USDA Natural Resources Conservation Service/ U.S. Migratory Bird Joint Ventures

National Coordination Work Session Report

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1 Setting the Stage for the NRCS/JVs Work Session

The primary purpose of the Natural Resources Conservation Service (NRCS)/Joint Ventures (JVs) meeting was to identify specific Farm Bill Program delivery elements for which the NRCS could benefit through added support and coordination with JVs, and vice versa, by examining:

- Areas of particular interest to NRCS nationally where increased communication, coordination, facilitation, etc., by JVs could result in better conservation outcomes.

- Areas of particular interest to JVs, collectively, where assistance, advice, facilitation by NRCS nationally/regionally could result in better conservation outcomes.

Meeting participants hoped to identify mutual benefits where collaboration enhances achievement of both NRCS and JV objectives. Establishment of such common ground was expected to facilitate JVs and NRCS in crafting a shared vision and increasingly working together toward achievement of common objectives.

Work Session planning resulted in identification of two priority areas:

1) Provision of science-based outcome support by JVs for existing NRCS landscape initiatives, with the objective to investigate opportunities for fostering collaboration to develop specific environmental outcomes and provide scientific justification for voluntary conservation; and

2) JV partnerships with NRCS to assist in overall coordination of species-based conservation efforts, with the objective to discuss opportunities for improving collaboration in support of delivering existing landscape initiatives at multiple scales (national, regional, state) and to identify existing information that could be used to support these objectives.

1.1 Structure of the Work Session and Purpose of Report

The Work Session involved a series of presentations intended to outline JV assets, objectives, and activities that actually or potentially dovetail with NRCS programs and objectives. The presentations provided specific examples from three JVs – Intermountain West, Lower Mississippi Valley, and Appalachian Mountain. Additional information from all the JVs was provided in a series of fact sheets distributed prior to, as well as at the meeting. The NRCS presentations outlined NRCS assets, objectives, programs, and priorities of significant interest to the Chief for coordination with JVs.

A series of discussion sessions were facilitated to assist participants in identifying the key needs, desires, and areas of intersection between JVs and NRCS where collaboration and partnership approaches could help each group achieve its organizational objectives. The most significant discussion periods were dedicated to the two priorities identified above; however, time was also dedicated to discussing what has worked well in previous collaborative efforts and what could be improved upon for future

cooperative initiatives. A modified approach of appreciative inquiry was used throughout the Work Session to identify best practices, explore past successes, and identify actions for future successful collaboration. The following report provides a summary of the presentations and discussions that took place over the day and a half NRCS/JV Work Session.

2 Overview of Agency Perspectives

Sections two, three, and four of this report provide summaries of presentations made by Work Session participants. The presentations covered a range of different perspectives about JV and NRCS needs, desires and current collaboration efforts.

2.1 NRCS Perspective and Expectations – Ron Alvarado

The key priority for the NRCS relative to JV collaborations is to provide a science basis for program implementation and find ways to measure their achievements (outcomes), so that the organization can effectively communicate the value of their actions. NRCS has focused investments in key areas that have resulted in the delisting of species or preventing the listing of some species; however, there is a need to also be able to identify tangible benefits in terms of the general public's wants and desires. For example, delisting an aquatic species may mean that the public may be able to resume swimming in the waters used by the impacted species. The goal is to examine the use of NRCS resources, collectively develop the science to measure outcomes, and provide field staff with the tools they need to make program delivery even better than it is today.

The second priority is to ensure that NRCS has the capacity to partner with JVs to better coordinate program delivery. NRCS needs to be able to effectively listen and learn from the JVs and then identify how to better employ its resources across the country. The resources available under the Farm Bill are declining, but it still provides significant opportunities to strategically focus on one threat at a time and achieve the targeted outcomes. For example, Sage Grouse Initiative Science Advisor, Dr. Dave Naugle, provides the science to identify threats and desired actions and then makes available the information to put the science into practice on the ground. Similarly, in the Southern Oregon-Northeastern California (SONEC) region, the Intermountain West JV is helping NRCS by providing science, technology, and field capacity ("boots on the ground") to catalyze science-based program delivery. The collaboration between NRCS and the JV is a critical element of conservation planning, prior to strategically investing in conservation on the landscape.

2.2 JV Perspective and Expectations – Keith McKnight

The central theme of this Work Session was that all of our goals and objectives are better met when we seriously search for and find commonality with partners and complementarity of partner capacity and assets. JVs were created on the premise that achieving conservation success depends on doing just that. Real world examples from the conservation non-profit world help make the point. Ducks Unlimited, Inc. (DU) and The Nature Conservancy (TNC) have competitive interests, but they have enough commonality within the JV landscapes to find ways to work together and undertake projects that are better than each organization may be able to achieve individually. There are three key elements to successful collaboration: 1) overlap of outcomes; 2) synergies created by utilizing complementary capacity; and 3) willingness to collaborate. There is an implicit expectation of a willingness to collaborate, but willingness often is heavily dependent on having the right personalities involved. Thus, the key to success is to focus on the issues/interests of the organization and work within the realities of

personalities! For success, it is imperative that NRCS and the JVs identify overlapping interests within relevant geographic scales, then undertake collaborative actions accordingly. NRCS and JV staff, organization, and structure differ across the country, and there will not be a single style or type of collaboration that can be repeated in all states or regions. However, we can learn from the examples presented here and the existing collaborative successes, in order to identify opportunities and key people to create new and unique collaborative efforts.

3 JVs Roles, Responsibilities and Objectives

3.1 Big Picture, Common Themes and State Agency Perspective – Ed Penny

The North American Waterfowl Management Plan (NAWMP) was created in 1986 in response to waterfowl population declines and habitat loss, and JVs were formed to deliver NAWMP objectives. Since then, JVs have evolved to address conservation of all birds, and now they serve as primary hubs for coordinating all facets of bird conservation through diverse voluntary partnerships. The concept of a JV is simple, but the actual implementation is complex—voluntary, collaborative partnerships that work to protect and restore landscapes supporting bird populations, sustain local livelihoods, and provide nature's benefits to people. JVs coordinate, develop, and conduct conservation throughout the U.S., Canada, and Mexico, and their actions are based on the best available science.

There is a great opportunity for NRCS to collaborate with JVs to improve conservation delivery. Why a joint venture? The emphasis of JVs is to enable local conservation action, couched in a landscape context, through partnerships. Each operates in accordance with an Implementation Plan, and is guided by a Management Board that determines the priorities. It is important to note that JV staff work to fulfill the direction of the Management Board; although, they work for a variety of entities (e.g., U.S. Fish and Wildlife Service [USFWS], DU, American Bird Conservancy [ABC]). Ultimately, JVs strive to be value-added to the partners.

Each U.S. JV utilizes a common set of desired characteristics ("JV Matrix"), based on the Strategic Habitat Conservation model, to assess its success in meeting expectations. The matrix identifies the ideal outcomes for a JV; hence, it represents the target to strive toward and provides order to the assessment of what the JVs undertake.

The strengths of the JVs include: applied conservation focused research; science-based implementation of habitat conservation; technical assistance; and being driven by common objectives of the partners. The key opportunities offered by JVs include: coordination and facilitation to focus on common objectives; cost sharing; science-driven biological objectives; and targeted initiatives.

3.2 Unique Attributes of the U.S. JVs – Barry Wilson

The JV Matrix, noted above, identifies the attributes of a fully developed JV partnership. However, JVs differ in many respects. For example, their geographic size varies greatly, and this has implications on the planning approach, project tracking, emphasis on programs versus projects, and capacity of JV staff. Staff size (one to ten; most with four to six staff) and capacity varies, primarily (but not solely) due to the amount of funding from the USFWS. JVs also vary in their leveraging of outside sources of funds.

Not only is there diversity in size, priorities, and actions among JVs, but the structure and operating norms also differ. The three common structures for JVs are:

1) JV as its own 501(c)3 non-profit, with federal funds provided via cooperative agreement. JV staff are employed by the JV as part of the non-profit, and funding is managed internally by the JV staff. The Playa Lakes JV is an example of this structure.

2) JV staff employed by an existing non-profit (e.g., ABC or DU), with federal funds provided via cooperative agreement. The Appalachian Mountains JV is an example of this structure.

3) JV staff employed by the USFWS. The Atlantic Coast JV is an example of this structure.

JV Management Board membership is highly variable in composition and includes international partners, corporate partners, landowners, non-governmental organizations (NGOs), and often, NRCS. The models have various arrangements for voting and non-voting partners, agency liaison, and ex-officio members. Variability is a strength that is driven by geography, natural resource issues, socio-economic landscape, etc. Ultimately, JVs espouse a common set of expectations and somewhat similar basic structure, but with diverse distribution of effort among the various aspects of bird conservation tailored to unique resource issues and partners.

3.3 Existing Models of JV/NRCS Cooperation

3.3.1 IWJV Cooperative Models – Dave Smith and Ron Alvarado

The Intermountain West JV (IWJV) is focused on implementation of habitat programs at the JV scale (sage grouse) and regional scale, such as SONEC (waterfowl and wet meadows). Collaboration with NRCS, in both instances, is based on the JV providing value-added services to NRCS using the following three-pronged model:

1) Science: Provide science-based decision support tools to help focus Farm Bill program delivery.

2) Field Delivery Capacity: Provide cost-shared wildlife biologist and range conservationist partner positions (i.e., “boots on the ground”) in NRCS Field Offices to assist with conservation planning and program delivery.

3) Partnerships: Shepherd and leverage partner resources.

The Sage Grouse Initiative (SGI), the flagship piece of the NRCS Working Lands for Wildlife (WLFW) partnership, has become the largest and most effective proactive, voluntary sagebrush conservation effort in history—in part due to a robust partnership between NRCS and the IWJV. In 2010, NRCS recognized the need for additional capacity to implement SGI; subsequently, they developed a five-year agreement with the IWJV to build the field delivery, science, communications, and partner development capacity for SGI through an innovative arrangement known as the SGI Strategic Watershed Action Team (SWAT). The IWJV leveraged NRCS’ $9.3M in technical assistance

capacity funds with $8.1M from 40+ paying partners, thereby creating a powerful partnership-driven vehicle for SGI implementation. The SGI SWAT resulted in 27 new wildlife biologist or range conservationist positions being established in NRCS Field Offices. These positions accounted for approximately half of SGI's 4.4M acres of sagebrush habitat conservation through 2014. A key element of the field delivery capacity was the establishment of an IWJV SGI Field Capacity and Delivery Coordinator position, responsible for melding the 27 positions into a highly integrated technical team. This powerful partnership helped the IWJV secure $1M from ConocoPhillips Company – a long-time corporate IWJV Management Board member – to support the SGI SWAT from 2015-2019. Rocky Mountain Power/Pacific Power is also investing, and the Management Board is likely to begin identifying other sources of "private" funding.

Progression from an Initiative to a Powerful Conservation Construct: SGI achievements have now resulted in SGI 2.0, a new "business plan" that will drive SGI through FY 2018. The IWJV will continue to implement SGI SWAT and has secured commitments from partners throughout the life of the 2014 Farm Bill. The collective investments in SGI 2.0 are as follows:

NRCS SGI 2.0 Investment Strategy

- Additional $211M allocated through FY 2018 (statutory life of Farm Bill)
- Environmental Quality Incentives Program (EQIP): $20M/year
- Agricultural Conservation Easement Program (ACEP): $25M/year
- Conservation Stewardship Program (CSP): Up to 264K acres
- SGI SWAT: Additional $5M to the IWJV
- SGI Core Capacity: Western Sagebrush Specialist and SGI Coordinator

IWJV Commitments: SGI SWAT 2.0

- $1M from ConocoPhillips Company
- $225K/year from USFWS Partners for Fish and Wildlife Program
- $20K/year from Rocky Mountain Power/Pacific Power
- Engagement by JV Management Board
- Working Across Boundaries: "Bureau of Land Management SWAT" partnership

Sage grouse conservation has been an extremely high-stakes national issue that warranted significant investments by NRCS from the national level. However, there are landscapes within the Intermountain West that play a critical role in sustaining other groups of birds that may not rise to the level of national prominence that sage grouse did as a candidate for an Endangered Species Act listing. This requires developing programmatic approaches and science, field delivery, and communications capacity best initiated at the state and landscape level.

The SONEC region is one of the two most important spring migration staging areas for waterfowl in North America, supporting approximately 80 percent of the Pacific Flyway's northern pintails and other dabbling duck populations (4.9M

waterfowl at goal levels) during spring migration. The working wet meadows of SONEC also provide habitat for several at-risk wildlife species, including greater sandhill crane, white-faced ibis, and greater sage grouse (during brood-rearing).

This extremely isolated and lightly populated region had long been overlooked in migratory bird conservation planning, but IWJV and partner research over the last 15 years brought its tremendous value into focus. Over the last decade, the IWJV conducted bioenergetics modeling as needed to establish defensible habitat objectives for spring migrating waterfowl. This work identified the need to sustain 64,700 acres of flood-irrigated (or similar) habitats on private lands to meet the foraging needs for dabbling ducks during spring migration.

The SONEC region is important within the JV because flood irrigation for hay production by ranchers mimics the natural flooding process of the region that is vital to migrating waterfowl and shorebirds. However, there is a lot of pressure to convert flood irrigation to sprinklers, which causes the loss of seasonal wetlands. In order to identify the needed balance between flood and sprinkler irrigation, the IWJV is developing the science for NRCS to strategically address water quantity and at-risk wildlife species resource concerns. Next, the IWJV and Oregon NRCS worked together at the state level in SONEC to develop the Working Wet Meadows Initiative (WWMI), a WLFW-type effort designed to sustain the wetland habitat needed to support Pacific Flyway waterfowl populations during spring migration. This initiative involves the creative integration of EQIP, ACEP Agricultural Land Easements, ACEP Wetland Reserve Easements, and CSP to strategically sustain these valuable wet meadow habitats on working ranchlands. Lastly, the IWJV is currently taking the science to the next level through a spatial wetland modeling project that will provide NRCS with valuable decision support tools for program implementation.

Partnerships were key in creating the investment in science and capacity before actually investing in conservation delivery. Field delivery capacity came with two new cost-shared (NRCS, IWJV, and others) partner biologists, and the science and communication capacity was built by the IWJV. Conservation actions have been initiated through contact with landowners by the partner biologists. Field staff was on the ground for over a year prior to making program investments. The communication effort was developed early in the process, as landowners didn't understand why birds were there for only a short period of time and needed the meadows to be wet during this time.

The SONEC WWMI was developed as a component of Oregon NRCS' *Strategic Approach to Conservation*, which is extremely well-aligned with the business model of the IWJV. As such, NRCS District Conservationists and their staffs are committed and fully invested in the effort. The take-home message is that the IWJV and NRCS have found common ground by: 1) emphasizing working lands conservation to address at-risk wildlife species needs; 2) using JV science to focus investments and determine biological outcomes; 3) cooperatively building field capacity through partnerships; and 4) mutually committing to a strategic approach to conservation.

3.3.2 LMVJV Cooperative Model – Steve Brock and Tim Landreneau

The Tri-state Conservation Coordination Committee (Tri-C) is a unique, multi-state approach to coordination among JV partners focused on NRCS programs and activities. The approach evolved from activities associated with Walton Family Foundation (WFF) support for reforestation in the Mississippi Alluvial Valley (MAV). The WFF made a commitment to the MAV partners through a competitive grants program, assisted in coordination by the Lower Mississippi Valley JV (LMVJV). WFF also hosts an annual summit of its funded partner organizations to collaborate and refine strategies toward shared MAV reforestation objectives. As part of the 2013 summit, a discussion occurred about how collaboration might be better facilitated over the three-state MAV area (AR, LA, MS). This resulted in agreement to formally collaborate around the following fundamental objectives:

- Support of NRCS Farm Bill program delivery.
- Jointly support partner interests and advance collaboration in the MAV across three states.
- Establish a tri-state committee to facilitate these actions.

The Tri-C began by defining their purpose and objectives, and initially identified Wetlands Reserve Easements program (WRE)-related priorities.

Accomplishments and outcomes to date include:

- WRE ranking criteria harmonized across Arkansas, Louisiana and Mississippi;
- Partner assistance with WRP/WRE closures;
- LMVJV partnership formal Charter of the Tri-C;
- Declaration of Partnership between the LMVJV and NRCS;
- Innovation with integration of easement and working land programs (e.g., Regional Conservation Partnership Program [RCPP] tri-state proposal) and Louisiana NRCS conservation planning partnership;
- Developing recommendations for management of WRP/WRE hardwood plantations;
- CSP wildlife enhancement proposals – submitted 12 over two years; and
- Wetlands Reserve Enhancement Partnership program planning – four multi-partner proposals.

The Tri-C has evolved and functions as a vital partnership among conservation partners within the MAV of the three states. A number of factors have contributed to success:

- A strong and growing NRCS partnering ethos.
- Strong sub-regional partnerships (e.g., Conservation Delivery Networks).
- Dedicated coordination capacity – “the glue” (from LMVJV office and TNC).
    - Consistently fostering communication;
    - Re-evaluating priorities; and
    - Planning and coordinating key meetings (planning, agendas, developing post meeting notes, leading work groups and creating key documents).

The critical success factors of the Tri-C are (1) leadership, (2) commitment to collaboration, and (3) vested, broad partner support. From an NRCS perspective, the Tri-C is important because it expands on the grassroots foundation of NRCS conservation program delivery and increases collaboration between partners.

3.3.3 AMJV Cooperative Models – Todd Fearer and Casey Shrader

The Appalachian Mountains JV (AMJV) is one of the newest JVs, with its first USFWS funding obtained in 2008. The highest priority habitats are early successional (i.e., young forests, old fields, and mine lands); mature deciduous forests (oak-hickory forest health and structure); and high elevation forests.

The relationship with NRCS began with the golden-winged warbler (GWW) being one of the target species of the NRCS WLFW. The GWW is one of the AMJV's highest priority species, and they have worked with the GWW Working Group and JV partners to delineate focal areas for the species in the Appalachians, as well as develop several habitat best management practices. The best management practices address different types of habitat – from landscape level to tree stand level – and recognize the need to constantly recreate it, since as a forest matures, the desired habitat disappears. They have been used to inform how NRCS conservation practices can be implemented to create GWW habitat.

JV partners, using a Conservation Effects Assessment Project grant are monitoring and evaluating the GWW's response to conservation practices. Five partner organizations were involved with monitoring 68 sites in four states. In Pennsylvania, 13 partner organizations are working together to add field capacity for implementing WLFW and coordinate GWW habitat creation on both public and private lands. The key was the development of capacity to do the monitoring—not hired by NRCS but located within NRCS Field Offices. National Fish and Wildlife Foundation conservation partnership funds, as well as other external funding sources, were used to hire staff located in NRCS Field Offices to implement WLFW. This model has been very successful in Pennsylvania, and the AMJV partners are attempting to replicate this approach in other states.

There have been many lessons learned from the implementation of WLFW. Early coordination with NRCS is important, in order to ensure all partners bring meaningful value to proposal projects or initiatives. Habitat or local issues need to be addressed early, such as the amount of eligible private lands available given a species' habitat needs; the presence of large landholders (Thermo Fisher Scientific Inc./mined lands); and the culture of the landowners and their likelihood of using federal assistance programs. Capacity issues (e.g., having sufficient biologists or foresters to work with landowners) need to be identified early and mechanisms to bring capacity to the table identified if additional staff are needed. Program rules can inhibit the ability to implement practices and need to be adjusted. Finally, endangered species issues and the need for National Environmental Policy Act review can affect the ability to efficiently implement conservation practices on the ground.

The next steps for the AMJV and NRCS will be creating WLFW Version 2.0, whereby they will have a new agreement, consolidate resources, centralize coordination, and improve delivery on the ground. They will look at the success of the Pennsylvania initiative, determine which elements can be replicated elsewhere and then try to be more strategic in their approach. They are also initiating their *Cerulean Warbler Appalachian Forestland Enhancement Project*, an RCPP award modeled after WLFW that identifies management goals for mature forests and seeks to integrate cerulean warbler and GWW efforts.

4 NRCS Viewpoints on Relationships with JVs

4.1 Current Interactions with JVs – Scott Edwards

The NRCS State Resource Conservationist was charged with developing the state's Conservation Practice Standards and Conservation Planning across the state. In terms of a migratory bird habitat example, the 2010 gulf oil spill provided an extreme challenge for NRCS to determine what they could do. There were hundreds of ideas being put together, and discussion took place about how NRCS would make something work on the ground. The approach was to ask where the habitat gaps were and what the key water issues were. To maintain the migratory bird science objectives the NRCS turned to the Gulf Coast Joint Venture that had the data to identify habitat gaps. All ideas had to address the identified needs and the relationship with the JV allowed the partners to openly communicate. The solution was to put habitat in place with early water and late water. The program worked and continues to be used today for long-term wildlife habitat.

NRCS was not part of the LMVJV Management Board at the time; however, they began working with the JV, as there was a desire to better manage bottomland hardwood forests. NRCS had the specification standards and worked with staff from three states to start down the path of identifying why they would make program changes. Eighteen versions later, there was a sense that they were getting close to a final plan document. Nevertheless, more changes had to be made such that at version 35, it was finally approved for printing. This illustrates the challenge of working as a partnership and learning how you share experiences in a multi-state JV where there are cultural, language, and terminology differences among the partners. However, success came from the long-term commitment of the partnership and the active participation of NRCS as a partner in the LMVJV.

4.2 Elements of Conservation Planning and Program Delivery

4.2.1 NRCS Needs – Galon Hall

The report, *U.S. Migratory Bird Joint Ventures – Resources and Opportunities Fact Sheets* (developed for the Work Session), is an excellent document, and at least half the ideas are already of interest to NRCS.

Looking at needs from the NRCS perspective of WLFW, the desire is to empower the states to adopt the SONEC model for implementing conservation in other geographies. However, the structure of the JV can be a challenge; the 501(c)3 model is the easiest for NRCS, as they don't want to manage an excessive number of agreements. In contrast, when an organization has both conservation and policy arms that may oppose a legislative issue, it provides a whole other set of challenges for the partnership to work effectively.

NRCS would like to have the science developed prior to making any investment in conservation, but sometimes there isn't time or information isn't available before action is required. Therefore, facilitating a partnership to help bring the science together over a multi-state area is very important. NRCS also needs to better understand the difference (if there is one) between Landscape Conservation Cooperative science and JV science. The JV Matrix may be a useful tool for the NRCS to examine and determine how they can fit into some of the elements, as well as what they may be able to contribute to achieve success at the JV scale.

NRCS recognizes there are many unique nuances of each NRCS state/regional office and how they might partner with the JVs. There isn't a one-size fits all approach that will work, and there needs to be ongoing discussions between JVs and NRCS at the local level. As part of the discussions for putting conservation on the ground, it is essential for partners to ensure they hire the right talent for the job (e.g., employing a biologist when a forester is a better fit); identify and act on the appropriate needs.

4.2.2 JV Needs – Jeff Raasch

JVs are at their best when the objectives of the overall JV become the objectives of the individual partners. In order to establish these common objectives and to become more effective in a partnership there are challenges that need to be overcome. The following list illustrates some of the challenges agencies may have to address:

- Committing to "internalizing" shared conservation objectives within NRCS;
- Institutional support for bird conservation throughout the NRCS hierarchy;
- Increasing engagement in strategic conservation;
- Supporting collaborative efforts to track delivery;
- Collaborating on bird monitoring;
- Defining practices and objectives focused on important shared goals; and
- Adopting a "Natives First" policy, including:
    - Reducing support for exotic grass pasture systems;
    - Directing field staff to prioritize native species;
    - Planning strategic communication for Natives First; and
    - Expanding support for natives at Plant Material Centers.

5 Cooperation Successes and Challenges

5.1 Background of RCPP – Maggie Rhodes and Jim Giocomo

The RCPP concept was to have proposals that incorporate existing programs and to mobilize partnerships to multiply investments and reach common conservation goals. In the 2015 round of proposals, 11 JVs applied; three were funded, one received partial funding, and seven were not funded.

A key step in proposal development that is still underutilized is coordination with the NRCS State Conservationist. It is necessary to work with or inform the State Conservationist about the proposal so they have a better understanding of what the partners are trying to achieve. They also need to know if changes to EQIP will need to be contemplated.

There are a number of specific issues that JVs could consider in terms of RCPP. There is some inconsistency between NRCS and JV staff engagement at the state and/or JV level when developing proposals or exploring ideas that require more discussion between agencies. It may be beneficial to consider standardizing this type of interaction process. The RCPP is viewed by NRCS as the "proponents program," and new ideas could be put forward to State Conservationists—JVs are encouraged to be creative, and early dialog is necessary. Even though RCPP proposals must address "certified practices," the intent is to allow applicants to propose other practices. However, this does need to be addressed early in the proposal process, as developing new standards is a much more complicated process and takes longer. NRCS does acknowledge that implementation of practices can vary, but they must meet the established standards.

5.2 Improving Science Collaboration Between JVs and NRCS

Due to the inherent overlap in natural resource priorities and issues, JVs likely have much to offer NRCS regarding science foundation for program priorities, focus, objectives, and measures of success. However, connections between JV science and NRCS programs may not be immediately obvious or intuitive. It is, therefore, important for JVs to initiate communication with NRCS to facilitate critical information exchange. One approach would be to arrange an invitation to present at a NRCS State Technical Advisory Committee (STAC) meeting to explain a JV's objectives and science behind them. Regardless of the specific process, JVs likely would benefit from engaging the STAC to explain the biological planning approach to JV activities and its advantages for habitat/bird conservation. Where possible, the messages to be communicated may need to be adjusted to fit current NRCS priorities (e.g., a bird priority could be described in terms of an aquatic health objective). JVs are encouraged to engage other technical advisors familiar with the STAC to help refine messages (i.e., translate a biological message to an agricultural message). Finally, in the longer term, it could be advantageous to participate directly on the STAC, as there are secondary benefits (e.g., having other agencies learn from the JV perspective and participation, and vice versa).

Through introduction of JV biological objectives to NRCS, it becomes more plausible to explore new ways to deliver practices (or at least to explain the science behind the proposed approach) that benefit both JV and NRCS resource interests. NRCS and JVs have many common issues and desired outcomes; the next steps could be to determine ways to work on them in a cooperative approach, link their results and report on shared outcomes. Developing common messages for their respective leadership teams would be advantageous.

5.3 Building Field Capacity for Delivering Farm Bill Programs

NRCS is open to continuation of the partnership agreement approach as it is a clear win-win situation. The 50 percent cost share is attractive to NRCS, as it may free up resources for other priorities or activities in other areas or perhaps facilitate multiple partnership hires. Under some circumstances, NRCS may be able to obtain a waiver for a 75 percent cost share agreement. It should be noted, however, that NRCS resources are likely to decline in the near term due to sequestration. In turn, this may increase the opportunities to partner for hiring private lands biologists or similar staff. Partner agencies do need to be flexible in their approach because the typical funding covers a three-year period.

The partnership approach has numerous elements that are important to consider. One of the key issues to address when hiring is to get the right people for the need—don't hire a

biologist if you need a forester. The use of “soft money” may impact the type and quality of staff, as short-term money typically attracts early career professionals. This can be beneficial because it can lead to the development of young staff with great potential and prepares them to move on to more advanced positions. On the contrary, it could result in higher staff turnover rates. It does provide the opportunity to develop staff with partnership skills/agency experience and allows managers to evaluate staff prior to any permanent hiring. Finally, the partnership approach for staffing brings more partners to the table and provides greater benefits and impact.

The JV view of partnership staffing is similar to that of NRCS—a very valuable, cost effective, win-win approach. There are a number of operational issues JVs and NRCS need to work through together, as each hiring situation may be different. However, the use of partnership staffing could be a model that is easily replicated across the country. One of the key elements for success, to date, has been the presence of a JV staff coordinator to guide the partnership/field biologists. This is especially important when multiple biologists are located in different NRCS Field Offices. The coordinator is essential to keeping the field biologists focused on the collective partnership outcomes and priorities, as well as preventing slippage or mission creep into other, unrelated priorities.

> ***Key Message:*** *NRCS is encouraged to communicate to leadership that when using multiple partnership agreements for private lands biologists, a coordinator position is very important for success of the overall initiative. The coordinator is critical to maintaining the focus of the staff on the desired and shared outcomes of the partners, including NRCS.*

JVs and NRCS are encouraged to agree on clear reporting relationships, locations for positions, shared priorities, etc., prior to initiating development of an agreement for a partner position. It is important to clarify the deliverables for each field biologist, unique roles, and the cost-share percentage for NRCS and the partners. JVs must be prepared to ensure that appropriate technical support is provided by the biologist(s) and that they have effective quarterly reporting mechanisms in place. It is also important to note that training costs will be higher for shared positions than for their own staff because the partnership biologists must receive training that is equivalent to NRCS staff; budget for this cost.

JVs that have not used the partnership agreement approach to staffing private lands biologist are encouraged to consider the following as key first steps:

- Describe the JV’s science and how it identifies the need for a partnership agreement, establishes JV/partner priorities, and justifies the need for field capacity;
- Begin discussions with partners (e.g., funding, desired outcomes, etc.);
- Explore what partners need and what they are already doing – it may be such that people are already working on identified priorities, and a partnership agreement could significantly enhance existing activities;
- Consider use of discretionary funds for biologist(s) and/or a coordinator position;
- Begin discussions with NRCS on shared priorities, possible funding arrangements, term of agreement, potential location(s), and willingness to partner; and

- Identify a funding/operation model that works for the JV, such as:
    - JV collects funds from partners,
    - Interagency Agreement (JV and NRCS),
    - Cooperative Agreement (JV and NGO partner competitively selected), or
    - Sub-agreements with delivery agencies.

A number of lessons can be learned from the existing partnership agreements between NRCS and JVs, some of which are noted above but are restated here because of their importance. Co-supervision of field staff by both the JV and NRCS facilitates efficient implementation of any program. Coordination of field biologists by the JV is critical to maintain focus on the partnership's priorities. NRCS District Conservationist supervision of the biologist(s) is also important, as they need to guide the work of staff located in their office(s). The partners need to understand reporting relationships and logistics of the physical location of the biologist(s), including how the State Conservationist and partners will undertake joint decision-making on some aspects of the work or priorities. It is critical to have good clarity on the desired deliverables of the field biologist(s).

6 Potential Issues and Actions for Future NRCS/JV Cooperation

Day two of the Work Session provided an opportunity to identify and briefly discuss a number of potential issues of common interest to JVs and NRCS. Participants individually identified topics, and the group collectively categorized them into common themes, selected the highest priority topics to discuss, and identified actions for future cooperative efforts. The following sections summarize these discussions.

6.1 Transferring JV Science to NRCS Priorities

One of the more important issues for NRCS was to explore how the science work of the JVs could be transferred and used within NRCS priorities. This issue was clearly linked to the discussions of day one (see **Section 5.2**), but new and specific issues/action items were explored by asking the question, "What does NRCS want or need?" Significant opportunities and benefits could be realized by integrating JV conservation plans and science at the national NRCS level. For example, NRCS could use the information to set wildlife priorities for national programs or use JV habitat objectives and decision support tools to enhance strategic conservation delivery.

NRCS, in general, does not fully understand the JV Implementation Plans and would greatly benefit from learning more about them, both at the national and regional levels. The aforementioned report, *U.S. Migratory Bird Joint Ventures – Resources and Opportunities Fact Sheets*, provides an excellent overview of the JVs, but additional discussion is needed to better understand the science elements of the JV Implementation Plans. This type of focused discussion could lead to the identification of common or shared outcomes that both organizations could work toward. Additionally, it may lead to a collaborative "results tracking system" or to JVs assisting NRCS in identifying quantifiable outcomes for reporting program achievements.

The Office of Management and Budget requires NRCS to develop performance measures that are outcome-based, rather than simply reporting outputs (such as acres of practices implemented). This provides a collaboration opportunity, whereby for example, acres and planting rates of longleaf pine could be modeled to provide performance metrics of increased bird use or carbon storage. The science available or potentially available from the JVs could significantly contribute to the development of outcome-based performance measures for NRCS.

NRCS is encouraged to identify desired model outputs (performance measures such as waterfowl use days or energetics) and the frequency of the information required from JVs.

NRCS will need to identify and request specific information or model requirements, such as output from NAWMP's Science Support Team on key migration/wintering locations using NRCS spatial data. The JVs identified that they would need NRCS to share its data in order to provide model results specific to NRCS program outputs. Sharing data can be problematic, as agreements need to be very specific to the use of the data, but in general, the aggregate data can be shared. For example, all of the NRCS easement data is already available in a public database.

Actions Identified:

- JVs and NRCS could designate contact persons to coordinate the identification of specific needs for outcome-based models. ***The initial contact persons suggested: Andrew James (NRCS) and Ken Richkus (USFWS);***
- Outcome-based performance measures could focus on species of interest by region (e.g., Great Basin WRP – sage grouse);
- Pilot projects for modeling and reporting outcome-based performance measures could be established prior to adopting the approach on a broad regional or national scale (e.g., Mississippi River Basin Healthy Watersheds Initiative or WRP in California's Central Valley);
- A formal high-level collaborative effort, such as a "Joint Chiefs Partnership," could be considered to advance collaboration throughout the JVs and NRCS. ***A team could be formed to develop the concept further, with the initial members suggested: Ed Penny (LMVJV), Galon Hall (NRCS) and Keith McKnight (LMVJV).***

6.2 Monitoring and Future Conservation Opportunities

There was significant interest from both NRCS and the JVs to collaborate on monitoring implemented practices. Undertaking such an effort would facilitate helping landowners better manage these lands in the future. Additionally, monitoring information would help address landowner interest in knowing if the land or practices were still performing effectively or if maintenance was required.

There are various types of information that could be monitored, including the biological status (basic information); management information (practices being implemented); whether the landscape is in the intended condition; and bird use as an indicator of function(s) provided. Efforts to monitor the landscape condition could involve working with a biostatistician to develop information for the larger (JV) landscape scale (e.g., Bird Conservancy of the Rockies Integrated Monitoring in Bird Conservation Regions project). Lastly, the results of any collaborative monitoring effort could be jointly reported to the regional JV/NRCS partnership—not only to share the information but to clearly demonstrate the benefits of working together.

Monitoring information and other science information available from the JVs could also be extremely valuable to inform the development or refinement of NRCS Conservation Practice Standards. The information could help build technologies or tools for use by the agriculture industry to adopt and implement sound conservation practices that provide

significant wildlife conservation benefits on private lands. Information sharing and collaboration could help to identify common priorities that have not been targeted yet or help NRCS identify new long-term conservation strategies. It could also contribute to the development and implementation of WLFW 2.0.

6.3 Other Information Sharing Efforts

Two other ideas for sharing information were identified as potential activities to bolster future collaboration between JVs and NRCS. These ideas were not fully discussed or developed to the point of identifying specific actions during the Work Session due to time constraints, but they are noted below as potential areas for future discussions.

6.3.1 Share Partnership Experiences

The presentations on day one of the Work Session outlined numerous examples of successful collaboration and partnership efforts between some of the JVs and NRCS offices. However, not all JVs and NRCS offices are working together as effective partnerships. Work Session participants identified a need to "export the partnership model" from "have" states to "have not" states. Participants also identified that there were state and regional inconsistencies in regards to how JVs and NRCS cooperated or approached the concept of working in partnership. It would benefit both JVs and NRCS if an approach could be found to broaden the discussion about new ways for JVs to help NRCS deliver their programs (e.g., capacity building, delivery mechanisms, new partnership models). Most importantly, participants supported the concept of creating a way to share the lessons learned from the Work Session with other JVs and NRCS offices.

6.3.2 Funding and Agreement Mechanics

There is clearly not a single model of a partnership that will work for all JVs and NRCS offices. A number of very different approaches to collaboration and means of funding partnership activities were discussed during the Work Session. Due to time constrains, many of the details about the various partnership agreement mechanics were not fully discussed. Additionally, many of the participants desired more details on the specific terms of partnership agreements and funding opportunities that could help finance JV partnership activities. This could also include more information on timelines, priorities, and the process for application and selection of RCPP projects or means of coordinating partner proposals for RCPP. Additional effort by JVs and NRCS could be focused on identifying and sharing the above types of information.

7 The Path Forward

The final element of the Work Session focused on identifying specific actions that could be undertaken to advance collaboration between JVs and NRCS. Participants were asked to identify what they could do more of, or do better/differently, to achieve their organization's goals and objectives. They were asked to identify actions that could be undertaken in the short-term to contribute to increased collaboration and partnership activities between the organizations. More specifically, the actions were to focus on providing science support to NRCS and enhancing the efforts of partnership biologists. The recommended actions and the key persons/positions responsible for initiating the actions are identified in **Tables 1 and 2**.

Table 1. Immediate Actions to Facilitate JV Science Support for NRCS

Actions	Responsibility
JVs reach out to local NRCS contacts	JV Coordinators
JV and NRCS staff are encouraged to develop personal relationships at local level	State Conservationists JV Coordinators
JVs develop understanding of organization and role(s) of NRCS **before** approaching State Conservationists	JV Coordinators
JVs provide updates to State Conservationists on regular basis and establish long-term process to provide updates	JV Coordinators
JVs determine resource needs of NRCS for program implementation; begin by contacting State Biologist	JV Coordinator JV Partners
JV Coordinators participate on NRCS STAC(s) and/or Wildlife and/or Forestry Subcommittees	State Conservationists invite JV Coordinators JV Coordinators offer assistance
National Level: JV community visit NRCS NHQ to inform leadership about JV values/activities; provide regular updates	JV Coordinators Association of Joint Venture Management Boards
JVs attend and/or participate in annual National Association of Conservation Districts (NACD) meetings (next meeting: January 30-February 3 in Reno, NV; note: National Leadership Team also meets February 1-3)	JV Coordinators contact Jeremy Peters (NACD in DC) to identify opportunity to participate in meeting Dave Smith/Ken Kriese do same at FWS national level
JV partners present on science topics at NRCS STACs or subcommittee meetings; note: STACs have required participants, but opportunity exists for invitation of others	JV Coordinators JV Partners
JVs build relationships at NRCS STAC subcommittee level to share information/science expertise	JV Coordinators JV Science Staff JV Partners
JV partners already engaged with NRCS continue to share knowledge/experiences with counterparts in other JVs	JV Coordinators
JVs develop relationships with NRCS staff outside of formal NRCS meetings	JV Coordinators

Table 2. Immediate Actions to Expand JV/NRCS Collaboration

Actions	Responsibility
JVs invite State Conservationists and key staff to Management Board meetings; one State Conservationist from within JV area could be on JV Management Board	JV Management Board Chairs JV Coordinators
Ensure that NRCS Liaison or Board member for each habitat JV is identified	JV Coordinators NRCS State Biologists
JVs included in "build-out" of WLFW 2.0 over next six-plus months	Galon Hall Bridgett Costanzo Tim Landreneau
Brief NRCS Chief on outcome(s) of JV/NRCS Work Session as follow up to initial meeting proposal	Galon Hall JV Partners
Brief FWS Director on outcome(s) of JV/NRCS Work Session; note: see below for related action	Todd Fearer Dave Smith Galon Hall
NRCS develop and host a Webinar for JVs and JV Partners on 2017 RCPP proposal process	Maggie Rhodes
FWS (Migratory Bird Program) include a briefing on JV/NRCS Work Session during monthly JV staff meeting(s)	Ken Kriese
JVs share highlights of Work Session with staff and partners; NRCS do same with staff	JV Coordinators and Regional Conservationists during quarterly biologist calls and other meetings
Distribute report, "*U.S. Migratory Bird Joint Ventures – Resources and Opportunities Fact Sheets,"* as part of regional NRCS briefings	Galon Hall Keith McKnight
JVs share information from JV/NRCS Work Session with western Biologist Consortium along with local JV information	JV Coordinators
Brief Jerome Ford, USFWS Migratory Bird Program Assistant Director on outcome(s) of JV/NRCS Work Session	Dave Smith Ken Kriese
Develop Priority Areas for Conservation for the eastern region: longleaf pine and eastern forest	Bridgette Costanzo Craig Watson Rob Holbrook Todd Fearer
Engage NRCS National Technology Support Centers (hubs for conservation practice standard development and science information transfer) to complement local JV/NRCS relationships	WLFW Team

Appendix A: NRCS/JV Work Session Agenda

USDA Natural Resources Conservation Service/U.S. Migratory Bird Joint Ventures
National Coordination Work Session Agenda
September 22-23, 2015 – Tara Wildlife in Vicksburg, MS

Monday, September 21

5:30 p.m. **Welcome Reception**

6:30 p.m. **Dinner**

Tuesday, September 22

7:00 a.m. **BREAKFAST**

8:00 a.m. Welcome and Introductions – ***Ed Penny, MS DWFP Deputy Director/LMVJV Management Board Chair and Kurt Readus, MS NRCS State Conservationist***

8:30 a.m. Keynote: NRCS Perspective and Expectations – ***Ron Alvarado, OR NRCS State Conservationist***

8:45 a.m. Keynote: JV Perspective and Expectations – ***Keith McKnight, LMVJV Coordinator***

Joint Venture Roles, Responsibilities and Objectives

9:00 a.m. Big Picture, Common Themes and State Agency Perspective – ***Ed Penny, LMVJV***

9:15 a.m. Unique Attributes of JVs Across the Country – ***Barry Wilson, GCJV Coordinator***

Existing Models of JV/NRCS Cooperation

9:30 a.m. IWJV – ***Dave Smith, IWJV Coordinator and Ron Alvarado, OR NRCS***

9:50 a.m. LMVJV – ***Steve Brock, LMVJV MAV Partnership Coordinator and Tim Landreneau, LA NRCS Programs ASC***

10:10 a.m. AMJV – ***Todd Fearer, AMJV Coordinator and Casey Shrader, KY NRCS State Biologist***

10:30 a.m. NRCS Perspective on Current Relationships and Interactions within JVs – ***Scott Edwards, LA NRCS Partnership and Initiative Coordination ASC***

10:45 a.m. **BREAK**

11:15 a.m. NRCS Needs: Overview of Specific Elements of Conservation Planning and Program Delivery for which JV Involvement May be Useful – ***Galon Hall, NRCS National WLFW Coordinator***

11:30 a.m. JV Needs: Overview of Specific Farm Bill Program/NRCS Challenges for which Increased Collaboration with NRCS May be Useful – ***Jeff Raasch, GC/LMV/OP/PL/RG JVs Management Board Member/Chair/etc.***

11:45 a.m. **LUNCH**

1:00 p.m. RCPP – What is Working Well, What is in Need of Improvement – ***Jim Giocomo, OPJV Coordinator and Maggie Rhodes, NRCS National RCPP Coordinator***

2:45 p.m. **BREAK**

3:15 p.m. Field Capacity for Delivering Farm Bill Programs: Challenges and Solutions – ***Todd Fearer, AMJV and Casey Shrader, KY NRCS***

5:00 p.m. **Adjourn for the Day**

6:30 p.m. **DINNER**

Wednesday, September 23

7:00 a.m. **BREAKFAST**

8:00 a.m. Overview of Tuesday Discussions, Suggested Topics and Morning Agenda – ***Dean Smith, Facilitator***

8:30 a.m. Suggested (New or Follow-up) Topic A

9:30 a.m. **BREAK**

10:00 a.m. Suggested (New or Follow-up) Topic B

11:00 a.m. Wrap up and Next Steps – ***All***

11:30 a.m. Adjourn and Safe Travels

Noon **LUNCH** (for those able)

Primary Focus of the Meeting

Identify specific Farm Bill Program delivery elements for which NRCS could benefit from added support and coordination with JVs (and vice versa) by examining:

- Areas of particular interest to NRCS nationally where increased communication, coordination, facilitation, etc. by JVs could result in better conservation outcomes.

- Areas of particular interest to JVs, collectively, where assistance, advice, facilitation by NRCS nationally/regionally could result in better conservation outcomes.

This meeting is intended to identify areas of ***mutual*** benefits in which collaboration enhances achievement of both NRCS and JV objectives. Establishment of such common ground will help JVs and NRCS craft a shared vision and increasingly work together toward achievement of common objectives.

Expected Outcomes

- Increased mutual understanding of priorities, capabilities, and common interests among NRCS and JVs at the national scale.

- Identify several priority collaborative projects/initiatives and responsible leads for immediate action towards enhanced Farm Bill delivery consistent with JV and NRCS objectives.

    - JVs bring needed resources, capacity and expertise.

    - NRCS brings focus and flexibility to Farm Bill conservation implementation.

    - JVs and NRCS jointly establish enhanced communication and coordination channels relative to implementation of these projects/initiatives.

- Established points of contact to continue and increase national/regional collaboration and communication.

Appendix B: NRCS/JV Work Session Participant List

Participant	*Title*	*Affiliation*
Craig Watson	South Atlantic Assistant Coordinator	ACJV
Todd Fearer	Coordinator	AMJV
Larry Heggeman	Delivery Coordinator	CHJV
Rob Holbrook	Assistant Coordinator	EGCPJV
Barry Wilson	Coordinator	GCJV
Dave Smith	Coordinator	IWJV
Keith McKnight	Coordinator	LMVJV
Ed Penny	Management Board Chair	LMVJV
Steve Brock	MAV Partnership Coordinator	LMVJV
Tim Willis	DU Conservation Programs Manager (SRO)	Multiple JVs
Ashlee Ellis Smith	DU Public Policy Director (SRO)	Multiple JVs
Jeff Raasch	Management Board Member/Chair/etc.	Multiple JVs
Ken Kriese	JV National Coordinator	National JV Level
Dave Gordon	USFWS DBHC Science and Planning Chief	National JV Level
Dan Casey	Coordinator	NGPJV
Jim Giocomo	Coordinator	OPJV
Bradley Bales	Coordinator	PBHJV
Bob McCready	Deputy Coordinator	PLJV
Mary Gustafson	Coordinator	RGJV
Andy Forbes	Coordinator	UMGLJV
Dean Smith	WoodWater Consulting, Inc.	Facilitator
Jeff Thurmond	Wildlife Biologist	NRCS AL
Mike Sullivan	State Conservationist	NRCS AR
Randy Childress	Assistant State Conservationist	NRCS AR
Maggie Rhodes	National RCPP Coordinator	NRCS NHQ
Galon Hall	National WLFW Coordinator	NRCS NHQ
Andrew James	National WRP/WRE Program Manager	NRCS NHQ
Bridgett Costanzo	East WLFW Coordinator	NRCS NHQ
Casey Shrader	State Biologist	NRCS KY
Scott Edwards	Partnership and Initiative Coordination Asst. State Conservationist	NRCS LA
Tim Landreneau	Programs Assistant State Conservationist	NRCS LA
Kevin Norton	State Conservationist	NRCS LA
Kurt Readus	State Conservationist	NRCS MS
Thad Heater	State Wildlife Biologist	NRCS NV
Ron Alvarado	State Conservationist	NRCS OR
Jeff Vander Wilt	Assistant State Conservationist	NRCS SD
Russell Castro	State Biologist	NRCS TX