

CWCS Bird Monitoring Workshop
29-30 November 2004
Oregon Department of Fish and Wildlife, South Willamette Watershed District Office
DRAFT Agenda, V2-111804-pb

A. Workshop Goals

1. Share information on current monitoring efforts
2. Brainstorm key monitoring information for CWCS

Priorities
Targets/Objectives
Programs by scale/goal
Partners

Strategy approach: use birds as a model in developing monitoring recommendations for other taxa.

B. Agenda

Notes: **Each presentation includes 5 minutes for Q&A.**

Room A = Large conference room; Room B = Small conference room.

Monday, 29 November		
Time	Topic	Speaker(s)
12:30	Welcome Overview and goals for workshop Introductions	Peg Boulay, ODFW and Bob Altman, ABC
1:00	Oregon's Comprehensive Wildlife Strategy: overview	Holly Michael, ODFW
1:20	Monitoring Chapter: outline and overview	Audrey Hatch, ODFW and Peg Boulay, ODFW
1:30	Forest bird monitoring and research in the Blue Mountains: Trends and applications for management and restoration	Rex Sallabanks, Idaho Dept. of Fish and Game
1:50	Sagebrush Bird Monitoring Network: monitoring and research on bird populations in sagebrush steppe ecosystems of eastern Oregon	Aaron Holmes, PRBO Conservation Science
2:10	Klamath Demographic Monitoring Network: monitoring and research on forest and oak woodland birds in southern Oregon	John Alexander, Klamath Bird Observatory
2:30	Seabird Monitoring along the Oregon Coast (draft title)	To be determined
2:50	Shorebird Monitoring in Oregon	Sue Haig, USGS
3:10	Break	
3:20	MAPS: Monitoring bird vital rates and causal factors in population changes and identifying management strategies for reversing population declines.	Dave DeSante, Institute for Bird Populations
3:40	Break-out Session 1: Identifying on-going bird monitoring efforts in Oregon Room A – passerines, raptors, other (woodpeckers, etc.) Room B – shorebirds, seabirds, waterbirds	All

5:00	End	
Tuesday, 30 November		
Time	Topic	Speaker(s)
8:00	Agenda overview	Peg Boulay, ODFW and Bob Altman, ABC
8:10	Upland game bird monitoring: Oregon and National perspectives	Dave Budeau, ODFW and Mike Pope, OSU
8:40	Waterfowl monitoring: Oregon and Pacific Flyway perspectives	Brad Bales, ODFW
9:00	Spatially-explicit population and habitat objectives: the importance of monitoring data for building models, testing hypotheses, and tracking progress.	Bob Altman
9:10	A California model: using indicator guilds to prioritize and monitor riparian restoration projects (draft title)	Aaron Holmes, PRBO Conservation Science
9:40	Coordinated Bird Monitoring	Jon Bart, USGS
10:00	The Idaho Bird Inventory & Survey (IBIS): A plan to implement Coordinated Bird Monitoring in Idaho	Rex Sallabanks
10:10	Break	
10:20	Break-out Session 2: Room A – Indicator species and guild approaches; habitat relationships Room B – Coordinated Bird Monitoring – issues and considerations for Oregon	All
11:15	Room change	
11:20	Break-out Session 3: Room A – Effectiveness monitoring and adaptive management approaches Room B – Population and habitat objectives; linking objectives among multiple planning efforts	All
12:15	Working Lunch	
1:00	Break-out Session 4: Room A – Population limitations: demographics, population dynamics and causal factors Room B – Scale issues: landscape-level approaches; stepping-up and stepping-down analyses	All
1:55	Room change	
2:00	Break-out Session 5: Room A – Long-term population trend monitoring Room B – Citizen Science and public outreach	All
2:55	Room change	
3:00	Closing discussion and wrap-up: identifying critical gaps in current efforts	Peg Boulay, ODFW and Bob Altman, ABC
3:30	End	

C. Potential Break-out Section Discussion Questions

Approach: Each break-out session will have topic-specific questions and objectives to guide the discussion. The following list includes some potential questions that may be assigned to a given break-out session. Please reflect upon these questions prior to the workshop.

- What are the current broad, multi-partner monitoring efforts and where are they occurring?
- What is the best use of current efforts? Are there ways to improve coordination or efficiency?
- What are the biggest holes in the current efforts?
- Should we identify targets in the Strategy (e.g., population objectives)? Note: we will likely provide a few examples of species and habitats where we can put in quantitative objectives and identify the need for further work.
- Should we indicate specific geographic locations for monitoring activities? If so, how will they be linked to Conservation Opportunity Areas (= priority landscapes)?
- How do we link objectives among planning efforts (e.g., Subbasin plans, bird conservation plans)?
- How do we identify meaningful indicators and link them to existing indicators (e.g., State Progress Board's indicators)?
- What are the best ways to incorporate multiple species in monitoring efforts? What about multiple taxa? When do we need to focus on individual species?
- What is the role of indicator guilds (or species) in monitoring programs? What is the role of "indicators of ecological integrity" in the Strategy?
- What are the most critical scales for monitoring? How can programs be designed to allow step-up and step-down of analyses?
- How can conservation actions and monitoring programs be best designed for adaptive management (e.g., State explicit hypotheses about the expected results of restoration or management activities and how these results will be measured.)?
- When can habitat monitoring be used as a surrogate for taxa monitoring? For habitat monitoring, how can remote sensing data and field measurements be integrated?
- What is the role of citizen science in monitoring? (CBC, Backyard Bird Count, nestbox programs; forest bird monitoring)?
- Coordinated Bird Monitoring questions:
 - Would this be a desirable approach for Oregon?
 - What would be needed to create a plan (e.g., personnel, cost, time)?
 - How would current efforts and programs be affected?
 - What are the large and small scale political considerations (e.g., IAFWA, NABCI)?
 - Other issues for Oregon?
 - What should we say about CBM in the Strategy?
- What are the best ways to integrate short-term inventory and management assessment (impacts of limiting factors; address data gaps; effectiveness of conservation actions/adaptive management) with long-term population abundance and trends monitoring?

- What are the potential cost and time requirements to acquire statistically valid samples for determining trends?
- How should monitoring programs be implemented? Who are the key partners and funding sources?
- How should Strategy recommendations and projects be monitored? [E.g., Where are projects occurring? Are they focused on priority species, habitats and landscapes? Do projects meet larger scale goals? Short-term: Did we make strategic investments (e.g., # easements in priority landscapes)? Long-term: Did we make a difference for species and habitats (e.g., population trends, changes in land use-land cover)?]

**ODFW Comprehensive Wildlife Conservation Strategy (Strategy)
All-Bird Monitoring Workshop, 29-30 November 2004
Final Report**

Introduction

Oregon's Strategy will address monitoring priorities for Strategy Species and Habitats and will provide a framework for evaluating the effectiveness of proposed conservation actions using an adaptive management approach. Bird monitoring is important to Oregon's Strategy because birds are useful ecological indicators and have been the subject of extensive planning efforts. In addition, there are well-established methodologies and both baseline and long-term data for many bird species. We plan to use birds as a "best case" model for developing monitoring recommendations for other taxa. We hosted an all-bird monitoring workshop of invited participants to gather expert opinion on bird monitoring activities and priorities for Oregon.

Goals and Process

The workshop goals were:

1. To share information on current monitoring efforts, and
2. To brainstorm key monitoring information for CWCS, especially data gaps, gaps in current monitoring efforts, improvement of current efforts, and priorities.

To achieve these goals, we used a mixed format of invited presentations and small group discussion (break-out) sessions. The presentations were intended to provide workshop participants with a broad overview of important monitoring efforts and issues. The presentations covered current monitoring efforts for all Oregon species groups (landbirds, shorebirds, waterfowl, upland gamebirds, waterbirds, and seabirds) and most geographic areas of Oregon. In addition, expert presenters provided information on effectiveness monitoring for riparian restoration, coordinated data sharing, population objectives, demographics, and Coordinated Bird Monitoring.

We had 5 break-out sessions. For each session, participants chose between two topic areas. The first break-out session set the stage for subsequent ones by documenting important current or recent bird monitoring efforts in Oregon. We asked participants to identify monitoring efforts, then briefly summarize the species/guild/group, geographic location, purpose, partners, and duration for each effort. For the other 4 break-out sessions, participants identified monitoring priorities through a facilitated discussion process. Appendix 1 lists the topic areas and general discussion questions. These questions were used as a basis for discussion; additional follow-up questions came up in individual sessions but are not included here.

After each break-out session, we posted flipchart notes with the identified priorities. This allowed participants to review information from other sessions. We kept the flipcharts from Session 1 posted throughout the workshop so participants could add additional information on monitoring efforts.

Results, Products and Benefits

Based on products and participant feedback, we feel that the workshop was highly successful and met our goals. There were 35 participants, including representatives from 4 state agencies, 5

federal agencies, 4 non-profit organizations, and 1 university. In addition, there were several consultants and expert presenters from Idaho and California.

There will be 2 products from the workshop. First, the priorities and other notes from the discussions will be summarized and will be used when creating the Monitoring chapter for the Strategy. Second, the list of current and recent Oregon monitoring efforts will be sent to all participants for review and reference. Compiling and sharing this information is a critical first step to increase coordination and efficiency of current efforts and to identify gaps and priorities.

Participants told us that they appreciated the workshop structure, quality of the presentations, discussions, opportunity to contribute to the Strategy, and opportunity to network and coordinate with their colleagues.

ODFW is very grateful for IAFWA's support for this workshop. The expert presenters added irreplaceable breadth and depth to the presentations and discussions. They also provided a regional and national context, which allowed participants to address coordinated monitoring more thoroughly. We would have not been able to host the experts without IAFWA's support.

Lessons Learned: Process

We would recommend this workshop's approach for other states wishing to coordinate bird monitoring efforts. Both the presentations and break-out sessions contributed to achieving goals and creating products. We believe that the interaction between participants was essential for workshop success. Thus, it is important to ensure enough time during presentations for questions/answers and discussion. For break-out sessions, it was important that the number of participants and discussion questions be realistic to allow focused discussion (e.g., <20 people, preferably ~8-15, and 3-4 questions for 55 minutes). During the workshop, we reduced the number of questions from our initial approach to focus on the key elements: current efforts, data needs, gaps in current efforts/data, and priorities based on current efforts/gaps. The process should be flexible enough to adapt to group dynamics and new content. We found that break-out sessions were most productive when kept to under an hour. The workshop length (1 ½ days) accommodated the mixed format approach. A workshop with broader goals may need to be longer.

We believe the following actions create a basis for success: (1) formulate clear workshop goals, share them with participants prior to the workshop, and allow time at the beginning of the workshop for participants to ask questions and fully understand their role; (2) use a mixed format of invited presentation and small-group discussion; (3) provide background materials for participants; (4) ensure that both presentations and the invitation list represents diverse species groups, geographic areas, approaches, and issues; and (5) use trained facilitators and recorders for break-out sessions.

Beyond the workshop structure, it was truly the active and thoughtful participation of the attendees that allowed the workshop to meet its goals.

Appendix 1. Break-out Session Introductions and Discussion Questions

For each break-out session, participants were given a short introduction to the topic and were led through a series of questions by a facilitator. In general, the most time was spent on identifying priorities.

Session 1A (Large) and 1B (Small): Identifying on-going bird monitoring efforts in Oregon.

We want to identify current (and recent past) bird monitoring efforts at all relevant scales. These may range from broad, multi-partner or multi-taxa efforts to focused, site-specific programs targeting an imperiled species. The most important criteria is: “Does the project contribute significantly to our knowledge about bird conservation?”. Identifying current efforts is the critical first step before identifying gaps in current efforts or opportunities to strengthen current efforts.

Please list recent or on-going significant bird monitoring efforts. For each effort, BRIEFLY (in a few words) summarize:

	Small-scale example: Yellow rail	Large-scale example: BBS
Species/guild/group	Yellow rail	Primarily passerines
Geographic location	Sycan Marsh	Statewide
Purpose	Short-term population trend, density	Long-term population trend
Partners	TNC, KBO	Many; uses volunteers
Duration	5-10 years	>30 years

Closing statement: For the rest of the workshop, we will be discussing priorities for different topic areas. Please consider these current efforts and gaps in current efforts when developing priorities.

Session 2A (Large): Indicator species and guild approaches; habitat relationships.

Indicator species and guild approaches have been used as a cost-effective way to monitor environmental health and management actions. Birds are frequently used as indicators because they are more readily monitored than other taxa. However, there are limitations to indicator approaches.

- What bird species or guilds are particularly effective as indicators?
- What types of data (e.g., habitat relationships) are needed to effectively use indicator approaches?
- What are the current gaps in the availability of this type of data (e.g., species, taxonomic groups, habitats, geographic areas)?
- Considering the data that needs to be emphasized, current gaps in the availability of that data, and other factors (e.g., hot topics, resources), what are the priorities for this topic in the next 5-10 years?

Session 2B (Small): Coordinated Bird Monitoring – issues and considerations for Oregon.

Coordinated Bird Monitoring Plans are comprehensive descriptions of bird monitoring activities for an organization or region. They are intended to increase efficiency and utility of bird

monitoring programs by improving program design and coordination. Each plan describes existing monitoring programs and then identifies needed improvements and new programs using the following approach: 1) identify the overarching goals of the program and the specific objectives that underlie these goals; 2) determine strategies and study design necessary to achieve these goals; and 3) secure commitments (financial and otherwise). (Source: Coordinated Bird Monitoring Plan for Montana, Ver. 2.0, March 2004).

- Would this be a desirable approach for Oregon? Why or why not?
- What would be needed to create a CBM plan (e.g., personnel, cost, time)?
- How would current efforts and programs potentially be affected by a CBM plan?
- What should we say about CBM in the Strategy?

Session 3A (Large): Effectiveness monitoring and adaptive management approaches.

One of the required elements for the Strategy is to recommend monitoring priorities to determine the effectiveness of recommended conservation actions and to use an adaptive management approach to respond to new information and changing conditions. For this discussion, we will use the concept of effectiveness monitoring in the broadest sense.

- What types of data are needed for effectiveness monitoring of conservation actions recommended in the Strategy?
- Where are the current gaps in the availability of this type of data (e.g., species, taxonomic groups, habitats, geographic areas)?
- Considering the data that needs to be emphasized, current gaps in the availability of that data, and other factors (e.g., hot topics, resources), what are the priorities for this topic in the next 5-10 years?

Session 3B (Small): Population and habitat objectives; linking objectives among multiple planning efforts; performance indicators.

There is increasing interest and need for quantitative habitat and population objectives for bird conservation. Data from bird monitoring and research are essential in the development of these objectives. However, certain kinds of data are more useful than others.

- Which types of data should be emphasized to support the development of quantitative objectives?
- Where are the current gaps in the availability of this type of data (e.g., species, taxonomic groups, habitats, geographic areas)?
- Considering the data that needs to be emphasized, current gaps in the availability of that data, and other factors (e.g., hot topics, resources), what are the priorities for this topic in the next 5-10 years?

Session 4A (Large): Population limitations: demographics, population dynamics and causal factors.

Bird populations can be limited by a number of independent or interrelated natural and anthropogenic factors. Data from bird monitoring and research are essential to understand the

dynamics of bird populations and to begin to develop strategies to address factors contributing to bird population declines. However, certain kinds of data are more useful than others to understand population dynamics and limiting factors.

- Which types of data should be emphasized to enhance our understanding of population dynamics and limiting factors and to provide the information needed for conservation action?
- Where are the current gaps in the availability of this type of data (e.g., species, taxonomic groups, habitats, geographic areas)?
- Considering the data that needs to be emphasized, current gaps in the availability of that data, and other factors (e.g., hot topics, resources) what are the priorities for this topic in the next 5-10 years?

Session 4B (Small): Scale issues: landscape-level approaches; stepping-up and stepping-down analyses.

Conservation of bird populations often requires an assessment of conditions and impacts at a number of scales. In the past, most emphasis was directed towards smaller scales (e.g. sites), but there is increasing recognition of the effect of landscape-level factors on bird populations. Additionally, there has been significant progress in the coordination of bird conservation efforts across non-ecological boundaries (e.g., states), including the need for stepping-up and stepping-down analyses to ensure efficiencies and effective conservation. Thus, there is an increasing need for bird monitoring data to have some levels of compatibility to support larger-scale analyses.

- Since both site and landscape-level analyses are likely to be important in developing management strategies, what types of data are likely to provide the most value for different levels of analyses and modeling?
- Where are the current gaps in the availability of this type of data (e.g., species, taxonomic groups, habitats, geographic areas)?
- Considering the data that needs to be emphasized, current gaps in the availability of that data, and other factors (e.g., hot topics, resources) what are the priorities for this topic in the next 5-10 years?

Session 5A (Large): Long-term population trend monitoring.

Long-term population trend data can be critical to recognize when populations are declining and conservation actions should be taken or when those populations may be undergoing cyclic variability. For most species, a minimum of 10 years of data is desirable for trend analyses, but for some species (e.g., long-lived birds) more years are necessary. There are some local, regional, and national efforts at both the community-level and species-level that are providing this data, however, many species do not fall under these programs. Long-term trend monitoring for all species, although desirable, would significantly impact limited resources.

- Review outputs from Session 1 on long-term monitoring programs and provide general categories for where the gaps are (e.g., shorebird migration, all owl species).

Are there species or preferably species groups that are conducive to the development of a long-term program?

- Are there existing programs that could be expanded to become long-term monitoring programs or enhanced to be compatible with existing long-term programs? Are there national or regional programs that could be implemented in Oregon?
- Considering existing programs, gaps, options, and other factors (e.g., hot topics, resources) what are the priorities for this topic in the next 5-10 years?

Session 5B (Small): Citizen Science and public outreach.

We wish to engage citizens in conservation by involving people in both the development and the implementation of the Strategy. People can be engaged through “Citizen Science” and/or by communicating methods and results widely. By “Citizen Science,” we mean programs in which volunteers are the primary or sole data collectors.

- Did we capture all of the Citizen Science programs during Session 1? Are there any other on-going volunteer-based bird monitoring efforts in Oregon?
- What types of data are most appropriate for Citizen Science programs?
- What are the limitations to the current efforts (e.g., program coordination, centralized databases, data analysis)? How can these limitations be addressed to improve current programs?
- Aside from volunteer-based data collection programs, what are other ways to engage citizens in monitoring? (Note: One example was the Swainson’s hawk migration project in northeast Oregon. Students used websites to monitor locations of GPS transmitter-equipped hawks.).
- Considering the data that are most amenable for Citizen Science, current efforts, and factors (e.g., hot topics, resources) what are the priorities for this topic in the next 5-10 years?