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To: [Kate Norman](#); [Craig Hansen](#)
Cc: [Lief Wiechman](#)
Subject: FYI - instructions for running reports and evaluating projects in CED
Date: Friday, February 27, 2015 10:59:11 AM
Attachments: [20150226_CED project evaluation INSTRUCTIONS Draft 2.0.docx](#)

Hi Kate and Craig,

See attached, FYI. Those webinars we did for FO biologists on Tuesday and Wednesday were pretty detailed, so to follow up I wanted to provide detailed, written instructions and (I hope) head off some questions and keep Lief's phone from ringing off the hook!

If you see any fatal flaws here, please let me know ASAP -- I would like to distribute this to the FO folks today. Lief has worked this over too.

Thanks - enjoy your snowy weekend!
Holly

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# Conservation Efforts Database (CED): Detailed Instructions for Phase I Project Evaluation

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Thank you for contributing your knowledge and expertise to this evaluation of greater sage-grouse conservation projects. This first effort will result in evaluation of approximately 330 of the largest projects entered into the CED as “complete” and “effective” by project proponents. These projects represent roughly 8 percent of the total number entered in the CED (> 6,100) and nearly 50 percent of the total acreage of conservation efforts in the database.

As a reminder, evaluation of projects intended to address Agricultural Conversion and Energy Development (specifically Oil & Gas) should be completed by COB Friday, February 27. Evaluation of remaining projects is due by COB Friday, March 13.

Lief Wiechman and Holly Freifeld held webinars on February 24<sup>th</sup> and 25<sup>th</sup>, 2015 to demonstrate this process for Field Office biologists tasked with conducting this first phase of CED analysis. The 2/24 webinar was recorded and can be watched here:

<https://mmancusa.webex.com/mmancusa/jdr.php?RCID=378b33611c73c430faa604a98570ddba>

1. Log into the CED: <https://conservationefforts.org/sgce/>
  - **USE CHROME OR FIREFOX** (The CED does not function as well in other browsers, such as Internet Explorer).
2. Once you've logged in: Select the **FWS QUERIES** button in the green menu
  - Click “Phased Assessment,” choose your state and then WAFWA Management Zone (MZ). This will yield a specific list of threats you may query: these are the key threats identified for that MZ (see [this table](#) posted on the [CED evaluation site on Sharepoint](#)).
  - Choose a threat.
  - Click “Download Excel.”
  - You will see a list of results on the CED webpage AND an Excel file in your download bar.
    - The list on CED webpage is sorted by record number - keep this open. You will be referring back to it frequently.
3. Save the Excel file to your hard drive. **DO NOT CHANGE THE FILENAME.**
  - CED generates a unique filename that includes your name, the state, MZ, and threat you queried, the date, and a unique number linked to the time. This will help us organize files and help avoid accidental overwriting of work you've already done in the event you re-run the same query at a later date.
4. Begin your evaluation
  - Leave the CED query results page open, and open up the Excel file.
  - You'll see a list of record numbers and projects names. *The results of your query are only those projects identified by the project proponents as complete and effective.*
    - Ignore the hyperlink in column C for now. You can access the same thing from the list of your results on the CED query page.
    - The activity and subactivity will reflect actions linked in the CED to the threat that you chose for this query.
      - For additional information about all of the activities, subactivities, and metrics in the CED, choose **SAGE-GROUSE CED HELP** from the menu on the right side of the screen, open the **CED User's manual**, and see the long table that begins on p. 15.
  - The list is sorted by metric value (highest to lowest); note that most projects are acres, but some (for Fire and Infrastructure) are miles or structures.

- Other columns of note for your evaluation:
    - Objectives (Column I) – project proponents were instructed to provide objectives that are linked to specific threats to sage-grouse as identified in the COT report. They may not have done so. This doesn't have to be a deal-breaker if enough other information is available for you to assess the effectiveness of the project.
    - Explain Activity Effectiveness (Column L) – 2/24: Currently, this column is largely empty. In many cases, this is a glitch in populating the spreadsheet, and the information does appear in the record. You can find it by selecting the project from the list of your results on the CED query page, and clicking the green button next to "Implementation Information."
      - We hope to have this fixed next week, and then this information will appear in the spreadsheet.
    - Doc 1, Doc 2, etc. (Columns M – Y) – These columns will provide file names and brief descriptions of documents uploaded in support of the project, if any. The most useful types of documents for your evaluation are project descriptions, monitoring reports, etc. You can find these by selecting the project from the list of your results on the CED query page, and clicking the green button next to "Documentation."
      - Note: In most cases, spatial data were uploaded with other project information. You don't need these data – you can view the location of the project by selecting the project from the list of your results on the CED query page, and clicking the green button next to "Location Information."
    - You will enter your evaluation of each project (and your name) in the final three columns in the spreadsheet (headers shaded red).
5. INITIALLY, PLEASE EVALUATE ONLY PROJECTS ≥500 ACRES.
- Again, this first evaluation will capture almost half of the total acreage of projects entered in the CED.
  - We recommend you generate the reports for every threat in your state and MZs and evaluate these large projects first.
  - IF you have time, then go back and evaluate smaller projects.
  - Infrastructure and Fire include some projects (e.g., fence removal and marking, fire-breaks) with metrics in miles rather than in acres. Infrastructure also has a number-of-structures metric.
    - If you have a report spreadsheets with multiple metric types, filter the Metric column and determine which projects you'll evaluate for each type of metric.
    - Describing a cut-off for initial evaluation in a list of projects with metrics reported in miles is difficult. Projects 100 miles or more in length clearly should be evaluated. However, smaller projects involving fence or powerline removal may be important to evaluate during this first cut. Please use your best judgment, based on the location of the project on the landscape and the activity involved (e.g., fence removal vs. fence marking).
6. Evaluate projects
- Drop-down menu in Column Z – "Does the Service agree with the self-reported effectiveness assessment?"
    - Click in a cell beneath the header and open the drop-down menu to see your choices for "Yes" and "No," and the type of supporting information required for these.
  - Supporting info: You may find what you need for "Yes" answers in the project record in the CED (effectiveness information and/or supporting documents), in the published or gray literature, or in personal communications (which must be documented). You'll cite these references in Column AA, "Explain Service Assessment (Required Based on Effectiveness Assessment)." The same goes for your supporting information or explanation of "No" answers. Again, remember to look carefully at the project information in the spreadsheet and the CED record.
    - If you need to take a quick spin in the literature to find references to use as supporting information, don't forget to consult the COT report and the BAER report – both of these are organized by threats, and contain good reviews of literature.

- Quality control is an important aspect of your review. In some cases, the activity and subactivity won't actually address the threat that's the subject of the report. In these cases, the correct answer in Column Z will be "no." For example, destroying corvid nests and cheatgrass control don't address the threat of infrastructure to sage-grouse.
    - In the first case, removing corvids is an activity intended to address predation, which is not one of the 13 threats identified in our 2010 finding and the COT report as drivers of sage-grouse population declines. So this is a straight-up "no."
    - In the second case, cheatgrass control is intended to address a key threat: noxious weeds. However, unless the project proponent chose "Noxious Weeds" as well as "Infrastructure" when they entered this project in the CED, the project could be lost from analysis.<sup>1</sup> In these cases, please identify the correct threat along with your explanation in Column AA, and add the word "FLAG" before your name in Column AB. This will help us identify all such cases so that we can determine their cause and a course of action to address them.
  - In addition to the supporting information required in the report, please consider various aspects of project implementation that may influence its effectiveness (e.g., what do they mark fences with, what methods did they use to remove trees, did they include monitoring post-removal, etc.) To ensure consistency of approach, PLEASE COMMUNICATE with the other FO biologists who are evaluating similar projects in their states/MZs and who are evaluating multi-state projects that show up on multiple states' reports.
7. Upload completed reports to Sharepoint
- When you have completed your evaluation of the largest projects in one report and saved the file, please upload the file in SharePoint.
  - Direct link to CED eval page in SharePoint:  
<https://portal.doi.net/usfws/SG/CEDeval/Forms/ByState.aspx>
  - Click "Add Document" at the bottom of the page.
  - Click "Choose File," select the file from your hard drive, and click "OK."
  - On the next screen, click in the "State" box, select your state, click "Save."
  - If you want to replace this file later, you can delete it and upload a new one. Be Very Careful to delete only your own documents from the Sharepoint page.
  - You will also see a 0\_Guidance folder – this contains other documents pertaining to the CED evaluation process that you may find useful. [This file](#) contains the table of threats by MZ and state and the list of FO leads for the evaluation shown at the beginning of the webinars on 2/24 and 2/25.
8. Please:
- coordinate and collaborate with your fellow FO biologists across the range
  - contact Holly Freifeld or Lief Wiechman if you have questions or run into problems
  - contact Jennifer Sturdivant if you have major Sharepoint problems

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<sup>1</sup> This may have happened for a variety of reasons. Project proponents may accidentally have selecting the wrong threat to associate with a particular project or group of projects in the CED. Alternatively, you may see a pattern in a particular report or among projects conducted by particular partners; such patterns may indicate a coding error in data that were batch-uploaded in the CED.

### **Frequently Asked Questions:**

**Q:** What should I do with a project that says it's in my state but it isn't (e.g., only a couple of pixels of the project polygon occur in my state)?

**A:** Coordinate with the POC in the appropriate state, get their evaluation language and supporting information, put those in your spreadsheet, and please flag/note "not in this state" in the supporting info. column.

**Q:** How will new data entered into the CED be evaluated?

**A:** We will run repeat queries at regular intervals during the status review to capture new projects entered in the CED after the current evaluation was completed. We may have to request FO assistance again at a later time to evaluate new projects.

**Q:** How/when will flagged records (i.e., project does not address this threat, but addresses another) be evaluated?

**A:** We will have to wait until at after March 13 to determine how many of those there are, and go from there. We likely will incorporate these into the results of the early May queries that capture newly entered projects (described above). We will coordinate outreach to conservation partners to address these flagged records as appropriate.

**Q:** How will the results of the evaluation be used?

**A:** Once all of the reports are completed, the new data (your evaluations) will be uploaded into the CED. We will then run refined queries that capture all of the projects deemed effective by FO reviewers, and provide the results to the Modeling and GIS teams to incorporate into their analyses and to the Writing team to incorporate into the Species Report.

**Q:** What happens to the remainder of 6,100+ records that we do not evaluate now? Will we be asked to evaluate them later?

**A:** Plans (regulatory mechanism, voluntary agreements, etc.) entered in the CED will be evaluated as part of the regulatory mechanisms analysis in the species report (Craig Hansen is coordinating this). Plans and projects entered into the CED with implementation status as 'planned' or 'in progress' and/or effectiveness as 'highly likely to be effective' or 'not effective' are set aside for consideration under the PECE policy if that should become necessary.