

## Appendices

### **Appendix A: Guiding Principles for States to Consider in Developing Comprehensive Wildlife Conservation Plans**

(and Wildlife Conservation Strategies (Plans-Strategies) for the State Wildlife Grant and Wildlife Conservation and Restoration Program)

Final: September 27, 2002

**The International Association of Fish and Wildlife Agencies recommends the following guiding principles for the states, the U.S. Fish and Wildlife Service, and their conservation partners to consider and apply while developing Comprehensive Wildlife Conservation Plans to meet their obligations under the State Wildlife Grant (SWG) program and Wildlife Conservation Strategies under the Wildlife Conservation and Restoration Program (WCRP).**

These guiding principles identify goals, objectives, and actions to strive for over time. Few if any will be fully realized in any state under what is hopefully just the first round of conservation program development under SWG and WCRP. Some things must occur from the outset, because they are legally required and/or because they are essential to success. Clearly, broad-scale public participation is an example of one such area. Among the diverse stakeholders in this effort are private, local, state, and federal agencies and governments, NGOs, etc. The Plan-Strategy provides an opportunity for the state wildlife agency to provide effective and visionary leadership in conservation. The Plan-Strategy can identify the measures that will be used, the results achieved, and the threats and needs that remain with regard to wildlife and wildlife habitat. It is also an opportunity to address broader issues and programs, including environmental and wildlife-related education, outdoor recreation, and wildlife-related law enforcement. These other areas can either constrain or enhance wildlife conservation efforts, and funding and public support for wildlife conservation can be increased, or at least stretched, by involving partners that share those interests.

#### A: Planning Process and Partnerships

1. Involve multiple staff levels within each agency and broad public-private partnerships to develop and implement the Plan-Strategy.
2. Involve partners that have the authority necessary to ensure that the Plan-Strategy addresses the full range of issues at hand.
3. Build capacity for cooperative engagement among all partners in the effort and make sure it is productive, so that trust and confidence grow, and organizational and interpersonal relationships become strengths of the Plan-Strategy.

4. Share responsibility and credit for planning and implementation among all partners, who collectively share responsibility for success of the Plan-Strategy.
5. Focus on efficiency and effectiveness, so the value added in planning and implementation is commensurate to the funds invested.
6. Ensure that the planning processes and the resultant Plan-Strategy is dynamic—so it can be improved and updated efficiently as new information is gained.
7. Communicate effectively with stakeholders, other partners, and the public, early and often.
8. The planning processes and the decisions made during planning should be obvious to those who read and use the Plan-Strategy—and repeatable: document the processes and the decisions so the next planning cycle can build on the current one.

## B. Focus and Scope

1. Base the Plan-Strategy in the principles of “best science,” “best management practices,” and “adaptive management,” with measurable goals, objectives, strategies, approaches, and activities that are complete, realistic, feasible, logical, and achievable. Describe these processes and practices sufficiently so that partners understand what they entail and how they should function.
2. Address the broad range of wildlife and associated habitats, with appropriate priority placed on those species of greatest conservation need, and taking into account the relative level of funding available for conservation of those species.
3. Integrate and address wildlife-related issues statewide, across jurisdictions and interests, and coordinate with parallel efforts in other states and countries.
4. Combine landscape/ecotype/habitat-based approaches and smaller scale approaches (e.g., focal, keystone, and/or indicator species; guilds; species of special concern) for planning and implementation.
5. Make the Plan-Strategy an effective, long-lasting blueprint for conservation that provides a broad vision and priorities, so a broad array of organizations, including other government agencies and NGOs, can help realize the vision. The Plan-Strategy should have sufficient flexibility to respond to the full spectrum of conditions and circumstances likely to be encountered within the planning area.

### C. Format and Content

1. Make the Plan-Strategy readable, understandable, and useful, with well-defined issues, short- and long-term goals and objectives, strategies, and realistic measures of performance that enable state agencies and their partners to demonstrate accountability.
2. Make full and effective use of relevant existing information; in particular, integrate appropriate elements of other plans and initiatives (such as Partners in Flight and the many regional and other plans), databases, GIS layers, records, reports, other information sources, and management information systems that overlap or complement this Plan-Strategy.
3. Identify knowledge gaps as well as areas of knowledge to help focus future efforts to improve understanding and planning, but do not allow a lack of information to inappropriately limit necessary short-term application of the best available science and good judgment in decision making.
4. Make the Plan-Strategy spatially explicit, to the extent feasible and appropriate, with a full complement of GIS and other maps, figures, and other graphics, as well as appropriate text to provide sufficient detail and consistency in describing species and habitat conditions, conservation needs, conservation recommendations, and other issues/actions, so it can be used effectively by all partners.
5. Use “threats analyses,” “risk and stressor assessments,” and other techniques to help set priorities for goals, objectives, strategies, and activities.
6. In addition to wildlife, address factors that can have substantial impact on wildlife conservation, such as management of invasive species, wildlife-related and conservation-related education, law enforcement, and outdoor recreation.
7. Include a comprehensive glossary, so partners and the public have a shared and common understanding of key terms used in the Plan-Strategy.
8. Develop an updateable information system to monitor Plan-Strategy implementation and the status and trends of wildlife and habitat.
9. Consider wildlife conservation-related education and wildlife-associated recreation as tools that can help accomplish conservation goals.

### D. Completion, Outcomes, and Availability

1. Provide annual written progress updates on the planning effort and progress to IAFWA’s CARA Implementation Committee each September, in addition to annual performance reports that must be submitted to the U.S. Fish and Wildlife Service pursuant to Federal Aid guidelines.

2. Ensure that the Plan-Strategy clearly and definitively meets state obligations to Congress under the WCRP and SWG legislation, and to the U.S. Fish and Wildlife Service with regard to Federal Aid administration.
3. Provide sufficient documentation in or with the Plan-Strategy to facilitate public understanding of the decisions that are made, and how and why they were made.
4. Make the Plan-Strategy a driving force in guiding activities under diverse wildlife and habitat conservation initiatives, and usable for helping to inform land-use decision making.
5. Make the Plan-Strategy readily available to the public in a variety of media.
6. Provide a mechanism for reporting accomplishments and tracking progress so local partners are aware of both.
7. Ensure that the Plan-Strategy can be implemented, i.e., it is administratively and politically feasible and there are sufficient resources (funding and staff) among the partners to accomplish significant gains at a large scale and within an appropriate time frame to preserve our nation's wildlife heritage.

## Appendix B: Process for Allocating Annual State Wildlife Grant Funds

*This framework applies to the allocation of Montana's State Wildlife Grant funds only until the approval of the Comprehensive Fish and Wildlife Strategy. Following that approval, project selection and fund allocation will be based on the Strategy.*

1. Appropriation passes Congress and apportionment to Montana is determined.
2. Chief of staff determines if spending authority is available for fiscal year and alerts technical committee if paperwork needed. Overhead portion is determined and total amount available is provided to technical committee.
3. Within one month after apportionment is determined: Steering committee establishes program-level allocation of funds, if necessary. (Program-level allocations could include a percentage to conservation and education, if appropriate, or tribal subgrants.)
4. Development of recommended projects (completed within three months after program-level allocations are set). Technical committee recommended projects will be generated by:
  - Review of proposals provided in previous year that were not funded
  - Review of projects that were “multiyear” from previous allocations
  - Generate list of conservation needs
  - Solicit new projects
    - Internal solicitation—List of conservation needs and request for proposals (Appendix A) is sent to FWP staff; division leads contact the appropriate staff in their divisions for proposals and help fleshing out ideas (fleshing out needs to include a general discussion of match opportunities for the project).
    - External solicitation—Project leads will contact partners to solicit projects that will align with conservation needs
  - Determine feasibility through follow-up contacts to identify match, personnel needs, etc. and enter into Table 1.
  - Develop recommendations based on selection criteria (Appendix B)
5. Three months after program-level allocations are set: Steering committee reviews and acts on technical committee's recommendations on projects and revises program-level allocations of uncommitted funds.

## Appendix C: Fish, Wildlife & Parks State Wildlife Grant Program Request for Proposals

FWP has received their third allocation of funds from Congress for State Wildlife Grants (SWG) in the amount of \$840,000 (after overhead has been removed). The director's office has allocated \$250,000 each to the Fisheries and Wildlife divisions. An additional \$300,000 is available for projects that may be solicited internally/externally, can be multidisciplinary in nature, and will be ranked on a competitive basis. Projects will be solicited from outside the agency, and all projects will be based on merit; this is just a request for proposals, not a guarantee that funding will be received.

Congress has directed that SWG funds be used to address the state's greatest conservation needs that are currently unmet. Typically, projects to be funded with SWG dollars will involve Montana's Species of Concern and/or other nongame species for which funding is very limited or unavailable. Wildlife projects that have been funded with previous allocations include greater sage-grouse surveys (identification of leks and wintering areas); evaluation of recreational shooting on prairie dogs, surveys of small animals associated with sagebrush and grassland habitats, bird monitoring efforts, planning processes, loon monitoring and research, expansion of Montana's coordinated land bird monitoring program, and prairie-riparian habitat surveys of eastern Montana. Fisheries projects have included prairie fish surveys in Regions 4 through 7, sauger telemetry study in the Powder and Tongue rivers, native species creel, cutthroat restoration in Region 4, and burbot status assessment.

Please provide the following information by (date):

- A brief project proposal including the location, the objectives, and deliverables (one page)
- An estimated budget
- Staffing needs (additional FTE would have to be "modified FTE," and while getting modified FTE is not a sure thing, the Fisheries Division has been successful in the past for SWG projects)
- Projects can be for more than one year (please reflect that in the proposal)
- Submit fisheries projects to Ken McDonald or wildlife projects to Heidi Youmans by (insert date)

When considering potential projects, be mindful of the following information:

- "Interdivisional" projects such as amphibian work or riparian-associated work is especially welcome but not mandatory.
- A nonfederal match (between 33 percent and 100 percent depending on the type of project) is required for all projects. *At this time, we are not requiring you to have the match in hand, but do ask that you think about sources of nonfederal match.* Sources of funds that we *cannot* use include D-J or P-R-funded projects, BPA, USFS, and other federal funds. We also can't use the

same nonfederal funds to match more than one source of federal money. We will work with you on lining out the match if your proposal is selected.

- SWG is administered through the Federal Aid Program, so a project needs to meet all Federal Aid requirements. We can assist with the necessary paperwork, but you will have to ensure enough time so that it can be completed, approved, and the project set up prior to initiation of the project (i.e., plan well ahead of field season for the project).
- Projects that are eligible for other funding sources will not be scored as high as those without any other potential sources of funding.
- After ranking projects based on a set of criteria, the SWG technical committee will make recommendations to the SWG steering committee, who will give final approval to projects.

## Appendix D: SWG Project Selection Ranking Criteria

Project (number or title): \_\_\_\_\_

**Ranking Criteria:** Each proposal is to be scored according to the following criteria (this calculation must be done in an Excel spreadsheet).

Indicate with a “1” for each that apply. Leave blank those that don’t apply.

1. \_\_\_\_\_ Project results will reduce the immediacy and/or severity of threats to one or more of Montana’s native species.
2. \_\_\_\_\_ Is the species a Species of Concern or a USFWS Threatened or Endangered Species?
3. \_\_\_\_\_ Conservation needs identified in project currently are not being addressed by any existing programs or other funding sources (excluding SWG funding).
4. \_\_\_\_\_ Project will benefit the public.
5. \_\_\_\_\_ The project will yield occurrence/distribution data and/or can be used for comprehensive planning efforts.
6. \_\_\_\_\_ Budget total is appropriate for the scope of the project.
7. \_\_\_\_\_ Partnerships outside the agency are being used in the project.
8. \_\_\_\_\_ Degree to which project results can benefit multiple native species (species assemblages or wildlife communities).

From the average of the technical committee’s scoring, projects will be prioritized and funding recommendations will be provided to the steering committee based on available funding.

## **Appendix E: Montana Fish, Wildlife & Parks Staff Exploratory Group**

The following FWP staff participated:

Thomas Baumeister	Conservation Education
Dianne Tipton	Conservation Education
T.O. Smith	CFWCS Coordinator
Andrew Jakes	CFWCS Planning Team
Chris Smith	Director's Office
Marc Scow	Facilitation
Mark Deleray	Fisheries
Mark Sweeney	Fisheries
Ken McDonald	Fisheries
Tom Flowers	Law Enforcement
Pat Flowers	Regional Management
Carolyn Sime	Wildlife
Bill Semmons	Wildlife
Kristi Dubois	Wildlife
Allison Puchniak	Wildlife
Pat Gunderson	Wildlife
Howard Burt	Wildlife

### ***Working Statement 1***

“What are some of the strategies, processes, and actions that would foster the best possible outcome of broadening FWP’s focus to try and more completely achieve its vision and mission statement?”

#### *Participation*

- Develop a strategy that includes FWP employees and commission, legislators, and community groups
- Do a public survey to measure the extent of public knowledge and familiarity with funding and management needs and opinion of what we should be doing
- Make intra-agency participation a priority
- Create partnership with other agencies
- Collaborate with other agencies and within FWP
- Bring the public along as we plan and move our paradigm
- Continue the regional and cross-regional discussions
- Involve the public early and often

## *Outreach/Education and Marketing*

- Use focus groups
- Work with Con/Ed to develop a message and delivery method
- Use bottom-up approach for internal buy-in
- Find ways to sell the program to landowners through positive example
- Tailor outreach messages to specific audiences
- Plan to meet MEPA and NEPA (a plan that doesn't require these isn't worth having)
- Meet with traditional hunter and angler groups to get their feedback and ideas (e.g., MWF, TU, etc.)
- Legislative outreach
- Prepare a public involvement strategy and encourage as much public involvement as is feasible
- Get buy-in through marketing
- Revise the road map as needed
- Keep hunters, anglers, and legislators informed via website and e-mail
- Use facilitated meetings to include biologists and public
- Use lots of education and outreach
- Develop a way to "sell" the program to traditional constituents
- Emphasis the importance of in-reach and outreach efforts
- Provide outreach for private landowners
- Use Internet, radio, TV, and newspapers to get the word out to the public
- Need to let the public know that we are not using license dollars for broadening focus, but need additional funding
- Identify and inform the public about the financial risks and rewards
- Need education to get everyone on the same page
- Prepare a historical account of where we have come from and where we need to go
- Try and eliminate misconceptions from the beginning
- Answer the question: Why do we need to do this, and then tell the public
- Identify the goals and priorities of the plan and then gauge the public's response to those goals and priorities
- Develop a statement of 50 words or less that explains why comprehensive management is necessary and makes sense, then educate the public
- Provide information to the public about how FWP funding really works and why we need additional funding
- Identify a "hook" to get people to buy in
- Seek buy-in both internally and outside FWP
- Sell the program internally
- Discuss how SWG funds would be allocated
- Use landowner incentives
- Public outreach

## *Planning*

- Use leadership to keep process moving
- Set a modest agenda
- Use caution as plan develops
- Be flexible during the planning process in order to amend the road map as needed
- Develop a clear statement of intent with other partners for what the plan will be
- Use innovative methods
- Develop a planning goal with partners and among FWP employees
- Identify alternative funding sources that can be used as a match
- Write the plan by habitat type, not by species
- Through [...planning...], identify specific projects for funding at the regional level
- Use existing plans
- Identify knowledge gaps
- Formulate a plan that is measurable, quantifiable, and has real objectives
- Formulate a plan that includes the needed resources of funding and staffing to meet objectives
- Incorporate all plans currently available (elk, wolf, prairie dog, etc.)
- Plan should focus on federal threatened or endangered species and Species of Special Concern, then expand to include communities and systems, rather than focus on a single species approach
- Use habitats as the foundation for all planning
- Develop a timeline
- Create a statement of intent
- Develop a road map
- Find ways to broaden management protocol to including monitoring of all species
- Provide future SWG funding at the regional level
- Plan should be the framework for decision making, not the decision itself
- Plan must provide enough direction to be meaningful but not obligate FWP to guarantee future funding for specific things
- Identify goals and objectives for plan within a time frame

## ***Working Statement 2***

“What would be the best possible outcomes of broadening FWP’s focus to try and more completely achieve its vision and mission statement?”

### *Constituents or Other Agencies*

Primary finding: FWP employees thought that one of the best outcomes would be acceptance by and support from the public, private landowners, and other agencies for FWP’s comprehensive programs.

- Hunters and anglers would have a broader ownership commitment
- Engagement of the nonhunting public with FWP that results in their support for its programs
- A truly comprehensive plan for all wildlife that is accepted by the public
- Strong partnership with interest groups and the public
- Cooperation among all agencies so that FWP can manage comprehensively
- Increased support for FWP from diverse constituencies
- Landowners participate in habitat incentives that come from the plan
- Hunters and anglers realize the benefits of comprehensive management
- A better land ethic where people respect the biological community
- Improved public perception of all FWP programs
- Everyone accepts overall plan
- No political ramifications to broadening the focus

### *Funding and Staff*

Primary finding: Participants were clear in pointing out that increased funding to FWP could be a best possible outcome, but that increased funding must be accompanied by increased staffing.

- Funding and staff for increased management and monitoring of all species
- Increased long-term permanent funding
- Funding and personnel available for management of all species
- Increased staff
- More staff to accomplish goals
- Additional funding to manage all species
- SWG is a funded federal mandate
- Increased funding
- Secure funding and responsible spending by FWP toward conservation of all species
- FWP gains support and ability to protect resources
- Sufficient funds to implement the plan so it becomes permanent

- More FTEs to accomplish comprehensive management

### *Management Paradigm*

Primary finding: Participants expressed that a shift in the way FWP and its constituents view wildlife and wildlife management to a more comprehensive approach could be a best possible outcome. *Note:* This outcome indicates that there is a perception that FWP and its constituents currently do not view wildlife and wildlife management in a comprehensive enough manner.

- Sportsmen and FWP acceptance of multispecies approach
- Constituents shift the way they think, from species specific to comprehensive
- Public would accept new way of managing
- Everyone sees the big picture of management
- A greater appreciation of regional ecotypes
- Hunters and anglers realize the benefits that come from comprehensive management
- Move the paradigm of management to all species management
- Shift FWP's approach to management and view all fish and wildlife in an integrated way
- Management by FWP for all species regardless of game classification

### *Multispecies*

Primary finding: Comments were made that being able to focus on more of Montana's species could be a best possible outcome of broadening FWP's focus.

- More efficient use of dollars to manage all species, not just a single species
- FWP would have a true ecotype approach
- Integration of all species management
- Game and nongame species benefit
- Increased management and monitoring of all species
- Recover all threatened and endangered species and stabilize sensitive species
- All outdoor activities perceived as important
- Better information about species and habitat relationships
- Better comprehensive management of all species
- Fewer listings under ESA

### *Montana Fish, Wildlife & Parks*

Primary finding: Broadening FWP's focus could lead to achieving its mission.

- Gap between Helena office and the field is bridged
- All FWP's vision and mission statements are met
- FWP advances the conservation agenda
- Fulfill our FWP mission
- Move away from crisis management and Species of Special Concern

### *Environment or Habitat*

Primary finding: Healthier habitats and environment could be a best possible outcome.

- Healthier natural environment for all species
- Healthy ecotypes across Montana that support the fish and wildlife that live in all habitats
- Plan creates better habitat resulting in increased hunting opportunities

### **Working Statement 3**

“What are the worst possible outcomes of broadening FWP's focus to try and more completely achieve its vision and mission statement?”

### *Constituents*

Primary finding: More comments were received concerning constituent relations than any other category. By far the largest concern was that by broadening its focus, FWP would lose the community support of its traditional hunters and anglers.

- Outside stakeholder groups might not participate
- FWP alienates one or more groups of constituents
- FWP actually causes less support for its programs
- FWP loses traditional support from sportsmen
- Constituent groups become divided
- FWP promises the public something it can't deliver
- Public does not understand the plan
- Game and nongame constituents are divided
- FWP alienates its sportsmen and traditional supporters
- FWP loses its traditional constituents
- If FWP uses habitat approach, agency might be accused of taking authority from land managers and private landowners
- Backlash from the public about Species of Concern
- Private landowners will oppose the agency
- Loss of traditional constituent support

- Wedge driven between game and nongame supporters and managers
- Sportsmen perceive FWP is moving game dollars to nongame issues

### *Biology*

Primary finding: FWP employees were concerned that moving from an individual species approach to a comprehensive approach could create conflicts in management needs. This problem was somewhat addressed by comments that the plan should focus on quality habitat management for communities.

- Potential for ecological conflict between species and between native and non-native
- Plan does not result in biological actions and further degrades support for planning efforts
- Plan is not habitat based enough
- Conflicting management mandates for different species
- Loss of focus on community habitat
- Plan will not be habitat based and will continue to promote species management
- There is no change in how FWP manages habitats and species
- Data collected will be misused

### *Money*

Primary finding: FWP employees were concerned that either permanent funding would not materialize, or that additional work would be created without the funding to acquire additional FTEs, which would result in additional workload.

- Other states do not participate fully and derail the opportunity for long-term permanent funding
- Waste of time and money
- Legislators divert funding
- Develop plan in anticipation of funding that doesn't come
- Creates more work with no additional FTEs or money
- FWP can't match federal funds and lose funding
- Adds more work with no additional FTEs or funding
- Creates work with no meaningful outcome

### *Politics*

Primary finding: FWP employees were concerned that legislators would not approve of FWP's actions and would create difficulties for the agency.

- FWP embraces a comprehensive management approach, but the public and legislators do not

- SWG becomes an unfunded federal mandate
- Legislators attempt to punish the agency because they do not support the plan
- FWP's actions create political fallout

### *Montana Fish, Wildlife & Parks*

Primary findings: FWP employees were concerned that FWP would be divided among by management interest or by field versus the staff

- Division within FWP
- Department becomes divided
- Increases the division between field and headquarters

### *General*

Primary finding: FWP employees commented that by further addressing the needs of all species, recreational opportunities and thus quality of life could actually be lost while enhancing Montana's wildlife communities.

- Loss of recreational opportunities
- Quality of life is lost

### ***Working Statement 4***

Participants were informed that even if SWG became a long-term permanent funding source, FWP would need alternative funding sources to fulfill its mission. They were asked to brainstorm all possible ways that FWP could gather additional new funds.

- .01 percent sales tax
- License plates
- Coal bed methane tax
- Property tax surcharge
- Tax on RVs
- Federal land use tax
- Soda pop tax such as in Arkansas
- Nonresident entry tax
- University cooperation
- Lottery
- Interest from a one-time investment of hunters' and anglers' dollars
- Auction grizzly, wolf, and other unique animal tags
- Nongame stamp
- Wild trout stamp
- Real estate transaction tax

- Gambling or other sin tax
- NGO donations
- Outfitters and guides tax
- Private donations
- Develop a line of nongame products (maps, etc.) for sale
- Old CARA-type tax (birdseed, etc.)
- An endowed foundation
- Oil and gas taxation
- Coal tax trust fund
- Sell state lands to create an endowment
- Remove SWG and or D-J and P-R match requirements
- Nongame activities license or stamps (e.g., bird watching and mountain biking stamps)
- FWP foundation dollars
- Solicit contributions through NGO-type organization
- Canoe and kayak fees
- Off-road vehicle tax
- Bed tax
- Public lands fee
- Local options tax
- Birdathon and other nonsporting competitions
- State highway funds mitigation
- Travel Montana
- Surcharge on all new construction permits

### ***Federal Requirement #1***

“Information on the distribution and abundance of species of wildlife (including low and declining populations) as the state fish and wildlife agency deems appropriate that are indicative of the diversity and health of the state’s wildlife.”

Participants were asked about what data, resources, or methods should be considered or used to meet this requirement.

- Gather information from all databases into one location
- State databases
- Use information from MNHP Species of Concern List
- Include professional judgment at the regional level in concert with the MNHP and USFWS list
- MFISH database
- Game database
- Furbearer database (harvest/tracking surveys)
- Wildlife collection permits
- Migratory bird permits (bird banding lab)
- Other agencies and tribal data

- (Caution that much of this data will be observational not abundance data that could provide historical trends/data we have is not population trend data and will ultimately be subjective)
- GAP analysis data
- Baseline data from conservation easements
- Observations taken during game surveys
- Raptor routes
- Incidental observations by biologists
- Incidental observations by public
- Make use of NGO lists of low and declining populations (birds especially)

### ***Federal Requirement #2***

“Descriptions of locations and the relative condition of key habitats and community types essential to the conservation of species identified in (1).”

Participants were asked about what data, resources, or methods should be considered or used to meet this requirement.

- Agricultural statistics service data could be used to determine percentage of habitat not currently providing habitat
- Use GIS layers and maps of species identified in #1, then expand those locations to access that total habitat
- Use species richness to determine what habitat types are most essential
- Use GAP-type analysis to identify habitat types with greatest richness of species that FWP determines to be of concern in #1 (will be dependant on past surveys)
- Look for communities that are still composed of native species containing a species that FWP identifies as of concern in #1 and give priority to that related habitat
- Need to review life history and habitat needs of species FWP identifies in #1
- Intersect species information with all related habitat layers in a matrix (e.g., wolf grassland=yes, mountain=yes, etc.)
- Use current distribution layers of species FWP identifies in #1 overlaid on different scales of habitat
- Develop a list of specialist versus generalist species and use their related habitats to identify those essential for conservation
- Use different habitat scales depending on species range size and number of habitats used
- Have a broad-scale habitat map, then have all less pronounced habitat type within each of the broad categories (1 montane forest/ 2 meadow complex/ montane riparian etc...)
- Rely heavily on professional judgment
- Make sure to relate small-scale habitat types to the public

- Scale will be dependant on species
- \*Group concluded to use three scales of habitat type 1) broad habitat types, 2) smaller scale within each habitat type, 3) GAP-type fine detail (if necessary for species)

### ***Federal Requirement #3***

“Descriptions of problems that may adversely affect species identified in (1) or their habitats, and priority research and survey efforts needed to identify factors that may assist in restoration and improved conservation of these species and habitats.”

Participants were asked about what data, resources, or methods should be considered or used to meet this requirement.

- Use local biologists’ expertise
- Use existing management and recovery efforts
- Wholesale damage to habitat
- Describe habitat-related problems
- Describe invasive or exotic species
- Describe harvest/poaching/collecting problems
- Identify contaminants issues
- Disease and climate change issues
- Describe the FTE and funding issues needed to address problems
- Include genetic information about hybridization
- Use GIS to target habitats
- Allow biologists to help identify problems

### ***Federal Requirement #4***

“Descriptions of conservation actions determined to be necessary to conserve the identified species and habitats and priorities for implementing such actions.”

Participants were asked about what data, resources, or methods should be considered or used to meet this requirement.

- Ask for local biologists’ expertise
- Cost share with private groups on purchases of habitat
- Develop a good ownership boundary on habitats FWP is concerned with
- Pull people together on each specific species to determine
- Prioritize habitats versus critical value that is intact and those that are in jeopardy
- Develop lists of species/groups of species and habitats
- Protect what is left, stop the bleeding, recover the degraded

### ***Federal Requirement #5***

“Proposed plans for monitoring species identified in (1) and their habitats, for monitoring the effectiveness of the conservation actions proposed in (4), and for adapting these conservation actions to respond appropriately to new information or changing conditions.”

Participants were asked about what data, resources, or methods should be considered or used to meet this requirement.

- Continue ongoing monitoring efforts
- Identify monitoring gaps
- Question if FWP is monitoring the right things
- Look at assemblages of species
- Don't duplicate efforts of other agencies
- Do more habitat and vegetation monitoring
- Use aerial photography
- Develop new monitoring methods for species not being monitored
- FTEs will be a huge issue determining if this is even feasible
- Assess current monitoring plans that aren't being implemented
- Include monitoring protocols for groups of target species
- Use peer review
- Set a follow-up for monitoring to determine if it is having effect
- Identify desired outcomes and monitor to see if they are being met
- Set a number of places and species to survey and measure over the long term
- Get commitment of staff to actually do it
- Plan must be flexible to change monitoring plan if it isn't meeting objectives
- Use adaptive management
- Define trigger points (at what point do you start doing something)

### ***Federal Requirement #6***

“Descriptions of procedures to review the Plan-Strategy at intervals not to exceed ten years.”

Participants were asked about what data, resources, or methods should be considered or used to meet this requirement.

- Revise actions and priorities every five years
- Compare accomplishments with objectives annually
- Internal committee review of progress
- Special projects bureau chief conducts review
- Provide summary of annual accomplishments to public

- Newsletter
- Report how much money is spent annually and on what
- Identify key interest groups and methods to communicate progress

***Federal Requirement #7***

“Plans for coordinating, to the extent feasible, the development, implementation, review, and revision of the Plan-Strategy with federal, state, and local agencies and Indian tribes that manage significant land and water areas within the state or administer programs that significantly affect the conservation of identified species and habitats.”

Participants were asked about what data, resources, or methods should be considered or used to meet this requirement.

- Create working groups oriented toward species/habitats
- Require management attendance at technical meetings, then have them report back to administrative level meeting groups and vice versa
- Establish oversight committee for each region (multi-agency) at the administrative level
- Base the technical committee on habitats
- Make sure to invite all experts in habitat or species from each region
- Private landowners should be considered at the oversight level
- Use MOU to finalize the coordination between agencies
- Coordinate monitoring with other agencies
- Make sure other agencies know what FWP is responsible for and have sideboards
- Use an e-mail list to communicate a newsletter

## **Appendix F: Law Enforcement Exploratory Group**

The following staff participated.

Jim Kropp	Chief of Law Enforcement
T.O. Smith	CFWCS Coordinator
Mark Anderson	Warden Sergeant
Tom Flowers	Warden
John Lesofski	Warden
Jim Conner	Warden

Law enforcement officers were asked what activities they currently perform that benefit the species and habitats identified through the Strategy as in greatest need of conservation.

### ***Survey/Inventory/Monitoring***

- Furbearer and game animal tagging
- Predator tagging
- Investigation of illegal kills
- Road kills
- Wolf sightings, kills, and enforcement
- Public request for identification of nongame species
- Falcon/hawk (falconer enforcement)
- Incidental encounters with species during checks/stations, etc.
- CWD and West Nile monitoring
- Transfer of DNA samples

### ***Species Specific Involvement (including Con/Ed, survey, disease issues, reintroduction, and management and enforcement activities)***

- Waterfowl
- Westslope Cutthroat
- Bull Trout
- Sauger
- Native Lake Trout
- Paddlefish
- Greater Sage-Grouse
- Pallid Sturgeon
- Grizzly Bear
- Wolf
- Lynx
- Bald Eagle
- Prairie Dog
- Bison

- Numerous Nongame
- Loon
- Bobcat
- Swan
- Pelican
- Harlequin Duck
- Great Blue Heron
- Black-Footed Ferret

### ***Habitat***

- Snowmobile and ATV issues with habitat
- Animal feeding (bears, deer, turkeys, pheasants)
- No-wake zone enforcement
- Fish ponds
- Exotic introductions
- Human/bear and wolf habitat conflicts
- Aquatic habitat restoration for westslope cutthroat
- Public point of contact for most current FWP habitat programs
- Fire season restriction enforcement in critical and all habitat
- 310 violations/motorhomes/fuel storage
- Enforcement of habitat easements
- Drought restriction enforcement for aquatic habitat
- Eeed issues/weed-free hay
- Focus already existing Con/Ed activities to better meet SWG priorities

### ***Ideas for the Future***

- Fund current FTEs for survey/inventory work on SWG tier species
- Additional funding could be used for saturation patrols to focus staff support needed on SWG projects
- Integrate current patrols and habitat assessments (e.g., whitebark pine, water conditions in critical areas). Wardens cover large amounts of habitat.
- Determine which wardens in the state have a greater proportion of their duties that are SWG related and consider funding and match benefits to agency.
- Increase overtime to allow for flexibility to support more SWG activities
- Serve on SWG committees so enforcement can collaborate with future projects from the beginning
- Seek compensation from SWG projects for work performed
- Emphasize the importance of law enforcement being included in future SWG legislative appropriation language

## Appendix G: Invitees to Advisory Group Meeting, October 1, 2003

Agency or Organization	Contact	Title	Address	City	Zip
BLM	Roxanne Falise	Wildlife Biologist	P.O. Box 36800	Billings	59107
USFS	Cindy Swanson	Director, Watershed Wildlife, Fisheries and Rare Plants	Federal Building, P.O. Box 7669	Missoula	59807
USFWS	Lori Nordstrom	Biologist	100 North Park, Suite 320	Helena	59601
USFWS	Mark Wilson				
MNHP	Sue Crispin	Director	Montana State Library	Helena	59620
Montana and Wyoming Tribal Fish and Wildlife Commission	Gayle Skunk Cap	Vice Chairman	Blackfeet Nation	Browning	59417
NRCS	Dave White	State Conservationist	10 East Babcock Street, Room 443	Bozeman	59715
DNRC	Tom Schultz	Administrator	1625 11th Avenue	Helena	59620
DNRC	Pete Van Sickle	Forest Management Bureau Chief	2705 Spurgeon Road	Missoula	59804
MSU	Dr. Scott Creel	Department of Ecology	310 Lewis Hall	Bozeman	59717
UM	Dr. Dan Pletcher	Director, Wildlife Biology	School of Forestry	Missoula	59812
Turner Endangered Species Fund	Mike Phillips	Executive Director	1123 Research Drive	Bozeman	59718

The Nature Conservancy	Jamie Williams	State Director	32 South Ewing, Suite 215	Helena	59601
National Wildlife Federation	Tom France	Director	240 North Higgins, Suite 2	Missoula	59802
Trout Unlimited	Bruce Farling	Executive Director	P.O. Box 7186	Missoula	59807
Montana Wildlife Federation	Craig Sharpe	Executive Director	P.O. Box 1175	Helena	59624
Walleye Unlimited	Bob Gilbert	Executive Director	P.O. Box 1228	Sidney	59270
Montana Stockgrowers	Steve Pilcher	Executive Vice President	420 North California	Helena	59601
Montana Association of Counties	Harold Blattie	Assistant Director	2715 Skyway Drive	Helena	59620
Montana Petroleum Association	Gail Abercrombie	Executive Director	601 Euclid Avenue	Helena	59624
Montana Wood Products Association	Ellen Engsted	Executive Vice President	P.O. Box 1149	Helena	59624
Montana State Government	Honorable Walter McNutt	Chairman EQC	110 12th Avenue	Sidney	59270
Montana State Government	Todd O'Hair	Natural Resources Policy Advisor	Montana State Capitol	Helena	59620
Montana State Government	Todd Everts	Legislative Analyst	P.O. Box 201704	Helena	59620
Rocky Mountain Elk Foundation	J. Dart	President	2291 West Broadway	Missoula	59807
Montana Farm Bureau	John Youngberg	Vice President of Gov. Affairs	502 South 19th Avenue, Suite 104	Bozeman	59718
Western Environmental Trade Association	Don Allen	Executive Director	33 South Last Chance Gulch	Helena	59601

USGS	Dick Jackowski	Center Director	Room 211, AJM Johnson Hall, Montana State University	Bozeman	59717
Private Landowner	Barbara Cowen			Havre	59501
Defenders of Wildlife	Minette Johnson		114 West Pine Street	Missoula	59802
Boone and Crockett Club	George Bettas	Executive Officer	250 Station Drive	Missoula	59801

## Questions and Input of Participants of October 1, 2003, Advisory Group

### ***Attendance***

Montana State University  
Montana Natural Heritage Program  
Stockgrowers Association  
WETA  
Walleyes Unlimited

Farm Bureau  
Boone and Crockett  
USGS  
University Of Montana  
DNRC

The Nature Conservancy  
BLM  
USFS  
NRCS  
MACO  
For Barbara Cowan  
National Wildlife Federation

Scott Creel  
Sue Crispin  
Steve Pilcher  
Don Allen  
Mike Sedlock  
Greg Heil  
John Youngberg  
George Bettas  
Dick Jackowski  
Dick Hutto  
Gary Frank  
Tom Schultz  
Pete Vansickle  
Brian Martin  
Katie Baltrusch  
Skip Kawolski  
Pete Husby  
Ellen Allestad  
Scott Wink  
Tom France

### ***Questions for Discussion***

- What role does your agency or organization want to play in the development of Montana's Comprehensive Fish and Wildlife Plan?
- Is there a representative from your organization other than you who should be the contact for becoming involved with planning or receiving

information about planning activities? (Please provide contact information, if possible.)

- Are there any other agencies and organizations you think should be involved in the planning process?

### ***Participant Input***

Collaboration with agencies, organizations, and the public.

May be difficult to get enough conservationists in some parts of the state (e.g., north-central and eastern portions).

NPS should be informed of where they fit in and should be a part of collaborative efforts, instead of only looking inward as an island.

Involve Indian tribes.

Involve more people with economic interest (e.g., outfitters and guides).

Make efforts to be sure large private landowners, especially ranchers and farmers, feel included and have opportunities to be involved.

Farmers and ranchers feed 75 percent of Montana's wildlife and therefore will want input into the plan.

FWP needs to include private landowners in the process. The recommendations coming out of the plan could have implications for them. Conduct meetings in small eastern communities to be sure FWP gets their input.

Most of the land-use impacts are not going to come from agriculture but from other groups.

Most of wildlife issues will be land use/growth related; consequently land-use planning efforts need to be incorporated.

Groups that should be included in the process include real estate, oil and gas, city/county planners, and others involved in land-use planning issues.

Should think about how the plan will fit into the growth policy debate and development that is going on statewide.

Need to get legislators involved.

FWP needs to be able to develop trust in the agency and in the process if it is going to succeed.

## ***Information and Education***

More people can be involved if organizations are used as an information conduit (the Farm Bureau could get the word out via its newsletter, which goes out to 11,000 members).

Needs to be taken (by FWP) out to the people. Open houses/listening sessions are best and will result in participation by more people including those who do not want to speak in front of large groups.

Montana is experiencing dramatic changes in user groups (e.g., growing interest in birds and birding) and FWP needs to be thinking about how to tie this in with traditional hunting and fishing. There is an upcoming segment of the population with no connection to hunting and fishing but an interest in wildlife. In addition, as ethnicity changes, FWP should look at how user trends are changing, which could put us in a position to better address the needs of Montanans. FWP needs to be looking at nature trails as well as shooting ranges, giving maps to floaters, etc.

Need to be sensitive to landowners feeling things may be shoved down their throats as well as being expensive (e.g., if species get listed).

Place more emphasis on why the SWG plan must be done (especially if we want to engage landowners or others not as familiar with the process).

There are wildlife recreation/tourism/economic diversification aspects to Montana's wildlife that should be incorporated (similar to how Montana has capitalized on Lewis and Clark).

Conduct a series of open houses such as FWP did with the wolf plan. In the first round of open houses have a dog and pony show to explain what we are doing, benefits, etc. Treat these as a kind of scoping session. When a draft plan is completed, return to those same places to present the draft and get local input.

There are a lot of organizations with newsletters and other publications that would be willing to print information on the plan and process if FWP provides it to them, for example, in a press release format. Some of these include Stockgrowers, Farm Bureau, grain growers.

Produce maps showing land ownership and species present so landowners could see the distribution and better understand the implications for them.

Many people will feel that frogs and snakes are not important and that FWP is wasting its time and theirs. FWP needs to overcome this mindset somehow.

Use phone inquiries and advertise in newspapers or other means; don't just have meetings as a means to make participation easier for more people.

Once the plan is completed and the information is available to the public, there will be great expectations of the agency.

People will expect FWP to do something about the issues identified. FWP needs to address their expectations in the plan, especially the question of what will be done if FWP doesn't get any more SWG funding.

There was some concern expressed that USFWS approval of the plan somehow constitutes an expansion of USFWS authority. Due to negativity toward ESA by landowners, this could be a difficult problem to overcome.

The whole deal comes down to the public trusting FWP and what the agency will do with the data.

### ***Planning***

No participants desired to be actively involved in the technical aspects of the plan but preferred to be informed of progress and have future opportunities to support planning efforts and review drafts.

The strength of the plan is in setting up monitoring programs.

Advantage of organizing the plan by three or four regions of the state is that it is easier for people to participate and take advantage of information from existing plans; disadvantage is combining them into one plan, and ensuring statewide view and interest from groups with a statewide instead of regional perspective.

USGS has a heritage of data collection from the time of the 1885 Biological Survey to mapping by Merriam. Those functions live on within USGS today. The plan could help us prioritize/plan research that will have the strength of a partnership with the state. It would also help USGS align our priorities with state priorities.

FWP should make a concerted effort to spend time with NRCS staff, learn about their programs, see what NCRS spends money on and how, identify opportunities and build synergies, avoid duplications; five- to ten-year funding is available from Farm Bill programs gets spent.

SWG plan needs to complement the work the National Wildlife Federation and others are doing and not duplicate efforts of other agencies; SWG plan will be a failure if this is not accomplished.

Be sure to keep the process open.

Consider including incentives for private landowners in the plan.

Think about how will habitat be addressed and how we can develop a comprehensive plan for animals when the habitat is owned by others?

The shorter and tighter the planning process the better (get it done in a matter of months, not years like Canyon Ferry; bull trout was endless and unrewarding, grizzly planning had good facilitation).

FWP is already oriented toward a successful model in garnering public comment; the difficulties will be in defining “comprehensive,” setting priorities, and dealing with groups/individuals who are focused on specific conservation issues and feel like their focus is not garnering the prioritization that it deserves.

The plan is an opportunity to establish comprehensive surveys—including coordinated statewide surveys and inventories. To get information more quickly, there could be a coordinated statewide survey every year to address a particular issue.

DNRC would find the comp plan helpful in layout and design of its forest management activities. It also would establish communication links between DNRC and FWP biologists, and would help reduce conflicts and assist with conservation plans.

It might be difficult to please everyone.

We have a varied knowledge base where we know a lot about one species and not much about another and how that will impact the prioritization process.

There is a planning conflict with managing species that live in the same areas but have different habitat needs (e.g., mountain plover and greater sage-grouse both live in eastern Montana where one prefers grazed-over lands and the other prefers “old-growth” sagebrush).

Need to assess whether we’ve “restored” something and determine how that will be done even for more localized efforts such as the Milltown Dam project.

The explicit differences between species are important to recognize upfront.

Organize review groups taxonomically rather than geographically, or by method or approach (by type of data needed for all groups: first determine species, then associated habitat, then associated threats).

Perhaps a quid pro quo approach would be helpful. We are asking landowners and others for their help with this process. In exchange, perhaps we can provide some help with other wildlife issues.

FWP should make tentative decisions on topics such as lists of species and habitat types (e.g., say here's what we think is an endangered habitat and what species are viable), then have an advisory committee test the reality.

The plan is a great opportunity to join with partners.

The plan should stay away from using SWG money for habitat acquisition. We should tell the public right up front that the funding would not be used for that purpose.

Limit the scope of the plan either geographically or by species. It might be too big.

Limit the range of activities that would be undertaken as part of the plan and make this clear to the public. For example, if we are going to seek additional regulatory authority to implement the plan the public should know that (if we aren't they should know that as well).

Given the number of species, the plan has to focus on habitat.

Plan should be adaptive and flexible including flexibility in scale, meaning that one can "zoom in" if needed, and remain "zoomed out" the rest of the time.

Plan should be used for setting priorities and addressing suites of species. The plan should be geographically based because Montana is diverse in terms of habitat and people (local areas have different customs, etc.)

The planning process is a good opportunity to learn more about Montana's fish and wildlife resources and prioritize conservation needs.

We need to look at dimensions of the plan: 1) figure out what is out there, 2) gather presence/absence information, 3) monitor trends, 4) identify what is driving these trends, 5) adaptive management, 6) work from the level of individuals to populations to communities to ecotypes.

Another, more rapid, way for the plan to take us where we need to go would be to: 1) find out what is out there, 2) identify habitat relationships (including land uses) which provide insight into issues for the species, and then 3) move directly

into adaptive management including incentives. (The model for this approach is the land bird—monitoring program at University of Montana.)

During planning sit down with leadership and get them on board, then identify potentially affected parties and who will be most impacted. Solicit their involvement and determine where you are going to concentrate efforts. Develop creative solutions to get consensus and focus on collaboration.

Look at PIF plan. All bird—good process-habitat driven-coarse scale; also look at PPJV and BBS plans.

Must be careful of prioritizing based on popularity rather than on biological resources; good planning effort that she has been involved with is the “YES” committee- structure is blend of science and agency working group. GB Management Plan; different groups but concepts blended together.

Look at systems and how to manage and conserve them.

Geographic means of organizing the plan would include “ecotypes,” “biomes,” and/or “hot spots.”

To be successful, the USFWS needs to give up some control to landowners. Landowners have management objectives for their lands, and the plan has to be compatible with those landowner goals in meeting species needs. Most landowners want to support critters out there to some degree. FWP needs to be seen as a partner instead of an enforcer.

Plan needs to have the full range of tools including public education.

Plan needs to take into consideration what FWP has authority for and what it doesn't. It needs to recognize parties who do have the authority to take actions (that FWP does not have authority to take).

FWP should develop the strategy (plan for the plan), then later, organizations can decide how much involvement they want, and at what points.

Utilize existing plans and fit them into the SWG plan (e.g., prairie dog or greater sage-grouse/sage-steppe); don't reinvent them. Use indicator species where possible.

Funding options and implementing existing plans should be integral to the SWG plan because people will be more energetic about how they can influence spending of money from various sources, not just be involved in a planning effort.

### ***Match and Alternative Funding***

Identify focus areas and use FWP programs like Habitat Montana as a match.

The Boone and Crockett Club is interested in funding for good research and in partnering with FWP in any areas that would lend themselves to conservation education and working with teachers and schools.

University will be able to help describe low and declining populations and threats; already a strong emphasis at MSU on threatened and endangered species, species assemblages, and landscape projects; nationwide trend with conservation planning; universities just part of that trend. Providing match beyond deferring overhead is difficult because most is federal dollars.

The plan needs to consider the issue that if SWG money dries up, how much game money will FWP have to use to support the new efforts.

Align project priorities with various sources of funds and integrate opportunities from all applicable (federal and state) funding sources available to FWP (e.g., SWG, LIP, Section 6 competitive funds are some of the federal opportunities) as well as other agencies.

Groups like Walleyes Unlimited have grant programs and may be able to help with matching funds.

DNRC has threatened and endangered species as well as Species of Special Concern on their lands. If we are match limited they could provide match and use the SWG funds. DNRC is working on a habitat conservation plan for threatened and endangered species and other species (30 total; e.g., wolverine, woodpecker, goshawk, westslope cutthroat) on its forested land, and are developing strategies to conserve species and identify data gaps.

The SWG plan could be valuable in filling in data gaps; if the plan identified species that were of concern to DNRC, it could possibly match SWG funds for survey, inventory, and research. DNRC is a major landowner in the state; CFWP plan could fit into DNRC plan depending on project suitability. Their plan will be very prescriptive in solutions; tiered down to activities that are being conducted on the ground but will not just be metrics but also ID information needs.

### ***General***

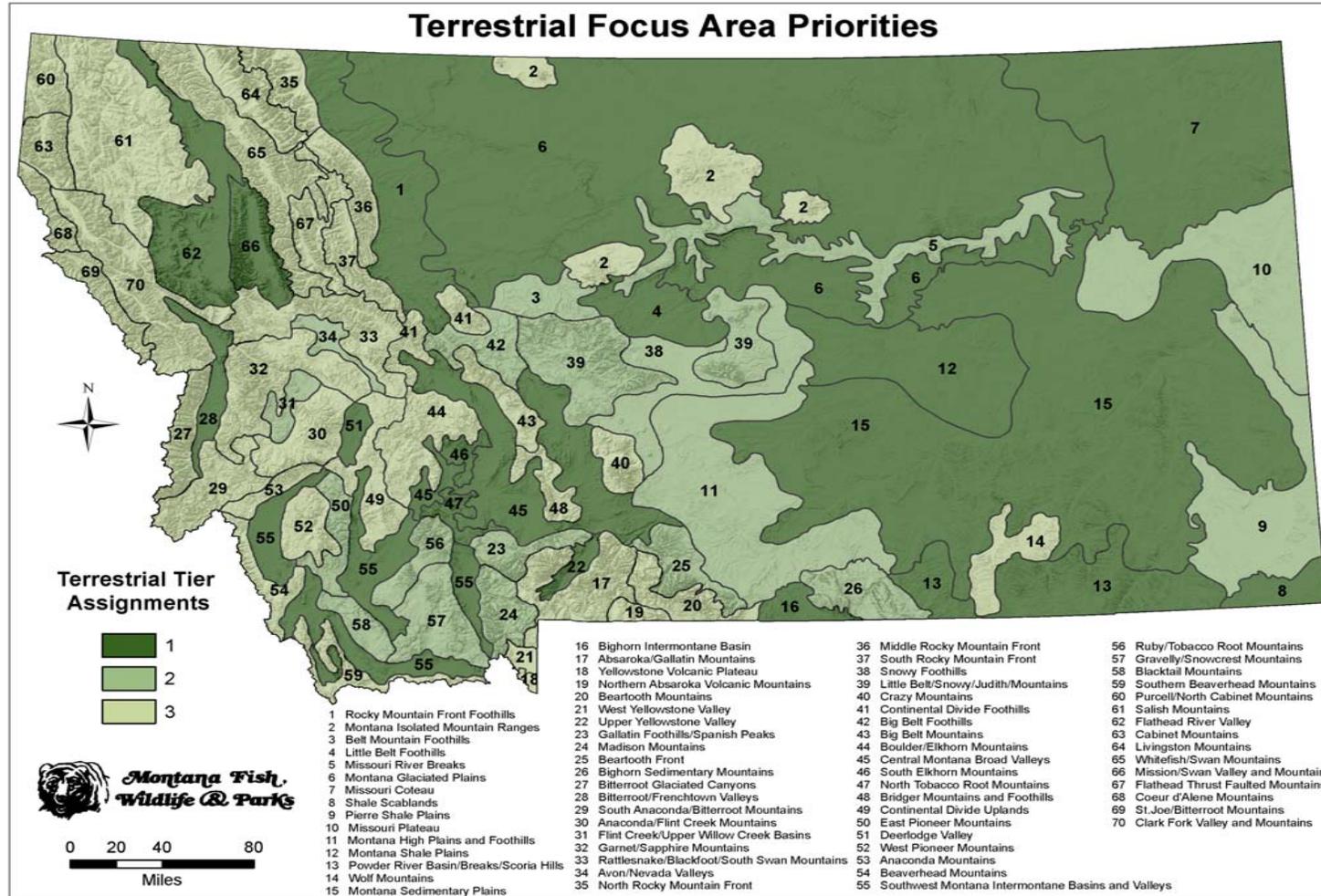
Emphasis on wildlife in addition to elk and rainbow trout (e.g., sauger, eastern Montana surveys) is good.

Congress and others are tired of train wrecks with threatened and endangered species listings; being able to avoid listings to begin with would be helpful.

Comment was made that the expectation is that FWP will do more of what we are doing now (efforts like collection of greater sage-grouse information and cutthroat trout restoration), which will help Montana get ahead of the curve.

This plan would help federal land management agencies deal with land management issues in concert with surrounding lands (in context with those lands and on an ecological basis with them). DNRC could use some of the SWG money to complete projects such as the HCP they are preparing for state lands and a culvert survey currently in progress.

# Appendix H: Terrestrial Focus Area Priorities



# Appendix I: Aquatic Focus Area Priorities

