

Appendix C. Partners for Fish and Wildlife Program Project Monitoring Guidelines Southeast Region

This policy guidance establishes a new requirement that all habitat improvement projects carried out through the Partners Program shall include a monitoring component to be included in the Monitoring Module of our Habitat Information Tracking System (HabITS), and in compliance with the following guidelines and definitions.

Overview

This memorandum provides a monitoring procedure for the Partners Program in the Southeast Region that is intended to focus on achieving the following goals:

- Improve Program delivery, customer satisfaction and overall Program accountability;
- Improve project implementation and to assess whether projects were carried out according to the habitat improvement plan;
- Document and demonstrate success of PFW projects based on defined habitat factors that have been described as necessary for conservation of focal species;
- Evaluate the effectiveness of specific habitat improvement practices, and enable Program staff to learn from each project relative to implementing changes in future projects;
- Serves an important role in supporting our Strategic Model (Figure 1); and,
- Identify long-term information and research needs.

This monitoring process is designed to meet these goals with minimal staff time and cost. As such, this process focuses on working with our partners to develop and pursue specific monitoring efforts, and using the information found in existing studies and published reports and other literature to help test and support our assumptions that specific habitat improvement efforts provide benefits to targeted fish and wildlife species.

Definitions

The following definitions are applicable to this process:

Monitoring: The collection and assessment of repeated observations and measurements over time to evaluate the effectiveness of specific habitat improvement actions.

Types of Monitoring

- **Baseline:** Characterizes existing conditions before a project begins. Baseline monitoring establishes the benchmark against which the success of a project can be measured and evaluated. (Applicable to all Partners projects)
- **Implementation or Compliance:** Assesses whether project activities were carried out according to the habitat improvement plan. (Applicable to all Partners projects)
- **Effectiveness:** Evaluates whether the project had the desired effect on the selected resource indicators. For example, a post-survey review documents that changes from the baseline condition in the stream pool depth occurred after placement of large, woody debris in the stream.
- **Validation:** This type of monitoring is intended to assess whether or not our expected outcomes in terms of species' benefits are being met through the implementation of the habitat improvements projects being carried out for those species. For example, did the planting of trees and shrubs lead to an increase in the population of black bears; or, did a specific mussel population increase following specific in-stream restoration actions?

Validation monitoring may require long periods of data collection and analysis, and operation beyond the scale of the specific landowners' project or even our conservation efforts being accomplished at the state level. Additionally, this type of monitoring of cause-and-effect relationships often leads to additional management questions and/or the need for even further evaluations and studies.

To address this monitoring need, we will work with our partners but will also rely on site-visit observations and references to other published scientific studies and reports to support our assumptions regarding cause-and-effect relationships and biological responses related to the success and benefits of projects to specific species or groups of species.

In some situations, the Service and our partners may collectively agree to share funding and technical assistance resources to evaluate the benefits of specific habitat improvement practices or groups of similar projects and practices within a specific watershed (e.g., specific populations of protected mussels and fishes within a specific watershed). To monitor and scientifically evaluate/validate such information would require data collections, analyses and evaluations on both the study sites and designated reference areas, and would require data from multiple years to address any real changes in biological responses and population status. The Partners Program may choose to be a partner in a limited number of such efforts, thereby providing technical assistance and/or financial assistance to the effort.

Monitoring and Reports

Over the duration of a Partners project agreement, staff should visit each project site a minimum of five times according to the general monitoring schedule listed below, and prepare a narrative monitoring report into the HabITS Monitoring Module for that project following each site visit.

General Monitoring Schedule (record dates for all visits):

- Pre-project visit
- Mid-project visit
- Post-project visit
- Mid-agreement visit
- End of agreement visit

Effective monitoring requires thinking ahead with a clear identification of the goals and objectives of each project. Project goals should focus on the desired habitat and ecological changes, and benefits for Federal trust and other species of concern.

■ **Pre-project:** This site visit and narrative report should scope out any specific baseline project information that has not already been included in the HabITS project narrative, and is identified as being needed to evaluate the project during later visits. It is during this visit that the Partners biologist should formulate the specific variables that will be monitored during future visits; for example, any success criteria, weather conditions such as drought that may affect the survival of planted vegetation, soil types, the number of gopher tortoise burrows on site prior to the projects, and/or the documentation of the presence or absence of target species, etc. Specific information to be documented is dependent upon the determination of those pertinent factors that can be reasonably measured and are needed to address the project goals and objectives found in the HabITS project narrative.

Photographic Documentation (to be completed for all monitoring visits):

- ◆ Establish permanent photographic locations at the project site and take appropriate photographs during each site visit.
- ◆ Take sufficient photographs to document and highlight the before and after habitat conditions, and any other unique or special features of the project.
- ◆ Electronically scan the best photographs and transfer into the HabITS Monitoring Module.

■ **Mid-project:** This visit and narrative report should address primarily project implementation issues.

- ◆ Check and document the status (e.g., active, on schedule, complete, of all project activities described in the scope of work in project agreement.
- ◆ Have the landowner and other partners carried out their responsibilities (technical or financial) as stated in the agreement? Describe.
- ◆ Do the landowner and/or contractor(s) have technical or other issues that need resolving? Document and track resolution of each.
- ◆ Continue photographic documentation.

■ **Post-project (immediately following scheduled completion of project activities or shortly thereafter):** Monitoring information collected during this visit and the narrative report should address the following issues:

- ◆ **Project Implementation:** A continuation of mid-project review issues; e.g., were all of the planned habitat improvement activities (e.g., a prescribed burn, three water-control structures installed, etc.) as noted in the project agreement completed as planned? Were all of the planned technical and financial assistance contributions met by all partners as identified in the plan?
- ◆ **Project Effectiveness and Validation:** Collect monitoring information for any specific factors previously selected to help determine the success of a project activity. Address whether or not the desired or expected ecological or biological conditions were achieved, based on the success criteria previously identified? For example, if the agreement plan called for the successful reestablishment of at least 200 trees per acres, and at least five species of trees, begin to collect the information needed to document this accomplishment.

Summarize known or expected benefits to target species or other Federal trust resources. Is the project site being used by a target species? Use appropriate references from other published literature as needed. Summarize any research studies and partnerships associated with the project. Begin to document any recognized research needs and information gaps.

- ◆ **Photographic Documentation:** Continue at previously established photographic sites.
- ◆ **Landowner Satisfaction Survey:** Complete a landowner satisfaction survey and report to answer at least the following questions:
 - Are the landowner(s) and other partners satisfied with the project results to date?
 - Are the landowner(s) and other partners satisfied with the performance of the Service?
 - What does the landowner(s) and other partners like or dislike about this project?
 - Do the landowner(s) and other partners have recommendations for improvement? List and discuss.

■ **Mid-agreement:** For a project under the minimum 10-year agreement, the project should be visited approximately half way through the length of the agreement. If the project is of longer duration (e.g., 25 years), we recommend visiting the site at approximately 5-year intervals.

Monitoring information collected and the narrative reports should continue to evaluate all of the issues identified in the Post-Project visit, above. Also, if the agreement included specific habitat maintenance responsibilities for the landowner and/or the Service, determine if these responsibilities are being carried out as specified in the agreement. Also, evaluate and document your thoughts as to whether the maintenance practices are achieving the desired results, and offer appropriate recommendations.

- **End-Of-Agreement:** Monitoring information collected and the narrative report should continue to evaluate all of the issues identified in the Post-Project and subsequent visits, above. Also, in this final narrative report, the Service biologist should develop project conclusions, based on all of the project information collected and evaluated throughout the life of the project. For example, what went well with this project, and what did not go well, and why? What are the documented benefits of this project to Federal trust resources? Additional data needs? What should be avoided in future projects, and recommendations?