

**North American Bird Conservation Initiative**

**Second Trinational Meeting**

**February 14 - 16, 2001**

**Querétaro, Mexico**

## Opening Plenary

The second trilateral meeting of the North American Bird Conservation Initiative (NABCI) opened with a series of welcoming presentations by several Mexican panelists. They included Exequiel Ezcurra (Secretaría de Medio Ambiente y Recursos Naturales), Yvonne Vandenpeereboom (Legislatura del Estado de Querétaro), Humberto Berlanga (NABCI - Mexico), Ernesto Enkerlin (Comisión Nacional de Areas Naturales Protegidas), Jurgen Hoth (North American Commission for Environmental Cooperation - CEC) and Martha Ruiz Corzo (Reserva de la Biósfera Sierra Gorda). Panelists emphasized the importance of NABCI as a trilateral effort for bird conservation. They discussed the important role of birds for ecosystem dynamics at local and continental levels and stressed the value of existing and upcoming opportunities for all three countries to work together toward achieving common bird conservation goals. A strong, optimistic message, and a call to participants to find new ways to improve the effectiveness of our conservation efforts through NABCI set the stage for the two-day meeting.

A series of four plenary presentations provided a historical context from the perspectives of all three partner nations and reinforced the collective vision that has been evolving through NABCI. A consistent theme of the talks was the tremendous opportunity offered by the Querétaro workshop, and the enormous responsibility thrust upon participants to seize this opportunity.

Bob McLean (Canadian Wildlife Service) began the Querétaro workshop plenary presentations with a historical perspective, particularly as it related to bird conservation in Canada and the evolution of the North American Waterfowl Management Plan (NAWMP). The North American Waterfowl Management Plan arose in 1986 in response to a crisis in the status of waterfowl habitat and populations. It has become a model for wildlife conservation wherein innovative

partnerships rely on a strong biological foundation to deliver conservation across priority landscapes. In both Canada and the United States, Joint Ventures have emerged as structures for the development of partnerships and the implementation of conservation projects. In Mexico, regional partnerships have served as delivery mechanisms for NAWMP since Mexico became a full partner in 1994. The *1998 Update to the North American Waterfowl Management Plan: Expanding the Vision* further underlined the need for landscape planning based on sound science and a broadening of partnerships, while retaining a primary focus on wetlands and waterfowl. Since the emergence of NABCI, the characteristics of Joint Ventures and other regional partnerships have changed, to the point where many are prepared to deliver conservation for all birds in all habitats within their boundaries. In Canada, the NABCI challenge is also being met outside existing Joint Ventures in the Western Boreal Forest and South Okanagan Valley. The Querétaro workshop should further advance this progress by moving toward shared recognition of community partnerships as the basis for conservation with a strong, continent-wide biological foundation. Mr. McLean indicated the importance of looking beyond North America to other regions, such as Greenland and Central America, and to the conservation of other wildlife species. Moreover, he stressed the need for a formal international agreement for action that captures a sense of urgency for the conservation of all birds in all habitats throughout North America.

George Fenwick (American Bird Conservancy) followed with observations from a United States perspective, noting in particular the principles upon which Partners in Flight (PIF) and other successful bird conservation partnerships have been built. These principles include trust within and among countries and expanding work with landowners. Partnerships are of paramount importance, and solid partnerships are built on clear visions and shared trust from which partners benefit without losing autonomy. He added, however, that truly effective partnerships also involve some compromise by those involved. A strong, scientific foundation is also key, and this involves support for research and monitoring and regular re-evaluation of assumptions. Knowledge is never perfect; the best possible decisions must be made with the information at hand. There is an appropriate geographic scale for each element of conservation, and failure to apply this subtle principle is at the root of many misunderstandings. Bird conservation today must take an ecological approach, in which maintaining the health of ecosystems is more efficient than a crisis-level, single species approach. However, conservation is rarely the primary

objective for most complex societies, and everyone must operate in awareness of realistic opportunities and challenges. Mr. Fenwick suggested that the Querétaro workshop encourage partners to move toward a collective long-term NABCI vision, recognizing that this is a large-scale initiative in which the clarity and consistency of that vision are key to its success.

Hesiquio Benitez (Comisión Nacional para el Conocimiento y Uso de la Biodiversidad) then offered a Mexican perspective, concentrating on accomplishments since the November 4-6, 1998 NABCI I meeting in Puebla, Mexico. A major focus has been the Important Bird Areas (IBAs in English and referred to in Spanish as “AICAS”, Areas de Importancia para la Conservación de las Aves) program. It has resulted in the publication of a book describing the complete set of key areas for Mexico. Bird Conservation Regions (BCRs) have been mapped in Mexico, as in the United States and Canada, but in Mexico their main goal was to identify clusters of AICAS. The 16 highest priority AICAS have been identified in 12 of Mexico’s 36 BCRs, with the goal of having at least one site in each BCR benefiting from the cooperation of North American partners. The hope is to develop institutional capacity, through enhanced organization and resources, that will lead to accelerated on-the-ground conservation efforts. The challenges are threefold: establish links with other groups, secure resources and establish partnerships among the three countries. There is optimism that the new administration will assume an enhanced leadership role in bird conservation, and that NABCI’s influence will extend to broader portions of society resulting in concrete conservation achievements. The results of the Querétaro workshop should increase the profile of NABCI and bird conservation in Mexico.

The final presentation, given by Paul Schmidt (U.S. Fish and Wildlife Service), focused on NABCI’s history and the opportunity and responsibility of the participants to make this workshop a success. The historical evolution of bird conservation through the 20th Century was reviewed, culminating in the CEC-led integrated NABCI partnership. The North American Bird Conservation Initiative became a reality at the first trinational meeting in Puebla, Mexico. Mr. Schmidt emphasized how fortunate we are to be involved in such a major transformation in bird conservation across this continent. This good fortune comes with a challenge to seize opportunities, first as presented in Querétaro, and then when participants return home to transform decisions into actions. While there now is an unprecedented level of support from leaders in conservation, there is also a great need to improve communications and broaden and

solidify support for NABCI throughout the continent. We now have a developing vision and plan, with clear examples for implementation through partnership-based Joint Ventures. Our work is just beginning and much more remains to be done. Collaboration, compromise and cooperation at the Querétaro workshop will be a major step in the right direction.

The structure of the meeting was then outlined. Each of the four half-day sessions focused on a single theme of critical importance to continental bird conservation. Each session began with a short plenary introduction, including a series of questions or topics for discussion. Thereafter, each participant joined one of eight breakout groups, each composed of participants from all three countries and every group discussed a thematic topic in an effort to reach conclusions. A leader from each group then met with the theme's plenary speaker, and together they crafted summary statements presented back to the participants and compiled in these proceedings.

## **Session A**

### **How do we best organize ourselves for effective bird conservation action?**

The North American Bird Conservation Initiative should be a trilateral initiative that works with regional initiatives. It must act as a facilitating body, not a controlling one.

Considering that many bird species spend part of their life cycle outside North America, it would be advantageous for NABCI to eventually expand to include more countries.

#### **Structure**

The three national committees should each select three rotating members for the Trilateral Committee. One of the roles of the Trilateral Committee is to develop international agreements that hold ministers and their departments accountable for implementing continental habitat and population objectives. Another role is addressing communications issues.

Bird Initiatives (IBAs, NAWMP, etc.) and other prominent factors in bird conservation communities should constitute National Committees, with national chairs drawn from this group. Efforts should be made to reduce confusion and redundancy while still maintaining autonomy and “NABCI-like” democracy among the players. The National Committees are NABCI implementation bodies. The three national coordinators are the main linkage between on-the-ground implementation and the national NABCI Committees.

A trilateral plan is needed for NABCI to operate properly. This plan must include a vision, objectives and strategies. It could be written by an international team represented by NAWMP, PIF, North American Waterbird Conservation Plan (NAWCP), national shorebird planning teams, IBA program leaders and national committee partners.

#### **Functions and Actions**

The North American Bird Conservation Initiative should focus on trinational issues that involve the following functions and actions:

1) Communications

- Facilitate fora/seminars/workshops
- Develop outreach message: (i.e. NABCI is working)
- Move from concept to product-development stage of outreach
- Advertise success
- Train emerging ornithologists/conservationists in Mexico
- Develop bird-oriented ecotourism in Mexico using U.S. and Mexican staff and funding resources

2) Science

- Establish a set of scientific priorities
- Re-establish a monitoring group that has a two-year task to develop a comprehensive plan for habitat and species, including inventory protocols, gap identification and funding estimate

3) Data Management

- Explore national biological information infrastructure for intra-country data linking and sharing opportunities
- Develop common GIS language

4) Funding

- Initiate discussions with international foundations to establish a bird conservation grant category. CEC leads timing: summer 2001
- U.S NABCI to collaborate with Canada and Mexico in developing approaches to multilateral funding institutions

- Encourage flow of money to exemplary international integrated bird conservation projects
- Use the NAWMP model for funding priorities

5) Policy

- Have an integrated conservation agreement signed by the three countries. It should be led by national coordinators, September 2001.

## **Session B**

### **Planning and Evaluation**

#### **NABCI Goals**

- Enhance communication among and within countries. Participants recognized NABCI as an ideal forum for discussion of relevant issues among the three governments as well as between organizations and initiatives in specific countries.
- Develop trans-boundary planning for bird conservation at different levels: national, binational and trinational. Participants suggested the use of conservation tools such as Joint Ventures, BCRs, IBAs, etc.
- Develop trinational NABCI planning to: gain concordance among stakeholders; maintain integrity of existing plans and processes (e.g., PIF, WHSRN, NAWMP and NAWCP and focus on items of continental importance.
- Plan NABCI at multiple scales, such as biological, geographical and political.
- Strengthen local capacity and promote cultural exchange among members.

#### **NABCI Strategic Planning Issues**

The eight groups discussing NABCI planning and evaluation needs all recognized the need to establish a clear and detailed strategic plan, named by some groups as the “NABCI Blueprint.” This plan should have sections on vision, goals, objectives (performance measures), conservation priorities, implementation, needed resources, timelines, monitoring and evaluation. The strategic plan should consider issues such as different scales, national, binational and trinational politics and cultural challenges. Important reasons for having a NABCI strategic plan include strengthening federal support in each country, securing financial support, formalizing partnerships, legitimizing activities, and facilitating cooperation. Features and outcomes of such a plan that were discussed include:

- Improve participants' communication
- Identify and fill knowledge gaps
- Include other programs in NABCI planning
- Address resident and endemic species issues
- Create opportunities for meetings and workshops
- Consider suites of species and habitats. Population goals should be by species, but goals for each species may have different characteristics, such as population size, density, trends, etc. Habitat goals should provide sufficient habitat to meet species requirements.
- Define an international structure to oversee the implementation of the strategic plan
- Signed by ministers of the three countries
- Build strategic plan with existing resources
- Identify species that spend part of their life cycle in two or more countries to facilitate and implement projects to address conservation issues of those species
- Implement demonstration projects
- Assign the writing of the strategic plan to the three national coordinators. Have the national committees review the plan before presenting a draft document to NABCI partners
- Need immediate, short- and long-term goals
- Plan strategically to get federal government attention in three countries. Include Mexico in ongoing prioritization discussions in the United States and Canada.

### **NABCI Monitoring and Evaluation Issues**

- Conduct NABCI evaluation at two levels: biological impact and program implementation
- Evaluation is essential to the strategic plan; it must be objective and conservation driven
- Set agreed upon standards for monitoring protocols among the three countries
- Address cost benefit of conservation actions
- Improve biological foundation of avian conservation
- Include indicators of success
- Assess BCR performance
- Evaluate on an on-going basis with periodic (3-5 year) reviews and assessments

- Establish clear and measurable milestones
- Base work on adequate science support
- Improve mechanism for sharing databases

#### **NABCI Database Issues**

Kinds of databases:

- Species Priorities – Rocky Mountain Bird Observatory
- Distribution/Population status and trends
- Key sites/habitats/IBAs, etc.

#### **Existing Databases Include the Following:**

- University of Kansas - CEC
- Bird Source – Cornell Lab of Ornithology
- United States Geological Service Patuxent Research Centre
- Comisión Nacional para el Conocimiento y Uso de la Biodiversidad
- The Nature Conservancy - Convention on International Trade in Endangered Species of Wild Fauna and Flora
- Convention on International Trade in Endangered Species of Wild Fauna and Flora

#### **NABCI Database Needs:**

- Facilitate list of existing international internet-based databases
- Need long term support for developing and maintaining web-based technology
- Conduct workshop for partners working on databases
- Strengthen link with existing databases

Geographic Information Systems (GIS) – NABCI to facilitate making layers, including land-use patterns, etc., available to all countries

A workshop that would identify and address database issues would be useful. Topics should include ways to minimize duplicated efforts among initiatives, database needs and standards, and future needs. The North American Bird Conservation Initiative must concentrate on how to fund and support long-term data collection and monitoring and internet technology management.

## **Session C**

### **Effective Program Delivery**

In the plenary portion of this session, Dr Arnold Boer presented a model for effective delivery of bird conservation programs, based on the highly successful NAWMP Joint Venture approach. He emphasized three “keys to success” and described their characteristics:

#### **1) Delivery through Partnerships**

- Self-directed, with the capacity to fund and execute projects in support of objectives
- Strong community involvement
- Accountable for delivery on the landscape
- Reflect jurisdictional realities
- Develop and support tracking system for evaluation

#### **2) Biological Foundation**

##### **a) Common biologically based framework for planning**

- BCRs

##### **b) Continental priorities and strategies**

- Bird Conservation Initiatives: the keepers of the continental-level plans for each taxonomic group - waterfowl, landbirds, shorebirds, waterbirds
- Set biological and strategic priorities for species within taxonomic groups
- Identify geographical or biophysical areas of special concern
- Identify common threats and actions needed to address them
- Extend actions beyond North America

##### **c) Integrated conservation plans with specific, measurable objectives**

- Work done by a team of biologists, GIS specialists, and, possibly, a

coordinator

- Develop integrated BCR and landscape plans
- Integrate species and habitat priorities
- Incorporate socio-economic context
- Develop landscape design and specific habitat objectives
- Foster inventory, monitoring and science in support of delivery

### 3) National and International Coordination

National NABCI Council/Committee:

- Forum for communication among initiatives, organizations and individuals to facilitate an integrated approach
- Guides policy and strategic direction

National Coordinators:

- Facilitate national and international planning, evaluation and communication
- Trinational NABCI Committee
- Link among the three national bodies
- Guides aspects that require international cooperation

Dr Boer finished his presentation with a series of questions for the breakout groups to discuss.

The groups reached the following conclusions:

#### **Question 1: What structures and mechanisms facilitate coordination?**

- Do what works and build on existing structures
- Requires leadership
- BCRs are units for planning and evaluation not implementation
- BCRs demonstrate unity among bird plans and allow multi-scale ecological planning

**What are the barriers?**

- Funding
- Capacity building—science to ensure biological foundation and land management
- Trinational agreement and strategic plan
- Communications

**Question 2: How do we establish and maintain effective partnerships?**

- Partnerships are dynamic and need constant nurturing
- Clarity, vision and objectives
- All views are legitimate, merely different
- Constructive issue resolution
- Everyone brings something to the partnerships
- Appreciate needs, differences and viewpoints, respect cultural and institutional differences
- Partners will need to compromise and possibly make sacrifices
- Trust, open and transparent communication
- Recognition and credit
- Encourage creativity

**Question 3: How do we balance local autonomy with continental responsibilities?**

- Guiding document with continental challenges, priorities and strategies
- Document sells NABCI to policy makers and funding agencies;  
who we are, what we are doing and why
- All bird databases will help provide context for local actions
- Guide by showing linkage of local actions to continental needs and priorities
- Communication lines open and active

**Question 4: How do we keep partners working together?**

- Shared success
  - early demonstration projects
  - build up from Mexican AICAs
  - benefit to all three countries
  - link to the ecosystem, resident, endemic and migratory birds
  - sustainable community issues
  - communicate social and economic values to communities
    - local recognition
- Trust and good personal working relationships

**Question 5: How to secure funds for the full range of objectives?**

- Look beyond traditional funding sources
  - North American Wetlands Conservation Act, Canadian International Development Agency, World Bank, agricultural sectors
- Each country has its own mechanisms
- Show effective use of funds, transfer as appropriate
- Public (federal, state, provincial) funds as seed money
- Private and non-government organization money as matched money
- Trinational Committee to develop funding document
  - economic, social benefits
  - success of demonstration projects
- Secure new funding sources and expand existing resources
  - stumpage fees, gas/oil exploration, public fines, Conservation and Reinvestment Act

**Question 6: How do we make decisions regarding resources?**

- Based on the biological foundation
- Develop criteria in advance
- Establish conservation priorities
- Most benefit to most birds—leverages the most conservation
- Community needs

- Reality of partners needs/constraints/strengths
- Resource allocation at multiple scales
  - international, national, regional, BCR, JV, etc.

Conclusion: NABCI should continue to sell the vision but expand efforts to sell the successes.

## **Session D**

### **Continental and Collective Actions for Bird Conservation**

The final session was organized around five issues that followed upon decisions that were articulated in the preceding sessions. Many key points from the earlier sessions were reiterated and emphasized prior to the breakout deliberations. These included:

- That NABCI is first and foremost a facilitating effort, and *not* a directing and controlling organization. As indicated in the NABCI vision statement, its purpose is to help coordinate and stimulate conservation among groups and countries
- That the core idea of NABCI is the delivery of bird conservation through regionally based partnerships, with a strong orientation to habitat conservation
- That the focus of NABCI is on-the-ground delivery of conservation
- That NABCI is a biologically driven effort that requires monitoring, biological evaluation and information sharing
- That to build communications is integral in the effort to building partnerships and improving coordination among bird groups and across international boundaries

Based on this framework for discussion, participants were asked to deliberate on the following issues in their breakout sessions:

#### **Trinational Accord**

Questions to be considered here included who would sign such a document, what steps should be taken to start the process of developing such a document and what would be included in it. Suggestions for the groups to consider inclusion of functional elements in the NABCI Action Plan, inclusion of a commitment to structures for international coordination, commitment to processes for international communication and information sharing, etc.

There is broad consensus that an accord is needed between the United States, Mexico and Canada.

**The purpose and use of the accord is:**

- To serve as a public expression for trilateral cooperation to deliver integrated bird conservation
- To further articulate the NABCI vision
- To establish an official standing for NABCI
- To help empower governments and citizens to work on NABCI
- To help facilitate funding
- To enhance the commitment of current and potential stakeholders
- To express a commitment by signatories to the conservation of birds

**Observations on the issue of who should sign such a document include:**

- Signatures should be at the highest level of authority possible, ie: at the ministerial and possibly the Presidential and Prime Ministerial levels.
- Some suggested broad representation, including agriculture and other sectors of government.
- It was noted that a narrow target of signatures would expedite the process.
- On the other hand, this could be an opportunity for a full range of partners to sign on and commit to the process.
- It may be possible to have a narrow list of signatories initially, but to institute a process whereby others could add their endorsement at a later date.

**Suggested elements of the accord include:**

- A preamble wherein the history and principles of NABCI are described.

- Explicit statements indicating the central role that would be played by the four major bird initiatives, but that the accord is open to all committed to the conservation of birds.
- The need for an international coordinating body should be expressed.
- Some suggested that the document be very brief, while others wanted a longer piece including descriptions of biological objectives.

**Process issues include:**

- The national coordinators should factor prominently in drafting the accord.
- A draft should then be reviewed and ultimately endorsed by the three national committees.
- Timing was unclear; some suggested doing this very soon and others suggested that getting signatures by International Migratory Bird Day in May, 2002 would be more reasonable.

**Structure for International Coordination**

NABCI has developed to date primarily through national-level efforts. An issue of concern is how to facilitate coordination of efforts across national boundaries. Options to consider might include a specific role for the G-9; affiliation with the Trilateral Committee; investing the Chairs of the three NABCI National Committees with this responsibility; assignment of responsibilities to the National Coordinators; or the creation of a separate oversight group of NABCI partners.

**Coordination**

It was agreed that a Trinational Committee is needed to deal with issues that are international in scope, and that simply attaching this function to the Trilateral Committee or another existing body is not a satisfactory solution. It was suggested that the current G9 structure be a starting point, with modifications suggested and membership specified by the three national committees/councils. Close linkage to the national committees is needed, with at least some of the trinational representatives belonging to those committees. A continued close connection to the CEC was also suggested.

## **Demonstration Projects**

Relevant questions for this issue include the appropriate conservation focus for such projects, what conservation actions would be undertaken in them, the relevant criteria for recognizing such projects (e.g., broad partnerships, high priority areas in each country, involvement of several bird conservation initiatives, etc.).

The value of on-the-ground projects to illustrate the importance of working across international borders and among initiatives was agreed upon. These would not necessarily be “NABCI” projects, but rather projects to demonstrate the value of the NABCI vision.

### **The criteria discussed for an exemplary trinational project include:**

- Feasibility
- Good design
- Science-based
- Co-benefits to other biota (biodiversity value)
- Demonstrate the value of trans-national coordination
- Many partners build on currently recognized opportunities of importance to conservation in all three countries
- The process by which demonstration projects should be identified include:
  - development should be from the bottom-up (locally derived).
  - Trinational projects should move from south to north, being rooted initially in Mexico, and then linked to the U.S. and Canada.
  - There should be multiple projects with broad geographic distribution.
  - Joint Ventures and other partnerships should be encouraged to continue taking the lead in development or identification of such projects.
  - The national coordinators and national committees should help develop or

rships needed to embark on such projects.

## **Communications and Information Sharing**

Communications and information sharing were a focus of discussion in virtually all the breakout sessions, irrespective of the session topic. The general idea in most discussions was that communication efforts and information sharing are much needed, and are likely to be more effective if they are coordinated at multiple levels. Issues concerning the identification of common messages for a communications strategy, the need for an institutional and structural process, the mechanisms for developing and sharing communications products, how to

facilitate data information sharing via the internet, and shared information infrastructures, data protocols and data products were discussed.

The need for stronger NABCI communications products and tools was agreed upon. Some of the themes suggested were:

- Development of a communications strategy stressing that integrated bird conservation at the continental level is the main product, not NABCI
- NABCI does not replace existing conservation efforts
- Partner awareness of conservation opportunities and interactions should be promoted
- Outreach regarding conservation opportunities and development and communication of scientific information are critically important; however, the two are very different functions

Communications process issues were identified, including:

- Existing projects should be highlighted as success stories
- Specific audiences should be targeted with tailored messages and measured output
- Ultimately, all partners should be vehicles for communication
- The CEC can be a very helpful partner in carrying out communications initiatives

Several potential NABCI products and activities were identified including:

- NABCI website
- Distribution of meeting notes and existing communications products
- NABCI partner directory
- NABCI project directory
- NABCI knowledge-building and partnership-developing workshops
- Develop closer links to the North American Bird Information Network and National Biological Information Infrastructure
- NABCI funding sources directory



## **Final Plenary**

At the close of the final plenary session, Karen Brown, Chair of the NABCI-Canada Council, Bob McDowell, Co-Chair of the NABCI-U.S. Committee and Hesiquio Benitez, on behalf of Dr. Jorge Soberón, Chair of the NABCI-Mexico Committee, offered their perspectives on the meeting. They all recognized and appreciated the participation, enthusiasm and commitment of the people in all three Nations for the progress made since NABC I in Puebla, Mexico.

They supported the proposed development of a strong trilateral agreement with clear and specific objectives, signed at the highest possible level while maintaining the multi-sector spirit of the initiative (similar to the NAWMP agreement). The need for close cooperation among the three national NABCI committees was recognized and they supported the formation of an enhanced trilateral committee to facilitate that cooperation.

There was strong support for the development of integrated bird conservation demonstration projects, as part of a NABCI pilot implementation phase, but noted that this should be done carefully. There is a need to review what has been accomplished and determine what still needs to be done. These projects will provide successful examples that will aid in promoting the many benefits of integrated bird conservation and cooperation at the national and international levels.

Communications is recognized as crucial to NABCI's success. The Querétaro participants recognize that professional communications expertise is needed to further the communications strategy and to develop quality communications products.

Participants also recognize the need for increased funding to deliver NABCI priorities. Partners are encouraged to commit efforts to seeking increased funding.

The importance of the involvement of political leaders in NABCI was recognized. Hesiquio Benitez concluded the NABCI II meeting by expressing his appreciation to those who made the meeting possible through their hard work and participation, to the CEC for their financial support, and to the staff of the Hacienda Jurica for helping to make NABCI II a success.