

# Lower Mississippi Valley Joint Venture Operational Plan

2024-2029

*for a*

*A landscape supporting healthy native bird  
populations across the LMVJV*



**Lower Mississippi Valley**

J O I N T V E N T U R E

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***DRAFT - October 2023 - DRAFT***

The members of the Lower Mississippi Valley Joint Venture Management Board agree with the guiding principles, priorities, and strategies contained within the Operational Plan and are committed to its long-term implementation. This commitment, recognizing that funding is subject to annual budgetary constraints and processes of each individual agency or organization, does not obligate funding at any prescribed level.

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The Lower Mississippi Valley Joint Venture functions as the forum in which the private, state, federal conservation community develops a shared vision of bird conservation for the Lower Mississippi Valley region; cooperates in its implementation; and collaborates in its refinement.

***Dedicated to bird habitat conservation***

***Committed to the use of the best science available***

***Believing in the power of partnership***

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# Lower Mississippi Valley Joint Venture

## Operational Plan 2024

### INTRODUCTION

The Lower Mississippi Valley Joint Venture (LMVJV) was formed in 1987 as a regional partnership working to achieve the goals and objectives of the North American Waterfowl Management Plan (NAWMP). In the late 1980s, the North American Bird Conservation Initiative (NABCI) emerged with the vision of “regionally-based, biologically driven, landscape-oriented partnerships delivering the full spectrum of bird conservation across the entirety of North America.” The LMVJV formally accepted responsibility for achieving the NABCI strategic conservation vision within the LMVJV region in 2001. Since that time, the LMVJV has been a leader in bird conservation planning, design, delivery, monitoring, and research. The wide acceptance and understanding of Strategic Habitat Conservation across the North American conservation community is in no small part due to the pioneering leadership of LMVJV partners, undertaking the enterprise of integrated bird conservation.

Since the inception of the LMVJV, the conservation landscape has changed (for better and worse), and many challenges remain to be addressed. This Plan articulates the collective expectations of the Management Board with respect to how the LMVJV operates, interacts, and cooperates among all its parts (office staff, partners, other partnerships), and more specifically, the essential expected outcomes over the next five years. The plan provides the LMVJV Management Board, coordinator, office staff, and partner staff a common context and reference point for making key (and perhaps tough) resource allocation decisions through 2023.

### THE HIGH VALUE OF PARTNERSHIP

The conservation community in North America faces daunting challenges as we move into the future. Our reality is a rapidly changing natural environment with limited resources to address and reverse population and habitat declines. State, federal, and NGO budgets are strained to keep pace with needs. At the same time, threats to our natural systems and native bird populations multiply and intensify daily. The steady march of urban development, the vagaries of agricultural commodity markets and their effects on Farm Bill programs, a society growing less connected to the natural world, continued introduction and expansion of invasive species, and the uncertainty of the impacts of a changing climate on wildlife habitats are but a few clear reminders of the difficult task ahead for conservation.

Despite the challenges, opportunities for better, more efficient and effective conservation are being seized upon and refined. These opportunities reside not in individual organizations buckling down and working harder – but in thriving, effective partnerships. The LMVJV has a proud history of *partners truly partnering*, sharing resources and responsibility to ensure that the resources directed

toward conservation are invested wisely. The LMVJV has well-established partnership connections, enhanced and expanded by locally driven Conservation Delivery Networks and has a legacy of careful, thoughtful biological planning powered by intelligent use of technology, and guided by high expectations of results.

The partnership is committed to learning from past successes and focusing our resources, energy, and connections on an even more effective and higher functioning bird conservation partnership than ever before. The Goals and Strategies that follow will ensure the partnership continues to successfully deliver its core objectives, by remaining **Dedicated to bird habitat conservation**, **Committed to the use of the best science available**, and **Believing in the power of partnership!**

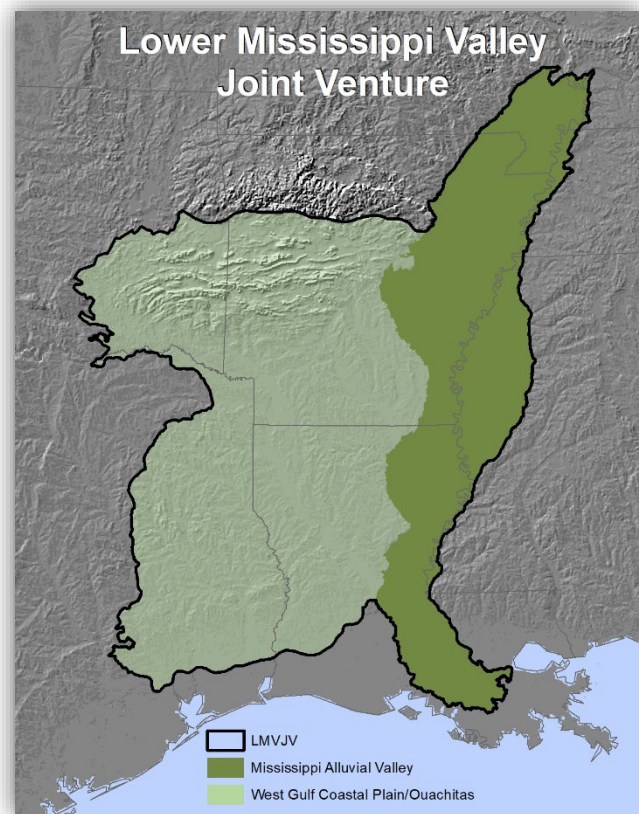
## THE LMVJV CONSERVATION LANDSCAPE

The LMVJV region is composed of two distinct Bird Conservation Regions: the Mississippi Alluvial Valley (MAV) and the West Gulf Coastal Plain/Ouachitas (WGCP). Whereas bird species composition is very similar between these two ecoregions, land use, bird habitat types and juxtaposition, and major threats and disturbances to natural processes, are dissimilar. As a result, conservation partnerships, priority actions and opportunities within these two areas are regionally distinct.

### Mississippi Alluvial Valley

The Mississippi Alluvial Valley (MAV) is a 22-million acre floodplain that supports a diverse and ecologically rich forested wetland ecosystem – one of the most productive in North America. It extends from the confluence of the Mississippi and Ohio Rivers, to the northern Gulf of Mexico and features a mosaic of ridges, swales, meander belts, and backswamps. Small changes in elevation (<1 foot) in the MAV are associated with large shifts in hydrology, which in turn, strongly affect plant and animal community composition and structure, making it a fertile and productive floodplain.

The rich alluvial soils of the forested floodplain proved to be a “gold mine” for the agrarian European settlers. Early clearing for agriculture focused on higher landforms that were associated with both braided stream terraces and natural levees that were partially protected from the potentially devastating and relatively frequent flooding. Expansive federally sponsored flood control and drainage projects created new opportunities for agricultural development such that by the 1950s, only 9 million acres of forested



wetlands remained – confined primarily to the more poorly drained portions of the floodplain. However, continued flood control and drainage projects along with high commodity prices over the next 30-35 years led to more than 4 million acres of the remaining forested wetlands being cleared, despite the fact that these lands were typically on poorly drained sites subject to regular flooding. By the early 1990s, less than 25% of the MAV was forested, and most of this forest occurred on the unprotected side of mainline Mississippi River levees or within the public land estate (e.g., National Wildlife Refuges and State Wildlife Management Areas). Well focused and coordinated reforestation by LMJV partners over the past 25 years has resulted in a reversal of the trend in forest loss, adding over 1 million acres of forest through various programs and efforts, most notably Wetlands Reserve, through the Farm Bill.

Today, the MAV continues to support significant migratory bird habitats and populations and is home to many federally listed fish, plant, invertebrate, and mammal species. Nearly 40% of North America’s waterfowl and 60% of all U.S. bird species migrate or winter in the MAV. The MAV was identified as a priority geography for waterfowl in the original North American Waterfowl Management Plan (1986), and the LMJV partnership continues its work to improve waterfowl habitat conditions, as well as habitat for songbirds, shorebirds, and wading birds in this heavily degraded landscape.

### **West Gulf Coastal Plain/Ouachitas**

The West Gulf Coastal Plain/Ouachitas (WGCP) physiographic area occupies about 52 million acres in southwestern Arkansas, southeastern Oklahoma, western Louisiana, and eastern Texas, and lies within the humid Southeast Region of the U. S. It comprises two subregions: all of the West Gulf Coastal Plain and the Ouachita Mountain portion of the Ozarks/Ouachitas. The region is dominated by pine forests on the uplands, shortleaf to the north and longleaf and loblolly to the south, and is dissected by numerous river systems characterized by forested wetlands, largely bottomland hardwood forests. Longleaf pine-bluestem savannahs formerly dominated the uplands in southeastern Texas and southwestern Louisiana, however these forests are much less common in today's landscape, comprising less than 3% of the land area of the WGCP. Shortleaf pine mixed with oaks and hickories historically was the predominant forest type outside of the longleaf range. Today much of the shortleaf pine forest has been replaced by loblolly pines, except in the Ouachitas and the drier areas to the west. Loblolly pines were formerly confined to flatwoods in the south and along moist (mesic) slopes in other areas, but now have largely replaced shortleaf and longleaf as plantations in most areas.

Outside of pine forests, the most extensive plant community type in the WGCP is mixed pine - hardwood that is often a successional stage on lands previously occupied by other types. Bottomland hardwood forests of various oak species, black gum, sweetgum, elms, and ash are found in stream and river bottoms. Cypress and/or tupelo swamps are found in frequently to permanently flooded sites. Other wetlands dominated by herbaceous emergent and floating plants are occasionally found in permanently flooded areas.

The Federally endangered red-cockaded woodpecker is among the highest priority species in the WGCP and occurs in open, park-like pine savannahs. Other high priority species that nest in this

habitat type include Bachman's Sparrow, Northern Bobwhite, and the Brown-headed Nuthatch. Pine savannahs are a conservation priority because of the numerous bird species they support, and they continue to be impacted by urban/suburban development, conversion to pasture, conversion to pine plantations, lack of thinning, and the lack of prescribed burning and/or suppression of naturally-caused fires.

Bottomland hardwood forests, cypress/tupelo swamps, and riparian habitats are distributed widely in association with the numerous rivers and tributaries within the WGCPO, and support priority species including Acadian Flycatcher, Louisiana Waterthrush, Red-shouldered Hawk and Swainson's, Yellow-throated, and Prothonotary warblers. Bottomland forests also support substantial populations of several waterfowl species including Wood Duck and Mallard. The primary threats to these forests of high conservation priority include reservoir construction, stream modifications, poorly planned timber harvesting practices, and conversion to pine plantations, pastures, and other land uses.

## GUIDING PRINCIPLES

Following are the basic principles that provide direction to the structure and work of the Lower Mississippi Valley Joint Venture.

### **Vision**

A landscape supporting healthy native bird populations and other wildlife across the Lower Mississippi Valley region.

### **Mission**

The Lower Mississippi Valley Joint Venture functions as the forum in which the conservation community develops a shared vision of bird conservation for the Lower Mississippi Valley region; cooperates in its implementation; and collaborates in its refinement.

### **Purpose**

The Lower Mississippi Valley Joint Venture is a self-directed, non-regulatory conservation partnership that exists for the purpose of sustaining bird populations and their habitats within the Lower Mississippi Valley region through implementing and communicating the goals and objectives of relevant national and international bird conservation plans.

### **Biological Scope**

The Lower Mississippi Valley Joint Venture partnership is focused on the protection, restoration, and management of birds of the Lower Mississippi Valley region and their habitats.

### **Operational Scope**

The operational scope of the Lower Mississippi Valley Joint Venture encompasses bird biological planning, conservation design, population and habitat monitoring, evaluation and research, and implementation through a biologically driven, landscape-oriented partnership.

### **Geographic Scope**

Lower Mississippi Valley Joint Venture planning, implementation, and evaluation are specific to Bird Conservation Regions (BCRs) as defined by the U.S. NABCI Committee. Our primary geographic focus is the two BCRs lying entirely or mostly within the LMVJV administrative boundary - the Mississippi Alluvial Valley and West Gulf Coastal Plain/Ouachitas.



## FUNCTIONS, SERVICES, AND PARTNERSHIP INFRASTRUCTURE

The NABCI goal of "regionally-based, biologically driven, landscape-oriented" conservation requires that a Joint Venture partnership provide functions and services that extend across state boundaries, often transcend the jurisdictional reach and capability of any individual partner, and address the full suite of Strategic Habitat Conservation elements. Such a partnership might be characterized as a fully functioning Joint Venture. The LMVJV has adopted an Operational Compass (**Appendix A**) to clarify what this means in very practical terms, and to aid in assessing our progress towards the goal of being fully functional across the entire "Bird Conservation Enterprise". The expectations of a fully functioning Joint Venture were developed by the collective Migratory Bird Joint Venture community and are described in ***Desired Characteristics for Habitat Joint Venture Partnerships*** (the "JV Matrix"; **Appendix B**). These expectations are organized into the following seven themes:

- Organizational Performance
- Biological Planning
- Conservation Design
- Habitat Delivery
- Monitoring and Evaluation
- Assumption-based Research
- Communication, Education, and Outreach

Accordingly, our member agencies and organizations seek to provide, through their collective actions, value-added services relevant to these themes, as described in more detail in the following pages. For each theme, a succinct list of the specific expectations found in the JV Matrix is shown in separate "Coordination/Partnerships" and "Technical" boxes for easy reference.

## ORGANIZATIONAL PERFORMANCE

**Goal 1a: Maximum level of collaboration among LMVJV Office, partner organizations and staff in pursuit of the Mission & Vision**

**Goal 1b: Optimal level of communication among LMVJV Office, partner organizations and staff in pursuit of the Mission & Vision**

**Goal 1c: Access to sustained levels of funding necessary to achieve the Mission & Vision**

The organizational structure of the LMVJV is composed generally of a **Management Board, JV Support Office, Working Groups, and Partner Organization Staff**. Each of these entities has unique and specific roles and functions, as described below. For example, it is the role of the Management Board to set the broad direction and priorities for the partnership’s shared activities, and the Support Office’s responsibility to facilitate the timely accomplishment of priorities through day-to-day coordination and attention. However, identifying and filling critical capacity gaps is the responsibility of the entire partnership, such that making decisions on how and by whom various functions are filled depends on the strengths and weaknesses in both Partner and Support Office capacity.

### Coordination/Partnership Expectation

- Ongoing networking and partnership expansion
- Partnership finds and fills capacity gaps
- Participates in developing funding messages to Congress, cultivating relationships with Congressional delegation
- Management Board participation in the Association of Joint Venture Management Boards

### Required Elements to Meet Expectations

- Coordination, Technical, and Administrative Staff within the JV Support Office
- Active Management Board
- Active Working Groups
- Ample Administrative/Operating Funds

### Status

**Management Board** The LMVJV is overseen and directed by a Management Board. The Management Board membership includes agencies and organizations, which by virtue of mission or legislative authority, commit to sharing in the responsibility of implementing national and international bird conservation plans within the LMV region. Member organizations are expected to dedicate time, energy and resources to developing a shared vision of bird conservation for the LMV and coordinating their otherwise independent actions in the cooperative pursuit and refinement of that vision.

Management Board members are expected to represent their agency or organization at an administrative and policy level on matters pertaining to allocating human and financial resources toward protection, restoration, and management actions that are inherent to the sustained, long term conservation goals of the partnership.

Recognizing that the commitment of member agencies/organizations is voluntary and subservient to the organization's mission, authorities, and budgetary capabilities, Management Board members are expected to participate regularly and fully in advancing the goals and objectives of the LMVJV. Board members are expected to attend two Management Board meetings a year, participate in conference calls or *ad hoc* working groups, and fulfill other such responsibilities in the course of a year as may be deemed appropriate by the Board as a whole.

As further described in the *LMVJV Operating Procedures (Appendix C)*, the Board is open, on an adjunct basis, to agencies, organizations, or individuals whose mission may not lend itself to sharing fully in the broad spectrum of conservation actions inherent in implementing national and international bird conservation plans, yet have an abiding interest in a joint commitment of energies and resources on specific areas of mutual concern.

**LMVJV Support Office** In furthering the purpose and mission of the Joint Venture, the Management Board is supported by a full time professional and technical staff. While the Joint Venture Support Office may receive funding and staff from other partners, the Office will operate as a field station of the U.S. Fish and Wildlife Service in the service of the LMVJV Management Board. The Joint Venture Coordinator and associated staff will be responsible for facilitating, guiding, and leading the various working groups created by the Board in pursuing all facets of Joint Venture implementation.

**Working Groups** Management Board representatives engage their professional and technical staff in the various facets of Joint Venture implementation through the forum of permanent or *ad hoc* Working Groups, Technical Committees, Teams, Conservation Delivery Networks, and/or networks and active sub-partnerships.

### Technical Expectations

- *MB* – Members bring significant resources to the partnership
- *MB* – Process in place for periodic self-assessment
- *Budget/Grant/Admin* – Admin staff capable of handling grants, etc.
- *Budget/Grant/Admin* – Grant writing capacity (partners and/or staff)
- *Budget/Grant/Admin* – Cultivates new sources of funding
- *Budget/Grant/Admin* – Annual and long-range development planning
- *Technical* – Science Coordinator & Geospatial Technician
- *Technical* – Functional Technical Committees with full partnership participation

## Priorities

High

- a) Consistent, high-level engagement and involvement from Management Board members
- b) Consistent, high-level engagement and involvement from partner staff in both technical and delivery related activities
- c) Effective two-way communication of LMVJV activities, accomplishments, and needs by JV Support Offices staff among Management Board members, their organizations' staff, and other partners
- d) Effective two-way communication of LMVJV activities, accomplishments, and needs by Management Board members within their organizations
- e) Cultivating relationships with key decision-makers and governmental delegations contributing to the policy and funding mechanisms that support the broader conservation objectives of the joint venture partnership
- f) Cultivate existing and capitalize on new sources of funds
- g) Sufficient JV Office budget to support staff, travel, and activities

## Strategies

Achieving all but priority G above is largely a function of effective communication. These issues are addressed within the "Communication, Education, and Outreach" section of this document, and detailed in the LMVJV's 2020 Communications Plan. Joint Venture partnership accomplishment tracking will continue to focus on elements of Desired Characteristics for Habitat Joint Venture Partnerships (Appendix B) and the LMVJV Operational Compass (Appendix A).

JV Support Office staff will continue to dialogue with partners and potential funders (foundations, federal grants, state grants, other private sources) to craft messages depicting conservation action within the LMVJV partnership as a well-organized, science grounded, and trustworthy investment. In particular, the LMVJV's approach to conservation design along with the existence of highly functional Conservation Delivery Networks provides a "complete package" that is attractive to funders.

## BIOLOGICAL PLANNING

### ***Goal 2: Landscape-oriented, biologically driven, partner vetted, up-to-date population objectives for priority species within all bird guilds in both BCRs by 2029***

Establishing biologically-based, landscape-scale, transparent population and habitat objectives has been central to the work of the LMVJV for over three decades.

**Appendix A** summarizes an assessment of the progress/status to date of each functional element within the Bird Conservation Enterprise, organized by BCR. LMVJV accomplishments in Biological Planning, particularly for waterfowl, landbirds, and shorebirds, have been extraordinary. Such progress largely has been the product of partner commitment (evidenced by investment of staff time and other resources) coupled with JV Support Office staff technical expertise and leadership. It is important to understand that **one does not get very far without the other**. Success in biological planning has been characterized by the commitment of JV Support Office staff co-leadership with a partner “chair” and significant intellectual input by partner staff, technical input by partner staff where available and appropriate, and significant technical input by JV Support Office staff. Closing the existing gaps (and remaining current) in biological planning requires similar, continued commitment and effort by the partnership.

#### **Coordination/Partnership Expectations**

- JV partners integrate JV biological objectives with relevant work of their agency

#### **Technical Expectations**

- *Biological Planning Unit* – Biological Planning Units defined as BCR or sub-BCR
- *Priority Species* – Final list of priority birds
- *Population Objectives* – Explicitly set with documentation of the process and identification of uncertainties
- *Limiting Factors* – Demographic factors targeted by habitat management actions
- *Species/Habitat Relationships* – Explicitly stated population-habitat models with assumptions documented as testable hypotheses

#### **Required Elements to Meet Expectations**

- Science Coordination
- Partner leads for each bird guild (waterfowl, landbirds, etc.)
- Identification and provision of Working Group participants by Management Board members
- Other subject experts
- Sufficient, relevant biological information
- Technical capacity for modeling, analysis, etc.

## Status

Solid progress has been made over the past five years in reducing deficiencies in Biological Planning, particularly in the WGCPO. The largest remaining deficiency in biological planning occurs in Waterbirds. However, we also recognize the importance of timely update and revision to outdated plans (Waterfowl, Landbirds within Open Pine in the WGCPO).

## Priorities

Perhaps chief among the criteria for prioritizing biological objective activities is the degree to which the lack of (or need for updating) biological planning hampers the effective delivery of conservation in support of priority birds. Posed as a question, where would LMVJV strategic Biological Planning have the greatest influence to increase our partners' ability to focus effort, garner additional resources, and achieve results in bird habitat conservation? This logic would suggest the following priorities:



## Strategies

A community of scientists thoroughly familiar with and contributing to the science needs of the LMVJV is critical. Achieving significant progress towards setting and/or refining LMVJV biological objectives depends upon a critical mass of subject matter experts to help assemble the available information, evaluate the range of approaches, then apply their expertise to arrive at useful and defensible objectives. The Science Team is encouraged to reach out to, cultivate, and organize an array of science specialists composed of long-standing contributors as well as scientists who are new

to the LMVJV partnership. In addition, JV staff will coordinate and collaborate with other Joint Ventures as appropriate.

The Senior Science Coordinator, Avian Ecologist, and/or representative of the Science Team should report at least annually to the Management Board on progress towards meeting the partnerships' Biological Planning objectives. Identification and discussion of barriers to achieving priority tasks would afford the Management Board an opportunity to better understand challenges and endeavor to find solutions to specific problems.

## CONSERVATION DESIGN

***Goal 3a: Up-to-date habitat objectives for priority species within each bird guild in both BCRs by 2029***

***Goal 3b: Effective decision support tools to link and integrate habitat objectives for priority species in each bird guild and other relevant resource concerns, useful for delivery action by 2029***

Conservation Design, in its simplest form, makes the first tangible connection between biological objectives and the landscape those objectives are meant to affect. Hence, this aspect of the conservation enterprise is often key to our ability to successfully translate biological objectives into effective action “on the ground”.

As with Biological Planning, the LMVJV has been relatively productive in this aspect of the conservation enterprise. In fact, across bird taxa and BCRs, Conservation Design expectations

### Coordination/Partnership Expectations

- Implements strategies to use JV science products to target and enhance delivery programs
- MB members build strong linkages to decision makers to strengthen their understanding of JV capabilities and activities

are among the most up-to-date of all the conservation functions (**Appendix A**). The MAV Forest Breeding Bird Decision Support Tool, stepped-down waterfowl objectives, Conservation Layers Planning Tool, and Potential Natural Vegetation models are but a few examples.

### Required Elements to Meet Expectations

In addition to the obvious bird-focused tools and models, Conservation Design can be applied to facilitate understanding of the partnership’s bird objectives and priorities in light of other natural resources and/or socioeconomic goods and services. A relevant example here is the spatial analysis of the nexus of bird habitat priorities alongside other relevant ecological/sociological interests of delivery partners found in CDN Delivery Priority Tools. Such analyses require not only bird conservation expertise, but effective collaboration with scientists familiar with the variety of other available data. This example (and many others) highlights the reality that capturing all reasonable types of knowledge and expertise in a single Science Coordinator, or even Science Team, is not possible. A natural extension of this reality is the need to (1) establish and cultivate positive working relationships with other entities possessing necessary expertise (e.g., other JVs, etc.) and to (2) identify and engage expertise and capacity within partner organizations.

- Science Coordination
- Partner Lead (“Chairperson” in some instances) for Working Groups
- Partner Subject Experts
- Biological Objectives
- Existing, relevant biological information
- Technical Capacity (JV Support Office and/or Partner)



## Status

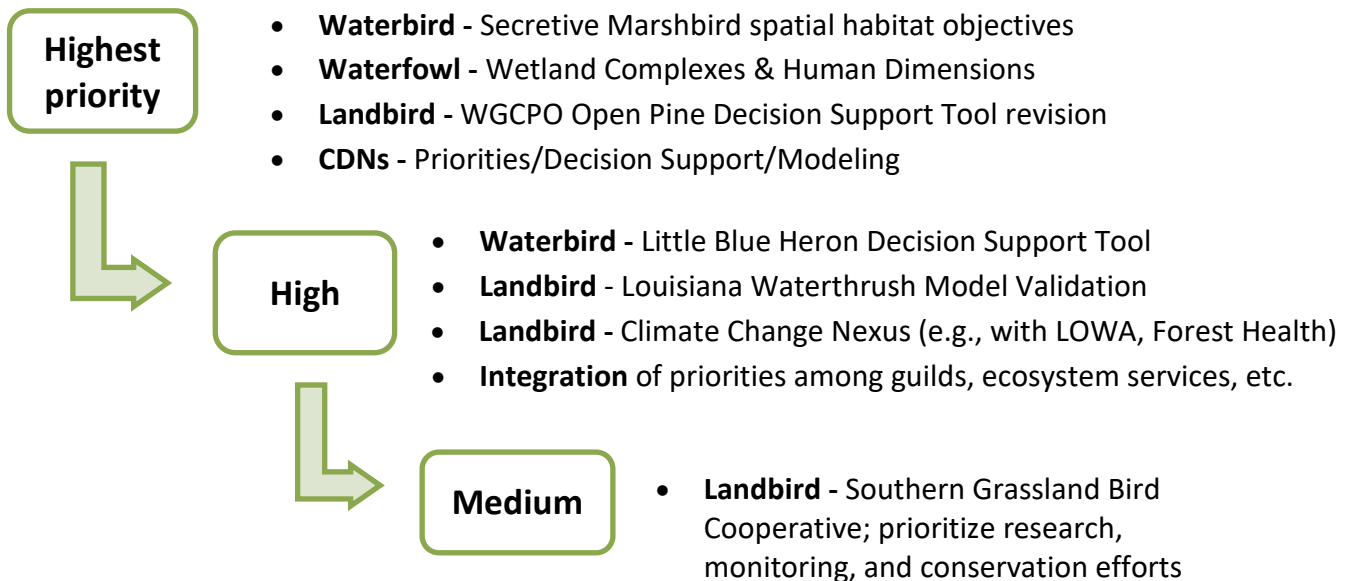
The largest deficiencies in conservation design occur in both the MAV and WGCPD for Waterbirds. Integration of multiple species objectives logically depends upon the existence of multiple objectives, and so will continue to be an area of deficiency until a threshold of various objectives exists. Varying degrees of update are needed in several other areas of Conservation Design within the matrix.

### Technical Expectations

- *Landscape Characterization/Assessment* – Rigorous analysis of K based on population models
- *Landscape Characterization/Assessment* – Assess historic and predicted future K
- *Landscape Characterization/Assessment* – Assessment of Conservation Estate, updated at 5-yr interval
- *Decision Support Tools* – Spatially-explicit DSTs for specific actions to overcome limiting factors, distributed to appropriate partners
- *Habitat Objectives* – Explicit, linked to pop. objectives, and stepped down as appropriate
- *Integration of Avian DSTs* – Documented process or integrating priorities among all priority species

## Priorities

The criteria for prioritizing Conservation Design activities are the same as those described for Biological Objectives – “where would LMVJV Conservation Design best facilitate the partners’ ability to focus effort, garner additional resources, and achieve results in bird habitat conservation?” This logic would suggest the following priorities:



## Strategies

Please see Biological Objectives Strategies (pp. 11-12)

## HABITAT DELIVERY

***Goal 4a: Actively seek and foster existing and emerging opportunities for coordinated and increased habitat delivery in support of LMVJV objectives***

***Goal 4b: Fully support the functionality and productivity of existing Conservation Delivery Networks, Tri-state Conservation Partnership, and AR-LA RCPP***

Biological Objectives and Conservation Design are only useful to the extent they inform Habitat Delivery in a meaningful way. To this end, the LMVJV partnership has increasingly strengthened its capacity to advance our collective goals and objectives through informed and coordinated delivery professionals in the field. Conservation Delivery Networks (CDNs) were conceived and developed by the LMVJV to address the need to effectively support and improve habitat delivery for migratory birds.

### Coordination/Partnership Expectations

- Provides structure and process that generates, attracts, leverages, and implements habitat delivery in support of LMVJV objectives

Partners fully recognize the value in leveraging and sharing resources, focusing collectively on common priorities, and sharing information. CDNs provide fertile ground for these and other productive partnership activities. CDNs are forums whereby members of the Joint Venture and other appropriate conservation organizations coordinate on-the-ground delivery of their otherwise independent efforts, with the scope of coordination intended to include not only the implementation of individual projects, but also the refinement of programs as partners deal with emerging challenges such as urban sprawl, habitat loss and degradation, altered hydrology and changing

### Technical Expectations

- *Program Objectives* – Translate bird habitat objectives into explicit program-specific objectives
- *Conservation Actions* – Comprehensive list and documentation of habitat conservation actions, tools, and treatments being deployed by the partnership, including quantification of how they are expected to affect biological outcomes
- *Delivery Capacity* – Fully developed partnership delivering on-the-ground bird conservation explicitly linked to JV objectives

societal attitudes and norms. They provide a functional link for translating biological planning and conservation design tools (science at landscape scales) to effective action on the ground. Importantly, this link also facilitates enhanced feedback from delivery staff to planners.

The role of CDNs, with assistance and coordination provided by Partnership Coordinators, is to:

- (1) facilitate effective exchange of information between planners and delivery staff (e.g., professionals on-the-ground), and
- (2) facilitate more effective communication, coordination, and collaboration among the full spectrum of conservation organizations working to positively impact the landscape for wildlife populations within the Lower Mississippi Valley Joint Venture region.

Addressing these two core tenants through the work of CDNs also results in enhanced utilization of shared resources and leveraging of capacities (i.e., staff, equipment/facilities and funding).

### **Required Elements to Meet Expectations**

Conservation programs of LMVJV partners form the operational link, both individually and collectively, between the JV's ecoregional-scale biological planning and its site-scale and project-scale delivery of conservation. Investment in capacity by the entire JV partnership (e.g., JV Support Office, individual partner organizations) is necessary to coordinate the suite of protection, restoration, and management practices offered within the JV geography. Jointly supported and strategically focused capacity is considered vitally important to successfully maintaining and enhancing the synergies of partner programs. The success of CDNs is demonstrated through the ongoing commitment of partner staff and operational capacity toward achieving the shared conservation goals emanating from these unique collaborative networks. Essential elements include:

- Partnership Coordinator – Mississippi Alluvial Valley BCR
- **?????**Delivery Coordinator – Mississippi Alluvial Valley BCR**?????**
- Partnership Coordinator – West Gulf Coastal Plain/Ouachitas BCR
- Delivery Coordinator – West Gulf Coastal Plain/Ouachitas BCR
- Partner Leads (Chair and Vice-chair per CDN)
- Partner Delivery Personnel
- Biological Objectives, particularly as reflected in landscape scale Decision Support Models
- Technical Capacity (JV Support Office and/or Partner) – particularly geo-spatial information
- Funds to support delivery action

### **Status**

Since the establishment of the first CDN in 2010, formation and support for these eco-regional networks to foster and support the partnership's delivery objectives has proven to be an effective strategy. Over the past 13 years, the partnership has benefited from establishment of these unique delivery focused forums. Although the initial goal of creating eight CDNs across the LMVJV region (four in each BCR), has not yet been achieved, the four that have been established have proven their value to the partnership, and are represented by two within the MAV and two within the WGCP.

The first CDN was formed in the MAV of Arkansas in the fall of 2010 (AR MAV CDN). In the summer of 2012, a two-state CDN was initiated in the Delta of Mississippi and Northeast Louisiana (LA-MS MAV CDN). The NE Texas CDN was initiated in the fall of 2012, followed by formation of the AR-LA WGCP CDN in late 2014. These four networks have provided a unique forum for delivery professionals to meet, collaborate and fellowship several times per year, where there was sporadic or no opportunity before. The tangible outcomes and beneficial accomplishments of these partner led groups are too numerous to list, and there are untold intangible benefits that are difficult to pin down, and may never be documented. These CDNs have successfully worked to increase delivery funding, which has in turn served to support the accomplishment of numerous on-the-ground conservation actions. These partner networks benefit from enhanced knowledge and awareness of past and current research, and have provided practical training to hundreds of delivery professionals. With these successes and continuing efforts, what was originally envisioned has proven successful.

In addition, several partnerships exist that perform many of the desired functions of LMVJV CDNs. For example, Longleaf Initiative Teams in Louisiana and Texas effectively facilitate coordination, communication, and funding for longleaf pine habitat conservation delivery within their respective landscapes. LMVJV partner staff are heavily engaged in these teams, and JV Office staff maintain communication and coordination, as appropriate and practical, serving on the Steering Committee of each team.

Finally, in the spring of 2013, LMVJV partners agreed that significant benefits could result from increasing the level of coordination among NRCS organizations in Arkansas, Louisiana, and Mississippi, and other LMVJV partners in those states. What began as a concept to enhance coordination, has evolved into a well-established three-state collaboration; the Tri-state Conservation Partnership (TCP). The fundamental purpose of this unique effort is to mutually identify specific Farm Bill program delivery elements for which the NRCS could benefit from added support and coordination with its conservation partners. This purpose is coupled with the mutual recognition that the LMVJV's core objectives can be greatly advanced by strengthening coordination and support of NRCS program delivery.

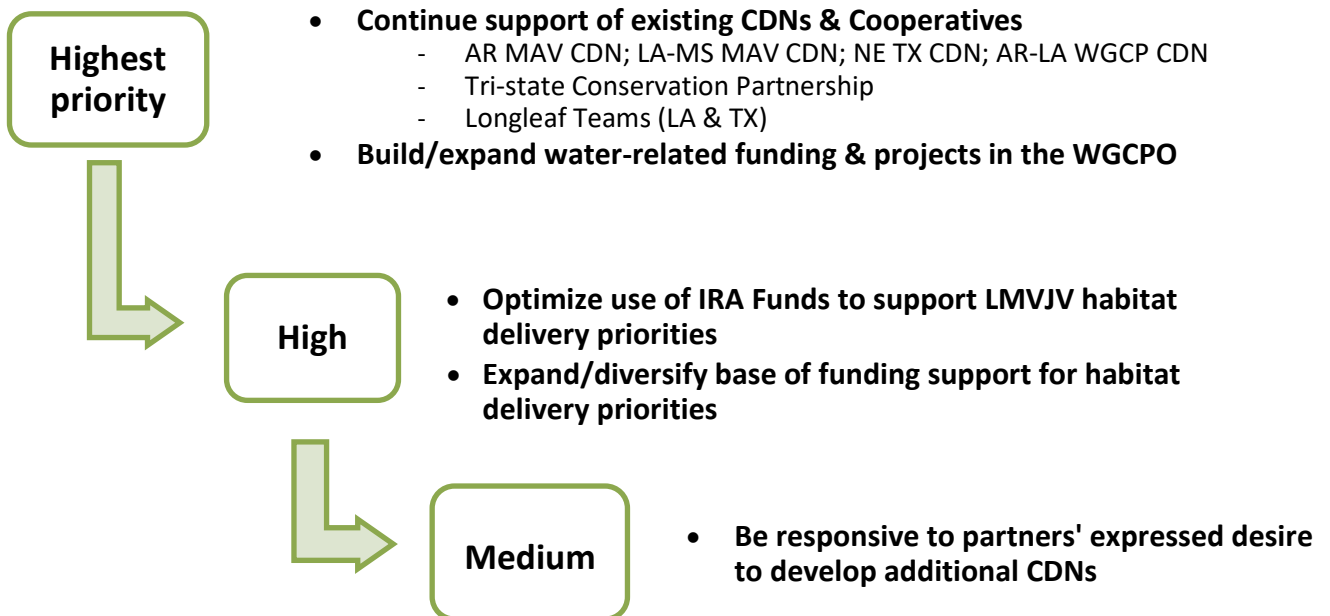
Over the ten years since its establishment, the TCP's collaborative efforts have enjoyed growing support of all involved partners. This has resulted in numerous shared conservation successes including supporting both the establishment and stewardship of Wetland Reserve Easements by obtaining increased funding (e.g., multiple awards of funding for the Wetland Reserve Enhancement Partnership Program [WREP]), developing video and printed materials to support WRE management for landowners and technical professionals, supporting JV NGO partners working to advance Farm Bill policy related to WRE, and working to support NRCS State Offices in the administrative functions associated with WRE restoration and management. Similar to the cooperative work associated with CDNs, the TCP has effectively supported the growth, development, and objectives of the partnership, proving invaluable to meeting long-term MAV delivery objectives of the LMVJV.

## Priorities

Continuing to support and advance the existing CDNs, TCP, and Longleaf Teams is a top priority for the LMVJV over the next five years. These established networks have proven extraordinarily valuable to supporting the accomplishment of JV's mission and have great potential for continued success in ensuring that partner investments in conservation are not only delivered efficiently and effectively, but also leveraged to garner additional support. Such additional support potentially comes from a diversity of sources, and making it a reality requires consistent attention, support, and leadership by both JV Office staff and partner staff. Within the MAV, the TCP has become a key asset to both supporting the work of the CDNs as well as helping to directly address core LMVJV priorities and conservation objectives, particularly related to the significant and tangible benefits of the WRE program. Therefore, continuing to support the growth and development of this partnership is considered of equal importance to CDNs within the MAV.

In the WGCP, many partners and potential funders are focused on conservation of water quality and quantity, and the natural nexus between these issues and forest conservation. Hence, the LMVJV will place highest priority on connecting forest bird-related habitat/science and funding opportunities focused on water issues.

Forming new CDNs is a priority for the LMVJV. However, the geographic location, pace of formation, and capacity dedicated to establishment of each is ultimately a function of the support, interest, objectives, and priorities of JV partner organizations within a given geography.



## Strategies

To meet the functional goals of the CDNs, the JV partnership will continue to make significant capacity investments in the established networks, particularly regarding support provided by the JV Office staff. LMVJV commitments to supporting and developing existing CDNs, as well as focusing efforts to establish additional networks, will primarily be the responsibility of the JV's two Partnership Coordinators. However, experience has demonstrated that the development of these networks also requires the support of JV technical staff, primarily in the form of conservation delivery-based GIS planning and products. It will be critical, therefore, for the JV to maintain and continue developing its core geospatial technical capacity both within the JV Office and through GIS support of LMVJV partner organizations.

Supporting the development of field technical staff (e.g., private lands biologist, Partners for Fish and Wildlife Biologists, etc.), as well as that of private non-industrial landowners through training and workshops is key to advancing the work of CDNs. The JV Partnership Coordinators will continue to support local partner organizations, as appropriate, in delivering these important developmental opportunities.

Each established CDN is compelled, through direction of the LMVJV's Conservation Delivery Network Charter, to report progress annually to the Management Board. In particular, identification and discussion of barriers to achieving priority tasks would afford the Management Board an opportunity to better understand challenges and endeavor to find solutions to specific problems.

The LMVJVs Charter of the Tri-state Conservation Coordination Committee (now Tri-state Conservation Partnership, "TCP"), along with the Declaration of Partnership with the NRCS in Arkansas, Louisiana and Mississippi, demonstrates an unanticipated yet proven delivery mechanism for the LMVJV. The TCP not only supports the successful functioning of CDNs, it also encourages and facilitates delivery collaboration among JV partners across the MAV and beyond. Therefore, directly supporting the work and success of this partnership will continue to be a core responsibility of the MAV Partnership Coordinator.

## MONITORING & EVALUATION

**Goal 5a: Monitor and evaluate priority species populations and habitat status at appropriate time intervals across the LMVJV region**

**Goal 5b: Capitalize on opportunities for effects monitoring that support LMVJV priority habitat conservation actions**

Monitoring and evaluation are key elements of strategic conservation because they (1) provide the essential feedback loop which allows for measuring success

### Coordination/Partnership Expectations

- Provides structure and process to generate, attract, leverage, and implement outcome-based monitoring in support of JV objectives

towards objectives, and (2) supply much of the raw material for testing important assumptions made in the Biological Objectives and Conservation Design phases. In reality, however, these elements tend to be the most consistently ignored and/or underfunded of all the strategic conservation activities. Fulfilling the expectations of Monitoring and Evaluation will require that the LMVJV address several basic issues, as described in strategies below.

### Technical Expectations

- *Conservation Tracking System* – In place, with explicit description of linkage to models for assessment
- *Habitat I&M* – Documentation of objectives and parameters to be inventoried and monitored, with expected process and time interval, and description of how information will be used to inform decisions
- *Habitat I&M* – Net change in habitat conditions assessment every 5 years
- *Population Monitoring* – Documentation of demographic parameters monitored with expected process and time interval, and description of how information will be used to inform decisions

### Required Elements to Meet Expectations

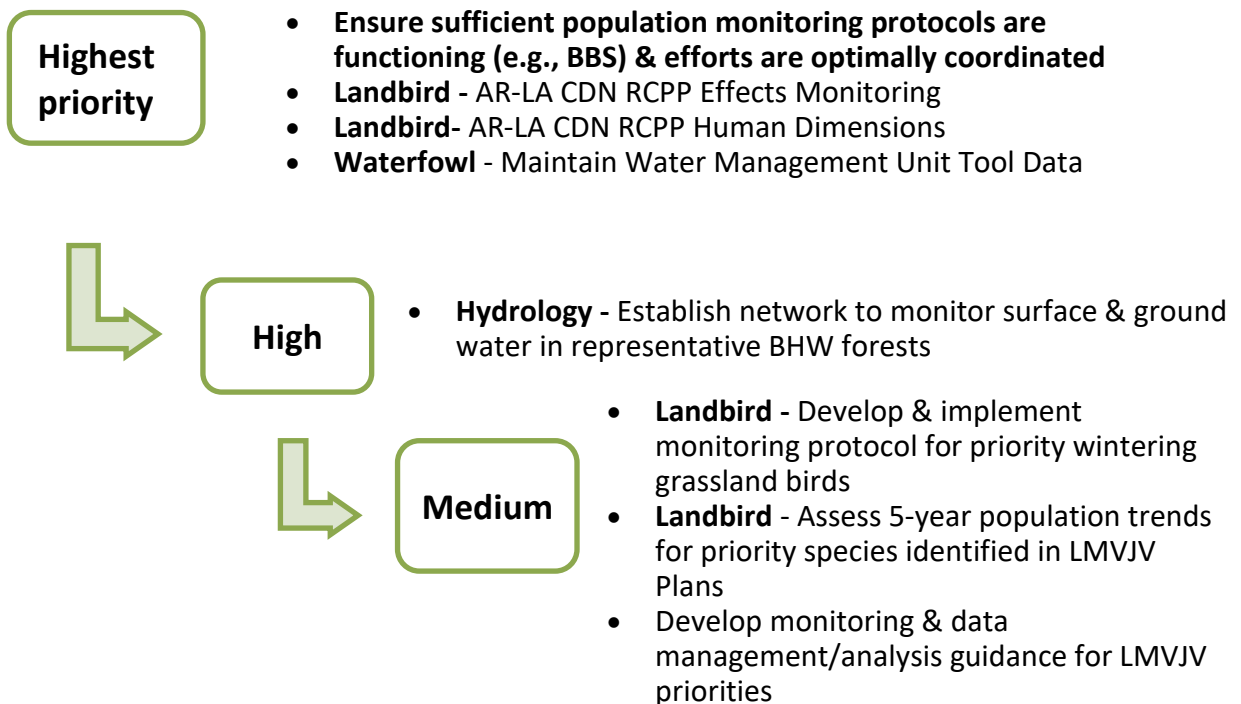
- Science Coordination
- Biological Objectives and Conservation Design elements with clearly defined assumptions
- Monitoring and Evaluation Plan
- Active and effective network of LMVJV partners involved in all facets of key monitoring and evaluation activities

## Status

A Monitoring & Evaluation Plan was approved in 2020. Biological Planning and Conservation Design supporting Waterfowl and Landbird conservation in both BCRs are fairly well supported by existing monitoring approaches (e.g., Breeding Bird Survey, LMVJV Wetland Management Unit Tool). The greatest deficiencies in biological monitoring occur for Waterbirds and Shorebirds in both BCRs.

## Priorities

Prioritizing monitoring and evaluation requires a thorough review of the partnership's planning and design assumptions, coupled with an assessment of ongoing and developing monitoring networks and systems. It is expected that priority actions emerging from the 2020 Monitoring & Evaluation Plan will be carried out as feasible.





## Strategies

The LMVJV must continue to be vigilant in clearly stating and documenting assumptions made in developing biological objectives and conservation design. Success in monitoring and evaluation is partially predicated on how thoroughly and succinctly the partnership tracks and accounts for important biological responses (habitat quantity/quality, key population metrics, etc.) across our taxa and regions of responsibility. Partners and staff should understand, coordinate with, and where possible, influence ongoing and developing monitoring schemes, systems, and networks to optimize the collective “data collection” efforts. The Breeding Bird Survey, USFWS Refuge Information & Monitoring program, Avian Knowledge Network, and Integrated Waterbird Monitoring & Management program are a few examples of monitoring and evaluation efforts that currently provide or hold promise for providing capacity and organization towards meeting LMVJV information needs. Many LMVJV partners already are involved in these and other efforts. To be successful, a great deal of communication, coordination, and cooperation are needed now and into the future. Hence, strong leadership from the Senior Science Coordinator, Avian Ecologist, and Science Team are necessary to identify opportunities to address high priority Monitoring and Evaluation needs. Deliberate and disciplined execution of the Monitoring and Evaluation plan offers the most reasonable and effective approach to fulfilling our Monitoring and Evaluation goals.

The Senior Science Coordinator and/or representative of the Science Team should report at least annually to the Management Board on progress towards meeting the partnership’s Monitoring & Evaluation objectives. Identification and discussion of barriers to achieving priority tasks would afford the Management Board an opportunity to better understand challenges and endeavor to find solutions to specific problems.

Conservation Plans slated for completion and/or revision during the next five years should include needs and recommendations for population and habitat monitoring priorities.

## RESEARCH

**Goal 6a: Update and prioritize assumption-driven research needs by 2029**

**Goal 6b: Active engagement by key research professionals in assumption testing and other applicable research for each bird guild, EGS, and human dimensions in both BCRs**

Assumption-driven research applied to issues of importance to the LMJV partnership is necessary for shoring up knowledge gaps and for testing key assumptions made in biological planning and conservation design.

### Required Elements to Meet Expectations

- Science Coordination
- Science Team
- Research Strategy
- Diverse and active community of research scientists well aware of LMJV Science Priorities

#### Coordination/Partnership Expectations

- Provides structure and process generates, attracts, leverages, and implements assumption-driven research activities in support of JV biological targets
- Strong relationship with USGS and universities

### Status

The LMJV *Developing and Refining the Biological Foundation of the Lower Mississippi Valley Joint Venture: an Assessment of Biological Planning, Monitoring, and Evaluation Issues* (2002) document was updated in 2014 and 2022 as the *LMJV Science Priorities* document. The Senior Science Coordinator is now actively engaged as an informal advisor and graduate committee member in several relevant research efforts.

#### Technical Expectations

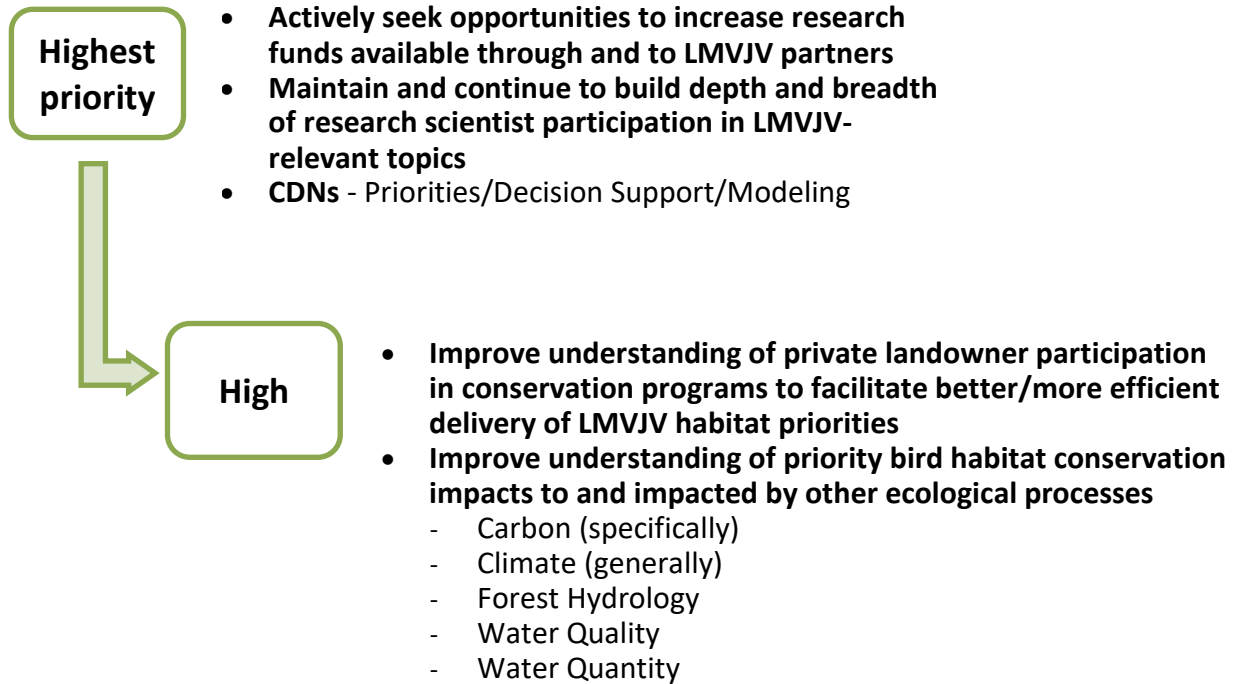
- *Species/Habitat Model Assumptions* – Prioritized, targeted research needed to address uncertainties
- *Conservation Treatment Assumptions* – Prioritized, targeted research needed to address uncertainties about conservation treatments on vital rates/abundance
- *Sensitivity Analyses* – Statistical analysis of key parameters influence on model results
- *Spatial Data Analyses* – Rigorous statistical analyses, and associated refinement, of key uncertainties in spatial data used for planning or monitoring

Research continues at many institutions on subjects that can inform LMJV biological planning and conservation design. Work by faculty, students, and post-docs at the University of Missouri, University of Arkansas Monticello, Mississippi State University, Stephen F. Austin State University,

Louisiana State University, the U.S. Forest Service’s Hardwoods Lab, and U.S. Geological Survey are current examples.

### Priorities

The highest priorities for achieving assumption-driven research expectations of the LMVJV are as follows:



### Strategies

Joint Venture Support Office staff and JV partners should remain alert to funding sources and other opportunities to address LMVJV science needs within the research community. The Senior Science Coordinator, Avian Ecologist, and Science Team should continue to actively seek out research professionals with geographic and functional areas of interest, facilitating greater knowledge of and participation in the science needs of the LMVJV.

As a practical means of exploring useful avenues in which the LMVJV can contribute to “people” objectives of major bird plans, partners and staff continue to work towards understanding private landowner motivations in conservation program participation. This is most logically accomplished via research in partnership with scientists well versed in Human Dimensions Science.

The Senior Science Coordinator, Avian Ecologist, and/or representative of the Science Team should report annually to the Management Board on progress towards meeting the partnerships’ research objectives. Identification and discussion of barriers to achieving priority tasks would afford the Management Board an opportunity to better understand challenges and endeavor to find solutions to specific problems.

## COMMUNICATION, EDUCATION, AND OUTREACH

### **Goal 7: Address priority actions detailed in the 2020 LMVJV Communications Plan**

Communication is central to effective implementation of every aspect of adaptive management and lies at the heart of a fully functional and successful Joint Venture partnership. However, communication takes on different forms, has many different potential audiences, and can operate to address any number of goals and objectives. An effective Communications, Education, and Outreach (CEO) Plan, complete with identification of critical needs and strategies to meet them, enables the LMVJV leadership to clearly understand and enumerate the highest priority issues and provide a means to ensure that we are accountable to those expectations. Both priorities stated below compel the Management Board and Office Staff to carefully determine the highest priorities for action over the next five years, considering all the other priorities (above) that compete for limited staff resources.

#### **Coordination/Partnership Expectations**

- Develops effective communications, education, and outreach products and strategies to attract, engage and inform partners, raise awareness, change attitudes and behaviors of key JV audiences
- JV identifies gaps in capabilities and fortifies those as appropriate

#### **Required Elements to Meet Expectations**

- JV Office Staff Coordination
- Management Board Participation
- Communication, Education, and Outreach Strategy Developed by National CEOT
- CEO Expertise
- LMVJV-Specific CEO Plan
- LMVJV-dedicated CEP Expertise (e.g., contracted communications professional)

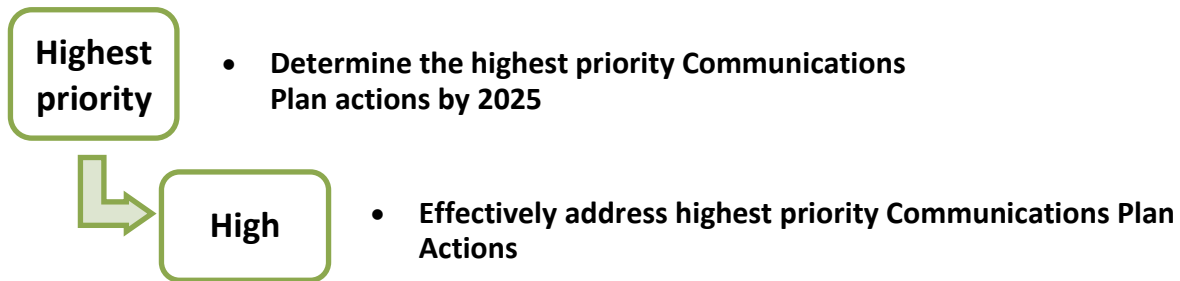
#### **Technical Expectations**

- *Priority Audiences* – JV Communication Plan
- *Priority Audiences* – Multiple means of communications established such as partner newsletters, public website, news releases, project tours, meetings, presentations & workshops – each with an associated evaluation plan
- *Audience Objectives* – Correlate audience objectives with bird conservation goals to determine how much and where increases in audience awareness, etc. are necessary to reach conservation objectives
- *Audience Assessment* – Regular formal assessments of priority audiences

## Status

The JV completed a revised Communications Plan in 2020 and continues to assemble and disseminate data and technical tools (e.g., MAV Forest Breeding Bird Reforestation Decision Support Model, LMVJV Conservation Layers Planning Tool, on-line Water Management Tool), and share these directly with the conservation community. The LMVJV maintains and updates the lmvjv.org website, providing useful background, biological foundation, literature, objectives, and tools to partners and the public. Distribution of updates and points of general interest to the partnership (e.g., online *News & Updates*) has been accomplished quarterly, as planned. In addition, the LMVJV began distributing a private landowner quarterly newsletter, *Leaders on the Land*, in Summer 2021, continuing through Summer 2022. The LMVJV has not maintained a consistent and comprehensive approach to government outreach.

## Priorities



## Strategies

Website maintenance and frequent updates are well within the capacity of existing JV Support Office staff and will continue. However, achieving distribution of quarterly News & Updates and other forms of more sophisticated and/or regular communication require at least a modest amount of additional capacity.

Past government outreach by LMVJV partners on behalf of the Joint Venture largely has been opportunistically associated with the annual Association of Joint Venture Management Boards (AJVMB) meeting in Washington D.C., as well as several focused meetings with State NRCS staff and Regional USFWS staff. A more strategic and consistent outreach approach that fosters relationship-building among LMVJV partner staff and key governmental staff likely will prove more effective in garnering future support. The LMVJV Staff and Management Board members will continue to seek

appropriate ways to remain engaged in AJVMB activities and communication and be alert for opportunities for effective outreach and in reach afforded by the AJVMB. These efforts will be guided largely by the National JV Communications, Education, and Outreach Team's Communications Plan. It is critical here to note that many of these AJVMB-related outreach efforts must be lead and conducted by our NGO partners.

The 2012 NAWMP and 2013 Action Plan compels joint ventures to consider and act more explicitly on the human dimensions aspects of waterfowl and natural resource conservation. As the NAWMP partner community develops more tangible human dimensions expectations and actions, the LMVJV will be engaged in these discussions that likely will help shape additional communication, education, and outreach needs.

**APPENDIX A. LMVJV OPERATIONAL COMPASS**

2024 LMVJV Operational Compass: Strategic Habitat Conservation To Sustain Bird Populations										
SHC Framework	Element/Product	NAWMP	PIF	USSCP	NAWP	NAWMP	PIF	USSCP	NAWP	
Biological Planning	Biological Planning Unit	MAV				WGCPO				
	Priority Species									<b>81 %<sup>2</sup></b> -4% <sup>3</sup>
	Population Objectives	- <sup>1</sup>				-				
	Limiting Factors									
	Species/Habitat Models	-			+	-			+	
Conservation Design	Landscape/Habitat Assessment	-			+	-	+		+	
Assessment of Conservation Estate	-				-					
Decision Support Tools	-									
Habitat Objectives	-			+		+	+	+		
Integrate Multiple Species Objectives										
Delivery (Action)	Conservation Treatments						+	+	+	<b>75 %</b> +5%
	Program Objectives						+	+		
Outcome-based Monitoring	Conservation Tracking System	-								<b>50 %</b> +27%
	Habitat Inventory and Monitoring Program	-				-	+			
	Population Monitoring Program	-	+	+						
Assumption-driven Research	Species/Habitat Model Assumptions	-				-				<b>56 %</b> +3%
	Conservation Treatment Assumptions		+				+			
	Keyfactor/Sensitivity Analyses		+							
	Spatial Data Analyses	-	+			-	+			
Overarching Disciplines <sup>4</sup>	Hydrological Science									<b>0 %</b>
	Climate Nexus									
	Social Science									
		<b>59 %</b> -8%				<b>58 %</b> -6%				<b>58 %</b>

<sup>1</sup> Change in status from 2018: "+" = increase by one degree; "+ +" = increase by two degrees; "-" = decrease by one degree; "- -" = decrease by two degrees; Note: Overarching Disciplines were not in the 2018 Operational Compass

<sup>2</sup> Percent of cells within the group that are green or light green

<sup>3</sup> Percent change since 2018 (Northern Bobwhite were collapsed into PIF in 2023, somewhat blurring the interpretation of "percent change")

<sup>4</sup> Overarching Disciplines were not addressed within the Operational Compass in the 2018 Plan

	Reliable information exists; good mechanisms in place
	Some reliable information exists, but needs to be updated; mechanisms in development
	Not much information available or recognized by JV; needs significant attention; and/or lacking in some guilds within the bird group
	Information absent or of little value; little/no attention paid to this by the JV

-7%

**APPENDIX B. DESIRED CHARACTERISTICS FOR HABITAT JOINT VENTURE PARTNERSHIPS**

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# DESIRED CHARACTERISTICS FOR HABITAT JOINT VENTURE PARTNERSHIPS

<i>Element</i>	<b>COORDINATION/ PARTNERSHIPS</b>		<b>Sub Element/ Product</b>	<b>TECHNICAL EXPECTATIONS</b>	
	<b>Minimal Content</b>	<b>Comprehensive Content</b>		<b>Minimal Content- Expected characteristics and level of performance for newly established and/or minimally-funded JVs (&lt;\$300K)</b>	<b>Comprehensive Content- JV Partnership should move toward this content as a Joint Venture matures. Increases in FWS funding are contingent on demonstrated progress toward these characteristics</b>
<b>ORGANIZATIONAL PERFORMANCE</b>	<p>Joint venture partnership develops a vision for the JV's future; establishes and implements strategies to achieve that vision. Joint venture develops and maintains strategic regional alliances, consistent with the JV's mission. Joint Venture Office provides leadership to develop, with the Management Board, a strategic implementation plan to define and achieve the goals of the partnership.</p>	<p>Joint Venture Office and Management Board actively look to broaden the external partnership with relevant individuals and organizations. JV maintains strong professional contacts and connections, networking to keep the JV abreast of current conservation issues, techniques, etc. Joint Venture Office identifies partner capabilities and works with partners to address any missing capabilities through additional staff, partners, contracts or training. The JV participates in development of common JV funding messages to Congress and cultivates informational relationships with its Congressional delegation and staff. One or more Management Board members regularly participate in the Association of Joint Venture Management Boards and contribute to the health and vitality of that organization.</p>	<b>Management Board</b>	<p>Joint Venture Office supports operations and administration of Management Board by advising and informing Board members. Management Board has broad representation within the JV geographic region (Fed, State, Non-Profit, Private) and members regularly participate in meetings. Member organizations commit energy and resources to developing a shared vision of bird conservation for the JV and coordinate their otherwise independent actions in the cooperative pursuit and refinement of that vision.</p>	<p>Management Board members bring significant resources to the JV partnership, engage in current issues facing the JV, share responsibilities for JV progress, follow through on commitments and responsibly use their influence for the betterment of the JV. Management Board develops and adopts a process for periodic self assessment that includes relevant goals and metrics for both programmatic and organizational performance.</p>
			<b>Budgeting/ Granting/ Administration/ Funding</b>	<p>Financial management system is in place. Administrative support is available to the JV office/staff either directly or through JV partners. Mechanisms exist to receive and expend federal funding in compliance with OMB Circular A-133. Joint Venture Office keeps the Management Board fully informed on the status of the JV's operations and finances. Maintains working knowledge of pertinent funding opportunities.</p>	<p>Joint venture financial system is sophisticated enough to manage grant/contract funds as appropriate. Administrative personnel are on or available to JV staff. Joint venture has grant-writing capacity available in staff and or partner organizations. Joint venture develops and implements fundraising strategies for approaching and cultivating new sources of major support, including foundation and corporate grant programs, and partner contributions. Working with the Management Board, JV Office directs the preparation of annual and long-range development planning.</p>
			<b>Technical Community</b>	<p>Technical expertise needs are identified. Joint venture has access to technical staff either directly or through partnership.</p>	<p>Joint venture has science coordinator and geospatial technician on staff or available through partners as appropriate. Technical committees for specific bird conservation science needs are in place with full participation from partnership organizations. Technical committees are improving the science of the JV.</p>

# BIOLOGICAL PLANNING

Element	COORDINATION/ PARTNERSHIPS		Sub Element/ Product	TECHNICAL EXPECTATIONS	
	Minimal Content	Comprehensive Content		Minimal Content- Expected characteristics and level of performance for newly established and/or minimally-funded JVs (<\$300K)	Comprehensive Content- JV Partnership should move toward this content as a Joint Venture matures. Increases in FWS funding are contingent on demonstrated progress toward these characteristics
<p>Joint venture partnership leads a collaborative effort, often through a technical committee appointed by the Management Board, to build a biological foundation of bird conservation needs that is both based on, and informs, continental, national, or regional bird conservation initiatives</p>	<p>Joint venture partners seek opportunities and venues to integrate JV biological planning with relevant work of their agency/organization and with the relevant work of other agencies and organizations active within the JV area. Priority examples include state wildlife action plans, National Wildlife Refuge Comprehensive Conservation Plans, TNC Ecoregional Plans, FWS Migratory Bird Focal Species plans, and National Fish and Wildlife Foundation Keystone initiatives.</p>	<p><b>Biological Planning Unit (Spatial and Temporal Scales)</b></p>	<p>Biological Planning Unit defined. Identify temporal importance (breeding, staging, wintering) of JV to migratory birds. Explain and justify when planning scale deviates from bird plan conservation ecoregions.</p>	<p>Biological Planning Units identified at BCR or sub-BCR scales. Explicit treatment of overlapping planning units within multiple JV admin boundaries.</p>	
		<p><b>Priority Species</b></p>	<p>A preliminary list of priority bird species or suites of species are identified and justified.</p>	<p>Final list of priority bird species/populations, considering all relevant FWS Birds of Management Concern. Explanation if priority species/populations deviate from priorities in latest bird plan updates.</p>	
		<p><b>Population Objectives</b></p>	<p>Anticipated population objective variables (abundance, vital rates, etc.) identified. General description of the process that will likely be used to develop population objectives. Description of how those objectives will link to bird plans' continental objectives.</p>	<p>Explicit set of population objectives. Include flexible population objectives as appropriate to account for environmental or seasonal variability. Documentation of the process for deriving population objectives and identification of major sources of uncertainty.</p>	
		<p><b>Limiting Factors</b></p>	<p>A list of potential factors thought to limit birds in planning unit.</p>	<p>Demographic parameters (e.g., survival rate, recruitment rate) targeted by habitat management actions.</p>	
		<p><b>Species/Habitat Relationships</b></p>	<p>Type of population-habitat model expected to be developed that will explicitly relate population response to limiting factors (empirical, conceptual).</p>	<p>Explicitly stated population-habitat models. Assumptions documented as testable hypotheses.</p>	

<i>Element</i>	<b>COORDINATION/ PARTNERSHIPS</b>		<b>Sub Element/ Product</b>	<b>TECHNICAL EXPECTATIONS</b>	
	<b>Minimal Content</b>	<b>Comprehensive Content</b>		<b>Minimal Content-</b> Expected characteristics and level of performance for newly established and/or minimally-funded JVs (<\$300K)	<b>Comprehensive Content-</b> JV Partnership should move toward this content as a Joint Venture matures. Increases in FWS funding are contingent on demonstrated progress toward these characteristics
<b>CONSERVATION DESIGN</b>	Commitment of JV partnership to develop technical capacities and planning tools for conservation design.	Joint venture partnership develops and implements strategies to utilize JV science products to better target and enhance conservation programs at the regional level to benefit migratory birds. Joint venture office and/or Management Board members build strong relations with decision makers in state and federal public institutions, private industry, and partner organizations to strengthen their understanding of the joint venture's conservation activities and capabilities.	<b>Landscape/ Habitat Characterization and Assessment</b>	General description of ecological setting relative to bird habitat. List of major drivers impacting bird habitat with links to assumed limiting factors and population-habitat relationships. Set of implications to bird population in the absence of partnership intervention.	A rigorous analysis of landscape/habitat carrying capacity based on explicit population-habitat models. Where possible conduct retrospective analysis of carrying capacity (e.g., prior to 1986). Where possible forecast expected carrying capacity with and without partnership intervention and predict impacts of expected major changes (e.g., urban growth, climate change).
			<b>Assessment of the Conservation Estate</b>	Preliminary summary of bird habitat (acres) protected, managed, and restored in the planning unit. This includes an assessment of all conservation lands that will benefit birds.	Thorough analysis of existing bird habitat under protection, management, or enhancement throughout the planning unit. Information should be presented by ownership, state, etc. where applicable. Assessment of the net change in the conservation landscape since the inception of the Joint Venture conducted at <5 year intervals.
			<b>Decision Support Tools</b>	Description of how the partnership might develop spatially explicit decision support models/tools to guide specific management actions suitable to overcome limiting factors. If deemed appropriate, develop a preliminary set of spatially-explicit focus areas to guide interim conservation delivery activities.	Spatially-explicit decision support tools for specific management actions suitable to overcome limiting factors. Tools distributed to partnership based on population-habitat models where appropriate. Documented analytical process and model assumptions.
			<b>Habitat Objectives</b>	General estimation of the magnitude of habitat protection, restoration, and enhancement that might be expected of the partnership.	Explicit set of habitat objectives linked to population objectives and based on population-habitat models, carrying capacity, assessment of conservation estate, and decision support models as available. Habitat objectives should be partitioned among sources of habitat (ownership, state) where appropriate.
			<b>Integration of avian decision- support tools</b>	Articulate anticipated approach for integrating habitat objectives among species-groups and management treatments for priority avian species/groups.	Document process for integrating habitat objectives and spatial priorities for all priority species/groups and management treatments. Describe decision-rules for conflict resolution. Describe extent of spatial/temporal overlap in conservation activities.

<i>Element</i>	<b>COORDINATION/ PARTNERSHIPS</b>		<b>Sub Element/ Product</b>	<b>TECHNICAL EXPECTATIONS</b>	
	<b>Minimal Content</b>	<b>Comprehensive Content</b>		<b>Minimal Content- Expected characteristics and level of performance for newly established and/or minimally-funded JVs (&lt;\$300K)</b>	<b>Comprehensive Content- JV Partnership should move toward this content as a Joint Venture matures. Increases in FWS funding are contingent on demonstrated progress toward these characteristics</b>
<b>HABITAT DELIVERY</b>	Joint Venture informs and influences partner organizations implementing habitat conservation programs.	Joint Venture provides a structure and process that generates, attracts, leverages, and implements habitat conservation actions in support of JV-established biological targets	<b>Program Objectives</b>	Description of how conservation programs (e.g., Farm Bill, land purchase and restoration programs, etc.) will be linked to biologically-derived bird habitat objectives.	Translate bird habitat objectives into explicit program-specific objectives (e.g., NAWCA, CRP, WRP, NWR, WMAs, etc.). If appropriate, describe ranking systems developed to inform prioritization and decision-making.
			<b>Conservation Actions</b>	General description of anticipated conservation actions, tools, and treatments the partnership expects to deliver to meet the needs of birds.	Comprehensive list and documented description of habitat conservation actions, tools, and treatments being deployed by partnership, including quantification of how specific conservation actions are expected to affect bird abundance and/or vital rates and to what degree.
			<b>Delivery Capacity</b>	Individual JV partners develop projects to deliver on-the-ground habitat conservation through existing programs	Fully developed partnership delivering on-the-ground bird conservation explicitly linked to JV biological planning/conservation design.

<i>Element</i>	<b>COORDINATION/ PARTNERSHIPS</b>		<b>Sub Element/ Product</b>	<b>TECHNICAL EXPECTATIONS</b>	
	<b>Minimal Content</b>	<b>Comprehensive Content</b>		<b>Minimal Content- Expected characteristics and level of performance for newly established and/or minimally-funded JVs (&lt;\$300K)</b>	<b>Comprehensive Content- JV Partnership should move toward this content as a Joint Venture matures. Increases in FWS funding are contingent on demonstrated progress toward these characteristics</b>
<b>MONITORING</b>	Joint Venture informs and influences partner organizations implementing monitoring programs.	Joint Venture provide a structure and process that generates, attracts, leverages, and implements outcome-based monitoring activities in support of JV-established biological targets	<b>Conservation Tracking System</b>	General description of anticipated need for tracking partnership activities (gross partnership accomplishments). A vision for creating that capability among partners. The JV Coordinator solicits information on accomplishments from JV partners, organizes and submits the information to appropriate managers of national databases.	Conservation tracking system in place. Explicit description of how information will be used to inform decisions (e.g., increasing performance for Program X). Explanation of linkage between tracking system and biological models so that biological accomplishments can be assessed and reported.
			<b>Habitat Inventory &amp; Monitoring Programs</b>	General description of anticipated process that will be employed to inventory and monitor landscape conditions and net habitat change over time and net progress toward habitat objectives (gains and losses).	Documentation of habitat monitoring objectives and habitat parameters that will be inventoried and monitored over time. Expected process (e.g., remote sensing) and time interval for data collection. Explicit description of how information will be used to inform decisions (e.g., refining habitat or population objectives). Assessment of the net change in Joint Venture landscape conditions conducted at <5 year intervals.
			<b>Population Monitoring Program</b>	Description of anticipated process for prioritizing and coordinating monitoring of bird population responses over time.	Documentation of demographic parameters monitored specific to each objective. Expected process (e.g., aerial surveys, nest survival) and time interval for data collection. Explicit description of how new information collected from monitoring programs will be used to inform future planning decisions (i.e., identify the feedback loop).
<b>RESEARCH</b>	Priority research needs are identified and distributed to JV partners and regional research institutions.	Joint Venture provides a structure and process that generates, attracts, leverages, and implements assumption-driven research activities in support of JV-established biological targets. Strong relationship with USGS and universities.	<b>Species/Habitat Model Assumptions</b>	A list of assumptions for population and habitat parameters used in models (e.g., priority species' limiting factors, predicted densities, habitat quality).	Prioritized, targeted research needed to address key uncertainties within models (prioritized based on value of better information).
			<b>Conservation Treatment Assumptions</b>	A list of assumptions inherent to the conservation actions/treatments of being implemented by JV partners.	Prioritized, targeted research needed to address key uncertainties about the impacts of conservation treatments on bird abundance/vital rates.
			<b>Sensitivity Analyses</b>	A list of key parameters most likely to influence 1) population response variables or 2) habitat objectives.	Statistical analysis of key parameters to examine their influence on population or habitat model results based on a range (e.g., confidence intervals) of assumed values (e.g., distance to edge).
			<b>Spatial Data Analyses</b>	A list of concerns relating to the limitations of current spatial databases as they may affect conservation planning.	Rigorous statistical analyses, and associated refinement, of key uncertainties related to spatial data used for planning or monitoring

<i>Element</i>	<b>COORDINATION/ PARTNERSHIPS</b>		<b>Sub Element/ Product</b>	<b>TECHNICAL EXPECTATIONS</b>	
	<b>Minimal Content</b>	<b>Comprehensive Content</b>		<b>Minimal Content- Expected characteristics and level of performance for newly established and/or minimally-funded JVs (&lt;\$300K)</b>	<b>Comprehensive Content- JV Partnership should move toward this content as a Joint Venture matures. Increases in FWS funding are contingent on demonstrated progress toward these characteristics</b>
<b>COMMUNICATION, EDUCATION AND OUTREACH</b>	<p>Mechanisms exist to facilitate communication between Management Board, JV office and broader JV partnership members. Appropriate JV partners or staff represents the JV to the conservation community, resource agencies, and elected officials, both regionally and nationally. The JV maintains an up-to-date website.</p>	<p>Develops effective communication, education, and outreach products and strategies to attract, engage and inform partners, raise awareness, change attitudes, and change behaviors among JV priority audiences to support bird habitat conservation. JV assesses various contributions partners can make to CEO, and has identified gaps in capabilities and fortified those gaps as appropriate.</p>	<b>Priority Audiences</b>	JV has evaluated the efficacy and applicability of education and outreach to achieve its conservation objectives. And has identified priority internal and external audiences and key messages.	A JV Communications Plan is guided by information from biological planning, conservation design, habitat delivery, monitoring and research to target communications geographically, programmatically and to the highest priority conservation need. JV has established multiple means of communications to priority audiences such as, but not limited to: partner newsletters, public website, news releases, project tours, meetings, presentations and workshops. Each tactic has an associated evaluation plan to guide development and assess effectiveness of communications product.
			<b>Audience Objectives</b>	JV conducts basic audience objective setting to determine what are the desired levels of awareness, attitudes and changes in behaviors necessary to achieve bird habitat conservation goals and objectives of the JV.	JV correlates audience objectives with bird habitat conservation goals and objectives to determine how much and where increases in audience awareness, changes in attitudes/behaviors are necessary to help reach bird conservation objectives.
			<b>Audience Assessment</b>	JV conducts informal assessment of priority audiences to determine their baseline level of awareness, attitudes, and behaviors affecting bird conservation in the JV.	JV conducts regular, formal assessments of priority audiences to measure change in awareness, attitudes and behaviors over time. Assessments can be in the form of focus groups, surveys, interviews or other systematic means of gathering audience data. The results of which are used to revise communications products to be more effective.

## APPENDIX C. LMVJV OPERATIONAL PROCEDURES

# Lower Mississippi Valley Joint Venture Operational Procedures

### MEMBERSHIP

The LMV Joint Venture is overseen and directed by a private, state, federal Management Board. The LMV Joint Venture comprises three membership options based on an organization's autonomous mission or legislative authority, level of commitment, and breath of accepted responsibility in furthering the conservation goals of the LMV Joint Venture. Regardless of Membership level, it is acknowledged that the commitment of Member agencies/organizations is voluntary and subservient to the organization's mission, authorities, and budgetary capabilities.

Executive Member: Executive Membership is open to any agency or organization that by virtue of mission or legislative authority commits to sharing in the responsibility of implementing national and international bird conservation plans within the LMV region. Executive Member organizations are expected to commit energy and resources to developing a shared vision of bird conservation for the LMV and coordinating their otherwise independent actions in the cooperative pursuit and refinement of that vision.

Executive Member organizations will assign a representative to serve on the Management Board. Executive Board Members are expected to represent their agency or organization at an administrative and policy level on matters pertaining to allocating human and financial resources to the protection, restoration, and management actions that are inherent to sustained, long term conservation.

New Executive Members will be considered by the Board upon receipt of a written request by the Chair from the agency or organization that documents its interest in participating and identifies the individual that would be representing such organization. Consensus of the Management Board is required for acceptance of membership.

Associate Member: The LMV Joint Venture Management Board is open on an Associate basis to other agencies, organizations, or individuals whose mission may not lend itself to sharing fully in the broad spectrum of conservation actions inherent in implementing national and international bird conservation plans but yet has a long-term and abiding interest in a specific facet of Joint Venture implementation (e.g. carbon sequestration, sustainable forestry, wetland restoration, water quality enhancement), and is committed to furthering that aspect of JV implementation through a joint commitment of energies and efforts.

Associate Members will be non-voting but will be invited to participate in all Management Board meetings and in Working Group meetings as appropriate to their area of interest/expertise. With the

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exception of non-voting status, only their level of interest and commitment will limit the participation of Associate Members in the development of conservation goals and objectives and the formulation and execution of conservation strategies.

Agencies, organizations, or individuals will be considered for Associate Membership upon receipt by the Chair of a letter documenting the organization's interest and area of expertise in furthering a particular aspect of Joint Venture implementation. Additionally, the Chair may with approval of the Board solicit an organization's participation as an Associate Member. On an annual basis, the Board will review the participation of Associate Members and may, with due notification and at its discretion, remove an agency, organization, or individual from Associate Membership status in the interest of maintaining an active and engaged Management Board.

Cooperating Member: A Cooperating Member is any person, organization, or agency working with an Executive or Associate Member agency/organization in the planning, implementation, monitoring, or evaluation of a specific project or task recognized by the Management Board as advancing the goals and objectives of the LMV Joint Venture. A person, organization, or agency will be deemed a Cooperator by virtue of being identified in any project or proposal or being a party to any management agreement implemented or developed with the specific intent of advancing the goals, objectives, and conservation strategies of the LMV Joint Venture. Cooperators will not routinely be notified of or expected to participate in Management Board or Working Group meetings.

#### **MANAGEMENT BOARD OFFICERS**

The LMV Joint Venture Management Board shall be comprised of a Chairperson and a Vice-chairperson. The Management Board will elect both officers to serve 3-year terms with no term limit. The Chairperson will organize and conduct the business meetings of the Management Board. The Vice-chairperson shall preside in the absence of the Chairperson. The Joint Venture Coordinator will assist officers in the preparation and conduction of Management Board meetings. The Joint Venture Coordinator will also record and act upon Management Board actions, serve as custodian of Management Board records, distribute information relating to Joint Venture activities, and maintain and report on Joint Venture accomplishments.

#### **MEETINGS AND ATTENDANCE**

Two regular meetings will be held annually (Spring/Summer and Fall/Winter) and shall be of sufficient length to ensure time for full discussion of relevant issues. Additional meetings may be called at the discretion of the Management Board Chairperson. Management Board Executive Members are expected to participate regularly and fully in advancing the goals and objectives of the LMV Joint Venture. Executive Members (or a recognized alternative) will be expected to attend two Management Board meetings a year; participate in conference calls or ad hoc working groups; and fulfill other such responsibilities in the course of a year as may be deemed appropriate by the Board as a whole. If an Executive Board Member misses two consecutive meetings, a letter will be sent by

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the Chair to the organization inquiring as to their interest in remaining on the Board. In the event three consecutive meetings are missed, the Board Member/organization will be placed in inactive status until such time as the organization recommits to participate.

Management Board meetings shall be open to Associate Members, Cooperators, staff, or other invitee of Management Board members, members of standing committees, and any other interested party.

## **DECISION MAKING**

Each Executive Member organization carries one vote. The Management Board Officers will participate in all votes. In situations in which consensus is not achieved and the Management Board Chairperson determines that a decision is required, a motion will pass by a simple majority vote of Board members (see quorum). Items requiring a decision or vote must be provided to all Management Board members not less than ten (10) days prior to a Management Board meeting. Decisions/votes may also be conducted via teleconference or e-mail provided there has been 10-days prior notice.

## **QUORUM**

There will be no official business completed by the Management Board via a meeting, teleconference or e-mail without the participation of 8 or more Executive Board Members (including those represented by alternates or proxies).

## **EXECUTIVE COMMITTEE**

Membership on the Executive Committee will be through volunteerism, with formal approval by the full Management Board. The Executive Committee will be composed of  $\geq 1$  state agency, federal agency, and NGO representative, with total Executive Committee membership not exceeding in number 50% of the full Management Board membership.

The Executive Committee will function to advise LMVJV Office Staff on issues and tasks that

- a) Require quick turn-around, and/or
- b) Benefit from detailed attention by a group smaller than the full Management Board.

Advice from the Executive Committee may take the form of approval, review/comment, and a recommendation to place before the full Management Board.

All substantive decisions and actions of the Executive Committee must be reported to the full Management Board in a timeframe appropriate to the decision or action.

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## SUPPORT LETTER ENDORSEMENT

Many effective conservation actions require or benefit greatly from expression of support from partners. In fact, the increasing emphasis on broad partnership in granting programs and cost assistance programs places a premium on letters of support and other “endorsements” of projects, efforts, and programs. Not surprisingly then, the LMVJV is asked frequently to provide written support in the form of “letters of support” and other similar documents. This can be especially delicate in matters of government policy, rule-making, etc.

The LMVJV seeks the greatest possible efficiency in responding to such requests so as to minimize the administrative burden on JV partners and staff, while providing support for worthy efforts in a timely manner.

Procedure. To fairly and expeditiously respond to “sign-on” requests, following are the necessary steps:

1. Coordinator receives electronic version of letter, proposal, etc., along with a request for LMVJV endorsement/signature.
  2. Coordinator determines compatibility of the document’s content with LMVJV goals and objectives.
    - a. If the content is perceived to be in conflict with LMVJV goals and objectives, the Coordinator will respond with explanation to the sender/originator that, in its present form, the JV cannot provide formal support for the document’s content.
    - b. If the content relates to proposed conservation, research, monitoring, and/or evaluation efforts which are consistent with established LMVJV goals and objectives, the Coordinator will provide a letter simply stating that consistency.
    - c. If the content relates to policy or related matters and is perceived to be consistent with LMVJV goals and objectives, the Coordinator will proceed to step 3.
  3. Coordinator will distribute the document via email to the full Management Board, with appropriate explanation, if necessary.
  4. Management Board members have 10 full business days to respond with one of the following three responses:
    - a. Support Approved
    - b. Support Not Approved; with (at least) brief reasons for opposition
    - c. Abstain (no response within 10 business days will be considered abstention)
  5. Reasonable effort will be given by the Coordinator (time permitting) to attempt resolution of problem issues if a minority of responses is “Support Not Approved”.
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