

QUARTERLY PROGRESS REPORT

Quarter: (circle one) 2021_1st 2021__2nd 2021__3rd 2021_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 Conservation of fish and wildlife diversity. 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 management is involved, including the NE SWAP Database which was developed as a prototype in 2014-16 and is now in need of an upgrade. We are working closely with NEFWDC and SWAP coordinators to develop a CSWG to accomplish this. TCI technical support this quarter included:

- Updating and preparing the NE SWAP and RSGCN Database for an update of RSGCN taxa team input. Options have been evaluated for the developing the best framework and structure to be migrated to an improved, more stable and accessible platform. We have been assisting the NEFWDC and SWAP coordinators in the development of a CSWG proposal to accomplish this. We have explored options and worked with TCI team and SA staff (D Drummey). The database template has been drafted, and the database links and tables are now being mapped to maximize the efficiency of the database. Research/crosswalk/QA/QC/coding of limiting factors to CMP/IUCN Threats and TRACS actions to update the new database table module for RSGCN. Maintenance of the State Wildlife Action Plan (SWAP) database. Presentation, technical assistance and training of the database to SWAP Coordinators and NEFWDC on monthly calls and their annual meeting. Update of launch page and contacts, state staff directory, and taxa team representatives.
- RSGCN list update is in full swing with taxa teams now engaged, intro webinars conducted, and taxa team review underway. Data compilation, QA/QC, prescreening, worksheet and document development occupies the full TCI team to accomplish this large data and outreach driven process.
- Research and analyses in support of state diversity programs, taxa teams work with invert team, RSGCN method workgroup and SA to develop RSGCN selection criteria and method slowed as RSGCN occupies the team full time this qtr.
- Presenting to NEFWDC and SWAP coordinators on monthly calls, providing updates, presentations, and reports to the NEFWDC for the Directors, Wildlife Administrators, Fisheries Administrators, and Technical Committees of 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 development and threats and actions, and coordinated with and presented to both SWAP coordinators and NEFDTC monthly

Objective 1: identify, review and update RSGCN information. This year's focus- Threats and actions and updating the RSGCN selection method.

This quarter, TCI:

1- RSGCN method development

This quarter we were fully engaged with data preparation, analyses and taxa team outreach. We worked with Invert overview team to ID which invertebrate taxa should be included in this update and included 4 new taxa. SA (D Drummey) assisted by running code to prepare data for this data driven effort. Developed consensus from surveying NEFDTC members on top RSGCN method issues and followed up on their monthly calls. Method, selection criteria and filters for prescreening were finalized. Data was extracted from multiple sources and compiled to allow prescreening to start to develop an updated RSGCN list. Data were organized into worksheets for each of the taxa teams. Instructional documents and webinars were developed and conducted. Taxa teams are fully engaged through their webinars in February.

2- Research, compilation and analyses for threat and action characteristics and levels was conducted. This allowed for consistent coding and data entry to prepare for an efficient Taxa team review:

TCI continued to 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
 - Review and QA/QC RSGCN pre-screening data
 - Prepare RSGCN taxa team review files
 - Prepare for and participate in RSGCN taxa team Introductory Webinars
 - Begin Drafting Regional Threats and Conservation Actions for RSGCN report
 - Prepared and gave presentation for NEFDTC on draft Threats and Conservation Actions
- Survey results were compiled and analyses has begun. The Survey was developed and prepopulated with the top 3 threats and actions from the NE SWAP database and results from the taxa team limiting factor data for most RSGCN (crosswalked results from items 2 and 3 below). The survey included threats levels/characteristics and action prioritization questions.
1. Began analysis of crosswalked limiting factor RSGCN data to CMP 2.0 threat and actions (consistent with the lexicon and synthesis) from taxa teams and NE SWAP database. Updated and finalized database RSGCN module with completed data entry: The Northeast State Wildlife Action Plan Database (Database) was updated to capture priority (most frequently cited) threat and actions that address the limiting factors identified by the taxa teams (including aspects of food, reproduction, mortality, and habitat). Assessment and monitoring needs and data gaps were also captured, to inform NEFDTC and RCN priorities and projects. Data from expert taxa teams were entered, crosswalked and compared to the NE SWAP database QA/QCd.
 2. Completed 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.

4-: NEFWDTC Technical Services Coordination and outreach: This quarter we coordinated with NEFWDTC and SWAP coordinators on their July, August, and September 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

- Attended NEFWDTC, SWAP Coordinators, Lexicon and Conservation Status Project Committee Meetings; take notes at NEFWDTC meetings
- Reviewed existing reports and materials for Regional Synthesis; draft revisions to Goals and Objectives for 2023 update
- Hosted scoping meeting for Regional Synthesis update
- Coordinate the Regional Synthesis and RSGCN projects with the Lexicon project
- 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 Synthesis
- Review the Conservation Measures Partnership classification systems for Threats and Conservation Actions, cross-walk them to existing RSGCN data fields

Objective 2: provide on-going technical support, and evaluation of use of regional Wildlife Action Plan database;

This quarter, we assisted NEFWDTC and SWAP coordinators in developing a CSWG proposal. We provided historical and current database information and participated in their meetings to answer any questions.

We provided a status update and 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. 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 176, 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.

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.

Difficulties Encountered in Meeting Goals and Objectives: The NE SWAP Database has outgrown its capacity and structure and would benefit greatly from an upgrade to a web-based platform.

Expected End Date: February 29, 2023

Costs: federal expense to date: \$0 FY-20-21- year 4: \$17,610 + 17,587.5 + \$25,498 + 19,304.50= \$80,000

Total 2021 YEAR to date expenses (include this quarter): = \$ 28,837.05 + 28,252.50 +61,651 + 59,804.5=178,545.05

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

Are you within the approved budget plan and categories? Yes- donated extra hours/ overage as match to stay within budget

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: 1-16-22

QUARTERLY FINANCIAL REPORT

Quarter: (circle one) 2021 1st 2021 2nd 2021 3rd **2021 4th**

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

Billing Address: Terwilliger Consulting Inc., PO Box 99, Locustville, VA 23404

A. Current Quarter Eligible Cost Summary:

	CONTRACT FUNDS	MATCH*	TOTAL
<u>Personal Service Cost</u>			
Salaries and/or Wages	6,811.00	40,500	47,311
Fringe Benefits			
Personal Service Indirect Cost ___%			
<u>Non-personal Service Cost</u>			
Travel			
Equipment			
Supplies & Materials			
Contractual Services	5620 + 2660 + 4,213.5		12,493.50
Other			
Total Direct Cost			
Indirect Expense			
TOTAL	\$19,304.50	\$40,500	\$59,804.50

*Match is a requirement of some grant programs; list matching funds if specified in contract.

**Please provide receipts or invoices for all direct expenses

B. Cumulative Total Grant Eligible Costs Claimed from Beginning of Agreement up-to-and Including Current Quarter:

Total Life-to-Date Expenses (2021)	
Year 4 of 5 yr workplan 2021 Expense	yr 4 qtr 1+ 2+3 = \$ 28,837.05 + 28,252.50 + 61,651 + 59,804.5=178,545.05
Less Previous Payments Processed 2021	17,610+ 17,587.50 + 25,498.00 = 60,695.5
Less 2021 match	\$11,227.275 + 10,665 + 36,153+ 40,500=98,545
Total Amount Due Contractor Now:	\$19,304.50

C. Salaries and Wages Summary for both Grant Funds and Matching Costs*:

Date	Name, Affiliation, Title	Rate	Task		Total Cost
10/1-12/31-2021	Karen Terwilliger	\$135/hr	Technical services	350.45	47,311
“	billed		RSGCN, RCN, Database, NEFWDTC charges	50.45	6,811
	match		Coordination, admin	300	40,500
“					

*Match is a requirement of some grant programs, document match if specified in contract.

NOTE: This certification must be signed prior to reimbursement of costs unless daily time and activity records summarizing personal services performed in relation to the project for each individual employee are signed by the appropriate supervisor and attached.

CERTIFICATION OF CONTRACTOR

I hereby certify that daily time and activity records for each individual detailing the specific hours devoted solely to this project which are distinguishable from work done on other projects during the same time frame, maintained in accordance with all applicable federal, state and general municipal accounting practices and procedures are available in our files for inspection.

TERWILLIGER CONSULTING, INC.

By: *Karen Terwilliger*

Name: Karen Terwilliger

Title: President
Duly authorized

Date: 1/16/22