❖Standard 1: Engage key internal and external partners and stakeholders throughout the process.

Case Study: **Okanagan Ecoregional Assessment Team Charter**

By: Nancy Warner, The Nature Conservancy, Washington and Rebecca Esselman ,TNC

Purpose and region of analysis

The Okanagan Ecoregion covers portions of Washington (35%) and British Columbia (65%) between the Cascade and Coast Mountains to the west and the Selkirk and Columbia Mountains to the east. The team formed to conduct the Okanagan ecoregional assessment included three major partners: The Nature Conservancy of Washington, the Nature Conservancy of Canada, and the Washington Department of Fish & Wildlife, along with collaborators from many other agencies and organizations. This collaborative approach strengthened the information base and established a communication network needed for developing strategies and taking cooperative conservation actions.

Criteria/Methods

In the Okanagan Ecoregion, the assessment team was organized to include diverse partners with the expertise and time needed to engage in a multi-month process of gathering and assessing available information on the ecoregion. The terms of each partnership and the expected outcomes of the assessment were established early in the process and helped build buy-in and feasibility for achieving the project goals.

Participation in the ecoregional planning process fell into three general categories: *core team* members, *technical subteam* members, and *other* contributors. Core Team members guided and shaped the assessment process and ensured products met the planning needs of the member organizations and other conservation partners within data and timeline constraints. Additional experts served on one or more technical teams and contributed knowledge and information to the process. Other contributors included a variety of experts with knowledge of species, natural systems, and the human context of the ecoregion including impacts to biodiversity. Additional contributors were invited to review and refine interim products. The table below lists major participants and their roles, and the figure illustrates the organizational structure of the assessment team.

Organization, Agency or other	Role
The Nature Conservancy	Core Team participant
Nature Conservancy Canada	Core Team participant
Washington Department of Fish and Wildlife	Core Team participant
Washington Department of Natural Resources' Natural Heritage Conservation Section	Core Team participant
British Columbia Ministry of Sustainable resources Management's Conservation Data Centre	Core Team participant

NatureServe	Core Team participant
US Forest Service	Data source, expert review
Colville Confederated Tribes	Data source, expert review
US Bureau of Land Management	Data source, expert review

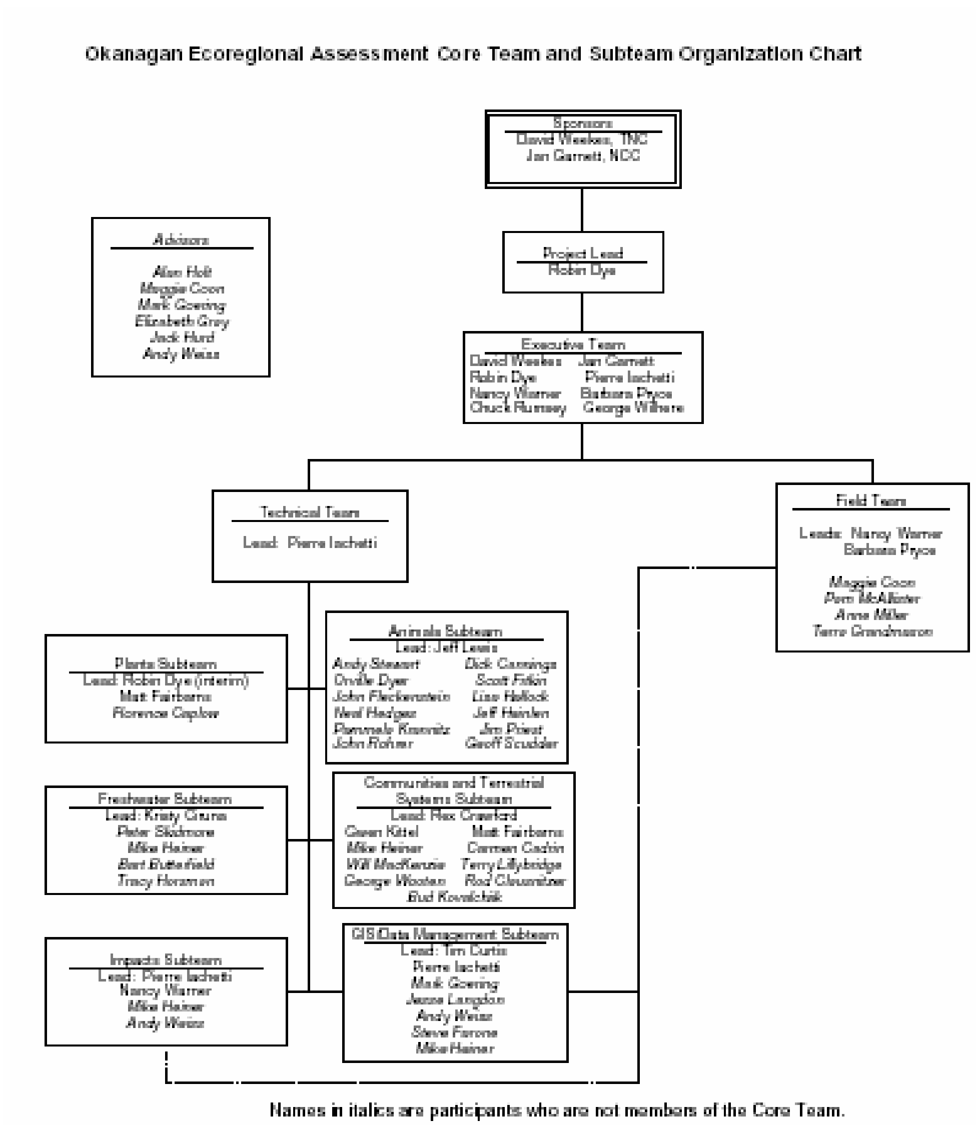

Figure 1: Organizational chart of Okanagan Ecoregional Assessment core team and subteams.

The teams illustrated in Figure 1 have extensive shared responsibilities for the completion and implementation of the ecoregional assessment. What follows is a summary of roles as they pertain to this standard (engaging key internal and external partners and stakeholders in developing and implementing the ecoregional assessment). The most innovative addition to this organizational structure is the creation of the Field Team. The **Field Team** is responsible for approaching potential partners and stakeholders to learn about applicable data resources they might have available and their capacity and need for using assessment products. An *expert interview guide* was developed to standardize this process. The team was also responsible for conducting outreach to other key audiences during the development of the assessment. Care was taken to coordinate consistent messages during this outreach and to share the results of specific presentations or interactions. The Field Team also produced periodic updates to share with technical experts seeking more background on the project.

Throughout the process the Field Team also gathered information to use in developing an overview of the human context of the ecoregion. This synthesis of key information on environmental, economic, and community issues provided an overview of the sociopolitical setting, key natural resource managers and users, institutions and policies, and other planning efforts..

Core Team Representatives served as liaisons between their agency and the Core Team and contributed to outreach efforts by sharing in presentations and attending meetings as needed. **Sponsors** served as liaisons to the senior management of their respective agencies. **Advisors** worked to ensure that the assessment process would effectively translate into conservation strategies and results, and ensure coordination with TNC's broader partnership efforts. The **Technical Team** had subteams that included plants, animals, freshwater systems, rare communities and terrestrial systems, impacts, and GIS/data management. Team leaders were also responsible for working with the Field Team on outreach to, and data gathering with, partners.

It was decided that due to differences in the missions and goals of the agencies involved in completing the assessment, it would be difficult to create a mutually agreeable implementation plan. Therefore, TNC and NCC planned to develop an implementation plan specific to the goals of their respective organizations that they will make available to the other assessment partners. The plan for sharing this internal strategy document will not preclude meeting internal TNC standards and deadlines.

Products/Outcomes:

- Periodic updates- Reports summarizing progress with the ecoregional assessment were produced for internal and partner audiences. An example of a periodic update can be viewed here.

- Outreach Table- The Okanagan Ecoregional Assessment Team created an outreach table and schedule. This table identified critical partners/stakeholders. For each person or group, a meeting date was scheduled, a leading staff person was identified, and the meeting goals and intended outcomes were defined.
- Talking points to answer anticipated questions- available soon.

- Human Context Analysis- available soon

- Expert interview guide- available soon

Strengths and weaknesses

A strength of this approach lies in the utility of broadly agreeable results. In addition to the use of plan results by TNC and NCC to shape and inform their programs in the region, two significant ways we know the results of the assessment will be used and will catalyze conservation are the Washington Statewide Biodiversity Plan and the Washington Department of Fish and Wildlife's intentions.