

# DESIRED CHARACTERISTICS FOR HABITAT JOINT VENTURE PARTNERSHIPS

Element	Sub Element/ Product	<b>TECHNICAL EXPECTATIONS</b>	
		Minimal Content-	Comprehensive Content-
		Expected characteristics and level of performance for newly established and/or minimally-funded Joint Ventures*.	Joint Ventures* should move toward this content as a Joint Venture matures and funding levels increase.
ORGANIZATIONAL PERFORMANCE	<b>Coordination/ Partnerships</b>	Joint Venture* develops a vision for the Joint Venture's future; establishes and implements strategies to achieve that vision. Joint Venture develops and maintains strategic regional alliances, consistent with the Joint Venture's mission. Joint venture office provides leadership to develop, with the Management Board**, a strategic implementation plan to define and achieve the goals of the partnership.	Joint venture office and Management Board actively work to broaden the external partnership with relevant individuals and organizations. Joint Venture maintains strong professional contacts and connections, networking to keep the Joint Venture abreast of current conservation issues, techniques, etc. Joint venture office identifies partner capabilities to address the Joint Venture mission and works with partners to address any missing capabilities through additional staff, partners, contracts or training appropriate to the size and complexity of the Joint Venture region. The Joint Venture participates in development of common joint venture messages to Congress and other relevant national entities and cultivates informational relationships with its Congressional delegation and staff. Management Board coordinates on congressional outreach with other Joint Ventures.
	<b>Management Board</b>	Joint venture office supports operations and administration of Management Board by advising and informing Board members. Management Board has broad representation within the Joint Venture geographic region (Fed, State, Non-Profit, Private) and members regularly participate in meetings. Member organizations commit energy and resources to developing a shared vision of bird conservation for the Joint Venture and coordinate their otherwise independent actions in the cooperative pursuit and refinement of that vision.	Management Board members bring significant resources to the Joint Venture, engage in current issues facing the Joint Venture, share responsibilities for Joint Venture progress, follow through on commitments and responsibly use their influence for the betterment of the Joint Venture. Management Board develops and adopts a process for periodic self assessment that includes relevant goals and metrics for both programmatic and organizational performance.
	<b>Budgeting/ Granting/ Administration/ Funding</b>	A financial management system is in place. Administrative support is available to the joint venture office/staff either directly or through joint venture partners. Mechanisms exist to receive and expend federal funding in compliance with OMB Circular A-133. Joint venture office keeps the Management Board fully informed on the status of the joint venture office's operations and finances. Joint venture office maintains working knowledge of pertinent funding opportunities. Joint venture office works with partner organizations to obtain grants and other funds to implement priority conservation actions.	Joint Venture financial system is sophisticated enough to manage grant/contract funds as appropriate. Administrative personnel are on or available to Joint Venture staff. Joint Venture has grant-writing capacity available in staff and or partner organizations. Joint Venture seeks and attracts funds from a broad range of traditional and non-traditional conservation programs and other funding sources to implement priority bird conservation actions. Joint Venture develops and implements fundraising strategies for approaching and cultivating new sources of major support, including foundation and corporate grant programs, and partner contributions. Working with the Management Board, joint venture office directs the preparation of annual and long-range development planning.
	<b>Technical Community</b>	Technical expertise needs are identified. Joint Venture has access to technical staff either directly or through partnership.	Joint Venture has science coordinator(s), geospatial technician(s), and other science expertise on staff or available through partners as appropriate to the size and complexity of the Joint Venture region. Technical committees for specific bird conservation science needs are in place as needed with full participation from partnership organizations. Technical committees are improving the science of the Joint Venture.

**BIOLOGICAL PLANNING**

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	<b>Coordination/ Partnerships</b>	Joint Venture leads a collaborative effort, often through a technical committee appointed by the Management Board, to build a biological foundation of bird conservation needs that is both based on, and informs international, national, or regional bird conservation initiatives.	Joint venture partners seek opportunities and venues to integrate Joint Venture biological planning with relevant work of their agency/organization and with the relevant work of other agencies and organizations active within the Joint Venture area. Priority examples include state wildlife action plans, National Wildlife Refuge Comprehensive Conservation Plans, The Nature Conservancy (TNC) Ecoregional Plans, US Fish and Wildlife Service (FWS) Migratory Bird Focal Species plans, and National Fish and Wildlife Foundation Keystone initiatives.
	<b>Biological Planning Unit (Spatial and Temporal Scales)</b>	Biological planning unit(s) is(are) defined. Identify temporal importance (breeding, staging, wintering) of the Joint Venture region to migratory birds. Explain and justify when planning scale deviates from bird plan conservation ecoregions.	Biological planning units identified at Bird Conservation Region (BCR) or sub-BCR scales. Explicit treatment of overlapping planning units within multiple Joint Venture administrative boundaries (if any).
	<b>Priority Species</b>	A preliminary list of priority bird species or suites of species are identified and justified.	Complete list of priority bird species/populations, considering all relevant FWS Birds of Management Concern. Explanation if priority species/populations deviate from priorities in latest bird plan updates. A subset of species may be identified that represent the larger set of priority species for detailed biological planning and conservation design.
	<b>Population Objectives</b>	Anticipated population objective variables (abundance, vital rates, etc.) identified. General description of the process that will likely be used to develop population objectives. Description of how those objectives will link to bird plans' continental objectives.	Explicit population objectives are identified. Flexible population objectives identified as appropriate to account for environmental or seasonal variability. Documentation of the process for deriving population objectives and identification of major sources of uncertainty.
	<b>Limiting Factors</b>	A list of potential factors thought to limit birds in the biological planning unit(s) used.	Demographic parameters for target species (e.g., survival rate, recruitment rate) thought to be most limiting to population objectives are targeted by habitat management actions.
	<b>Species/Habitat Relationships</b>	Discussion of population-habitat model(s) expected to be developed to relate population response to known or suspected limiting factors (e.g. empirical, conceptual).	Explicitly stated population-habitat models. Assumptions documented as testable hypotheses.

**CONSERVATION DESIGN**

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	<b>Coordination/ Partnerships</b>	Commitment of Joint Venture to develop technical capabilities and planning tools for conservation design.	Joint Venture develops and implements strategies to utilize science products to better target and enhance conservation programs at the ecoregional level to benefit migratory birds. Joint venture office and/or Management Board members build strong relations with decision makers in state and federal institutions, private industry, and partner organizations to strengthen their understanding of the Joint Venture’s conservation activities and capabilities.
	<b>Landscape/ Habitat Characterization and Assessment</b>	General description of Joint Venture’s ecological setting relative to bird habitat. List of major drivers impacting bird habitat with links to assumed limiting factors and population-habitat relationships. Set of implications to bird population in the absence of partnership intervention.	A rigorous analysis of landscape/habitat carrying capacity based on explicit population-habitat models. Where possible, conduct retrospective analysis of carrying capacity (e.g., prior to 1986). Where possible, forecast expected carrying capacity with and without partnership intervention and predicts impacts of expected major changes (e.g., urban growth, climate change).
	<b>Assessment of the Conservation Estate</b>	Preliminary summary of bird habitat (acres) protected, managed, and restored in the planning unit. This includes an assessment of all conservation lands that will benefit birds.	Thorough analysis of existing bird habitat under protection, management, or enhancement throughout the biological planning unit. Information should be presented by ownership, state, etc. where applicable. Assessment of the net change in the conservation landscape since the inception of the Joint Venture conducted at <5 year intervals.
	<b>Decision Support Tools</b>	Description of how the Joint Venture might develop decision support models/tools to guide specific management actions suitable to overcome limiting factors. If deemed appropriate, develop a set of spatially-explicit focus areas to guide interim conservation delivery activities.	Spatially-explicit decision support tools for specific management actions suitable to overcome limiting factors are available. Tools distributed to partnership based on population-habitat models where appropriate. Documented analytical processes and model assumptions.
	<b>Habitat Objectives</b>	General estimation of the magnitude of habitat protection, restoration, and enhancement that might be expected of the Joint Venture.	Explicit set of habitat objectives linked to population objectives and based on population-habitat models, carrying capacity, assessment of conservation estate, and decision support models as available. Habitat objectives should be partitioned among sources of habitat (ownership, state) where appropriate.
	<b>Integration of avian decision- support tools</b>	Articulate anticipated approach for integrating habitat objectives among species-groups, habitat types and management treatments for priority avian species/groups.	Develop tools for integrating habitat objectives and spatial priorities for all priority species/groups and management treatments. Describe decision-rules for conflict resolution. Describe extent of spatial/temporal overlap in conservation activities.

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<b>HABITAT DELIVERY</b>	<b>Coordination/ Partnerships</b>	Joint Venture informs, assists, and influences partner organizations implementing habitat conservation programs.	Joint Venture provides a structure and process that, attracts partners; guides existing funds and programs to priority conservation actions, leverages and generates new funding; and coordinates and implements habitat conservation actions in support of JV-established objectives at appropriate scales.
	<b>Program Objectives</b>	Description of how conservation programs (e.g., Farm Bill, land acquisition and restoration programs, etc.) will be linked to biologically-derived bird habitat objectives.	Translate bird habitat objectives into spatially-explicit program-specific objectives (e.g., North American Wetlands Conservation Act, Conservation Reserve Program, Wetland Reserve Program, National Wildlife Refuges, Wildlife Management Areas, etc.). If appropriate, describe ranking systems developed to inform prioritization and decision-making.
	<b>Conservation Actions</b>	General description of anticipated habitat conservation actions, tools, and management treatments the partnership expects to deliver to meet the needs of birds.	Comprehensive list and documented description of habitat conservation actions, tools, and management treatments being deployed by partnership, including quantification of how specific conservation actions are expected to affect bird abundance and/or vital rates and to what degree.
	<b>Delivery Capacity</b>	Individual joint venture partners develop projects to deliver on-the-ground habitat conservation through existing programs with joint venture office assistance as appropriate.	Fully developed partnership delivering on-the-ground bird conservation explicitly linked to Joint Venture biological planning/conservation design. Delivery partnerships are developed and coordinated by the joint venture office at appropriate scales (including BCR, state, focus area and local).

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<b>MONITORING</b>	<b>Coordination/ Partnerships</b>	Joint Venture informs and influences partner organizations implementing monitoring programs.	Joint Venture provides a structure and process that generates, attracts, leverages, and implements outcome-based monitoring activities in support of Joint Venture established biological targets.
	<b>Conservation Tracking System</b>	General description of anticipated need for tracking partnership activities (gross partnership accomplishments). A vision for creating that capability among partners. The joint venture office solicits information on accomplishments from joint venture partners, organizes and submits the information to appropriate managers of national databases and Management Board.	Conservation tracking and spatial database system in place. Explicit description of how information will be used to inform decisions (e.g., increasing performance for Program X). Explanation of linkage between tracking system and biological models so that biological accomplishments can be assessed and reported.
	<b>Habitat Inventory &amp; Monitoring Programs</b>	General description of anticipated process that will be employed to inventory and monitor landscape conditions and net habitat change over time and net progress toward habitat objectives (gains and losses).	Documentation of habitat monitoring objectives and habitat parameters that will be inventoried and monitored over time. Expected process (e.g., remote sensing) and time interval for data collection. Explicit description of how information will be used to inform decisions (e.g., refining habitat or population objectives). Assessment of the net change in Joint Venture landscape conditions conducted at <5 year intervals.
	<b>Population Monitoring Program</b>	Description of anticipated process for prioritizing and coordinating monitoring of bird population responses over time.	Documentation of demographic parameters monitored specific to each objective. Expected process (e.g., aerial surveys, nest survival) and time interval for data collection, storage, and management. Explicit description of how new information collected from monitoring programs will be used to inform future planning decisions (i.e., identify the feedback loop).
<b>RESEARCH</b>	<b>Coordination/ Partnerships</b>	Priority research needs are identified and distributed to joint venture partners and regional research institutions.	Joint Venture provides a structure and process that generates, attracts, leverages, and implements assumption-driven research activities in support of Joint Venture established biological targets. Strong relationship with US Geological Survey and universities.
	<b>Species/Habitat Model Assumptions</b>	A list of assumptions for population and habitat parameters used in models (e.g., priority species' limiting factors, predicted densities, habitat quality).	Prioritized, targeted research needed to address key uncertainties within models used in biological planning (prioritized based on value of better information).
	<b>Conservation Treatment Assumptions</b>	A list of assumptions inherent to the conservation actions/treatments being implemented by joint venture partners.	Prioritized, targeted research needed to address key uncertainties about the impacts of conservation treatments on Joint Venture population objectives (bird abundance/vital rates).
	<b>Sensitivity Analyses</b>	A list of key parameters most likely to influence 1) population response variables or 2) habitat objectives.	Statistical analysis of key parameters to examine their influence on population or habitat model results based on a range (e.g., confidence intervals) of assumed values (e.g., distance to edge).
	<b>Spatial Data Analyses</b>	A list of concerns relating to the limitations of current spatial databases as they may affect conservation planning.	Rigorous statistical analyses, and associated refinement, of key uncertainties related to spatial data used for planning or monitoring.

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<b>COMMUNICATION, EDUCATION AND OUTREACH</b>	<b>Coordination/ Partnerships</b>	Appropriate joint venture partners or staff represents the Joint Venture mission to the local, regional, national, and international conservation community.	The Joint Venture has identified optimal roles for the Management Board, joint venture office, and the joint venture partners in furthering its biological objectives through communications, education, and outreach activities and products. As deemed appropriate, the Joint Venture has identified gaps in capabilities and fortified those gaps to raise awareness, change attitudes, and change behaviors to support bird habitat conservation.
	<b>Priority audiences and objectives</b>	Joint venture partners have evaluated the efficacy and applicability of communications, education and outreach activities in achieving Joint Venture conservation objectives. Joint Venture Management Board has identified priority internal and external audiences and key messages.	A Joint Venture Communications Plan, guided by information from biological planning, conservation design, habitat delivery, monitoring and research, is developed to set communication, education, and outreach objectives and target activities and products geographically, programmatically and to the highest priority conservation needs. The Joint Venture has identified and prioritized all relevant audiences and correlates audience objectives with bird habitat conservation goals and objectives to determine how much and where increases in audience awareness and what changes in attitudes/behaviors are necessary to reach bird conservation objectives. The Joint Venture has established appropriate means of engaging priority audiences.
	<b>Tactics and products</b>	Mechanisms exist to facilitate communication between Management Board, joint venture office, and the joint venture partners. The Joint Venture maintains an up-to-date website.	Each tactic and/or product (Examples include, but are not limited to: partner newsletters, public website, news releases, project tours, meetings, presentations and workshops) is evaluated to assess effectiveness and guide development of future communications products and activities.
	<b>Audience Assessment</b>	Joint venture partners conduct informal assessment of priority audiences to determine their baseline level of awareness, attitudes, and behaviors affecting bird conservation in the Joint Venture region.	Joint Venture conducts regular, formal assessments of priority audiences to measure change in awareness, attitudes and behaviors over time. Assessments may be in the form of focus groups, surveys, interviews or other systematic means of gathering audience data. The results are used to improve future Joint Venture activities in support of bird conservation objectives.

\* Joint Venture in this document refers to the specific joint venture partnership including all members and facets of the partnership.

\*\* Management Board refers to the specific Joint Venture's Management Board.