

## QUARTERLY PROGRESS REPORT

Quarter: (circle one)      2022\_1st      2022\_\_2<sup>nd</sup>      2022\_\_3<sup>rd</sup>      2022\_4th

Grant Program, Number and Title: RCN 2017-03 GSA 00029, Amendment #2

Contractor: Terwilliger Consulting, Inc.

Project Leader: Karen Terwilliger

Abstract: Summary

Terwilliger Consulting Incorporated (TCI) is contracted to provide technical support primarily for Technical Services that support the NEFWDC and their NEAFWA charges that guide, prioritize, and coordinate the implementation of state conservation of fish and wildlife diversity regionally in the NE. Much of the work focuses on researching, compiling, synthesizing, analyzing and reporting on NE Regional Species of Greatest Conservation Need (RSGCN) as these species represent the priority species in the greatest need of collaborative conservation in the region. Significant coordination and data research, analysis, management, and reporting is involved to assist NEFWDC in accomplishing their broad and challenging charges annually. We work closely with WDPMs, SWAP coordinators, taxa team experts and conservation partners to liaison and coordinate and document these efforts.

TCI technical support this quarter included updating and preparing the RSGCN Database to reflect the updated RSGCN list and supporting data provided by 20 taxa teams. Options were evaluated for developing the most efficient and streamlined framework and structure to be migrated to an improved, more stable and accessible platform for the CSWG SWAP database upgrade in 2023. We worked with SA staff (D Drummey primarily) to evaluate these options and create this structure.

Data compilation, QA/QC, worksheet and document development, and analyses occupied this quarter to wrap up the database and RSGCN list of nearly 400 RSGCN and an additional 400 watchlist species. Research and analyses determined which key data gaps existed and directed this qtrs. work (reported on under Amendment #5). Significant progress was made on the urgent need in order to be able to conduct more thorough analyses with the additional data needed.

Coordination included providing NEFWDC and SWAP coordinators what they needed on monthly calls, providing updates, presentations, and reports to the NEFWDC for the Directors, Wildlife Administrators, Fisheries Administrators, and Technical Committees on the status of RSGCN (including birds, mammals, herps, fish, and inverts) based on information from taxonomic experts, SWAP Coordinators, and other sources.

Were planned goals/objectives achieved last quarter? Yes.

Progress Achieved: completed tasks focused on RSGCN method and list development and coordinated with and presented to both SWAP coordinators and NEFWDC monthly

**Objective 1: identify, review and update RSGCN information. This year's focus- updating the RSGCN RSGCN list.**

**RSGCN list update required compiling data from excel worksheets for 20 taxa teams for input, webinar review and confirmation through 2 rounds of expert review webinars.**

This quarter we were fully engaged with data compilation, analyses and QA/QC to finalize the list. Data were compiled from the 20+ taxa team webinars and QA/QC with follow up correspondence with taxa experts was required. We did a gap analysis to determine which data were needed for RSGCN and our analyses was put on hold until we could fill those data gaps (see report under Amendment #5). Significant data gaps existed for the new RSGCN/watchlist species, especially for invertebrates, and this prevented us from doing a thorough analyses and including this important information in the updated database.

Tasks initiated and/or completed:

- Attend NEFWDTC, SWAP Coordinators, Lexicon and Conservation Status Project Committee Meetings
- Provide monthly update on project at NEFWDTC meetings; take notes of meetings for NEFWDTC
- Coordinate the RSGCN Update project with the Regional Database and Lexicon projects
- Compile taxa team data and follow up correspondence to solicit or confirm additional data needed on RSGCN and watchlist species.
- Reviewed RSGCN taxa team files, webinar recordings and prepare summaries.
- Manage, review and QA/QC RSGCN and Watchlist species data- ID gaps
- Correspondence with taxa team members, answering questions and following up on individual species' status and data as needed
- Review habitat classification systems, cross-walk existing systems in use in the Northeast across various projects, and draft an updated system for RSGCN and the Regional Database
- Review the Conservation Measures Partnership classification systems for Threats and Conservation Actions, cross-walk them to existing RSGCN data fields
- Review and identify Overriding Factors for RSGCN update as needed
- Review update of RSGCN Marine species (fish, reptiles, mammals, invertebrates) for outliers, harvested species status, existence of fishery management plans, and seasonal regional responsibilities for migratory species
- Data management of draft final RSGCN list for NEFWDTC review, research and answer follow-up questions and comments
- Assist in preparation of responses and coordination with other NEAFWA committees on draft final RSGCN list
- Review and revise data fields in RSGCN Database
- Draft preliminary outline of RSGCN report
- Prepare summaries of RSGCN Plants options for Northeast

**Objective 2: provide on-going technical support, and evaluation of use of regional RSGCN database;**

This quarter focused on working with SA's Donovan Drummey to finalize the data structure and fields for the updated RSGCN database that is being split out from the NE SWAP database in preparation for

the CSWG project for the NE SWAP database upgrade. We implemented recommendations for database future needs to NE SWAP coordinators and NEFWDTC on their monthly calls to assist in the CSWG proposal development and state planning efforts. Significant effort and discussion refined the data fields and database structure. The NEAFWA website continues to track users regarding the regional SWAP database in addressing other program priorities and actions. This quarter, the total rose to 195 with additional state agency, Us Forest Service, Academic universities, NGOs, and USFWS users downloading the database for use in their programs.

We continued to monitor the use of the database from the NEAFWA website. Some users indicate that they are using it for grant (CSWG, RCN, etc.) applications and proposals in order to include the SGSN, key threats and actions from the NE SWAPs. We briefed several new partners on the database, and it was sent to additional state and federal partners associated with the CASC network. We coordinated with the SE and MW on their databases and attempts to develop a lexicon and RSGCN list.

Data requests, queries and reports of information on Regional Species of Greatest Conservation Need are provided upon request and have been updated and a new tab added. Species menus have been improved to allow more flexibility in searching the database for particular species. The launch page of the database was updated to provide additional access to the database from the Northeastern Association of Fish and Wildlife Agencies' website. States were asked to link it to their SWAP sites as well. Contact information and website links were also updated on the launch page.

#### **Research, compilation and analyses for the RSGCN database.**

- Code threat and action characteristics and levels. This included all threats other than Climate Change which is being conducted by a separate collaboration with NE CASC. This allowed for consistent coding and data entry for an efficient Taxa team review:
- Continue QA/QC literature, survey data, and database to code limiting factors to CMP threat categories (including CMP, IUCN, SWAP database, State and Federal Listing documents, taxonomic literature, etc.). TCI
- Compile and analyze Regional Threats and Conservation Actions for RSGCN dataset
- Compile and QA/QC RSGCN taxa team review files and ID data gaps remaining
- Data from expert taxa teams were entered, crosswalked and compared to the NE SWAP database QA/QCd.
- Complete coding and crosswalking of limiting factors to CMP 2.0 threats and actions from the taxa teams and NE SWAP Database. Documentation and consistent coding with the lexicon of taxonomic team reports including threats and conservation actions. These were compiled, coded and condensed down to the top threats for each RSGCN. Analyzed survey results, confirmed threat and actions and began analyses.

#### **Objective 3: Provide NEFWDTC Technical Services Coordination and outreach:**

This quarter we coordinated with NEFWDTC and SWAP coordinators on their April, May and June webinars/conference calls to provide project updates and solicit final comments and edits. We also provided updates and reports on NEFWDTC and SWAP Coordinator monthly coordination meetings and followed up with other presenters to provide information requested of the NEFWDTC. Specifically, we

- Attend and present on the RSGCN update at the 77<sup>th</sup> Annual Northeast Fish and Wildlife Meeting
- Attended NEFWDTC, SWAP Coordinators, Lexicon and Conservation Status Project Committee Meetings;
- Prepare and give presentations on project updates to SWAP Coordinators and NEFWDTC monthly webinars
- Prepare progress reports and PPTs for RCN 2.0 Technical Services project
- Prepare draft final list of RSGCN and Watchlist species for final taxa team, and NEFWDTC
- Coordinate the RSGCN and Database projects with the NE Conservation Assessment (TNC), Synthesis and Lexicon projects
- Coordinate with the SE RSGCN on plant process to inform NE RSGCN plant process

Difficulties Encountered in Meeting Goals and Objectives: none

Expected End Date: January 1, 2023

Costs: federal expense to date: \$31,034.80

Total 2022 YEAR to date expenses (include this quarter): = \$ \$94,754.80

Total Approved Budgeted Funds yr 4: \$80,000

Are you within the approved budget plan and categories? Yes

**The foregoing information is accurate as of the date set forth below.**

**TERWILLIGER CONSULTING, INC.**

By: *Karen Terwilliger* Name: Karen Terwilliger

Title: President, Terwilliger Consulting, Inc.

Date: 7-18-22