



United States Department of the Interior
BUREAU OF LAND MANAGEMENT

Washington, D.C. 20240
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In Reply Refer to:
1610, 1734, 4100, 4180, 6700 (230) P

SEP 1 2016

Instruction Memorandum No. 2016-144
Expires: 9/30/19

To: State Directors (California, Colorado, Idaho, Montana, Nevada, Oregon/Washington, Utah, and Wyoming) and Center Directors

From: Deputy Director *Steven Feltz*

Subject: Gunnison and Greater Sage-Grouse (including the Bi-State Distinct Population Segment) Habitat Assessment Policy

Program Areas: Wildlife Management, Threatened and Endangered Species Management, Rangeland Management, Riparian Management, Fuels Management, Vegetation Management, Emergency Stabilization and Rehabilitation.

Purpose: This Instruction Memorandum (IM) provides policy on how to assess habitat for Gunnison and Greater Sage-Grouse, including the Bi-State Distinct Population Segment, (hereafter referred to as "sage-grouse") and under what circumstances the habitat assessment is required.

Policy:

- The Bureau of Land Management (BLM) offices that manage sage-grouse habitats are required to use the mid-, fine-, and site-scale indicators and the habitat suitability rating process provided within the Sage-Grouse Habitat Assessment Framework (HAF; Technical Reference 6710-1, Stiver et al. 2015) when assessing sage-grouse habitat for a population/subpopulation/biologically relevant area that encompasses sage-grouse seasonal habitats. Offices may look for opportunities to integrate other measurement and modeling assessment approaches into the habitat assessment.
- Field offices whose GRSG Plan contains a Habitat Objectives Table are required to use the objectives table (and any associated footnotes) when completing sage-grouse habitat assessments. Ecological potential of sites within the assessment area will be taken into account when analyzing the sampling locations and interpreting the habitat measures.
- Field offices (FO) are required to use the site-scale HAF suitability ratings (e.g., suitable, marginal, unsuitable), following the HAF methodology to determine suitability, when evaluating the wildlife/special status species habitat quality land health standard.

- Field offices will include prioritization criteria from the Approved Resource Management Plan Amendments for the Rocky Mountain and Great Basin GRSB Regions and nine Approved Resource Management Plans in the Rocky Mountain GRSB Region (collectively referred to as the GRSB Plans) when establishing priorities for sage-grouse habitat assessments.
- Field offices whose RMP does not contain a Habitat Objectives Table should use objectives from an applicable sage-grouse conservation plan (e.g., Gunnison Sage-Grouse Rangewide Conservation Plan); use the habitat suitability characteristics found in the HAF; or follow procedures set forth in the HAF to modify the indicator values to use during sage-grouse habitat assessments.
- BLM offices that complete a multi-scale sage-grouse habitat assessment are required to compile a Habitat Assessment Summary Report.
- BLM offices will use the Habitat Assessment Summary Report to inform the wildlife/special status species habitat quality land health standard(s) when completing Land Health Assessments and Land Health Standard(s) evaluation¹ (BLM Handbook 4180-1, Land Health Standards) and associated National Environmental Policy Act (NEPA).
- State offices (SO) are required to post Habitat Assessment Summary Reports completed in their state to the BLM Sage-Grouse Implementation SharePoint site.
- Data and information from several sources can be used to inform sage-grouse habitat assessments while considering their limitations. Responsibilities for collecting and managing sage-grouse habitat data and information are described herein.
- The BLM Washington Office (WO), National Operations Center (NOC), National Training Center (NTC), Regional/Zone Leads and other subject matter experts will develop training opportunities to support implementation of this policy.

Prioritizing Sage-Grouse Habitat Assessments

BLM FO authorized officer will set priorities for sage-grouse habitat assessments using prioritization criteria consistent with the applicable GRSB Plan. Priorities may be further refined by BLM FO wildlife biologists, Interdisciplinary Teams (IDT), and in coordination with state agencies to ensure that sage-grouse habitat assessments are conducted within areas where habitat information is limited, or within populations where changes in management may be expected to improve sage-grouse habitat (e.g., for compensatory mitigation purposes, where a GRSB Plan adaptive management trigger has been tripped, etc.). Also, an evaluation of existing data, such as core and supplemental indicator data collected as part of the Assessment, Inventory and Monitoring (AIM) Strategy and legacy trend data, as well as other ecological data will help prioritize assessments in areas where habitat does not appear to be suitable.

Creating and Using a Habitat Assessment Summary Report

A Habitat Assessment Summary Report will be developed and used to inform the Land Health Assessment and Land Health Standard(s) evaluation relative to wildlife/special status species

¹ Adjustments to authorized use based on not meeting the land health habitat standard are made once a determination is complete, the causal factor has been identified, and current conditions are taken into consideration.

habitat quality standard(s) (“BLM Handbook 4180-1, Land Health Standards”) and associated NEPA.

Field offices will coordinate with district offices (DO), SOs and the NOC, as well as with state agencies, other federal agencies and research partners, to acquire the best available data to inform mid-, fine- and site-scale suitability ratings. After the mid-, fine, and site-scale HAF forms and descriptions are completed, FOs will compile a Habitat Assessment Summary Report that follows this outline and contains (at a minimum):

- Contact information for the FO.
- An Executive Summary
 - Summarized information about data sources and the metadata.
 - Summary of how sampling locations were selected (e.g., randomization, targeted, strata, etc.).
 - Maps of the assessment area and habitats within the assessed area.
 - A summary of the suitability ratings and the rationale used to reach the suitability rating.
- A description of habitat condition and extent (e.g. limiting, such as late brood-rearing riparian areas), and significant threats within the analysis area.
- A description of indicator values used to assess suitability. If the indicator values were modified from those found in HAF or supplemented using other measurement or modeling approaches, include a summary of the process and scientific basis for the modification (e.g., the GRSG Plan).
- An appendix of completed HAF Data Forms from the mid-, fine-, and site-scales that were used to assess habitat suitability.

Upon completion of each Habitat Assessment Summary Report, the FO will submit a pdf version of the report to the SO to be uploaded to the GRSG Implementation SharePoint site.

The Habitat Assessment Summary Report can also be used to:

- Inform management actions to improve sage-grouse habitat at the mid-, fine-, and site-scales.
- Identify metrics to monitor for determining the effectiveness of vegetation treatments in sage-grouse habitats.
- Provide context in NEPA documents for proposed actions in sage-grouse habitats.
- Inform the habitat value (e.g. condition and extent) of debits and credits related to compensatory mitigation and can be used in conjunction with state developed compensatory mitigation valuation approaches.

Sage-Grouse Habitat Data Acquisition and Management

To implement multi-scale sage-grouse habitat assessments, a high level of coordination is necessary at all levels of the BLM (WO, SOs, DOs, FOs, NTC and the NOC). Although some specific duties may change over time, the general responsibilities of each office are outlined below. The BLM will continue to collaborate with state wildlife agencies, other federal agencies, research partners and others to share results relevant to sage-grouse habitat and population data (e.g., radio-telemetry).

General Responsibilities:

1. BLM FOs, DOs, and SOs will work with the assessment and monitoring branch at the NOC to design a sampling strategy that conforms to the national AIM sampling strategy and provides adequate sample points in sage-grouse seasonal habitats to complete the site-scale habitat assessment data collection.
2. BLM offices in need of additional sampling locations to complete the habitat assessment process should use a statistically-valid sampling design that conforms to the AIM strategy. FOs should coordinate with their state AIM coordinator or the NOC AIM leads to generate an appropriate sample design.
3. BLM FOs are responsible for identifying data gaps; coordinating with the DO/SO to gather data; and interpreting and writing mid-, fine-, and site-scale suitability descriptions and ratings, as well as the Habitat Assessment Summary Reports. Habitat Assessment Framework indicator data should be in a standardized spreadsheet or database and FOs should submit habitat assessment data and reports to a centralized electronic folder that is maintained by the SO.
4. The BLM WO, NOC, NTC, Regional/Zone Leads, SOs and other subject matter experts will develop training opportunities for sage-grouse habitat assessment data collection, interpretation and report writing. Training for field data collection of the AIM Core Indicators is available and coordinated through the assessment and monitoring team at the NOC and the appropriate state office program lead(s).
5. Broad-scale data: The NOC maintains, updates and serves broad-scale spatial data sets (e.g., LANDFIRE and Grass-Shrub Stewardship Fractional Mapping) and derived products.
6. Mid- and fine-scale data: The WO, NOC and SO share responsibility for maintaining and updating mid- and fine-scale spatial data (e.g. anthropogenic disturbances, seasonal habitat, and biologically significant unit boundaries).
7. Site-scale data: The FOs, DOs and/or SOs are responsible for site-scale data collection, quality assurance, and management. The NOC is responsible for consolidating and serving the site-scale habitat indicator data collected under the AIM core methodologies, as well as providing analytical support for these data.
8. BLM SO and FO will work with states to share and acquire data.

Datasets to Inform HAF Site-Scale Indicators

The core and supplemental indicator data collected as part of the AIM strategy should be used to inform the HAF site-scale indicators within sage-grouse habitats. If the field office has collected data following techniques other than the AIM technique (HAF, Table 14), begin transitioning to the AIM techniques for consistent measurements across the range. While some HAF indicators may be applicable to multiple seasonal habitats, it is important that grass and forb related data be collected during the appropriate phenology. Currently, the AIM core data does not inform all of the site-scale indicators identified in the HAF. Examples are:

- Distance from a lek to adequate sagebrush cover.
- Proximity of detrimental land uses from a lek.
- Proximity of trees and other tall structures from a lek.

- Riparian/wet meadow stability.
- Sagebrush shape.

The need for data to inform the indicators not collected using the core measurements, or other datasets, should be evaluated on a case by case basis. Consider acquiring the data for the lek-specific indicators using remotely-sensed or other existing data and/or consider their relative importance in the determination of the suitability rating. Additionally, indicators not described in the HAF (such as lentic sites) may be useful to address specific habitat characteristics in some areas and should be added as needed to complete the suitability rating.

Field Offices may also consider using BLM legacy data or integrate other datasets and information to inform the evaluation of habitat indicators or trends in habitat condition. The utility of these datasets to fully inform the HAF indicators and allow assessment across a larger landscape may be limited, and should be evaluated and documented in the Habitat Assessment Report.

Establishing Habitat Suitability Indicator Values

Habitat indicator values in the HAF technical reference forms should be used to rate suitability (i.e., suitable, marginal and unsuitable) unless these indicator values 1) differ from the values in the GRSG Plan Habitat Objectives Table, or 2) fail to accurately reflect regional scientific information. The following steps describe the process for adjusting habitat suitability indicator values in the HAF technical report forms:

1. Where they differ, replace the HAF indicator values for a *suitable* rating on Forms S-2 through S-6 with the GRSG Plan Habitat Objective desired conditions.
2. If the indicator values for a suitable rating were replaced in Step 1, develop indicator values for the *marginal* and *unsuitable* ratings using the process that was used to determine the desired conditions in the Habitat Objectives Table in the GRSG Plans.
3. In FOs without a GRSG Plan Habitat Objective Table, or in regions where science and data support adjustments to the indicator values, use the applicable sage-grouse conservation plan objectives (e.g., Gunnison Sage-grouse Rangewide Conservation Plan) or follow the process identified in the HAF Technical Reference (pages 20 and 21) to develop *suitable*, *marginal* and *unsuitable* indicator values. Coordination with state agencies during this process is encouraged.

Data forms in the HAF technical reference have been modified to allow changes to the indicator value columns as well as to allow additional indicators in the rows for those offices that have additional indicators and associated values from the applicable GRSG Plan Habitat Objectives Table or other sage-grouse conservation plan. The customized forms may be found at:

http://www.blm.gov/wo/st/en/info/blm-library/publications/blm_publications/tech_refs/SG_HAF.html

Timeframe: This IM is effective immediately.

Budget Impact: The BLM requested additional funds in fiscal year (FY) 2016 and FY 2017 President's Budget Request for sage-grouse conservation. The BLM received the additional

funding in FY 2016 and will use some of the funds to collect habitat indicator data, train staff to complete sage-grouse habitat assessments, and develop data and GIS products such as seasonal habitat and vegetation maps, and anthropogenic disturbance inventories. Sage-grouse habitat assessment implementation will be phased in, following prioritization as described in this IM and based on available budgets.

Background: The HAF is a key component of measuring the success of the BLM's conservation strategy to maintain, enhance or restore seasonal habitats that meet sage-grouse life history needs. The HAF has been refined by decades of sage-grouse research and policy and provides a high level of consistency, transparency and expertise to sage-grouse habitat assessments. The HAF is recognized in the scientific community as a blueprint for sage-grouse habitat evaluation.

In 2000, BLM-Idaho developed a habitat assessment process that provided a standardized framework to assess indicators of sage-grouse habitat, largely focused on the site scale (Sather-Blair et al. 2000). In 2006, WAFWA, and other habitat specialists and sage-grouse experts from state, federal, and non-governmental organizations, built on the concept and initiated a habitat evaluation tool. The habitat evaluation tool provided a standardized assessment framework to assess additional indicators of sage-grouse seasonal habitats including the fine, mid and broad scale, in addition to the site scale. The Greater Sage-Grouse Comprehensive Conservation Strategy (Stiver et al. 2006) outlined objectives for the HAF, including temporal and spatial methods for evaluating sage-grouse habitat suitability at multiple landscape scales. An initial version of this more comprehensive HAF was released in 2010 and subsequently refined (Stiver et al. 2015). Conducting the HAF at multiple scales within sage-grouse habitat remains a cornerstone of the sage-grouse conservation strategy.

Manual/Handbook Sections Affected: Manual 4180 and Handbook 4180-1, Manual 6500, Manual 6600, Manual 6840.

Coordination: This IM was coordinated with the Division of Forest, Rangeland, Riparian and Plant Conservation, the AIM Lead, the NOC Division of Resource Services, and BLM State Office wildlife and sage-grouse leadership within the range of sage-grouse.

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