

From: [Norman, Kate](#)
To: [Wiechman, Lief](#)
Subject: Re: CED to Sp.Report
Date: Monday, January 12, 2015 5:16:19 PM
Attachments: [20150112_CEDProcess_KNN.docx](#)

I also posted to SharePoint just for records :)

<https://portal.doi.net/usfws/SG/docs/Forms/datacall.aspx>

On Mon, Jan 12, 2015 at 3:02 PM, Wiechman, Lief <lief_wiechman@fws.gov> wrote:

All,

Please take a look and let me know what your thoughts are -- Understanding this is coming to you late and half of you are in travel as you get this.

I fully understand this is somewhat wordy, and some steps could be combined, but I want to be explicit so that those who will be tasked with this and who are unfamiliar with the CED to this point in time, will know what's up. I'll begin to create .ppt slides now for incorporation into our presentation tomorrow morning, and will update if/when I get edits/comments. That stuff is preferred sooner than later...

See you tomorrow.

(go Ducks)

LW

Lief Wiechman

Sage-grouse Ecologist
U.S. Fish & Wildlife Service
Mountain-Prairie Region
Cell: 307.214.8426
Office: 307.772.2374 x236
lief_wiechman@fws.gov

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Kate Norman, Sage-Grouse Project Manager
U.S. Fish and Wildlife Service, Region 6
134 Union Blvd, Lakewood CO 80228
PO Box 25486, DFC, Mailstop 60120, Denver CO 80225
Office: 303-236-4214
Mobile: 703-927-2445
kate_norman@fws.gov

Collection, Organization, and Analysis of Conservation Efforts

January 13th 2015

For Projects

1. **QUERY:** Create 'canned queries' to extract records (data and associated information, narratives, and supplemental docs) from Conservation Efforts Database (CED). These queries would be organized by **threat ameliorated and WAFWA Management Zone (MZ)** and include all efforts conducted to ameliorate the 13 threats identified in the Conservation Objectives Team (COT) Final Report (2013).
2. **FILTER:** Use filters to narrow scope of records to be reviewed.
 - a. **Filter 1:** Rapidly identify whether the action conducted address a threat that is (1) present, and (2) of primary concern for the MZ. This may result in the analysis of some efforts being temporarily deferred if the threat is localized to one or two areas (or populations) in a MZ that is otherwise relatively 'free' of the threat in question (i.e. Conifer Encroachment may not be a present or primary threat widespread across MZ I or II)
3. **REPORTS:** USGS will take the criteria/fields identified in **Step 2** to generate reports from the CED. This process will be automated so we can update our numbers at any point **and-in** time in the future. The reports generated from these 'canned queries' will provide a summary of metrics (total acres, miles) and number of projects, in addition to a summarized list of each record included in the summary. Reports will be structured similarly to the reports available in the HaBITS system.
4. **DEFER:** Projects that do not meet the criteria in **Step 2** will be deferred (with documented reasons/rationale for deferring said projects at this time).
5. **ASSESSMENT:** All projects that are **not deferred** will be passed on to each respective Field Office (FO). FO biologists will be assigned to these records pertaining to the primary threats present in their state (and ultimately rolling up to applicable MZ). FO biologists will then coordinate with the author of each threat chapter from the Species Report. FO Biologists will review, and certify all records **that meet effectiveness criteria** - prioritizing those that have large acreages, those in critical areas. The CED has a Map Viewer built-in to do coarse and simplistic queries to illustrate where each respective project (or plan) has or will be implemented to aid FO biologists in prioritization if need be.
 - a. If the filters applied in the preceding steps have not appropriately removed 'noise' from the efforts to be evaluated, FO biologists use their discretion and local knowledge prioritize which efforts need to be evaluated. This step will ensure the data we are quantifying have been quality controlled and that actions purported to be effective have truly added to sage-grouse conservation.
 - b. Develop general certification considerations to determine which efforts 'qualify' for effectiveness will be used here. This will ensure consistent sideboards for analysis across all threats, FOs
6. **DOCUMENT RATIONALE:** FO Biologists will provide reasons/rationale for 'certifying' or deferring projects at this time. Documentation will be entered in CED (either directly or through geodatabase) identifying decision to consider and advance or consider and defer. The CED (or through geodatabase) will have fields for FO biologists to indicate whether we agree (certify) with the self-reported effectiveness assessment, or if we do not (defer), from a drop-down menu to explain why: (no info on effectiveness provided, incomplete info on effectiveness provided, threat not present in that population, etc.), and text box to provide additional info if needed.
7. **UPLOAD:** USGS will batch upload all certification/deferment information to associated records in CED. A second set of 'refined canned queries' will then be executed to extract only those efforts that are addressing present and primary threats, and that have been certified effective by our FO biologists.

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Comment [KNorman1]: ?

Comment [LW 2]:

2.a. Build filters to narrow scope of review-able efforts (e.g. conifer removal in OR vs. conifer removal in ND)

Rapid Assessment Tool
(Lief and ??)

Comment [KNorman3]: Is there a filter 2?

Comment [KNorman4]: Based on what? Does this exist or are we creating "list of threats that matter by management zone"?

Comment [LW 5]:

3.a. Database developers take info from step 1 and build reports in the CED to automate our list of queries. This will be important when we need to update our numbers down the line. [Note: At this point, plan data will likely be analyzed outside of the CED in combination with other GIS layers - GIS analysts will be needed to help us automate this process to query the CED and other GIS layers to answer plan-level queries]

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Comment [LW 6]:

Use example from HaBITS that Kathy showed

Comment [KNorman7]: Looks redundant with Query... recommend removing "query" and leaving "report"

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Comment [LW 8]:

3.b. Filters applied here (and projects "drop out", or are flagged as possibly less relevant in reports?)

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Comment [LW 9]:

Possibly actions that are addressing an secondary/ancillary threat

Comment [LW 10]:

NOTE: This is the application of the "certification criteria" and where we should focus our energies for the upcoming workshop. Staff exercise to break out into small groups by effort to brainstorm what effective efforts look like, then regroup into small groups by threat to crosswalk between the two.

Comment [KNorman11]: Isn't this the worksheet? Or are you saying "certification by action type"?

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Comment [KNorman12]: Or could be uploaded from the excel files???

Comment [LW 13]:

FWS will only use efforts that have been deemed "certified" will be used in the analysis.

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8. **SHARING WITH GIS TEAM:** This information will also be supplied to GIS Team so they may proceed with the creation of maps, and assist with the quantification of acres/miles of threat addressed (conservation efforts) and outstanding (total threat less the conservation efforts). The GIS Team would then be able to use any new information providing after the analysis has begun to update these maps, and associated analysis as partners continue to provide information related to conservation efforts.
9. **QUANTIATIVE MEASURES:** Quantitative measures generated from refined queries will be used, in conjunction with other information (e.g., data-call info) to develop narrative write ups for each threat chapter and for the Factor D analysis.
10. **PECE:** FO biologists will then query and evaluate local, state, and federal planning efforts. If necessary (for critical actions that have not yet been implemented or deemed effective), PECE will be surgically applied - and these actions will be included in this analysis.
11. **SPECIES REPORT:** Assignments are made to write sections of the factor D analysis. This section will be organized by WAFWA MZ and will include summaries of both conservation efforts (**Steps 1-9**, above) and regulatory (**Step 10**) that have been implemented and deemed effective. Work will start on this section immediately, with quantitative metrics to be added when they are available.

Comment [KNorman14]: Writing Team? Modeling Team?

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DRAFT