

BRIEFING STATEMENT – RECOMMENDATION

PREPARED FOR: Chief, National Wildlife Refuge System

DATE: 29 May 2018

TITLE: Implementation of the I&M Review Recommendations

ISSUE: The final I&M review report details 8 Findings along with 15 Recommendations. The challenge moving forward is twofold: roll out the final report, and develop the new I&M 7-Year Plan while incorporating or addressing relevant recommendations. Six recommendations can be addressed in the next 7-Year Plan. How the other nine recommendations are implemented will require further NWRS Leadership Team conversations.

BACKGROUND: In 2015, the NWRS Leadership Team commissioned a review of the National Wildlife Refuge System's (NWRS) Inventory and Monitoring (I&M) Program from FY2012-2016 to evaluate the new program's progress. The Team examined the collective progress of the System's I&M efforts against the planning documents (Strategic Plan, Operational Blueprint, and 7-year Work Plan). The Review Team looked at the processes, expenditures, funding decisions, and communications of I&M, also delving into the organization of the Natural Resource Program Center, as they deemed warranted. Their final report, including 15 recommendations was completed in August 2017.

An NWRS Oversight Team (Polly Wheeler, Kim Trust, Tom Harvey, and Mark Chase) provided guidance and clarification as necessary regarding NWRS Leadership expectations. In light of the timing of its report, a goal of the review was also to inform development of the next I&M strategic plan (2020-2027). The NWRS Oversight Team proposed an implementation plan for the recommendations.

STATUS/KEY POINTS:

- Six recommendations were found to be within the purview of the next 7 year plan.
- The I&M Coordinators will provide regular status updates to NWRS Leadership regarding the proposed approach for these six recommendations.
- Nine recommendations require discussion by the NWRS Leadership in order to establish side-boards for any team that may staff potential implementation actions. These recommendations are loosely organized into four categories: Budget, Communications, Organization, and Organic Documents.
- Discussion will focus on *how* (or *if*) these recommendations should be approached.

RECOMMENDATION: Approve the I&M Review recommendations draft implementation plan as outlined in the attached document.

PREPARED BY: Mark Chase, Chief, NRPC

Attachment: Inventory and Monitoring Plan Review: A plan for moving forward

Inventory and Monitoring Plan Review: A plan for moving forward

In 2015 the NWRS Leadership Team commissioned a review of the National Wildlife Refuge System's (NWRS) Inventory and Monitoring (I&M) Program. The purpose of this review was to evaluate the progress of the I&M program from FY2012-2016 to inform Refuge System leadership discussions. The team, led by Noah Matson, and including Georgia Basso, Karen Miranda and Lou Ballard, began their efforts in Spring 2016 and the final report was completed in August 2017.

The Team was asked to evaluate the collective progress of the System's I&M efforts against the planning documents (Strategic Plan, Operational Blueprint, and 7-year Work Plan). As part of the review, the Team conducted 84 interviews of employees from field stations, regional offices, and headquarters. In addition, the Team conducted extensive reviews of the planning documents and National, regional, and field expenditures of funding to inform their findings and recommendations. The I&M Review Team was given wide latitude to look at processes, expenditures, funding decisions, and communications, and was encouraged to delve into any areas they deemed warranted and to provide recommendations to the degree they saw fit. An NWRS Oversight Team (Polly Wheeler, Kim Trust, Tom Harvey, and Mark Chase) provided guidance and clarification as necessary regarding NWRS Leadership expectations. The review was completed in August 2017. In light of that timing, an implicit goal of the review was also to inform development of the next I&M seven year plan (2020-2027).

The final I&M review report details 8 Findings along with 15 Recommendations. The particular challenge at this point in time is twofold: roll out the final report in some way, and develop the new 7 year plan while incorporating or addressing relevant recommendations. In our initial review, six recommendations were found to be solidly within the purview of the I&M Coordinators, within the context of the new 7-year plan. The proposed implementation plan for these six recommendations is as follows:

Recommendations proposed to be addressed by the Inventory and Monitoring Coordination Team (IMCT)

1A. Establish and prioritize natural resource management objectives as a precursor to inventory and monitoring planning; foster information-sharing to prioritize efficiently.

Provide periodic status updates to NWRS Leadership:

- July 2018 – I&M 7-Year Plan, draft approach
- November 2018 – Status update
- February 2019 – Present final draft of the I&M 7-Year Plan:2020-2027 for approval

*Proposed Implementation Date: **October 1, 2019***

*Proposed Implementation Team: **Inventory and Monitoring Coordination Team***

*Proposed Deliverable: **Final draft and timeline detailed in the I&M 7-Year Plan:2020-2027***

1B. Evaluate inventory and monitoring plans and regional I&M planning processes to distill lessons learned and improve efficiencies.

Provide periodic status updates to NWRS Leadership:

- July 2018 – I&M 7-Year Plan, draft approach
- November 2018 – Status update
- February 2019 – Present final draft of the I&M 7-Year Plan:2020-2027 for approval

*Proposed Implementation Date: **October 1, 2019***

*Proposed Implementation Team: **Inventory and Monitoring Coordination Team***

*Proposed Deliverable: **Final draft and timeline detailed in the I&M 7-Year Plan:2020-2027***

2A. Find ways to make protocol development less cumbersome.

Provide periodic status updates to NWRS Leadership:

- July 2018 – I&M 7-Year Plan, draft approach
- November 2018 – Status update
- February 2019 – Present final draft of the I&M 7-Year Plan:2020-2027 for approval

*Proposed Implementation Date: **October 1, 2019***

*Proposed Implementation Team: **Inventory and Monitoring Coordination Team***

*Proposed Deliverable: **Final draft and timeline detailed in the I&M 7-Year Plan:2020-2027***

5B. In planning for the future, the Service should narrow the focus of the program.

Provide periodic status updates to NWRS Leadership:

- July 2018 – I&M 7-Year Plan, draft approach
- November 2018 – Status update
- February 2019 – Present final draft of the I&M 7-Year Plan:2020-2027 for approval

*Proposed Implementation Date: **October 1, 2019***

*Proposed Implementation Team: **Inventory and Monitoring Coordination Team***

*Proposed Deliverable: **Final draft and timeline detailed in the I&M 7-Year Plan:2020-2027***

5C. Establish meaningful metrics for program success.

Provide periodic status updates to NWRS Leadership:

- July 2018 – I&M 7-Year Plan, draft approach
- November 2018 – Status update
- February 2019 – Present final draft of the I&M 7-Year Plan:2020-2027 for approval

Proposed Implementation Date: October 1, 2019
Proposed Implementation Team: Inventory and Monitoring Coordination Team
Proposed Deliverable: Final draft and timeline detailed in the I&M 7-Year Plan:2020-2027

5D. Reconsider goal of developing measures of System-wide “health” or resource trends

Provide periodic status updates to NWRS Leadership:

- July 2018 – I&M 7-Year Plan, draft approach
- November 2018 – Status update
- February 2019 – Present final draft of the I&M 7-Year Plan:2020-2027 for approval

Proposed Implementation Date: October 1, 2019
Proposed Implementation Team: Inventory and Monitoring Coordination Team
Proposed Deliverable: Final draft and timeline detailed in the I&M 7-Year Plan:2020-2027

The remaining nine recommendations are loosely organized into four categories, with the top two categories likely of greatest interest to the NWRS Leadership Team. **How, or if,** the remaining nine recommendations are addressed should be discussed by the NWRS Leadership at the June 2018 meeting.

BUDGET:

6B. Develop more formal and transparent process for regional project funding decisions.

6C. Require use of FBMS codes for Refuge I&M funding and train staff to use.

COMMUNICATIONS:

6A. NRPC and the Regions should better communicate budget decisions.

7A. Improve consistency and completeness of communications.

7B. Consider suggestions from the field for improving communications.

ORGANIZATION:

2B. Consider whether Refuge I&M needs to be distinct from other science support.

8A. Integrate more fully with other Service monitoring and science-related programs.

8B. Pursue additional national-level partnerships with federal agencies having inventory, monitoring and related capacities to leverage collective effort.

ORGANIC DOCUMENTS:

5A. Revise strategic planning documents.