



**TAKING STOCK AFTER THE FIRST THREE YEARS:
REPORT OF A RETREAT
OF THE STAYING CONNECTED INITIATIVE PARTNERSHIP**

**February 14-15, 2012
Fairlee, Vermont**

Retreat Organizing Committee:

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INTRODUCTION

The Staying Connected in the Northern Appalachians Initiative (SCI) Partnership hosted a Retreat at the Lake Morey Resort on February 14-15, 2012. The core purpose of the retreat was to exchange information, tools, strategies, challenges, and lessons learned among the members of the Staying Connected partnership and a number of collaborating organizations. About 45 people -- from New York, Vermont, New Hampshire, Maine, Québec, New Brunswick, and Ontario -- attended the Retreat.

Specific objectives for the gathering included:

1. Present and evaluate progress in advancing place-based connectivity conservation strategies within SCI's 8 current priority linkage areas.
2. Present and evaluate progress in advancing cross-cutting connectivity conservation strategies:
 - a. **Model easement standards** to ensure habitat connectivity for use by land trusts and public agencies;
 - b. **Best practices and land use planning tools** employed by municipalities across the U.S. portion of the Northern Appalachians;
 - c. **Road ecology guidelines and barrier mitigation strategies** to help transportation agencies and municipalities address habitat connectivity issues; and
 - d. **Connectivity measures framework** to establish the current status of, and measure progress toward, the goal of conserving and restoring, landscape connectivity at the ecoregional and linkage scales.
3. Engage in candid discussion of the effectiveness of within-linkage and cross-cutting strategies designed to sustain and enhance connectivity, and lessons learned.
4. Seek consensus on future partnership goals, structures and opportunities for advancing connectivity conservation in the Northern Appalachians.

The following is a summary report of the outcomes of the Retreat and is organized as follows:

1. **Overarching Conclusions and Short-term Action Steps**
2. **Linkage Theme Synthesis**
3. **Cross-cutting Theme Synthesis**
4. **Five-to-ten year goals**
5. **Structure, Opportunities, and New Audiences Going Forward**

We have also compiled a comprehensive set of notes from nearly all workshop sessions. These are archived, along with the presentations and other background materials, in the "Staying Connected General" project within SCI's Basecamp account:

<https://stayingconnected.basecamphq.com/projects/4572358-staying-connected-general/log>. If you need or have trouble with access to the Basecamp site, contact Conrad Reining (conrad@wildlandsnetwork or 802.785.2838).

1. Overarching Conclusions And Actions Steps:

Over the course of the two-day workshop many important ideas emerged. We present five key conclusions, and associated next steps below. There is some overlap among these five elements.

- **Improve/increase cross-border collaboration.**



- There was a clear call to expand the Staying Connected approach to the Canadian portions of the existing linkages, and potentially to bring the approach to new areas entirely within Canada.
- There was also a call to enhance collaboration across state borders in the US part of the Northern Appalachians.
- Some specific action recommendations include:
 - Establish regular calls and other forms of communication among SCI partners and others on key connectivity themes/strategies such as land protection, land-use planning, monitoring, transportation and science.
 - Provide networking and regular general updates of the initiative's work.
 - Consider establishing an SCI "super coordinator" position whose purview would encompass the breadth of the initiative and who would foster enhanced communication, coordination, and effectiveness of the SCI partnership in the US and Canada.
- **Enhance internal and external communications.**
 - There was lots of interest in the stories and anecdotes that emerged from the various projects. These have great potential to communicate lessons learned and other valuable information, and we need to find a way to get these out in some systematic fashion.
 - One key method is via the SCI website. Additional funds (\$10,000) have become available to beef up the website, and this process is underway. Emily Boedecker at TNC/VT is the lead.
 - Other communications methods should also be established, such as blogs maintained by the linkage coordinators. These would be related to the website, but since they would be the primary responsibility of the coordinators, they would be more decentralized and customized to a given locale.
 - We should also increase the membership and use of SCI's two listserves. One (habitat_connectivity@googlegroups.com) is intended to cover the full partnership, while the other (vt_staying-connected@googlegroups.com) is focused on Vermont SCI partners.
 - Get stories placed in New York Times, Boston Globe, other major media outlets. Focus on the stories and anecdotes.
 - Overall, we need to enhance both our outreach and our "inreach".
- **Refine long-term goals, objectives, strategy**
 - There is a need for refinement and better articulation of the overarching vision, goals, measurable objectives and strategies of SCI.
 - Consider hiring an outside consultant to help. Nick Salafsky and his organization, Foundation for Success, were mentioned specifically. They have helped the Northeast Association of Fish and Wildlife Agencies (NEAFWA) define their goals and strategies.
 - Involve as broad a range of entities as possible in the refining of the SCI goals.
 - It is important to distinguish SCI from its major funding sources, particularly the competitive State Wildlife Grant (SWG) that was the major funding source for the first phase of SCI. The SWG does not equal SCI. This will be particularly true in the

second phase of SCI, regardless of whether additional SWG funds are received. This distinction should be emphasized in all future communications from SCI partners.

- As possible, integrate planning and strategies at the state level with strategies at the 4-state/regional level.
 - Pay particular attention to how the land conservation elements integrate with technical assistance and outreach elements of Staying Connected.
 - TNC is heading into Conservation Business Planning for the Northern Apps, starting in May. Try to dovetail the SCI goals/objective setting process with the TNC planning and budgeting process.
- **Step up SCI engagement on transportation issues.**
 - Many SCI activities overlap with transportation issues, initiatives, and opportunities at the local, state and federal levels. There was lots of interest and discussion around this topic during the Retreat.
 - There needs to be more effort to consider the interests and perspectives of transportation agencies and personnel. The representative from Vermont's Agency of Transportation, Gina Campoli, helped provide this perspective during the retreat.
 - How can SCI increase the professionalism and sophistication of its interactions with the transportation community?
 - An SCI task force/committee should be set up to brainstorm with Gina how to develop this approach more completely. Potential initial members include Dirk Bryant, Barbara Charry, Conrad Reining, Jens Hilke, and Phil Huffman.
 - **Refine the governance structure of the initiative.**
 - The role, function, and composition of the SCI steering committee needs to be revamped as we move into Phase 2 to better reflect the broader vision of the initiative (e.g., ecoregional in scope, not just US-focused), the thematic and geographic breadth of the partnership, and key issues/opportunities (funding, policy, etc.).
 - Foster better cross-pollination/synergy around thematic areas such as land use planning, transportation, conservation science, land protection, and monitoring. Working groups or forums with periodic conference calls and listserves may be one good mechanism for advancing this. Make sure that there is good representation from across the partnership in terms of expertise and geographic spread.
 - Avoid not getting overly bound up in structure. Find the right balance between empowering everyone in the partnership to advance good, creative work while fostering efficient communication, coordination and trying to keep everyone moving toward shared goals.
 - How can SCI enhance its involvement with officials from state/provincial transportation and fish/wildlife agencies? What are their interests, and how do they wish to be engaged? Consider establishing an agency advisory committee.
 - Similarly, how can SCI enhance its collaboration with US (and Canadian) federal agencies and initiatives (such as the USFWS-led North Atlantic LCC)?
 - How does/can SCI fit strategically with Two Countries, One Forest and the Wildlands and Woodlands Partnership?
 - Enhance SCI's government relations/policy outreach, including pursuing transborder engagement with the New England Governors and Eastern Premiers.

- Consider initiating an advisory committee that would involve a larger group of SCI partners and allies – try to get funders to be part of this advisory committee, or even get them involved more closely.

2. Linkage Themes Synthesis

The following is a synthesis of the plenary discussion that followed the presentations on the linkage projects.

• **Reflections On What We've Learned To Date**

- *Dealing with a long time horizon:* set realistic expectations internally and with external audiences, set interim milestones (e.g., in next 3-5 years) to demonstrate success to keep the momentum and make sure we have meaningful achievements even if we ultimately can't sustain this work over decades
- *How we work* – maintain flexibility on approaches, because the context and opportunities in each linkage is distinct. Investment in outreach, branding and education (winning hearts and minds) is important if we are in it for the long term
- *Having a local face/working locally is critical for success* – a person, and organization. This requires continuity, and it takes time for investments to pay off. What would it take to sustain that over a 10-20 year period?
- *Regional perspective is powerful:* goal is to create and sustain a network of connected lands...some are core areas, some are linkages. The big partnership on a regional scale focused on that goal gives us the foundation to work on a big vision.
- *Need a true bi-national effort:* especially if climate adaptation is a goal.
- *Getting the most bang for your buck:* some strategies are worth doing anyway even if we don't have high confidence they will address connectivity needs in specific areas (e.g., riparian habitat protection, addressing community values)

• **Looking Ahead**

- *Long term vision and goals that speak to a large audience:* Need an overall articulated purpose, vision and goal that 'doesn't look soft'...with measurable objectives, and which includes Canada.
- *Get better at making the science case for our work:* need to address soft science behind connectivity; how work benefits individual species. Justify the work.
- *Transportation strategies:* need clear, realistic tools around transportation strategies, developed with agency staff who understand the constraints and realities....and messaged to reach engineers and specialists that will be doing the work.
- *Branding/engagement:* Be careful with branding at the local level so we aren't viewed as some big government takeover but rather an opportunity to bring help/support to local areas. But need to engage at the regional level (e.g., NE Governors and Eastern Premiers)because this will help with sustainability of the initiative.
- Build on opportunities to get *aquatic and terrestrial win-wins*...e.g., culverts work, watershed based approaches.

- **When Are We Done/What Does Success Look Like?**
 - Measuring and documenting success is easier when you focus on things that have been done (action/process accomplishments) rather than biological end goals.
 - Invest in developing results chains with interim objectives that lead to long term functional outcomes (like permeable landscapes and protecting ability for biodiversity to adapt and change).
 - Need to phase out big outcomes...like providing the sustainable infrastructure.

3. Cross-cutting Strategies Synthesis

The following is a synthesis of the plenary discussion that followed the presentations on cross-cutting projects.

- **How can we apply and leverage the tools and lessons from the cross-cutting work?**
 - Can the North Atlantic LCC play a role in helping to support further measures data development (especially to get at trans-border measures and data with Canada)?
 - Question about whether we should even use the term “measuring success”?
 - Perhaps better to measure effort and performance.
- **Measure/evaluate status of land use planning and zoning enabling conditions at the state/provincial and local levels over time.**
 - Favorable land use planning and zoning policies at the state/provincial level are an “enabling condition” that creates opportunities for a range of conservation activities at the local level to proceed.
 - Also need to track the status and progress on connectivity/wildlife habitat friendly plans and policies at the local level over time.
 - Perhaps look at land use planning on a linkage-by-linkage or state-by-state basis to determine the status of such policies, and establish baselines against which trends can be tracked.
 - There are some good existing models (from NH, VT, elsewhere) of analyses of wildlife habitat and forest conservation through local planning mechanisms.
- **Linkage between land use planning and transportation planning also important. Can we help communities understand those connections?**
 - Low volume roads – minimum maintenance roads. NY attempt to keep low impact roads.
- **Existing conservation design largely based in Randall Arendt’s work – driven more by aesthetics than ecology. Can we update or publish revised guidelines that better incorporate ecological considerations?**
 - Above and Beyond - Julie Campoli et al. Book published by APA on post-Arendt planning and design.
- **Use linkage science (identifying priority road segments) and transportation mitigation strategies to leverage federal transportation enhancement grant programs.**

- Work with DOT engineers, analyze cost-benefit of different approaches to improve structures.
 - Under federal law, enhancement program identifies wildlife connectivity as allowable for use of enhancement funds.
 - Look for site-specific opportunities for pilot enhancement projects that demonstrate an integrated/holistic approach to addressing connectivity needs – e.g., incorporating enhancement of an existing structure, fencing, signage, protection of adjacent forested lands through acquisition/easements/land use planning, etc.
- **Federal opportunities that could have a local, on-the-ground impact?**
 - Figure out a way for federal funding flowing to transportation agencies, some to be granted out to towns to help them upgrade aging culvert infrastructure in a manner that benefits terrestrial and aquatic connectivity, reduces vulnerability to major storms and climate change. Could be a jobs bill.
 - FEMA – helping to ensure that best possible structures are put in place when existing structures are destroyed in storms. FEMA will only pay for structures that are built in accordance with state/local standards, so need to ensure that those adequately address connectivity needs (both terrestrial and aquatic). Ties closely to Army Corps programmatic general permits. They may be issuing a New England-wide general permit rather than the existing state-by-state PGP approach – an opportunity to ensure a strong permit that guides state rules and action across the region. Need to think about/plan for post-disaster response (e.g. Irene), where many culverts are replaced in a short time span.
 - Towns need money, technical assistance, and encouragement/prodding to do good culvert/bridge work.
 - **Model easement strategy**
 - Most existing working forest easements do require a management plan. Perhaps our tools and guidance could be used in the development and updating of those management plans. Don't be overly narrow in our thinking about this tool only applying to new easements.
 - Question – is connectivity addressed in FSC or SFI certification systems? Could be a good high leverage strategy.

4. Five-to-ten year goals

- **Goal for this session was to begin to build a vision and strategy for 2C1F/SCI over the long term.**
- **General comments and observations:**
 - Our current goal was created specifically with SWG application in mind: To retain, enhance, and restore habitat connectivity. Don't limit vision statement to just SGCN species or just the SWG grant—include plants, other animals, ecological process, and a *network* of core + connecting lands.
 - Need to define what we want to get done in 5 years, start with clearly defined Vision and Goals, then identify SMART objectives (e.g., “by 2020, x will have been achieved”), then

strategies – with feedback. Spend time soon getting greater clarity on SCI vision and goals, etc.

- **Strategies for long-term success:**

- Local efforts are key to our success and local action is essential, but is challenging and time-consuming. We need to empower local groups to lead and take ownership but also be strategic about what the leverage points are, e.g., working with/through regional planning commissions. Combination of bottom-up and top-down.
- Be careful not to establish SCI as a bureaucratic entity but operating as a network at multiple scales
- Message our successes and enhance communication with funders. We need to re-educate funding sources to match the needs of connectivity work, and better capture the successes we're having in terms of more intangible deliverables, i.e. a change in behavior is a critical long-term outcome...but difficult to measure/report on in the short time horizon of most grants/funders.
- Recruit a marketing person to re-word vision statement to make it punchy
- Communicating our science is important. What is the form that the scientific info should take, who will transmit it, and how do we need to influence values?
- Measuring our success will be challenging. Think about social as well as biological measures and objectives.
- Connectivity is a subset of what matters to each organization. Let's put our energy into changing "business as usual" rather than creating our own institution.
- Need for institutionalization of the concept. Connectivity should be an imbedded factor in decision-making, i.e. professional groups – realtors, surveyors, etc. or developing a set of values that a town could adopt; need to think about training professionals who are practicing in the field. Get this into curricula in schools and to those about to enter the workforce.

- **Five-to-Ten Year Goals: Some Conclusions**

- Suggested goal: Local groups are empowered enough to carry on work on their own.
- Need to be strategic about leverage points, such as regional planning commissions.
- Get Northern Appalachians widely recognized as an important region for wildlife movement
- Emphasize sustaining landscape connections not only for wildlife, but also for people.
- Possible vision statement: "Network of connected lands that foster long-term adaptation of animals and natural systems to climate change"

5. **Structure, Opportunities, and New Audiences Going Forward**

The following summarizes some of the key points and themes that emerged from the breakout and plenary sessions held on the afternoon of the Retreat's second day. These sessions were focused on the following questions: 1) What different forms of operating approaches or structures could the partnership use going forward, and what are the benefits and drawbacks of each approach? 2) How do we move connectivity conservation forward under different funding scenarios? What if substantial core funding like that received in Phase I is not available? Are there funding opportunities beyond the traditional ones we have considered? 3) How best can we engage new participants and audiences?

- **Key Issues for SCI Leadership**
 - SWG management and administration should be differentiated from the role of overall leadership for the initiative. Staying Connected does not equal SWG, and vice versa, but SWG is one important facet of SCI.
 - SWG management and oversight will continue to need some kind of committee/working group. This could be a subset of the Steering Committee or a stand-alone group going forward.

- **Key Functions of the Steering Committee (or its successor)**
 - Leadership and Outreach
 - Vision
 - Serve as a champion (e.g., with NE Governors and Eastern Canadian Premiers)
 - High level strategy, focus, prioritization (less administrative)
 - Capacity building and fundraising
 - Transferring and embedding our values into other enduring entities (which may outlive SCNA)
 - High level external communication and outreach (e.g., website)
 - Decision Making/Approval
 - For issues requiring high level oversight and review
 - Internal Communications
 - Fostering strategy-based communications networks
 - Listserv
 - Basecamp

- **Steering Committee Composition**
 - Extend to include Canada. Likely need at least one representative from Quebec and one from Atlantic provinces.
 - Seek/sustain good geographic and thematic/strategy representation.
 - Achieve better agency representation and involvement (state/provincial/federal) – either through the steering committee or possibly an agency advisory committee.
 - Seek representation with skill sets that align with the key functions listed above
 - Perhaps include one or more foundation representatives.
 - Whether or not as part of the Steering Committee, need to build mechanisms to foster broader inclusion of SCI partners.

- **Other Key Points on SCI Structure and Operating Approach**
 - Need an individual leader/coordinator
 - We have many “leaders” involved in Staying Connected, which is a good thing and should not be undermined.
 - What is most needed is a “coordinator” with sufficient time/capacity and the right skill set to strengthen and facilitate the SCI partnership network.
 - Perhaps in addition to a reconfigured Steering Committee that convenes regularly, consider a broader Advisory Group that convenes less frequently.
 - SCI’s structure and operating approach should be mission-driven rather than funding-driven.
 - Need further consideration of how SCI relates to/integrates with 2C1F.