



## Species Conservation Planning Working Group

### 2009 CBSG Annual Meeting 2009 St. Louis, MO, USA

#### Participants

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#### Objectives

- Explore mechanisms by which CBSG's conservation planning processes can be improved by integration with the SCSP process
- Think about Jan/Feb 2010 CBSG workshop design and goals
- Determine the implications for application of tools to the question of population stability (both intensively and extensively managed populations)

#### Background

The SSC is interested in revamping their conservation planning process to emphasise action and ultimate success for species persistence and function. A Species Conservation Strategic Planning task force has been established, Bob Lacy is the chair of this taskforce.

Traditionally SSC specialist groups planning:

- are focused on a single or few species although some have multiple species impacts
- have been developed by biologists alone i.e. no diversity of stakeholders which is built into CBSG processes and recognised as an element essential for success
- visioning has been quite high level and does not necessarily define success: avoid extinction for how long, save all populations, within a certain range, define cultural relevance
- lack details such as the barriers to achieving goals and what will need to be accomplished to succeed? What will be necessary and sufficient, who is responsible, by when must this be performed?

The result is plans developed and implemented at the policy level, providing guidance but not getting the work done the ground. CBSG has been chosen as the lead agency to drive forward and coordinate other SSC groups in this area due to its history with successful conservation planning in the past. There was some resistance to CBSG taking this lead role - others have expertise and felt this would be undermined if they were to be subsumed by CBSG. A Conservation Planning SG was also suggested to be run by CI, WWF or some other independent group – there was even more resistance to this suggestion. So, a new secretariat along-side Red List lead by CBSG but with equal partners CBSG. It is a challenge for CBSG to determine how we contribute without appearing to dominate the process. There are no firm terms of reference yet for this body, but there are general guidelines.


A new SSC tool has been developed to address the short falls of this process. The SSC will evolve, promote and implement this tool over the coming years.

#### How the Tools Compare

The new SCS process and its relationship with PHVA's in particular are in the briefing notes and handouts. The apparently similar nature of the Species Conservation Strategy (SCS) tool and the CBSG planning tools such as PHVA and CAMPs has prompted us to clarify the role of each planning tool and perhaps modify the tools to reduce the risk of confusion with SSC processes.

#### Status Review

Current conservation context, for the taxa/areas under review, species description, summary of values put on the taxon, historical distribution, habitat assessment, threat analysis, current conservation management, spatially explicit to the extent possible, and use all of the sources of data where possible. This would compare with the common practise of pre-PVA to establish baseline models before the actual workshop. In either case, care has to be taken to ensure inclusivity and an extensive element of stakeholder buy-in, perhaps in the data gathering process. Should be ongoing, data can be added in and should continue to inform objectives, goals, etc.



The SCS includes a clear articulation of the vision, - all actions feed back into trying to achieve this goal - what the group wants to achieve as a desired future state e.g. viable populations of species X that are ecologically functional and successfully co-existing with local human populations that value them. It was felt that the PHVA could benefit from including this element more explicitly. This could also be used as an evaluation tool – which would be a valuable addition to any process for long term conservation planning.

Goals, that rephrase the vision in operational terms, including wording on the number of populations required, the size and range of each population, spatial connectivity, defining viable, multiple, with what purpose, to meet what human goals etc.

Goal targets in the SCS outline the goals that can be realistically achieved over the lifetime of the strategy (5-10 years).

Objectives outline the activities that are required to achieve the goals and address the threats outlined in the status review as well as constraints such as lack of institutional capacity to make change or other sociological impediments. Additional threats and constraints not identified in the status review can be identified through problem analysis, such as problem trees, mind mapping, causal flow diagramming, etc. This is necessary to develop objectives that genuinely ameliorate threats and constraints.

Objective targets outline the targets that can be realistically achieved over the lifetime of the strategy (5-10 years). PHVA models inform conservation scenarios, then develop goals and actions to achieve those scenarios. Actions in both tools provide detailed guidance on the activities needed to address each objective target within the next 1-5 years. Each action – in fact each goal and objective target is required to meet the SMART criteria so as to make them as practical and achievable as possible.

#### **Discussion of the tools relevance:**

The SCS process is intended to be flexible taxonomically, so to be applied to jaguars, parrots of Mesoamerica, general flow of info and discussion would be equivalent. Modelling of human behaviour has not specifically been brought up by the SSC.

The timeframe of the SCS has been discussed as being anything from the PHVA highly intensive 3-4 day period to a multi-month process (e.g. cheetah).

Lacking in the SCS is inclusion of explicit risk assessment component, partly because scope could be so large as to make specific risk assessment unreasonable. PHVA's are problem based. If we change the type of risk assessments we do, PHVA's may be more applicable to the wider taxonomic scope. We will need a new type of risk assessment to handle all conservation programs. Risk assessment is necessary but we can look at very broad parameters, degree of habitat destruction, fragmentation, loss, etc. The resulting risk assessment may not be as refined but will give you a good idea of species status. IUCN (Jean Paul Rodriguez contact) meetings in Barcelona passed a resolution stating that a process should be started to explore establishing categories and criteria for risk assessment at the ecosystem level. Commission for ecosystem management have identified it as something they are interested in.

To have an iterative component on a large scale plan – overall plan then have multiple species plans that fit under it that give locals a greater direction on how to proceed

There remains a focus on species rather than on larger ecosystem areas, but there is no implication that this is always the best level at which to direct conservation planning.

An inflexible system will not work for long, particularly with the added complexity of climate change: Novel approach is needed in case of unexpected things, e.g. species moving out of natural range, external influences. Need a regional approach to planning future range, geographic scope of planning.

We also need to deal with the conservation mis-match issue. On first review some actions may seem like the ideal conservation solution but further review could identify it as sub-optimal.



## Meshing the processes

We need to be aware of increasing body of people who know about the SCS process so will expect a PHVA to be a SCS format. Further, some SSC members will only follow SCS “rules” while others will see it as a guideline, to be melded to the needs, experiences etc. There should be understanding that different means/elements can be used to achieve an optimal conservation strategy. There may be SCS accreditation process – not yet determined. Nomenclature of all planning processes should be as easily assimilated as possible to avoid time wasting debates, and make state up front transparently which process we are undertaking before you start. The SCS process is the overall conservation planning process that could address wide ranging questions such as: fungi of Cambodia, invertebrate planning for the Congo, range wide distribution of Jaguars in central America (multiple populations, habitats, countries etc), versus mountain gorillas (limited range, individuals). These would require different tools applied depending on the request from the group under the umbrella of the SCS:

- PHVA’s are a powerful tool in the SCS process focussing on species and population level.
- Range wide priority setting (RWPS) include spatial mapping, intensity of threats, position, determine high priority areas, apply conservation units to those areas. PHVA’s may be completed for each high priority areas (then combined under the RWPS).
- CAMP’s, CAP’s may need to be updated and will likely be most useful for priority setting and large scale analysis

These are all types of SCS’s. SCS is the end point – not a specific tool.

The taskforce discussed the guidelines of the process – not recommendation of which tool to use, this is something CBSG will take on in a Feb 2010 meeting.

The SSC taskforce who have some experience with PHVA’s see them as a powerful tool as part of an SCS. There may not be common agreement on how much value in the wider SSC community, partly due to lack of experience with PHVA’s in this group. There have been some significant questions on the value from some. We need to make the evaluation of PHVA outcomes to promote the value of the process to the SSC. This process has begun several times and some processes have been evaluated, but others have been stalled.

Reports of the PHVA’s and SCS are very different - SCS reports go to government and are formal policy documents, PHVA reports are less formal and not in fit format for submission to government. PHVA reports are more likely to be living documents through mass collaboration tools. The SSC has not decided what the species conservation plan would look like once it is finished.

These planning processes must be applied to captive populations.  
We need a structured decision making process at PHVA’s.

## January February Meeting:

### Purpose:

- Invitations to come from the SSC. For the benefit of the taskforce and all planning practitioners.
- To identify suite of tools for conducting an SCS
- To compare and contrast tools to ID strengths and weaknesses across tools
- To gain clarity on where specific tools – including PHVA – fit on the landscape of SCS planning need
  - GAP analysis and opportunities for integration
- To figure out how CBSG can better respond to the SCS process and better serve its role for species conservation planning

Recommendation: Put together a summary paragraph of a proposal to be delivered to Simon Stuart at WAZA – to be given to Bob Lacy to review and sign.

Phil and David to prepare during lunch

Recommendation: Put together a workshop planning team to begin dialog with Simon Stuart about workshop and subsequent proposal



## Thoughts around the meeting

- Species is a defined category – ecosystem is not a defined unit, or geographically explicit area, do we deal with levels of complexity?
- An opportunity for the people who use these tools around the world, and figure out where you might pull pieces together to achieve the stated goal
- Form consensus on the format of final conservation plans
- Consider the impacts of climate change in developing and improving tools
- Strengths and weaknesses in the PHVA – need to make PHVA to be that much better for the end users. Explicit criteria for determining strengths and weaknesses – will also help with evaluating at the field level. Need an overarching overview of all processes (not just CBSG) to fit each together into the SCS process. Need to have stakeholders at the table to gain information on all planning processes but also to get over the “Bristol effect” by taking doubters into the planning process.
- Best fit and nomenclature standardisation with SCS processes. Maybe PHVA becomes a SSC accredited tool for SCS? SCS may become a type of “metamodel” or “metaprocess”. The danger of accreditation and/or proscription is that the flexibility is lost – this would be deadly.
- Develop a more complex decision tree to decide how each planning tool would be used to achieve the SCS endpoint.
- Important that the taskforce be well established and have the mandate set forth for the task-force. Must define the problem and the issue to take to the meeting

## Prioritization

Generally CBSG get involved after a prioritisation process has determined that the focal species/area are worthy of conservation. SSC will often decide when is a logical time to tackle a particular species, but no-one has taken on the responsibility of developing a system to triage species/areas. Even the red list says that the list is not a basis for prioritisation.

There is now global recognition that we will not be able to achieve effective conservation if we aim at everything (e.g. primate action plans). Species are already prioritised over others, generally based on the charisma of the species, the passion of key people, or the level of threat. Threatened status only describes the amount of effort required to drag a species back from the edge of extinction, we now require a conscious triage/prioritisation system that addresses the following issues:

The ecosystem value of species – architectural species without which the ecosystem would fail/cease to provide services. Identify and protect the weakest links within an ecosystem – i.e. the most vulnerable point of structure  
Assess function as well as abundance of species within an ecosystem (species activity change as a result of climate change/disease)

Priority must be given to species that are resilient to climate change, and improve the ecosystems resilience to climate change. Eg top predator extremely important in the resilience of the ecosystem. Amphibian die off has led to homogenisation of populations and therefore reduced resilience. This has not been considered to our knowledge, but may be a role for CBSG. Evolutionary standpoint can inform long term resilience.

Common species must be considered due to the unpredictable nature of species decline, environmental change – we must be ahead of the red list. Does this make prioritization irrelevant? Species prioritisation may not be as important as we think. Common species e.g. devils, were not considered prior to DFTD. Due to unpredictability of population decline (e.g. devils). Sustainability should be considered on equal footing – establish what we can, rather than what we should.

Perhaps a matrix is the way to go – address key threatening processes (poaching, habitat destruction, invasive pests, disease etc) with conservation actions (insurance population in captivity, buying land, lobbying government to protect areas, change policies, work with local communities, education etc). Within each abatement strategy the species/areas should be prioritised with a matrix that would multiply the vulnerability (red list and other factors) with species importance (ecosystem services, climate change resilience)



## Process Considerations

- Need to allow outlets for the passion of skilled people as well as recommending effort concentration.
- Use these tools to plan/approve captive collections and buildings. Populations must be sustainable to be approved. Collection planning should not be done in the absence of this type of planning.
- At what level do we prioritise? Do we concentrate on areas where species are more vulnerable? Importance of region/country/valley specific data. How do all the pieces tie together?
- The new species conservation planning secretariat will be sitting next to the red list, this will facilitate the red list playing an important (although not overpowering) role in the matrix.
- This should not be a proscriptive process – dictating to governments what to work on. This should assist in clarifying difficult decisions not remove the ability to work on a species that is already the focus of conservation efforts.
- How do we get the data, disseminated to and the actions taken care of within each country?
- Zoos need to prioritise research to test species preferences/tolerance etc – ecophysiological data
- There is likely to be disagreement about the classification system – there is already dissent with red list. This matrix will aim to bring greater understanding and agreement about the importance of conserving species, and incorporate many important issues as well as red list.
- We cannot take too much responsibility for prioritisation through to implementation
- What role does the CBSG take- do it or hand it over? How about offering help to develop a tool that would be helpful to us?

There are tools that may be able to be modified to suit our purposes

Recommendation CBSG to offer to open communication between the SSC and WCPA to link planning efforts as a way to develop an effective strategic prioritisation tool for species and habitat planning

Action: Rebecca and Bob Lacy to talk. Bob to talk with Simon Stuart about establishing this contact.

## Structured Decision Making

All objectives are incorporated into goals and actions

The consequences of all actions are evaluated against each objective

Objectives could be weighted, and the impact of each action with respect to each objective is assessed to make sure that each objective is covered according to its weight.

e.g.

Objective minimize extinction (other objectives are to reduce cost of program, minimise impact on agric., max local buy in)

Goals/actions

Conservation plan for species X