ask them what kind of DSTs they need/want? At what scale? This will be presented to the PIF Federal Committee later this week.
- PRBO/California PIF (?) are developing nodes targeted for JVs; they are being used by private land incentive programs (e.g., to answer a question like What is the potential for Burrowing Owls on this site?) It helps in planning and if they ask about an inappropriate species, it will guide them toward a better one.

- This raises a question about a lack of communication between PIF regional working groups. Why can't we share this kind of information? Figure out ways to apply existing tools to other regions and species? It was noted that the PIF Implementation Committee was where that was supposed to happen. In the past when we had PIF Regional Coordinators, they always gave regional reports at the IC (then Management Steering Committee). It was suggested that we resurrect the regional reports, or perhaps more of a working session to share information and figure out how to apply products further.

ACTION ITEM?: Begin to schedule at least regional reports and perhaps a working session to improve communications among the PIF regional working groups.

MONITORING Element

Population Monitoring Sub-Element

All the discussion under this Sub-Element was around the AKA presentation.

Avian Knowledge Alliance (AKA) – presentation and handout from John Alexander; below are some key points from John's presentation and the resulting discussions.

- AKA was developed to provide a unified voice for NGOS doing monitoring in a way that would add value to monitoring being done by federal and state government agencies that was driving the monitoring process. AKA was developed to align with the Avian Knowledge Network (AKN), especially the distributed databases. AKA/AKN has dynamic datasets that they did not want to put into static databases. AKA goals are presented on the handout. AKA wants to emphasize what they (NGOs) can do that government agencies can not do, and that they are poised to act on this. Example, often state agencies can contract out work to observatories who can do the work more cheaply. The conceptual model for AKA is an adaptive management one; different NGOs can plug in at different places, providing what they can, but they can all speak as one voice through AKA.
- Three Immediate AKA Goals: (1) continue work on coordinated bird monitoring across the U.S.; (2) developing a set of nodes for AKN to secure important monitoring databases; and (3) developing a survey in cooperation with PIF to go to federal agency land managers to find out what DSTs they need (eventually other surveys could be targeted at other audiences).

There are 2 priorities for PIF and NABCI that AKA can help with: (1) meeting NABCI Monitoring Subcommittee needs; and (2) addressing needs coming out of the State of the Birds Report – demonstrating the role of birds as indicators.

- Avian Knowledge Network is a data warehouse handled through the Bird Monitoring Data Exchange (BMDE). There is a simplified table that can handle all bird monitoring data. Nodes are the regional groups of people that are identifying data sets, bringing the datasets into the node, and describing them so that they can be translated into the BMDE; they are the interface with the primary data in the AKN. Each node is responsible to handle the “depth” of the data (e.g. habitat data is collected at some places as well as bird data). AKN has a sophisticated operation that goes to a node and periodically harvests their data. The data warehouse can be updated; it is different than static databases like the point count database. There are about 10 AKN nodes; some are regional, some topical, some focus on archiving of datasets, or creation of a DST. others focus on another issue. (e.g., there is a node on banding data). The AKN archives all data in its native formats. Each data “owner” can choose how his/her data are used – they can even chose NOT to make it available, in which case AKN is providing a data storage/backup service. Some place no restrictions at all on their data. One focus is to find “at risk datasets” and get them into the AKN (e.g., historical data). Some datasets like the Christmas Bird Count data are not currently threatened; they are well managed, but if things should change, they could be put into the AKN. Some agencies are including requirements in their contracts that contractors enter their data into AKN to avoid having lots of data in drawers somewhere that never see the light of day. NOTE: work on the AKN and nodes has different levels of participation across the country. It’s quite active in the West.
- We want AKA to become a “household word”. Plan to make presentations to the PIF Council and the PIF Federal Committee. AKA is a loose consortium that originated within AKN, but now the AKA activities cover all manner of monitoring issues – it is more than a support group for AKN, although that is an important function.
- These discussions can be linked back to NABCI/PIF and to the JV Matrix. AKN and AKA are important tools that PIF can use to meet the needs identified in Sub-Element Population Monitoring under the Monitoring Element. How can we better support the requirements described there? The last sentence about using information collected from monitoring programs to inform future planning decisions is just what AKN and AKA are doing – using results to create DSTs that help managers make decisions.

NOTE: The west is progressing well on these kinds of efforts. In the northeast, this kind of process has not gotten very far. They have made lots of progress on standardized protocols and approaches, but not very much progress on identifying decision-makers and ways to help them. There is not a group of data users driving the process, seeing how they would benefit. It might help to have the JVs see the value of this effort and start providing feedback to describe how it could be made more useful. There was some uncertainty about why this is not working

in the northeast. Observations: (1) What is lacking are people or organizations that are really pushing this (like PRBO and KBO in the west). (2) The northeast doesn't operate in a regional sense like the west; perhaps because there are now big public land management agencies here. (3) In the west, NGOs are working under contract for state agencies AND the PIF Western WG has been focusing on monitoring issues for a LONG time. (4) In the southeast there is very little communication on these issues.

- It would be very useful to have some kind of information piece – in layman's terms and with education value – with an example of how these kinds of tools have affected conservation (e.g., PRBO riparian information). It could be done for the PIF 20th anniversary.
- It is sometimes difficult to get people to provide their data if they don't see any value to providing it. We sometimes don't even know what data are available. Ways to get folks involved: (1) One solution might be to identify a particular project for which we're looking for data (e.g., we want to compile all existing Wood Thrush data from all sources). It would bring together all the data "owners" and show them a product that will result from their collaboration. (2) People often don't have the capacity to "visualize" their data; LAMNA (sp?) wants to develop an AKN node that provided tools for the people to use to look at their data.
- There is a need for PIF to define, at a national level, what our monitoring objectives are. Different monitoring strategies are being developed in each PIF region without any consistent understanding of what our objectives are. Maybe we do this through the NABCI Monitoring Committee and maybe on our own. There was a mention of Elizabeth Ammon (with whom?) pulling something together. Is there a role for PIF Science Committee on this? To some extent we have been waiting for the NABCI Monitoring Subcommittee to do something on this, but if they are not going to do something, we should not wait around. Perhaps if we were to take the lead, it would help the NABCI Monitoring Committee?

PIF is doing things. The AKA is the PIF Monitoring Working Group in some ways. The Monitoring Needs Assessment document developed by Ed Laurent from the McAllen Needs Assessment effort reads a lot like a new PIF Monitoring Needs document with some editing. There is a group working on nightbird monitoring. Comment: National guidance has always been that people should go ahead and begin addressing needs; what is new here is thinking about some kind of data management to handle monitoring data.

- We need to decide whether this monitoring effort is landbird or all birds. In the west it is all bird. If it is seen as a PIF effort only, it could limit the success. JV comment: you need to do it with all four bird initiatives – they don't want to go

to 4 more group meetings. NABCI is supposed to do this but they're not. PIF can take the first step in organizing this effort and invite other initiatives to come.

- We need to make sure we have all the parties at the table – not just NGOs – including agencies. Wording on presenting this will be important; acknowledge that AKA has been focused on NGOs but HAVE to have the feds and state folks at the table. We can AKA as a unified voice of NGOs working well with agencies.

There was some concern about changing the dynamic of AKA if we bring agencies into AKA; we might lose what is most powerful about it if it is not just NGOs. The point was made that one of the reasons that AKA was established was that agencies have not always worked well together on monitoring issues and yet wanted to set the monitoring agenda; ALSO NGOs collect such a large proportion of the monitoring data; there was some disagreement about whether this was true in all regions. AKA has been open to sharing data. It was suggested that AKA might need to evolve if it wants to become a national force for bird monitoring – evolve to become effective in other regions that have a different dynamic (e.g. the northeast and southeast). If there's no possibility for change, then PIF might need to look for other opportunities. The discussion went on at some length regarding these issues. It was noted that AKN is not just an NGO affair, as they are working in some places to get agency datasets into the AKN. Someone mentioned the PIF NGO Committee as a model for the AKA as an NGO entity.

- Project tracking databases were mentioned as another outlet. There are efforts in California to tie project tracking databases to the AKN node so that there could be seamless tracking of the number of acres and number of birds produced. This is also something that is needed by the IWJV.

ACTION ITEMS: We recommend that AKA do the following: (1) make an effort to expand beyond the west; (2) become the PIF Monitoring WG; and (3) convene a face-to-face meeting to talk about PIF monitoring needs, using Ed Laurent's monitoring doc (McAllen Needs Assessment) as a starting point for discussion.

(4) Publish the Monitoring Needs Assessment document by Ed Laurent as PIF Technical Paper. It will be circulated to the PIF Science Committee for review. This will be developed as a PIF monitoring strategy statement.

(5) Encourage Elizabeth Ammond (Great Basin Bird Observatory) to convene a workshop on monitoring strategies, as she has been planning. PIF should support and participate in this workshop. Encourage Elizabeth to use Ed Laurent's document as presenting organizing principles. Encourage her to expand the concept for this workshop to address the issues we've discussed here.

COMMUNICATIONS/EDUCATION/OUTREACH Element

- There should be components of communications in all of the above elements/sub-elements, although there are also some components on communication that stand alone.
- Person-to-person communications (not just handing out a publication) is very important. The guide (handout) should be a reference AFTER you have talked with the target audience and gotten them to listen to you. Otherwise 90% will get tossed.
- There are BEAC products that are ready to go but there are no resources to accomplish this.
- U.S. NABCI Committee is interested in knowing how they can become more involved in communications.
- There are only 7 full time staff across all JVs that do education, outreach and communication. How will these folks interact? How can communication and participation in larger PIF communication efforts be managed? Some of the smaller JVs are interested in communications, but their biggest need right now is internal communications – nurturing their management board, setting up a website. A good mechanism is being developed with a JV communication working group – Jennie Duberstein (Sonoran JV) is involved and also has a link to PIF; this provides a mechanism for PIF to work with JV communications folks. But not all JVs are involved.

Suggestion: Ashley Dayer should participate in the JV communications working group [is this an Action Item?].

- BEAC tool kit project – they are looking at getting all bird initiatives feeding into a database and identifying audiences and what products are needed? There was a lot of interest among JVs when this was presented.
- A project by Tina Phillips (Cornell graduate student (?)) on ecological literacy – measure the effectiveness of education efforts by looking at before and after.
- Jennie Duberstein has asked for help to do a training on evaluation of success.

GENERAL DISCUSSION OF PIF CONTRIBUTION TO JVs

- Wherever PIF can step up to help address our needs (e.g. delivery capacity) they will have more influence in the process. Does PIF have funding to bring so that you have a stake in the process? Responses: ABC employs people involved with JVs; KBO and PRBO and RMBO have lots of influence through their

involvement; there are lots of opportunities for PIF partners to become more involved on the implementation side.

- Idea – Can PIF help with Training for JV partnerships? Getting expertise to the field. Instead of producing printed material, produce workshops. Response: lots of JV partners are hungry for this. We had some discussion about whether this was something that PIF had to offer or not; do we have the capacity to do workshops?
- We need to get the JV Science Coordinators to the PIF IC meetings.
- The question was asked about how folks thought these discussions and ideas would play with JVs that were not present. There were a number of people present to participate in other JVs. CJ said that these discussions would resonate with the Pacific Coast JV. David P said the same for the newer JVs (e.g. Lower Rio Grande,). We agreed that we'd provide info on this meeting to other JVs to get their input.
- Although JVs want better DSTs and models, we can't lose sight of the fact that JVs were formed to develop partnerships and deliver conservation on the ground.
- Is it important that the science we do to address JV needs is peer-reviewed science? YES.
- Everyone agreed that these discussions have been VERY helpful.

Monday, 16 March 2009

Additional Attendees on Monday: Alicia King (Communications Coordinator for FWS), Marcia Maslonek (FWS Migratory Bird Office), Jim Tate (Fellow at Smithsonian Migratory Bird Center, retired FWS)

NOTE: notes from the morning are incorporated in the outline discussions above for Sunday afternoon.

ACTION ITEMS: We have identified three “products” – the meeting minutes, an outline summarizing our discussions about PIF and JVs and the matrix, and a graphic produced by John Alexander. These can be used in at least 3 ways: (1) If the NCN is approved on Thursday, we will use all of this information as starting points for developing a proposal as described above; (2) Once our thoughts are organized, we need to present this information to the JV audience, perhaps through JV management board meetings, or JV Technical Committees, or JV Coordinators meetings. The first of the JV management board meetings are in early April and we should have materials available at that time. (3) These materials will also provide direction for the future activities of PIF as we address JV needs. It was noted that JVs would appreciate seeing the materials in

this #3 in order to better understand where PIF is going. This was agreed to, with the caveat that PIF wanted to have some more discussions prior to presenting this to the JVs.

Further updates on various projects/issues were presented.

State of the Birds

- Roll out this week – The Secretary of the Interior will be making the announcement on Thursday, March 19 at 2:30 p.m. There will be a briefing for the House and Senate on Friday.
- Informational materials have been produced – a national press release, a PowerPoint presentation, articles for websites and newsletters, suggestions for ways that communities can become involved. The recommendation is to take the national press release and then attach a memo or local press release. A video was also produced, that we watched; it is available on the web to view. Web address is <http://www.stateofthebird.org>
- One of the emphases – where conservation efforts have been applied, we can see results. Where conservation needs have been neglected, we see declines. A new concept that was introduced was that of birds as indicators of habitat quality; we made the case that they are also indicators of environmental change and human quality of life (this is a take off from efforts in the UK where their state of the birds report is treated as an economic indicator). Goal – to grab the attention of high level decision-makers.
- FWS and Bob Ford were the leads on this effort. There was a Science Team that included FWS folks, David Pashley, Laurel Moore-Barnhill, Dave Mehlman, Greg Butcher, Terry Rich; there was a Communication Team that included Ashley Dayer and Alicia King that worked in parallel and in collaboration with the Science Team from the beginning. The aim was for a very pithy presentation; to pull out the key messages.
- There was a summary of the methodology, looking at all birds in the U.S. including Hawaii and seabirds and using the BBS, CBC and FWS waterfowl survey data in new analyses developed by John Sauer (USGS Patuxent Wildlife Research Center).
- Key Points – (1) Emphasis on need for monitoring; (2) Hawaii was highlighted because of the large number of listed species there; (3) hit on messages of concern and major threats in particular habitats and also messages of hope; (4) focus on marine birds, grassland birds, arid land birds, several forest-type birds, arctic/alpine birds, coastal, and wetlands (wetlands provided evidence of success)
- There has been only a small print run of hard copies (1000 copies). This is for the initial release and most will be distributed to important target audiences like

Congress, state wildlife agency directors. There is a clear need for more copies and expect that there will be more print runs. But the report will be online at the website as a downloadable PDF.

20th Anniversary of PIF

The 20th Anniversary of PIF is in 2010. A number of ideas have been floated for ways to celebrate.

- The IMBD theme for 2010 is “The Power of Partnerships” and will include focus on PIF’s anniversary, although of course, it’s larger focus is all birds. We will be able to make ties to IMBD products, posters, and national reception.

ACTION ITEM: We should give any feedback to Sue Bonfield soon on poster design and artists.

- There should be a celebration at the North American Wildlife and Natural Resources Conference in Milwaukee in March 2010. They plan a year out on this so we need to start now! We could sponsor the opening reception, or we could arrange a special event/location where we could have a PIF display throughout the whole meeting. NOTE: we do not currently have a PIF conference display (perhaps Barb Bresson has something we can start with?). And we should find out the price tag.

ACTION ITEMS: (1) Initiate contacts with the North American to begin the planning process. Find out what the cost would be. (2) Develop a PIF conference display for use here and elsewhere.

- The PIF Trinational Vision for Landbird Conservation document is planned for release in March 2010 – there can be joint releases and publicity associated with that release and the anniversary.
- We should try to link up with as many of our partners as possible. A couple other partners are celebrating anniversaries also (Bird Studies Canada – 50th; KBO – 10th).
- We should work to have articles about the anniversary in as many partner newsletters, magazines, etc. as possible. Also bird magazines. We should develop set language that can be used in many venues, and we should provide “teasers” about what we can provide. NOTE: many of them plan a year out, so we should be contacting them NOW! BEAC is updating the PIF slide show.

ACTION ITEM: Begin making contacts with partner newsletters and magazines to plan articles on the PIF Anniversary.

- **REMINDER** – It is not possible to plan large scale celebrations in 4 months! We have to begin planning now! – not possible to plan in 4 months – HAVE to begin planning; need a year in advance for North American
- Scope – (1) We should also include Canada, Mexico, and MesoAmerica in these celebrations. We could do an event at the MesoAmerican conference being held late in 2010. (2) Because of the ties between PIF’s beginnings and the other bird initiatives, it’s possible to have a multi-initiative celebration.
- Ideas for other materials – “Birder Bands”; a calendar highlighting PIF successes; a package of resources; a PIF Partner Directory.
- Questions to ask ourselves: What is our goal? Who is our target audience? What do we want them to know about? Our successes? How do we get the info we need to develop these materials? What outcomes do we want? What messages do we want to convey? Figure out how to use the celebration to push our future PIF agenda (perhaps as defined in the Trinational Vision document)
- Focus – (1) The focus of this celebration should be about the success of bird conservation, not just about PIF. We need to strike the balance between this being “about the birds” but also getting credit for PIF as an important contributor. (2) There are lots of themes of sharing birds across the continent to give the continental perspective. (3) We can focus on bird conservation successes and doing it well through partnerships (like the IMBD theme). Although it’s important to talk about successes, we also have to present a vision for the future. Walk the balance between hope and challenges. There is still lots of work to be done. (4) In the last 20 years we’ve developed qualitative assessment of bird status; in the next 20 years we want to develop better, quantitative assessments.

Reflection on what has changed in 20 years – 20 years ago (1) landbird conservation was about people putting up nestboxes; (2) state and federal agencies did not employ nongame bird folks; (3) the 1990 AOU meeting focused on the technical aspects of ornithology and nothing about conservation, (4) international conservation was unheard of, (5) JVs were 100% ducks, and (6) we were treated like “aliens” at wildlife meetings. Today (1) the scientific community has changed, (2) agencies have changed, (3) there are many new NGOs that didn’t exist in 1990; (4) we are thinking about rangewide assessment of bird species, (5) conservation biology is legitimate field. NOTE: in doing this kind of reflection, we have to be careful about the tone so that we don’t look like we’re saying “look how dumb you were and how we helped you”.

- Ways to demonstrate effort/success: (1) Calculate the amount of money that agencies, and other partners have spent on landbird conservation, (2) find a way to see if all the changes that happened in the last 20 years really made a difference for landbirds (e.g. are any of the blips on the State of the Birds graphs in the last

few years real?). (3) Vignettes of successes; vignettes could also be used to capture the “then” and “now”.

- How to get this done - Who will coordinate this? Who is the Planning Team? PIF IC? What resources are we allocating? Alicia King has time assigned to work on this. We have communications folks willing to work on this IF some resources can be dedicated to support their time/effort. This is also a clear responsibility of the PIF Implementation Committee.
- A big PIF Anniversary Party – Let’s not just have a big party, spend lots of money, and get nothing out of it. Let’s consider a fundraiser. John Alexander knows the owner of Camden Yards (baseball stadium in Baltimore).j

ACTION ITEM: John A will contact his friend about the possibilities of getting Camden Yards for a celebration and will report back to the committee.

- Points to consider – (1) It is sometimes easier to get time/space at the AFWA meetings in the fall as compared to the North American in the spring. We could explore our options there since we have closer ties to the AFWA event. (2) We should consider inviting the Secretary of the Interior to our event. (3) Consider whether we want to merge our roll out of the Trinational Vision document with the 20th Anniversary celebration or keep them separate to avoid diluting the attention. (4) Do we want to get on the agenda of the Trilateral to talk about the Trinational Vision document and the PIF anniversary? (5) Try to get people who were present at the very first meeting that initiated PIF involved in the anniversary celebration.

DECISION: A PIF 20th Anniversary Steering Committee was identified, including Alicia King (lead), Terry Rich, David Pashley, Ashley Dayer, Brad Jacobs, Carol Beidleman. They will think about others who should be involved.

ACTION ITEM: Alicia King will set up a conference call for the committee.

Trinational Vision for Landbird Conservation document – update from Ken Rosenberg

All the scoring is done to identify priority species for the three countries (U.S., Canada and Mexico). The meeting of the PIF Science Committee on this subject in Mexico City in February 2009 appeared to really gel our plans for this document. Timeline to produce this document: (1) another meeting of the PIF Science Committee this July somewhere in Canada; (2) a relatively clean draft to present at the AFWA meetings in September 2009; (3) a published document to release at the North American in March 2010. The format and direction for the document is being inspired by the State of the Birds report. This is NOT an update of the North American Landbird Conservation Plan (Rich et al 2004) and will NOT replace it; this will be at a different scale, including all three countries. We will be pulling out the big continental messages – (1) continental

responsibility for our avifauna; (2) shared species; (3) the need for full life cycle conservation; etc. The scoring database produced a set of species lists (not just a single list like in the CPlan) – we will structure the document around these groups of birds and themes and threats. We recognized that there will be some specific messages that each country will want to take home from these analyses, but decided that this document would try to focus mostly on the continental/trinational messages. The three country leads for the document are Terry Rich, Judith Kennedy, and Humberto Berlanga. We have a Wikki site that we're using to coordinating our writing/communication effort. We will be simultaneously producing Spanish, English and French versions. Much of this will be written simultaneously in Spanish and English; Canada is committed to producing the French version. We are dealing with various challenges related to terminology and concepts that don't always translate well between countries, cultures and languages.

We will need to develop a budget and begin raising funds right away! Terry will present info for the budget at the PIF Federal Committee later this week. John Alexander pointed out that NGOs are able to make flexible contracts with federal agencies and may be able to help with funding for this by capturing end of year dollars to be spent as the publication occurs.

Unresolved is the issue of who will help produce the various related documents that we want to have available at the same time as the Trilateral Vision document – not everything can fit into a document of the format type of a State of the Birds report.

ACTION ITEM: Begin the process of raising funds for the Trinational Vision for Landbird Conservation.

McAllen Needs Assessment – update from Carol Beidleman

A group has been working on separate articles on 5 subjects from the larger, comprehensive Needs Assessment document that is already available on the PIF Website, which shows information about each session along with the needs assessment information from that session, along with a large Excel spreadsheet with all of the needs compiled. The following people had the lead on these sections: Research – Janet Ruth; Monitoring – Ed Laurent; Education/Outreach – Ashley Dayer; Capacity Building – Laurel Moore-Barnhill; and Public Policy – Geoff Walsh. There are good drafts of each of these sections but we do not yet have a final project. The authors have used somewhat different approaches to synthesize the McAllen Needs Assessment materials on their subject. Some used only the material from McAllen, others (esp the Monitoring and Research sections) have mined additional information available about needs to create a coherent synthesis – the needs identified at McAllen, because they came from sessions that represent a subset of possible subjects did not really provide a coherent view of the highest priority needs. However, even those who incorporated additional needs information tried to emphasize the results that came out of McAllen. Each of the section leads gave a quick summary of their efforts. There was also an acknowledgement that there remains a potential for overlap between the sections.

Suggestion – It would be nice to crosswalk these needs with the JV matrix to see where there is synergy; this would be useful for a JV audience and might identify some things that were left out.

Concern was expressed that the PIF Monitoring Committee had not seen the Monitoring Needs Assessment until last week. The Monitoring WG would like to have an opportunity to provide input to this document, relate it to other PIF efforts like the Dunn et al. PIF monitoring needs document, get buy in, and ensure that this represents PIF's views on monitoring. To do this, the approach of incorporating information beyond the McAllen needs is crucial.

There were further discussions about how to handle these pieces and ensure that they got published. It was noted that a lot more work would be required to have all of the sections represent a synthesis larger than the materials from McAllen. We reviewed the commitments that we'd made to McAllen participants about how we would use these materials. We determined that we had met the promise to make the needs available by posting the large, comprehensive Needs Assessment document on the website. The point was made that if that indeed fulfilled our commitment, then it was less important to write another document that was "just" about the McAllen needs. There was some discussion about what the value of these publications would be; it was agreed that this might differ between the different section writeups. There was a suggestion to try to just pull out the major themes and present short, compelling document(s).

Question: Should these documents, particularly the comprehensive research and monitoring documents, be published in the McAllen proceedings or in the primary literature? Some of this depends on what the lead authors are willing to do. We discussed whether it was still possible to get these into the McAllen proceedings. Terry reported that he has 60 final manuscripts in hand and 30 that are still being revised by authors; the end of March is the drop dead deadline for these manuscripts to be received. BUT there are probably still 4-5 months until a final product will be posted on the web and then some more time until hard copies are produced. He felt that it would still be possible to finalize and include separate chapters on the needs, for those lead authors who wanted to proceed; Terry would like reviewed and revised manuscripts by the end of May. It was noted that the purpose of McAllen was to plot the future direction for PIF and synthesizing this kinds of needs information is part of meeting those goals. Because of the different approaches used by the authors, it will be very important for each of them to describe what they've done and cite any additional sources that they used. These draft writeups (manuscripts) should be reviewed by appropriate PIF folks: Research writeup by the PIF Science Committee; the Monitoring writeup by the PIF Monitoring Working Group; the capacity building writeup by the PIF IC and the JVs; the Education/Outreach writeup by BEAC; [I don't have anything written down for the Public Policy writeup???] We agreed that if we got something published in the McAllen proceedings and had good bulleted summaries for on the web [I found not other notes about this last part?????] that we should be satisfied that we'd met our commitments to McAllen.

ACTION ITEM: Each of the 5 lead authors is responsible to circulate his/her Needs Assessment manuscript to the appropriate PIF group, make revisions, and submit this to Terry by May 31, 2009.

PIF Budget – presentation by Terry Rich

This budget summary for 2009 is developed mostly for the PIF Federal Committee – he provided a handout. A few points from the budget outline:

- McAllen Proceedings – It will take some money to get the proceedings formatted and into a large PDF to put on the web and then to print hard copies through U of Texas Pan American (if we have money to print it).
- We need some funding to support folks like Ashley Dayer to participate in PIF activities (mostly travel expenses) and provide the communication/outreach perspective.
- Species assessment database – RMBO has gotten contributions this year but will need more for the next fiscal year. Suggestion – it would be appropriate to hit up Canada and Mexico this time round because of all the use of the database for the Trinational Vision document.
- Development of more pocket guide (e.g., for sagebrush birds) This has been a very popular, successful effort. There are quite a few others targeted for the future.
- MesoPIF and La Tangara – they have not gotten any support for the last few years and are operating out of their own pockets; a minimum of \$10K would really help with La Tangara, MesoPIF reps travel and training in MesoPIF.

BEAC – update PowerPoint from Ashley Dayer

- BEAC's recent meeting in GA in Feb - Priority projects for 2009: (1) collaboration with bird conservation initiatives on communication issues; (2) Development of products to advance implementation. BEAC plans to work on outreach to the bird conservation initiatives, serve as a communications team for the Trinational Vision document; work on the PIF 20th anniversary, and work on the education/outreach needs assessment manuscript for McAllen proceedings (let outreach folks know it's available). A number of PIF-related folks are involved in BEAC: Melissa from PRBO, Jennie Duberstein from Sonoran JV, Sue Bonfield (Environment for the Americas and IMBD)
- BEAC Products – (1) Bird Conservation Tool Kit – an interactive, internet-based resource that links conservation to education; it's designed to identify the steps people can go through to develop the tool kit they need. (2) resource directory, [there were others that I missed]

- They are working on a guide for how to use a common language for classifying threats – they are pulling the threats out of the various bird conservation plans. Eventually they may develop a white paper on creating a shared lexicon for threats.

International PIF – update from Carol Beidleman

- PIF MesoAmerica group held a meeting and workshops in El Salvador at SMBC meetings. In McAllen MesoPIF had identified the need for a formal agreement between PIF and SMBC as a way to get ongoing support. A letter of cooperation was developed and vetted through the PIF Council; an official signing occurred in El Salvador at the SMBC meeting; this was a big deal for MesoPIF.
- PIF Costa Rica has great website and El Salvador has a new PIF Newsletter.
- The next fund raising need of for money for the next SMBC meeting in Belize some time in October 2009. MesoPIF has to determine the nature of the workshop and International PIF WG will try to help facilitate and raise funds.
- KBO helped with an international training following the NAOC meetings in Veracruz – ProAves Colombia took lead on a banding workshop. There is lots of interest in int'l training and capacity building. The focus has been on intensive internships and then following them back to their country and facilitating their own training efforts - facilitate leadership from within. El Salvador held the first banding council international certification. In Costa Rica banders came together to create a banding program in Costa Rica – they are distributing residential bands and AKN will be the data repository. Costa Rica PIF is spawning a banding network. Training workshops are popping up elsewhere like in the Caribbean. Peru is planning a banding workshop in October on the Bolivian border; one in Trinidad in May. The North American Banding Council has responded to this interest with a workshop and training committee. The Park Flight trainee from last year is the lead trainer for a workshop in Trinidad.

International Migratory Bird Day – update note by Carol Beidleman (for Sue Bonfield)

There will be the usual major event in Washington, D.C. for IMBD although it may not be as high profile as some years. It will be held on April 30 for IMBD sponsors. Sue can use help in getting the invitations to the highest level person in the agency or organization so that we can try to get good attendance at the reception. There will be a reception and lecture at the National Zoo. The artist will be in attendance.

Items to be taken to the PIF Council

- Naming the new PIF representative to the U.S. NABCI Committee

- Presentation of handouts on AKA and BEAC

- minutes by Janet Ruth