Crown of the Continent High Five Working Group

Meeting Summary  
September 15, 2016  
O’Shaughnessy Cultural Arts Center  
1 Central Ave, Whitefish, MT 59937

**Participants:**

Diane Tomback  
Whitebark Pine Ecosystem Foundation

Kyle Johnson  
U.S. Bureau of Land Management

Michael Allbritton  
U.S. Bureau of Land Management

Rick Connell  
Flathead National Forest

Dave Soleim  
Glacier National Park

Scott Murphy

Waterton Lakes National Park

Jed Cochrane  
Parks Canada

Helen Birk  
Montana Conservation Corps

Delaney Peter

Dawn Lafleur  
Glacier National Park

Mary Riddle  
Glacier National Park

Greg Denitto  
US Forest Service

Linh Hoang  
US Forest Service

Valerie Walker  
Lolo National Forest

Elliot Meyer  
Lolo National Forest

Ken Reed  
U.S. Bureau of Land Management

Ian Dyson  
Alberta Environment and Parks

Kella Sadler  
Environment and Climate Change Canada

Brad Jones  
Alberta Environment and Parks

Justin Hynicka  
American Forests

Jody Krakowski  
Alberta Agriculture and Forestry

Rob Sissons  
Waterton Lakes National Park

Michael Murray  
British Columbia Forest Service

Randy Moody  
WBEP Canada

Melissa Jenkins  
Flathead National Forest

Liz Davies  
Heart of the Rockies Conservation Initiative

Cyndi Smith  
Whitebark Pine Ecosystem Foundation- Canada

Danah Duke  
Miistakis Institute

Brenda Sheppard  
Jasper National Park

Peter Achuff

Scientist Emeritus

Robin Gutsell  
Alberta Environment and Parks

Marcus Jackson  
U.S. Forest Service

Michael Reichenberg  
Flathead National Forest

Stephanie Keightley  
Canada Forest Products (CanFor)

Travis Sjovold  
Alberta Environment and Parks

Jenny Burgess  
Alberta Environment and Parks

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U.S. Fish and Wildlife Service

Rick Yates  
Flathead National Forest

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Rob Nagled

Mike Giesey  
Kootenai National Forest

Roian Matt  
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Flathead Biological Research Station

Shannon Blackadder  
Crown Managers Partnership

Ted Gullison  
Teck Resources

Keith Bott  
Riversdale Resources

Mary Frances Mahalovich  
U.S. Forest Service

David Walker  
Consultant (Lake Louise)

Dave Hanna  
The Nature Conservancy

Jim Lindstrom  
U.S. Fish and Wildlife Service

Amy Nicholas  
U.S. Fish and Wildlife Service

Regan Nelson  
Crown Conservation Initiative

Sasha Harriott  
Crown Managers Partnership

Chris Prew  
Flathead National Forest

Marsha Moore  
Flathead National Forest

**HIGH FIVE WORKING GROUP CHARTER AND MISSION**

A subcommittee has worked since the March 2016 workshop in Fernie to draft a governing charter that would formalize the High Five Working Group. Diana Tomback gave a short presentation outlining the draft High Five Working Group charter, and led a group discussion to elicit feedback and input on the draft. The draft charter included a Mission Statement, and defined the role and membership of the Hi5 Working Group, it’s responsibilities, administrative structure, and subcommittees.

The group suggested the following amendments:

* Mission Statement: change “treatment” to restoration; remove “resilient” as its not well-defined. Group decided we can define “functional” so let’s keep that language. Change “maximize funding opportunities” to “leverage funding opportunities…within applicable authorities”.
* Working Group Membership: The group discussed the membership structure at some length. The Charter as drafted stated one individual from each organization would formally be a working group member; additional individuals from organizations could participate, but wouldn’t be a formal member. Folks felt this was too restrictive and the working group should strive to be more collaborative. Yet, folks recognized that to be fair in terms of decision-making, we needed equitable representation (e.g not too many individuals from a single organization). The group suggested that each entity would have one representative appointed that is part of the working group, and would represent the entity in any decisions required of the Working Group. But the entity could have as many individuals participate in working group subcommittees/activities as are interested.
* The group suggested that organizations could “sign” the charter. Each of the charter signatories would be listed in an Appendix along with a point person from that organization. The organizations would constitute the Working Group membership, so multiple individuals from an organization could be part of the Working Group, although the point person would be the lead “decision-maker” for the organization in Working Group matters.
* Administrative Structure: Some folks asked if the Working Group needed a subcommittee dedicated to funding and fiscal management? For the time being, we decided it would be important to have a liaison from the Crown Managers Partnership participate on the leadership team to help oversee any fiscal needs that arise.
* Amending the charter: Folks suggested the charter needed to contain a clause about what was required to amend the charter.

***Motion to approve the charter as amended. No one is opposed to the charter as amended.***

* Diana Tomback and Regan Nelson agreed to revise the charter as suggested in the meeting, and circulate a final draft, and at that time ask for interested organizations to “sign” the charter to become formal Working Group members.

**HIGH FIVE WORKING GROUP MEMORANDUM OF UNDERSTANDING**

Linh Hoang led a conversation around whether or not the Hi5 Working Group needed a Memorandum of Understanding (MOU) or some other legal instrument to secure the commitments of various agencies and organizations to carry out the responsibilities of the Working Group as spelled out in the charter.

Some of the benefits that participants agreed might be delivered by a more formal legal agreement included:

* Ability to share data across entities
* An endorsement and commitment by entities to fully execute the responsibilities in the Charter, by providing staff capacity to participate in Working Group meetings, subcommittees and activities
* Some agencies need a formal agreement to gain support for participation and access to funding. In some situations, a charter will suffice for these motives.

Some of the drawbacks of pursuing a formal legal agreement included:

* Some agencies felt the level at which an MOU would have to be reviewed and approved was too much of a hurdle (the international nature of our landscape means any MOU may need to be reviewed at the highest levels of federal government).
* Some organizations felt they couldn’t sign an MOU, even though they would commit to delivering on the charter. Others felt an MOU would bog us down in unnecessary bureaucracy.

The group discussed that sharing resources and data were the primary issues that may need to be addressed through a legal agreement, but suggested exploring alternative means to an MOU. For example, cost-sharing agreements between agencies could be developed on a case-by-case basis, where needed. The Crown Managers Partnership could explore developing a data-sharing agreement for all conservation priorities, not just five-needle pine. The CMP uses Transboundary Management Protocols that are intended to list the commitments of various entities on shared objectives. The High Five Group could use these to formalize their delivery components.

No formal decision was made by the Working Group about whether or not to pursue an MOU at this time. The Working Group will put the MOU/legal agreement discussion on the back burner until such time as it is necessary to revisit this discussion.

**UPDATES FROM Hi5 WORKING GROUP SUBCOMMITTEES**

Seven subcommittees were formed at the March 2016 Fernie workshop, and several of these have been hard at work over the summer to advance the goals and objectives they set for themselves. The subcommittee leads were invited to give updates to the Working Group about their progress, to advise of their needs, and to outline their next steps. The Working Group members then provided feedback and sought to make necessary connections between the work of the various subcommittees.

**Inventory and Monitoring Subcommittee: CCE-wide Five needle pine database**

One of the first priorities of the Inventory and Monitoring subcommittee was to determine what it might take to form a Crown-wide database for 5NP in the CCE. Shannon Blackadder, a Research Technician with the Crown Managers Partnership, develop a scoping document outlining the justification, required setting factors and suggestions on initial project scope, and she presented the results of this scoping project to the group. Shannon’s scoping document will be sent alongside this meeting summary.

To develop her recommendations, Shannon consulted with similar initiatives (Greater Yellowstone Coordinating Committee, the US Forest Service WLIS project, and the Rocky Mountain Inventory and Monitoring Network), and considered transboundary nature of the project, to determine that the following five “setting factors” need to be in place before beginning a transboundary, common database:

* **Leadership**: Need someone who can champion the work, ideally from partner agencies who already manage 5NP data, and who can facilitate cooperation.
* **Data Agreements in place**: Need agreements in place to allow for seamless data sharing, including how information can be stored, collected and shared. Permissions. Need to determine how as a group we can share data, need to be able to share data at the same level, the exact same way. Need to be able to give data back out, need to have clear ideas of how this will work within individual agencies. Some agencies do not want to give out exact location data.
* **Users’ Needs Assessment:** What are the goals, objectives and timelines of the database? What do we need a database to do? Think both short-term and long-term. Set up data structure to support long term objectives. Set up the criteria of the database can be painstaking but is the most important step.
* **Funding**: A big undertaking. Need to have funding in place for at least two years based on the Greater Yellowstone’s efforts. Funding for both staff and technology.
* **Plan for future**: A functional database requires long term maintenance and storage. Who will house the data base, who will access?

Shannon recommended that the group’s efforts to develop a common database focus on keeping the initial project as simple as possible, to see what can be borrowed from other projects/collaborations, that the project minimize the complexity of data input, spend time setting up criteria to develop the database, and consider how the data will be used and shared.

*Comments and Questions:*

* When asked “What do you think is the initial first step?”, Shannon replied we need to have a data sharing agreement of sorts in combination with a user needs assessment. Need to take a look at all the other types of databases and see what they are collecting.
* I and M Network, needed to add limber pine, incorporate monitoring of planting, etc. Critical to have all needs listed before developing the database.
* A meeting participant suggested we should consider the WBPEF area instead of a smaller focus of the CCE.
* Need data on limber pine.
* Do we need a single database or is it a set of data standards so that everyone is collecting the same data and using the same units?

**Inventory and Monitoring Subcommittee: Opportunities for citizen science initiative**

Danah Duke, the Executive Director of the Miistakis Institute, a non-profit research institute in Alberta, discussed how citizen science could help advance some of the objectives of the High-5 Working Group. The Miistakis Institute successfully uses citizen science to help generate data to inform conservation challenges, and they develop the tools and frameworks that contribute to successful citizen science projects. Danah said the benefit of citizen science is the marriage of getting data and engaging people. The power of engagement of the people drives the approach. She described several existing citizen science initiatives that the Miistakis Institute has led, including:

* RoadWatchBC – a smart-phone app that engages the general public about where wildlife crosses the road. Spatial reference about what the public saw. Have built in functionality, volunteers are driving designated routes of highway. A simple interface reduces the need for training. Participants are able to view their contributions.
* Grizz Tracker – Peace Region in Alberta, an app to gather data about where people are seeing grizzly bears. Partnership between government and industry currently.
* Call of the Wetland – City of Calgary, engaging the public. Identification tool, unique as you can upload a photo or call of the animal. People sitting at home can help in classifying the data.
* Opportunities: occurrence and condition data can be collected
  + Design and address absence data
  + Include both public and private land
  + Can address both public awareness and data needs.
* Program Considerations:
  + User needs assessments
  + Data collection tools (mapping tool, smartphone application, mobile website data collection form)
  + Useability testing
  + Program implementation (timing, who are you engaging)
  + Promotion and coordination with volunteers (on the ground coordinators engaging volunteers)
  + Ongoing maintenance and updates (updating and continually engaging people and technology)
* Lessons Learned:
  + Importance of establishing goals and objectives
  + Determine how data will be used
  + Determine how data will be shared
  + Willingness of people to participate
  + Importance of useability testing
  + Importance of local champions and promotion/coordination

*Questions/Comments:*

* Subset user group would be private landowners. Need to address sensitivity issues around species at risk.
* Would be an excellent mechanism for collecting data on limber pine. From ground up to implementation and on-going maintenance for a citizen science app would cost from $50k-150K.
* There is an app that is already created to capture 5NP location data. Free ESRI app. – Jodie Krawkowski

**Crown-wide 5NP Restoration Strategy Subcommittee**

Robert Sissons and Michael Murray are co-leads of the Restoration Strategy Subcommittee. They discussed the need to develop a scoping document that would provide an outline for how the Working Group can work together to develop a Crown-wide Restoration Strategy, and outline what the restoration document will look like. Rob suggested that restoration strategies for 5NP already exist (e.g. in the Whitebark Pine Range-wide Restoration Strategy, for example) and we do not need to recreate the wheel, rather we need to focus on where/when to apply strategies across the landscape.

Rob suggested the working group discuss the possibility of holding a 2-3 day workshop, with a moderator, to develop a draft report. He suggested we look at established conservation planning models (for example, Results Chains) to guide our effort.

Diana Tomback mentioned that the WPEF and American Forests are currently collaborating on a possible restoration strategy for the U.S. Rockies, and these processes should work off of one another to the extent it makes sense.

Meeting participants suggested that our restoration plan develop criteria to prioritize areas across the Crown, irrespective of legal boundaries and jurisdictions. This will help the Working Group to understand where action is most important – recognizing that there is not enough money to restore everything everywhere. This kind of boundary-less analysis and planning helps to ensure that money gets directed to most important areas, and the Restoration Strategy can be incorporated into individual agency planning initiatives. Regan mentioned that there is $3,000 from American Forests to support a workshop in the spring.

**Fire Subcommittee: Best Management Practices Guide**

The Fire Subcommittee decided to develop best management practices guide that managers across all jurisdictions could incorporate into their jurisdictional fire planning efforts. Bob Keane presented a matrix of prescribed fire and restoration treatments pre and post-wildfire for a set of situations, land types, site types and stand conditions, that could form the foundation for a best management practices guide. The table includes prescribed burning actions before fire, possible companion mechanical restoration actions before fire, possible restoration actions after wildfire or treatment.

Meeting participants were enthusiastic about the product, and suggested the need for this guide to influence/be included in the development of the Crown-wide Restoration Strategy.

**Mitigation Subcommittee:**

Canadian Federal Recovery Strategy for Whitebark Pine in Canada

Kella Sadler gave an update on the Canadian Recovery Strategy for whitebark pine. As a species listed under the Canadian Species At Risk Act (SARA), whitebark pine is in the process of having critical habitat designated. Critical habitat in Canada needs to be protected whether on public or private land. She said critical habitat is being developed to account for seed dispersal, to support existing individuals, for regeneration and recovery. She said more information on the location of whitebark pine is needed.

One thing Kella hopes this group can do is to help identify mitigation strategies that are appropriate to use if critical habitat is threatened or destroyed. She would like to be able to point people in the right direction, and provide a consistent and unified message.

One meeting participant urged Kella to ensure the critical habitat rule addressed areas that function as suitable habitat but there are no trees found (due to for example fire).

**Development of a Five-Needle Pine Mitigation Strategy**

Randy Moody is the lead of the Mitigation Subcommittee. Randy explained that we need mitigation strategies for industry when 5NP habitat is compromised, and that government needed to ensure fair and appropriate mitigation was being assigned across the landscape. Randy presented data that showed how projects which disturbed or destroyed five needle pine often had very different mitigation required of them, and there was little in the way of monitoring to ensure mitigation was implemented. Randy would like to form an alliance with industry to partner with and share funding.

**Comments/Questions:**

* In mitigation are you considering the individual tree or the function of that tree or group of trees?
  + In Canada, species at risk are protected on federal lands once they are listed. Critical habitat is not protected until the document comes out.
* Mitigating by planting seedlings for replacing adult cone producing trees is not replacing the functioning habitat. Seedlings will die due to blister rust, habitat loss for wildlife.

**Protected Areas Strategy Subcommittee**

The lead for the protected areas strategy subcommittee was not present. However, Diana Tomback outlined the purpose and need of this subcommittee. She explained there is a difference in what you can do in wilderness areas and reserves in Canada and the USA. In Canada, there are many different types of wilderness and is related to the establishment of a provincial and federal parks. There is no designation of wilderness in Canada that would preclude restoration strategies for WBP. In the USA, there is a Wilderness Act. Wilderness Areas are specifically protected to precludes “trammeling”, which has been defined to mean it is not permissible to take motorized vehicles or use motorized equipment (hand saws only). Wilderness areas are meant to maintain primeval characteristics of the appointed lands. Various restoration practices have been labelled as trammeling.

Around half of the WBP in the US is located in Wilderness Areas. Currently, the Whitebark Pine Ecosystem Foundation is in discussions with US Forest Service and have asked them to come up with a more uniform policy around trammeling and WBP restoration.That being said, there is plenty of work outside Wilderness Areas to work on.

One meeting participant discussed that there is a more national conversation occurring around climate change and how many ideas should be applied to Wilderness Areas because of climate change. For example, in Glacier National Park they are removing non-native fish with a motorized boat in the Wilderness Area due to the importance of the area in the face of climate change. The group discussed the need for reaching up to higher management levels to inform their discussions.

**Communications Strategy Subcommittee**

The lead of this group is Megan Evans, but she was unable to attend this meeting. Regan Nelson gave an overview of the purview of the subcommittee. The subcommittee would work to pull together a multi-faceted communications strategy, aimed at different audiences. She noted that the Crown is the epicenter of the blister rust infection of five needle pine, and the Crown is in danger of having 5NP species go functionally extinct in our landscape, yet very few people understood how dire the situation is. We need to communications strategy that will 1) help inform the public as to the urgency of the situation, to help build political will for active restoration, and 2) help inform decision-makers as to what is necessary to keep the species on our landscape. The Communications Strategy subcommittee will have their first meeting in October, 2016.

**SUBCOMMITTEE MEETING REPORT-OUTS**

After hearing updates from all the subcommittee leads, the subcommittees then broke out to discuss their next steps, based on the feedback they heard from the full working group. We then reconvened, and each of the subcommittees shared their next steps.

Fire Management Subcommittee

* They have decided to simplify the matrix that Bob presented
* They think the Restoration Strategy subcommittee should review the draft product to make sure it is appropriate and matches the direction that the Restoration Strategy is headed – they will get a draft to Rob/Michael by January, 2017.
* The subcommittee will finalize their draft BMP guide and circulate to the full Hi5 Working by March 31, 2017.
* The subcommittee also talked about developing a one-pager on long-term strategies & tactics for incident management teams and people working on the ground.

Restoration Strategy Subcommittee

* Priority: User needs assessment – complete in the short term
* User needs assessment will help form the scoping document.
* Call out for additional data and augment existing data
* Fill in data gaps continually
* Short term, get people to help write the strategy

Restoration and Highly Protected Areas Subcommittee

* They suggest consider applying Aldo Leopold’s Institute decision making tool as part of the development of the Crown-wide Restoration Strategy, with regard to relevant strategies for the wilderness areas in the Crown.
* The group suggested a need to analyze historic/potential habitat in wilderness areas, and to identify short and long-term goals in Wilderness Areas. For the long-term, want to clarify permissible actions or need for non-action in Wilderness. In the short-term, we need more engagement between wilderness managers on this topic.
* The subcommittee will contact the wilderness coordinator in Region 1 and Region 6 to get an idea of what actions are being taken in the wilderness in regards to whitebark pine across agencies that have wilderness.
* The group suggested the subcommittee lead of the restoration and highly protected areas needs to be a part of the needs assessment.

Mitigation Strategy Subcommittee

* The subcommittee will come up with best management practices for each of the steps of the mitigation hierarchy (i.e. avoid, minimize, restore, offset) for each sector considering landscape scale planning
* Come up with an inventory standard for BC and coordinate with the inventory and monitoring group and the restoration group.
* Coordinate efforts for seed/seedling availability
* Coordinate screening efforts
* Create a map of all the tenure efforts
* Mainly focused on industry need to consider recreational activity
* Funding needed for an in-person meeting

**Milestones for 2016-2017**

The Hi5 Working Group then discussed the key milestones they hope to accomplish through 2017. These include:

* Fire Management Subcommittee –
  + The Best Management Practices document will be completed March 1, 2017. Fire managers will from Canada and the USA will be reviewing the BMP document strategy as well.
  + Will put together a contact list of fire contacts for CCE.
  + Strategy and tactics one pager for incident management teams and people on the ground
* Mitigation Subcommittee-
  + Need a list of different tenure holders/industry lands in the region, particularly for the US side.
  + TECK has a whitebark pine action plan in place and will provide to the group to overview.
  + Want to meet the minimum needs of the restoration group guidelines. Will need to coordinate.
  + List of nurseries and people who can contribute seed – Jodie Krawkowski
  + Mitigation strategy and BMP first draft will be completed by January 31
* Inventorying and Monitoring Subcommittee
  + Greg Denitto volunteered to be the lead for this subcommittee
  + This group will need to explore appropriate data sharing agreements, and should work with the CMP to do so.
  + Need long-term commitment and home for the database
  + For the restoration strategy, the group discussed the need to do a new call-out for data, to review existing distribution maps, overlaid with known observations and known health data (Shannon noted that CMP has Crown-wide data layers in mountain pine beetle outbreaks and fire history). Use this information to identify data gaps, and prioritize filling those if possible in 2017 field season.
* Charter
  + The leadership team will do a quick turn-around on the charter, and will ask participating organizations to “sign onto” the charter by agreeing to be listed in an Appendix of the charter as a working group member.
* Restoration Strategy Subcommittee
  + Complete users needs assessment.
  + Complete minimum requirements for data request.
  + Looking at having a path forward, working document/outline ready in January. Need to identify criteria for restoration, and determine data needs to conduct the analysis.
  + Explore the potential of a spring workshop to begin developing restoration strategy and data management subcommittees focus. Small group meeting.
* Protected Areas Subcommittee
  + Assessing the restoration actions that are being considered across the CCE with the Assessment framework
* Meetings
  + Hold a Hi5 Working Group conference call in January 2017 & April 2017.
  + Next annual in-person meeting in Jasper, September 2017, to co-occur with Whitebark Pine Ecosystem Foundation Annual Science Meeting. We can work to coordinate our meeting with Brenda Shepard, who will be lead organizer of Whitebark Pine Ecosystem Foundation meeting.

**America Forests:**

* 1875 started out as a professional organization
* Have a grant program called Global Releaf
* Looking at other ways to fund forest restoration
* New focus areas, WBP is one of them
* Biggest partner has been the USFS, only plant on public land. Typically set up a cost share agreement.
* Typically an open grant process, this year would be a closed process with focus on specific areas, the CCE is one of them.
* Have funded nursery projects in the past.

**Nominations for the Leadership Team:**

***Co-Chairs***

USA:

Melissa Jenkins

Canada:

Brad Jones – Alberta Agriculture and Forestry

***Associate Chairs***

USA:

Dawn LaFleur – GNP

Linh Hoang - USFS

Canada:  
Randy Moody – WBPEF Canada

Nominees will seek approval from their supervisors and report back.

Leadership team is conditionally accepted.

Special thanks to American Forests for   
providing funding for this meeting!

