

**Hardner & Gullison**

**External Independent Evaluation of  
*Power of Flight* and *Longleaf Legacy*  
Conservation Grant Programs of  
Southern Company and  
National Fish and Wildlife Foundation**

***Prepared by:***

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### **About Hardner & Gullison Associates, LLC**

Hardner & Gullison Associates, LLC (HGA) is a private consulting firm that provides technical assistance in the field of conservation to foundations, conservation groups, governments, and corporations. Its work includes program evaluation, economic analysis, conservation finance, project design, and corporate environmental management. Members of the firm include among their past and present clients National Fish and Wildlife Foundation, Gordon & Betty Moore Foundation, U.S. Agency for International Development, The World Bank, Inter-American Development Bank, The Nature Conservancy, World Wildlife Fund, Conservation International, U.S. Environmental Protection Agency, NOAA National Marine Fisheries Service, BP, Shell Oil Company, Rio Tinto, Compañía Minera Antamina, among others.

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## **EXECUTIVE SUMMARY**

This report presents results of an evaluation of the *Power of Flight* (POF) and *Longleaf Legacy* (LL) conservation programs, funded through a partnership of Southern Company, its four operating companies (Alabama Power, Georgia Power, Gulf Power, and Mississippi Power), and National Fish and Wildlife Foundation (NFWF). The organizations requested the assistance of Hardner & Gullison Associates, LLC (HGA) to conduct this independent external evaluation.

The evaluation found that these young programs have made a very strong start. They are widely recognized among environmental stakeholders as making a noteworthy contribution to conservation issues considered a priority in the region. The impacts of the programs are tangible, and include the establishment and restoration of various types of natural habitats (particularly longleaf pine), and aiding the recovery of some emblematic bird species, such as the red-cockaded woodpecker.

Accomplishments to date provide a strong base from which to identify ways that the two programs can further strengthen their efforts, including suggestions on how to maintain ecological gains over the long-term, measure performance, and convincingly communicate the benefits of the program to a broad audience.

### **Overview of Programs**

The goal of POF is to conserve birds characteristic of the southern U.S. It does this by funding projects such as habitat restoration and management; species conservation through implementation of priority management actions; environmental education that targets urban or underserved youth; and, applied research with direct implications for management and conservation.

The goal of LL is to help restore longleaf pine forests through restoration of longleaf on public lands, which includes conversion of non-native pine plantations; re-establishment of longleaf ecosystem on sites adjacent to or near existing longleaf stands so as to create larger and more ecologically viable areas of forest; replanting in areas that are high priority for wildlife conservation, such as red-cockaded woodpecker recovery sites; and, outreach to private landowners who are willing to manage longleaf on a long rotation to benefit wildlife.

The geographic focus of the two programs is Southern Company's operating area, which includes most of Georgia and Alabama, the panhandle of Florida west of the Apalachicola River, and southeastern Mississippi. Some projects funded by the programs extend outside this area, as dictated by conservation needs.

Since 2003, when the two programs began making grants, Southern Company has contributed \$3,823,760 to projects and NFWF has matched with a contribution of \$3,798,583 in federal funds and \$153,920 in non-federal funds. Grantees have brought an additional \$40,133,251 in funding to their projects, including \$768,111 of federal funds.

### **Method**

HGA developed the evaluation methodology in close collaboration with NFWF program staff, the Southern Company stewardship committee led by Leslie Montgomery, and a technical advisory panel of independent scientists.



The evaluation was designed to address seven major thematic areas:

- Alignment with conservation priorities
- Performance measurement in practice
- Actual performance of projects
- Sustainability of conservation gains
- Communication of achievements
- Improving performance measurement and evaluation
- NFWF grant management

Sources of information to examine these themes included interviews with experts in the relevant fields of conservation, grantee proposals and project reports, an extensive online survey of grantees, site visits and interviews with grantees, and interviews with environmental stakeholders in the region.

This evaluation considers grants made from inception of both programs to early 2008. Over this period, POF awarded 49 grants, and LL awarded 29 grants, totaling 78 awards made to 55 grantees at 38 different grantee institutions.

### **Impact of Programs**

The evaluation found that grantees have used POF and LL funding to generate significant conservation impacts. Some 4,200 acres of longleaf forest have been established, either through creating new forests, or converting plantations of other tree species. More than 12,000 acres of existing longleaf forests have been treated through burning and hardwood mid-story removal. Nearly 48,000 acres of different habitats are under improved stewardship. And, approximately 133,000 people have received some form of conservation education, and an additional 201,000 were potentially exposed to a conservation message via visits to birding sites and nature trails.

Given the youth of the programs, many of the impacts of grants are anticipated to occur in the coming years. When all currently funded projects have finished their activities, approximately 30,000 acres of new and restored longleaf forest should result.

Some impacts of the programs are either difficult or impossible to measure, such as the influence of landowner education programs, which may affect conservation practices over tens- or hundreds of thousands of acres. In addition, the programs have had indirect impacts that have produced significant but difficult to quantify conservation benefits. Examples include: developing markets for native species seeds and seedlings; emulation of land management practices among neighboring landowners; sharing of techniques and methodologies, such as training of state land managers in prescribed burning practices; and development of partnerships and alliances across conservation actors within and outside the program.

POF and LL fill an important donor niche and have initiated significant conservation efforts for major priorities across the geographic focus of the programs. Environmental stakeholders recognize the programs as making an important contribution.

## **Looking Forward**

Building on a very strong start, the programs can now look ahead to opportunities to further strengthen their efforts. This evaluation lays out a series of challenges and recommendations on the following themes:

- addressing conservation priorities;
- ensuring adequate ecological scale of projects;
- overcoming limiting factors to conservation;
- communicating program impacts; and,
- measuring performance.

The strong and effective partnership between Southern Company and NFWF is an excellent base upon which to take on these challenges. Regardless of the speed and success in overcoming the challenges identified in this report, POF and LL will remain excellent programs that have had an important impact for conservation in the region.

## **DESCRIPTION OF PROGRAMS**

This evaluation covers two programs, the *Power of Flight* (POF) and *Longleaf Legacy* (LL), both funded via a partnership between Southern Company, its four operating companies (Alabama Power, Georgia Power, Gulf Power, and Mississippi Power) and the National Fish and Wildlife Foundation (NFWF).

### *Overview of POF and LL*

The goal of POF is to conserve birds characteristic of the southern U.S. Projects of interest include habitat restoration and management; species conservation through implementation of priority management actions; environmental education that targets urban or underserved youth; and, applied research with direct implications for management and conservation.

The partners originally committed to a five-year program in 2003, with Southern Company contributing \$250,000 annually for projects, and \$50,000 for administration, and NFWF matching Southern Company's project contributions. Southern Company recently extended its commitment to POF for an additional five years, increasing its project funding to \$300,000 per year, and \$60,000 for program administration. NFWF will match Southern Company's project contributions.

The goal of LL is to help restore the South's most famous and unique ecosystem, longleaf pine, as well as to sequester carbon. Projects of interest include: restoration of longleaf on public lands, which includes conversion of non-native pine plantations; re-establishment of longleaf ecosystem on sites adjacent to or near existing longleaf stands so as to maximize habitat area; replanting in areas that are high priority for wildlife conservation, such as red-cockaded woodpecker recovery sites; and, outreach to private landowners who are willing to manage longleaf on a long rotation to benefit wildlife.

The partners committed to a five-year partnership in 2004, with Southern Company contributing \$500,000 for projects and \$100,000 for program administration each year, and NFWF matching this contribution. This commitment has been extended by both parties for an additional five years with the same level of funding.

Both programs have a geographic focus of Southern Company's operating area, which includes most of Georgia and Alabama, the panhandle of Florida west of the Apalachicola River, and southeastern Mississippi.

### *Grants Evaluated*

This evaluation considers grants made from inception of both programs to early 2008. Over this period the two programs awarded \$7,776,263 (\$3,823,760 contributed to projects by Southern Company and NFWF matched with a contribution of \$3,798,583 in federal funds and \$153,920 in non-federal funds). Grantees have brought an additional \$40,133,251 in funding to their projects, including \$768,111 of federal funds.

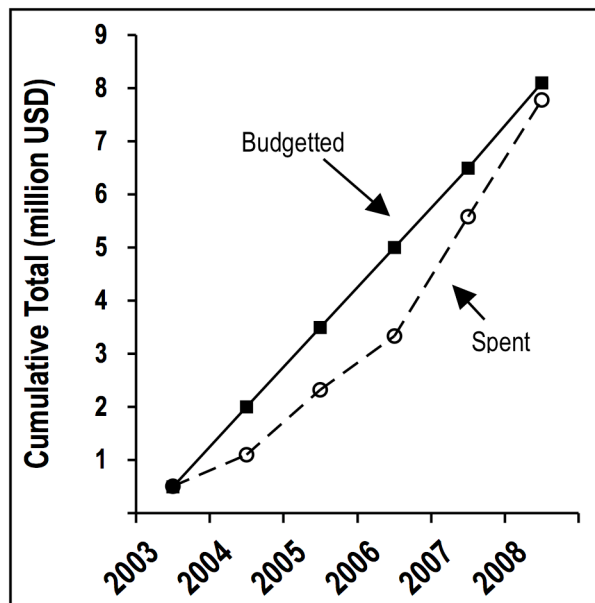
Over the evaluation period, POF had an annual budget of \$500,000 (2003-2007) and LL an annual budget of \$1,000,000 (2004-2007). However, the grant programs did not award all available funding in their initial years (Table 1 and Figure 1). This allowed for higher levels of grant making in subsequent years.

The programs have awarded the most single-state grants in Georgia, followed by Florida, Alabama, and trailed by Mississippi. Approximately 30 percent of the funds have been awarded to projects with activities in two or more states<sup>1</sup>.

**Table 1: POF & LL Funding, 2003-2008 ('000 USD)**

	2003	2004	2005	2006	2007	2008	Total
<b>Grant Funding</b>	\$505.0	\$589.7	\$1,220.4	\$1,015.1	\$2,251.8	\$2,194.2	\$7,776.3

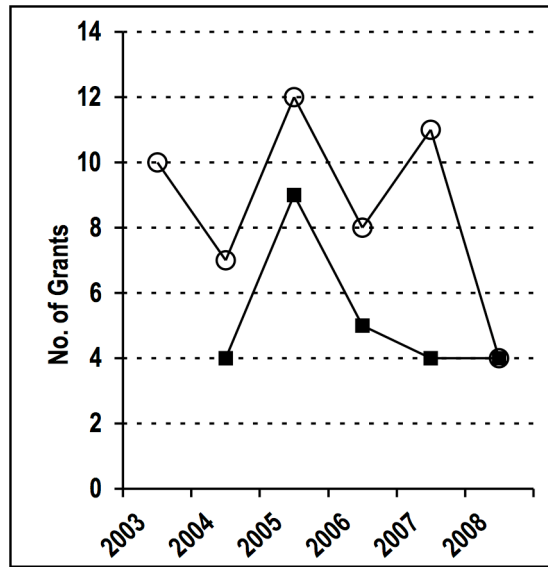
**Fig. 1: POF & LL Cumulative Budgets and Spending**



Over the evaluation period, POF awarded 49 grants, and LL awarded 29 grants, for a total of 78 awards. The number of grants made each year is shown in Figure 2.

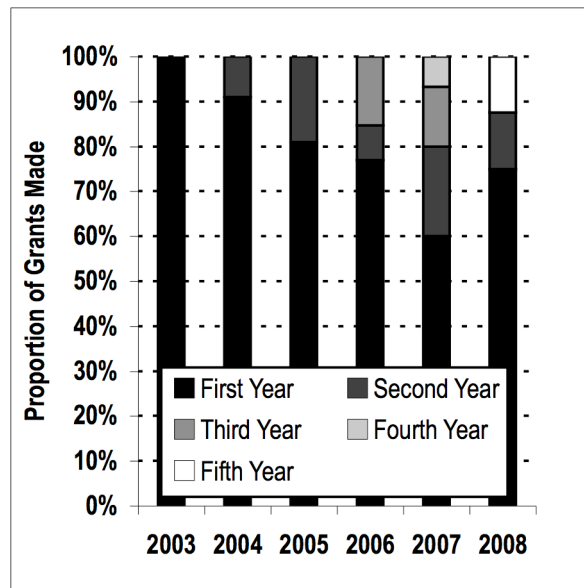
<sup>1</sup> Geographic scope of activities was based on “location narrative” from NFWF program spreadsheet.

**Fig. 2: Annual Number of POF & LL Grants**



The two programs have awarded sequential grants to some projects (Figure 3), and the proportion of projects receiving multiple grants has increased over time. This allows the program to provide funding over longer time periods, helping to increase the financial sustainability of projects. Since 2005, the programs have made the commitment to multiyear funding more explicit. For example, this year POF has awarded a five-year grant for the continuation of the Apalachicola National Forest Red-Cockaded Woodpecker Monitoring project.

**Fig. 3: Trends in Sequential Funding of Projects**



The two programs have given awards to 38 institutions. Some institutions have received multiple grants for the same project, while others have received multiple grants for different projects, which may be conducted by different branches of the same organization (e.g., different state chapters of The Nature Conservancy) or different lead grantees at the same institution (e.g., different professors receiving grants at Auburn University), as shown in Table 2.

**Table 2: Number of Grants and Projects Supported by Grantees that Received Multiple Grants**

Grantee Institution	No. Grants	No. Projects
U.S. Fish and Wildlife Service	8	5
The Nature Conservancy	7	6
Georgia Department of Natural Resources	5	4
Mississippi State University	5	3
National Wild Turkey Federation, Inc.	5	5
Tall Timbers Research, Inc.	4	4
Auburn University	3	3
Georgia Wildlife Federation, Inc.	3	1
National Audubon Society, Inc.	3	2
Quail Unlimited, Inc.	3	1
Avian Research and Conservation Institute	2	1
Francis M. Weston Audubon Society	2	1
The Wildlife Center	2	1
Wildlife Foundation of Florida, Inc.	2	2

Table 3 shows the distribution of projects by category of conservation activity.

**Table 3: Distribution of Grants by Project Category\***

Project Category**	No. of Projects
1.1 Site/Area Protection	2
2.2 Invasive/Problematic Species Control	1
2.3 Habitat & Natural Process Restoration	31
3.1 Species Management	9
3.2 Species Recovery	1
3.3 Species Re-Introduction	2
4.1 Formal Education	4
4.2 Training	5
4.3 Awareness & Communications	4
6.1 Linked Enterprises & Livelihood Alternatives	1

\* Categories as defined by Conservation Measures Partnership

\*\*Projects spanning project categories are counted by main activity.

Of relevance to this evaluation is the youth of grants in the two programs. Only 32 of 78 grants had final project reports available. Proposal and reporting guidelines have changed over time, so that even where project reports exist, these documents do not always provide a consistent basis to evaluate projects. For this reason a critical part of this evaluation was to develop a standardized basis for collecting current information on the projects, as described in the next section.

## METHODOLOGY

HGA developed the evaluation methodology in close collaboration with NFWF program staff, the Southern Company stewardship committee led by Leslie Montgomery, and a technical advisory panel of independent scientists. We believe that the interactive and collaborative nature of our approach generates results and recommendations that are most likely to be relevant, useful, and ultimately accepted by the programs' stakeholders. The following description of the methodology includes a series of iterative steps whereby participants contribute to the development of evaluation questions, criteria for interpreting performance, strategies for data collection, review of summary results, and formulation of recommendations.

### *Step #1: Start-Up Meeting*

We began the evaluation with an introductory meeting February 6, 2008 in Atlanta GA, attended by HGA, NFWF program staff, the Southern Company stewardship committee and other key Southern Company staff. The meeting:

- Provided background information on the two programs and an overview of Southern Company's environmental stewardship programs and communication strategies;
- Initiated discussion of the questions the evaluation should address;
- Generated consensus on creation of an independent advisory panel for the evaluation, with members to be drawn from a shortlist of candidates provided by Peter Stangel.

### *Step #2: Review of program documents, grantee files, and attendance of grantee meeting*

NFWF prepared a comprehensive package of program files, including all grantee proposals and project progress- and completion reports. We reviewed these materials and began to produce a database of relevant information for the evaluation.

We were also able to attend the 5<sup>th</sup> Annual Stewardship Partners Meeting, April 16-17<sup>th</sup>, 2008, in Helen, GA. The meeting provided an excellent opportunity for us to familiarize ourselves with the current projects and to meet some grantees.

### *Step #3: Literature review and independent expert interviews*

We reviewed technical information relevant to POF and LL, including conservation prioritization schemes, and consulted thematic experts on key conservation issues. Expert interviews also assisted in selecting the independent advisory panel. Members of the panel were chosen based on their relevant expertise, as well as ability to represent private sector, research, and on-the-ground conservation practitioner perspectives. The final composition for the panel was:

- *Dr. R Todd Engstrom*, Associate Director, Florida State University Coastal and Marine Lab
- *Dr. Jim Sweeney*, Professor & Associate Dean of Research and Service, Warnell School of Forest Resources - University of Georgia
- *Nathan Klaus*, Wildlife Resources Division - Georgia Department of Natural Resources.

#### Step #4: Evaluation framework

We worked with Southern Company, NFWF, and the advisory panel to refine the set of questions to be addressed in the evaluation. The questions address seven broad themes:

1. Alignment of POF and LL with existing conservation priorities;
2. Performance measurement in practice;
3. Actual performance;
4. Sustainability;
5. Communication of POF and LL achievements;
6. Improving performance measurement and evaluation; and,
7. NFWF grant administration.

With NFWF and Southern Company, we then developed an *evaluation framework* that describes how each of the evaluation questions would be answered. Current POF and LL grantees were also given an opportunity to comment upon the evaluation framework at the Stewardship Meeting in Helen, GA.

For each evaluation question, the framework addresses the types of data required to answer the question, the sources of this information, and the analyses to be performed with the data. The complete evaluation framework is provided in Appendix A of this report.

Embedded within the evaluation framework is an analysis of the barriers that may threaten the successful conservation of the species and habitats that are the focus of the POF and LL grant programs. These *limiting factors* fall into nine basic categories, as described in Box 1.

#### **Box 1: Limiting Factors to POF and LL Conservation Objectives**

Scientific Understanding: Insufficient scientific knowledge about conservation target (e.g. habitat requirements of target species)

Strategic Plan: Lack of strategic plan supported by key institutions for the conservation of target species or habitat

Public Policy, Legislation, and Regulatory Framework: Lack of supportive government policy and legislation (e.g. tax treatment of forest land not supportive of conservation)

Institutional Capacity: Insufficient capacity of relevant institutions (e.g. state agency lacks personnel)

Stakeholder Support: Lack of public awareness or support for conservation

Economic forces: Economic pressures threaten the conservation target

Enforcement: Insufficient enforcement of conservation/wildlife regulations

Short-term funding: Insufficient short-term funding to conduct project

Long-term funding: Insufficient long-term funding to continue project (e.g. ongoing management requirements such as prescribed burns)

Other: Other limiting factors as identified by grantees.



*Step #5: Survey of grantees*

The evaluation framework formed the basis of an online survey to collect standardized information from grantees. We sent invitations to participate in the online survey to 55 grantees representing 73 grants (note: projects receiving multiple grants received a single invitation; five grants were excluded because the grants were made too recently). Eighty-four percent of the invited grantees, representing 88 percent of the grants included in the evaluation, ultimately filled out the survey. Non-respondents cited staff turnover, lack of time, and/or illness as reasons for not participating in the survey.

*Step #6: Site visits to grantees and stakeholders*

We visited POF and LL grantees and stakeholders during July, 2008. The site visit strategy was designed to include a blend of project types, grantee types, geographic localities, and accommodate the schedules of grantees and stakeholders. Priority was given to visiting grantees, with program stakeholders integrated into the schedule when time permitted.

In total we interviewed 22 grantees and nine stakeholders during site visits (Table 4). Another three grantees and five stakeholders were interviewed by phone. Together the 25 grantees represented 34 of the 78 grants in the portfolio, and \$4.2 million dollars of the \$7.8 million awarded by the two programs (see Appendix B for a list of grants represented by grantees interviewed).

Adding interviews with NFWF and Southern Company staff, and the initial interviews with the advisory panel members, interviews totaled 49 (see Appendix C for a list of grantees and stakeholders interviewed). As mentioned above, we also attended various meetings which provided exposure to many more grantees and stakeholders, though not in a formal interview structure.

**Table 4: Interview Summary**

Method	Group	Alabama	Mississippi	Georgia	Florida	Multiple States	Total
Site visit	Grantees	5	3	8	6		22
	Stakeholders*	3	1	5	0		9
Phone	Grantees	2				1	3
	Stakeholders*	1		1		3	5
Phone	NFWF Staff					5	5
	Southern Co.			1		1	2
	Advisory Panel					3	3
<b>Total</b>		<b>11</b>	<b>4</b>	<b>15</b>	<b>6</b>	<b>13</b>	<b>49</b>

\* *Stakeholder* category includes government, NGOs, and academics

*Step #7: Data Analysis*

We compiled and analyzed data generated by review of program documentation, online surveys, and interviews, as planned in the evaluation framework.

Per the request of NFWF, grants were divided into project type using the Conservation Measures Partnership typology of conservation actions (Table 5)<sup>2</sup>.

**Table 5: Conservation Action Categories in POF & LL Portfolios**

<b>Conservation Activity</b>	<b>Description</b>
<b>1.1 Site/Area Protection</b>	Establishing or expanding public or private parks, reserves, and other protected areas roughly equivalent to IUCN Categories I-VI
<b>2.2 Invasive/Problematic Species Control</b>	Controlling and/or preventing invasive and/or other problematic plants, animals, and pathogens
<b>2.3 Habitat &amp; Natural Process Restoration</b>	Enhancing degraded or restoring missing habitats and ecosystem functions; dealing with pollution
<b>3.1 Species Management</b>	Managing specific plant and animal populations of concern
<b>3.2 Species Recovery</b>	Manipulating, enhancing or restoring specific plant and animal populations, vaccination programs
<b>3.3 Species Re-Introduction</b>	Re-introducing species to places where they formally occurred or benign introductions
<b>4.1 Formal Education</b>	Enhancing knowledge and skills of students in a formal degree program
<b>4.2 Training</b>	Enhancing knowledge, skills and information exchange for practitioners, stakeholders, and other relevant individuals in structured settings outside of degree programs
<b>4.3 Awareness &amp; Communications</b>	Raising environmental awareness and providing information through various media
<b>6.1 Linked Enterprises &amp; Livelihood Alternatives</b>	Developing enterprises that directly depend on the maintenance of natural resources or provide substitute livelihoods as a means of changing behaviors and attitudes

Source: (<http://conservationmeasures.org/CMP/IUCN/browse.cfm?TaxID=ConservationActions>)

*Step #8: Presentation of preliminary findings to advisory committee*

We presented the results and preliminary conclusions of the evaluation, via teleconference, to the advisory committee on August 21, 2008. The advisory committee provided additional insights and perspectives on the preliminary findings, which were incorporated in to this report.

<sup>2</sup> For more information on this classification scheme, see: <http://conservationmeasures.org/CMP/IUCN/browse.cfm?TaxID=ConservationActions>

*Step #9: Presentation of results and submission of written report*

We integrated the feedback of the advisory committee into a written draft report, which subsequently was submitted to the advisory committee, Southern Company's stewardship committee, and NFWF for review.

The evaluation comes to completion with the submission of a final report and presentations of the results, upon request, to Southern Company and the Board of Directors of NFWF.

**RESULTS**

In this section we present the results of the evaluation, organized according to the evaluation framework (Appendix A).

**Theme 1: Alignment of POF and LLP with Conservation Priorities**

**1.1 Do POF and LLP actively consider the conservation priorities of other institutions when making awards? If so, how? If not, why not?**

A great number of existing prioritization schemes are available to guide investments in bird conservation. Some of the major relevant schemes for birds are shown in Table 6. In contrast, there are no completed prioritization schemes for longleaf restoration and conservation.

**Table 6: Major Relevant Bird Conservation Prioritization Schemes**

Prioritization Scheme	Description	Example
Partners in Flight (PIF)	PIF evolved among government agencies, foundations, conservation groups and others to promote the conservation of landbirds.	Partners in Flight Bird Conservation Plan for the East Gulf Coastal Plain
Joint Ventures	Joint ventures are regional partnerships of public and private organizations that were originally formed to implement the North American Waterfowl Management Plan, and are now attempting to integrate all bird prioritization schemes and plans for their areas.	East Gulf Coastal Plain Joint Venture
Comprehensive Wildlife Conservation Strategies (or State Wildlife Action Plans)	Plans developed by all states seeking to access federal funds through State Wildlife Grants program.	Conserving Alabama's Wildlife - a comprehensive strategy. AL Dept of Conservation and Natural Resources & Division of Wildlife and Freshwater Fisheries
US Fish & Wildlife Service - Endangered Species Program	USFWS lists species that are threatened or in danger of extinction over all or a significant portion of their range. Once listed, a variety of programs are available to support recovery of the species.	Red-cockaded woodpecker recovery plan

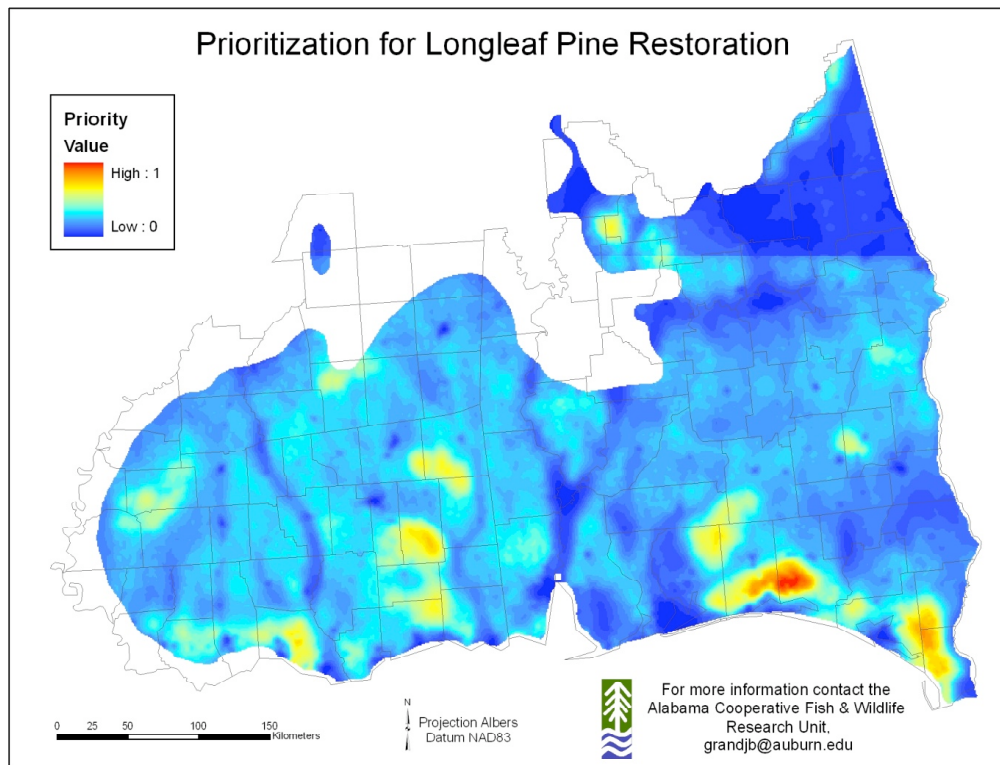
According to program staff, both POF and LL actively consider the conservation priorities of other institutions when making awards. This is done in a variety of ways, including:

- Personal familiarity with the staff and conservation priorities of other institutions;
- Grantee reference to conservation priorities in their proposals; and,
- Letters of reference supporting grant proposals that comment upon the priority of the grantee’s proposed activities.

In cases where there are no relevant prioritization schemes, such as for longleaf restoration, special attention is given to project attributes such as scale and landscape conservation value to ensure quality projects.

POF and LL are also investing in developing prioritization schemes for longleaf pine forests that will be of considerable value when they are complete. The first example is a project to develop a decision support tool (DST) to help guide longleaf restoration in the East Gulf Coastal Plain. This effort – led by the East Gulf Coastal Plain (EGCP) Joint Venture – will identify areas where reforestation will make the greatest contribution to bird conservation, thus providing a way to integrate the POF and LL programs. Already the Alabama Division of Wildlife and Freshwater Fisheries is using the DST to direct money for longleaf work made available by the USFWS program *Partners for Fish and Wildlife*. POF and LL are moving ahead now to expand the DST to the rest of the historical range of longleaf forests.

**Fig. 4: Prioritization of Longleaf Pine Restoration to Support Bird Conservation in Alabama and Mississippi**

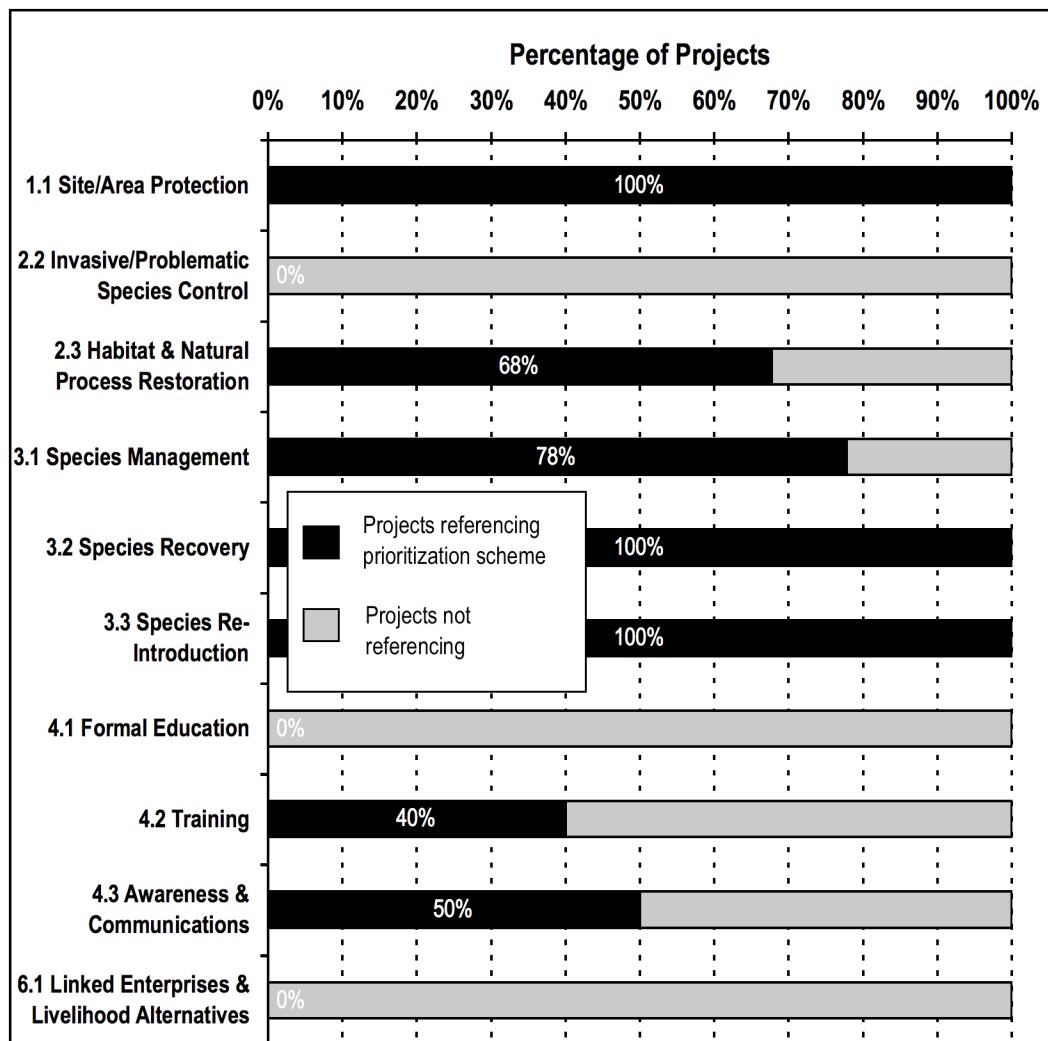


Environmental education projects are another class of projects where few environmental prioritization schemes are available to guide grant making. When evaluating environmental education proposals the selection committee looks for a demonstrated need for the program, and ideally a link to a broader education initiative, such as the Flying Wild program.

**1.2 Where do POF and LL projects fit within the priorities of other institutions, whether they were actively considered or not?**

The extent that grantees placed their projects within the priorities of other institutions varied by project type (Figure 5). None of the very small number of projects that sought to control invasive species, or to create economic incentives for forest conservation, were able to cite ecological prioritization schemes to justify their work. Half or less of the education, training, and awareness & communications projects were able to locate their projects within the ecological priorities of others. In contrast, the majority of habitat and natural process restoration projects (68%), species management (78%), species recovery (100%) and species re-introduction (100%) projects were able to cite ecological priorities that their projects supported.

**Fig. 5. Percentage of Projects Citing Ecological Prioritization Schemes, by Project Type**



Note: Sample sizes by project category: 1.1, n=2; 2.2, n=1; 2.3, n=31; 3.1, n=9; 3.2, n=1; 3.3, n=2; 4.1, n=5; 4.3, n=4; 6.1, n=1

The grantees' activities most commonly addressed the conservation priorities of state wildlife action plans and the Endangered Species Act (Table 7). Appendix D provides a complete mapping of the grantee organizations to the specific prioritization schemes that their projects support.

Independent expert interviews also supported the view that POF and LL grants address conservation priorities for the region. Several stakeholders pointed out that State Wildlife Action Plans have incorporated the priorities of environmental NGOs to a significant degree so that grants that support the State Plans also support the priorities of a broader constituency.

**Table 7. Prioritization Schemes  
Most Often Cited by Grantees**

Conservation Prioritization Scheme	Totals Grantees Citing
State Wildlife Action Plan	9
Endangered Species Act/Recovery Plan	6
Northern Bobwhite Conservation Initiative	4
Partners in Flight	4
State priority/threatened species	4
National Forests in Alabama Revised Land and Management Plan	3
Longleaf Alliance	2
North American Waterbird Conservation Plan	2
Partners in Flight - National landbird conservation plan	2
TNC Ecoregional Plan	2
Western Hemisphere Shorebird Reserve Network	2
Audubon Society Watch List	1
District Environmental Impact Assessment	1
Forest Legacy Assessment of Need - Georgia Forestry Commission	1
International Recovery Plan	1
NatureServe	1
North American Waterfowl Management Plan	1
North American Wild Turkey Management Plan	1
South Atlantic Migratory Bird Initiative	1
State Park	1
Swallow-tailed Kite Conservation Alliance	1
U.S. North American Bird Conservation Initiative (NABCI)	1
US Shorebird Conservation Plan	1
USFWS Priority habitats	1
<b>Total</b>	<b>44</b>

If POF and LL tighten up their evaluation of project proposals with respect to the extent that they are meeting conservation priorities, there may be some resistance from organizations such as the Longleaf Alliance that are focused on restoring longleaf at a larger landscape scale across its former range. From their point of view, the conservation need is immense, and longleaf planted anywhere is a contribution to reaching their goals. While we appreciate this position, we encourage POF and LL to continue to focus on funding the projects of the highest conservation priority (per existing

prioritization schemes such as the State Wildlife Action Plans or the EGCP Decision Support Tool), and let other less discriminating sources of funding such as the Conservation Reserve Program focus on broader needs.

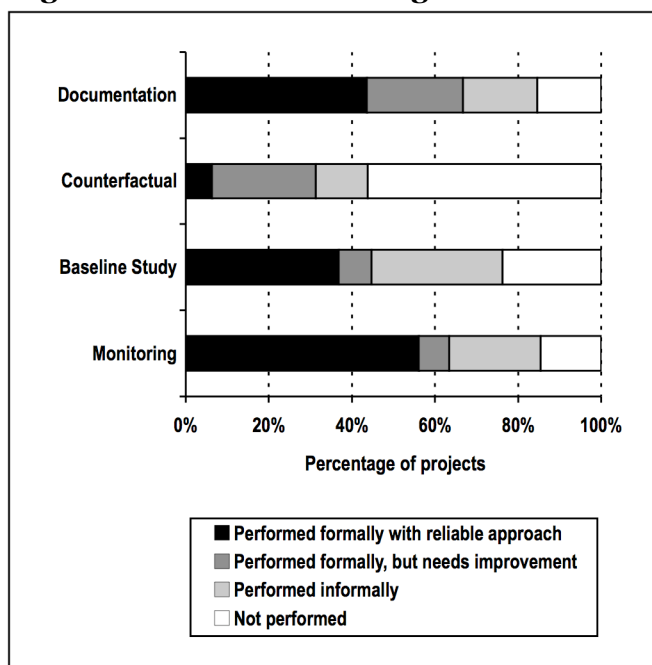
**Theme 2: How Performance is Measured in Practice**

**2.1 How have conservation gains been measured quantitatively and reported by grant recipients at the project level?**

The first evaluation finding of relevance to the issue of grantee reporting is that most grantees felt that it is premature to assess the conservation gains of their projects. Not only is this because so many of the projects are still active, but also because they felt that conservation gains were best assessed at least 3-5 years after the grant’s activities were completed. A significant number of grantees felt that an even longer period of five to ten years or more was more appropriate. Few projects in the two programs are this old.

The second evaluation finding of relevance to the issue of grantee reporting is that relatively few projects have a complete formal monitoring and evaluation program in place (Figure 6). Projects are strongest with respect to the degree that they monitor and document results, and weakest with respect to having baseline studies and *counterfactuals* (that is, a reference of what might happen in the absence of a project, such as control sites). There are notable exceptions. For example, Georgia DNR’s Bobwhite Quail Initiative conducts careful monitoring, has baseline data, counterfactuals (control sites), all of which are formally documented. Greater adoption of these practices across the portfolio will be beneficial in the future. Most grantees conduct at least informal monitoring of project results, and so are able to provide some basic information on their impacts, but the limitations of these data should be kept in mind. It is worthy of mention that many grantees indicated a willingness to improve monitoring practices, if donors would support it. Recommendations on how to improve project monitoring are discussed in Theme 6.

**Fig. 6: Extent of Monitoring and Evaluation**





We summarize the most frequently used quantitative metrics in the POF and LL portfolios in Table 8, broken down by project category. A quick glance at the table reveals the diversity of metrics used by the grantees.

**Table 8: Most Frequently Used Quantitative Performance Metrics**

Project Category	Metric 1		Metric 2		Metric 3		Metric 4	
	Metric	No. times used	Metric	No. times used	Metric	No. times used	Metric	No. times used
<b>1.1 Site/Area Protection</b>	Acres of habitat entering Safe Harbor Agreements	1						
<b>2.2 Invasive/Problematic Species Control</b>	Control or prevention of invasive species	1	Small mammal inventory conducted	1	No. of exclosures established	1		
<b>2.3 Habitat &amp; Natural Process Restoration</b>	Longleaf pine restored - acres	13	Longleaf pine planted - acres	7	Habitat improved - acres	3	Wetland restored - acres	3
<b>3.1 Species Management</b>	Abundance - % increase quail	1	Wildlife food plots developed on fire lanes - No. of miles	1	Birds radio-tagged and tracked - No. clapper rails	1	Knowledge of important stopover sites - % total	1
<b>3.2 Species Recovery</b>	Clusters monitored - No. RCW	5	Territories monitored - No. RCW	1	Artificial nesting cavities created - No.	2	Nest platforms constructed - No.	1
<b>3.3 Species Re-Introduction</b>	Individuals translocated - No. RCW	4						
<b>4.1 Formal Education</b>	Educators trained - No.	4	Environmental education - No. of schools reached	2	Environmental education - No. students reached	1	Environmental education - % students reached	1
<b>4.2 Training</b>	Stakeholders reached - No. of landowners	4	Stakeholders reached - No. public	2	Stakeholders trained - No. of foresters and landowners	2	Stakeholders supplied with training materials - No.	2
<b>4.3 Awareness &amp; Communications</b>	Visitors to site - No. per year	5	Public awareness about bird migration - %	1	No. interpretive signs	1	No. information kiosks built	1
<b>6.1 Linked Enterprises &amp; Livelihood Alternatives</b>	Knowledge increase about birding as economic driver - %	1	Maps distributed - No.	1	Birding sites with enhanced infrastructure - No.	1		

Although they are diverse, some patterns emerge.

- The most commonly used metrics relate to the number of acres of longleaf habitat restored or planted. As these are the metrics used by the program staff to track progress, it makes sense that they are the most common metrics used by grantees. Unfortunately these metrics do not reveal much about the quality of habitat that results from grantee actions.
- For species-level projects, such as RCW recovery, grantees most often use metrics such as number of birds monitored and translocated. These are useful when habitat conditions are known to support adequately the target species. In cases where this is not known, habitat metrics are needed to gain a better view of performance.
- For education, training, and awareness projects, grantees typically report on the number of contacts made during the course of project activities. However, they do not measure how education may have changed the attitudes or behaviors of people related to the conservation of particular species or habitats.

In Theme Six of the evaluation we will discuss these issues in detail.

**2.2 When not captured through quantitative measures, how have conservation gains been reported qualitatively?**

Table 9 provides examples of some of the ways that grantees reported qualitative impacts. Qualitative reporting was not very common – most grantees limited their reporting to quantitative metrics. Qualitative metrics generally focused on attributes that were difficult to measure (e.g., a project generated “greater interest in Mississippi’s wildlife”).

**Table 9: Qualitative Impacts Described by POF & LL Grantees**

Project Category	Example 1	Example 2	Example 3
<b>2.3 Habitat &amp; Natural Process Restoration</b>	Impact on other habitats through demonstration plots, field tours and workshops	Development of public information campaign	Development of GIS decision support tools
<b>3.1 Species Management</b>	Understanding of migration routes and wintering destinations	Identification of alternate summering sites for US birds	Understanding of likely sources of mortality
<b>3.3 Species Re-Introduction</b>	Improved scientific understanding of population dynamics	Development of strategy to relate translocations to population productivity	
<b>4.1 Formal Education</b>	Informed public policy on conservation issues		
<b>4.2 Training</b>	Feedback from participants on how they found the training workshop	Periodic followup on participant activities	
<b>4.3 Awareness &amp; Communications</b>	Decreased disturbance of snowy plover nests	General public's access to bird viewing infrastructure	
<b>6.1 Linked Enterprises &amp; Livelihood Alternatives</b>	Ecotourism development	Greater interest in Mississippi's wildlife and wild lands	

### **2.3 How have conservation gains been measured *quantitatively* and reported by NFWF at the programmatic level?**

NFWF reports conservation gains in three venues each year. First, program staff present to the Board of Directors as part of annual program renewal. Programmatic reporting includes:

- A proposed budget for projects and program administration;
- The program's objectives and history;
- Rollup statistics of the program's accomplishments, including the number and amount of grants that have been awarded and additional funds leveraged (additionally, for LL, the number of acres to be reforested and number of seedlings to be planted); and,
- A brief two-line summary of each project funded the previous year, its funding match, location, and paragraph summary of the program's accomplishments that year.

In the future, reporting to the board will also include a short statement about how the programs align with NFWF's new organizational structure, the Keystone Initiatives, although these remain to be fully developed and a format for this reporting is not yet in place for POF or LL.

The second venue in which NFWF reports conservation gains is an annual program fact sheet. The content of the fact sheet is similar to that submitted to the board. Fact sheets provide the following quantitative information:

- Number of grants awarded and grantees;
- Amount of funds awarded each year;
- Amount of matching funds generated;
- Number of projects funded in each state;
- Acres of habitat
  - For LL – number of acres and seedlings to be planted
  - For POF -- number of acres to be restored or enhanced
- For POF – number of people receiving environmental education

Finally, NFWF presents the results of the programs in various presentations and NFWF publications, such as its Annual Report.

Because of the time lag between grant execution and realization of project outcomes, the fact sheets refer to conservation gains as “anticipated accomplishments”.

## **Theme 3: Actual Performance of Projects**

### **3.1 What have been the direct conservation gains attributed to POF and LL, as measured by quantitative and qualitative metrics identified from questions 2.1 and 2.2, and others provided by grantees in the evaluation?**

Summarizing the accomplishments of the two programs requires a standardized approach to reporting the gains of individual projects. As noted previously, grantees have used a wide diversity of metrics for self-reporting their gains and this information is therefore difficult to aggregate to the programmatic level.

To resolve this problem we selected a subset of common quantitative metrics and requested all grantees to report their accomplishments using these metrics in an online survey. For the few

grantees that did not participate in the survey, we added their accomplishments as described in project reporting<sup>3</sup>.

In Table 10 we summarize *direct* conservation impacts of POF and LL. Despite the youth of the programs, it is clear that grantees have used POF and LL funding to generate significant conservation impacts. Some 4,200 acres of longleaf forest have been established, either through creating new forests, or converting plantations of other tree species. More than 12,000 acres of existing longleaf forests have been treated through burning and mid-story removal. Nearly 48,000 acres of different habitats are under improved stewardship. And, approximately 133,000 people have received some form of conservation education, and an additional 201,000 were potentially exposed to a conservation message via visits to birding sites and nature trails.

**Table 10. Summary of Direct Conservation Impacts of POF & LL**

Metric	Longleaf Pine	RCW	Quail	Wet-lands & Coasts	Other	TOTALS
No. of acres of NEW longleaf pine forest established (planting and maintenance)	972	250	-	-	-	1,222
No. of acres of EXISTING forest converted to longleaf pine (planting and maintenance)	2,753	250	-	-	-	3,003
No. of acres of EXISTING longleaf pine forest treated (e.g., burning, midstory removal, etc)	1,144	9,609	1,275	-	-	12,028
No. of acres with improved stewardship practices	11,271	325	33,973	2,000	-	47,569
No. of individuals of target species managed	-	-	-	2,000	-	2,000
No. of individuals of target species translocated	-	120	-	-	-	120
No. of nest sites managed (e.g., monitored, protected)	-	120	-	150	11	281
No. of breeding clusters/colonies managed (e.g., monitored, protected)	-	175	-	70	-	245
No. of landowners educated	255	10	1,576	50	674	2,565
No. of school children educated	100	80	-	230	19,150	19,560
No. of public educated	450	20	-	100	110,299	110,869
No. of visitors (e.g., at birding sites or nature trails)	200	-	-	200,150	900	201,250
No. of scientific publications	9	-	-	3	2	14

Many of the impacts of grants are anticipated to occur in the coming years. When all currently funded projects have finished their activities, approximately 30,000 acres of new and restored longleaf forest should result. A variety of factors can introduce delays between funding projects and realizing proposed conservation impacts. This is especially true of reforestation projects. A factor internal to the program is delay between grantee proposal submission and receipt of funding. In addition, the introduction of multi-year projects has extended the timeframe for realizing more ambitious project outcomes (a shift in NFWF grant making that experts and grantees agree is extremely positive). Factors external to the program include extreme weather events such as hurricanes and drought, and logistical barriers such as scarcity of seeds and seedlings required for reforestation. Given this context, the apparent delays seem reasonable and we have no reason to believe that anticipated outcomes would not be achieved.

<sup>3</sup> For non-reporting grantees we included results from grants made in 2006 and prior. Typically, grants made in 2007 and 2008 were not yet fully implemented.

The accomplishments listed in Table 10 are likely an underestimate of the true impact of POF and LL. This is because some direct impacts are either difficult or impossible to measure, or simply no attempt has been made to measure them. Projects that merit special mention in this regard are initiatives to educate landowners and influence their stewardship practices. A good example is Quail Unlimited's *Quail Habitat Restoration in the Southeast*, a project that has received three POF grants. According to Roger Wells, the QU grantee, "The private land acres under improved management are thought to be considerable. One meeting alone had over 100 landowners who controlled over 1 million acres. Also, with 3,000 booklets distributed we expect a good degree of improved management as a result." Another example is the unmeasured benefits to non-target species of plants and animals found in longleaf ecosystems. Many grantees cited this as a direct but unquantified benefit of their projects.

### 3.2 Are there instances of indirect conservation benefits of POF and LL?

We define *indirect* conservation benefits as the impacts of actions of non-grantees that were catalyzed or influenced by a POF or LL grantee. As mentioned previously, many of the POF and LL projects are young and in early stages of the project cycle. As a result, many have not had time to generate direct benefits yet, let alone indirect benefits. Nevertheless, many grantees were able to provide examples of indirect benefits generated by their projects. Broad categories of indirect benefits, and examples of each, follow below.

- *Helping develop markets:* by purchasing large numbers of native species plants for restoration, grantees have helped create markets for these products. Suppliers are then available to support restoration efforts elsewhere. Example: grants to Georgia Department of Natural Resources to pay for longleaf pine ecosystem restoration have helped create commercial markets for wiregrass seeds and plugs.
- *Project emulated by others:* various grantees reported that their restoration activities had catalyzed similar actions by neighboring landowners. Example: the National Wild Turkey Federation reports that grants that they have received for longleaf restoration have catalyzed additional reforestation in Georgia and other states in the Southeast.
- *Sharing of techniques and methodologies:* some grantees that had developed methodologies reported that other scientists and conservation practitioners had adopted their approaches. Example: in Florida, TNC has been using its prescribed burns as a training opportunity for other land managers, including those of the State of Florida, resulting in improved capacity of state land managers to perform burns on public lands. In another example, the Wildlife Center in Alabama has disseminated a method for reintroducing downed juvenile raptors to



Phil Spivey of Georgia Department of Natural Resources surveys a longleaf forest in southwest Georgia (near Silver Lake) for red cockaded woodpeckers. LL is supporting the protection and restoration of this 8,430 acre forest, considered a major accomplishment for longleaf conservation among environmental stakeholders. (This project is not included in Table 10 as it is not yet completed.)

their parents, potentially reducing the caseloads of wildlife centers that care for abandoned and injured raptors.

- *Creation of new partnerships and alliances:* several grantees played an active role in establishing partnerships with like-minded people to promote conservation of their targets, and disseminate lessons learned.

Example: in addition to promoting the use of his methodology for the monitoring of secretive marsh birds throughout the National Estuarine Research Reserve system, Mississippi State University's Mark Woodrey has been instrumental in launching the "Tidal Marsh Endemic Working Group" with some of his colleagues. The working group promotes the networking of a community of experts for the study of secretive marshbirds. Another example is the collaboration between USFWS and Department of Defense (DoD) in RCW translocation, resulting in the funding by DoD of two additional biologists for this work in two additional states.



Mark Woodrey of Mississippi State University touring the Grand Bay National Estuarine Research Reserve, in Mississippi. Mark's research on secretive marshbirds has generated important basic knowledge required to conserve these birds. Many other biologists working in similar systems have adopted the methodology that Mark promotes.

Investments by POF and LL in developing conservation prioritization schemes also have the potential to generate significant indirect benefits, as the efforts of other donors and conservation practitioners coalesce around these schemes. For example, as mentioned previously, Alabama Division of Wildlife and Freshwater Fisheries is already using the EGCP Joint Venture DST to direct cost share money for the establishment of longleaf on private lands.

These are a sample of the indirect benefits that the POF and LL programs have produced to date. As more projects come to fruition, the number of indirect benefits produced by these projects is sure to increase. NFWF and Southern Company may want to consider modifying reporting requirements and encouraging grantees to report on the indirect benefits resulting from their projects.

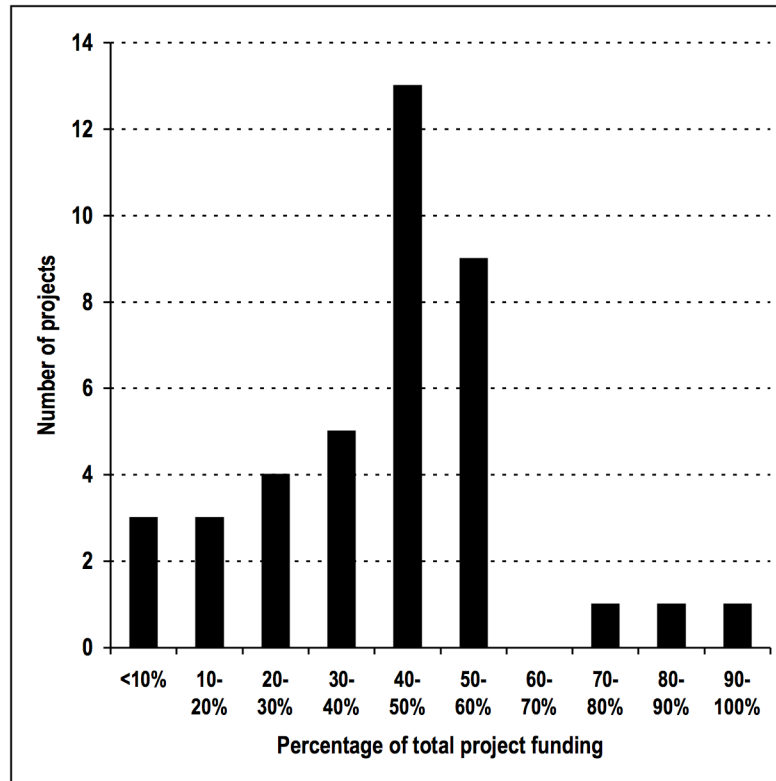
### **3.3 What is the probability that outcomes specified in questions 3.1 and 3.2 would have occurred in the absence of POF or LL?**

As noted in question 2.1, only six percent of grantees have comprehensive formal monitoring and evaluation programs in place that include counterfactuals (i.e., control sites, to determine what would have happened in the absence of the project's activities), and so it is impossible to directly determine whether *conservation gains* would have occurred in the absence of project funding.

However, we can answer a related question – would the *projects* have been likely to occur without POF and LL funding? Strong circumstantial evidence suggests that many of the projects would not

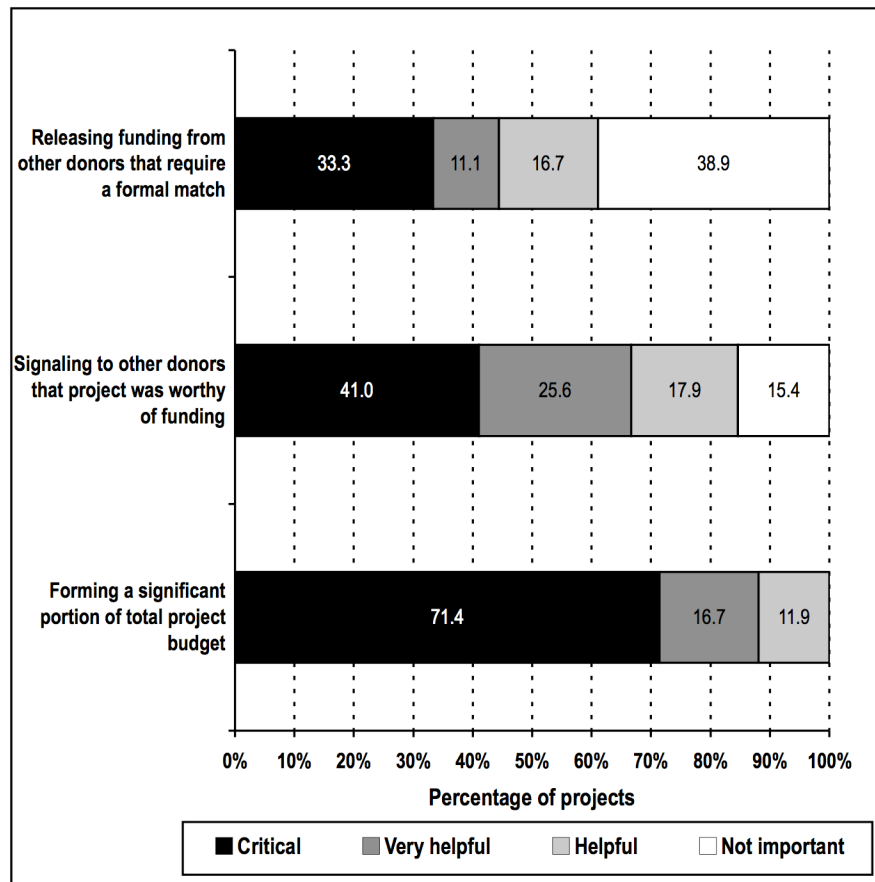
have occurred without POF and LL funding. For example, POF and LL funding typically made up between 40-60 percent of the total project budget (Figure 7). For most grantees, this funding was critical – 83 percent of grantees said that funding opportunities were either insufficient, or grossly insufficient, for themselves and other conservation practitioners doing similar work.

**Fig. 7: Contribution of POF & LL Grants to Total Project Funding**



More than a third of grantees said that POF and LL were the principle donors for their type of conservation activities. Finally, grantees said that NFWF funds were not only important because they formed a critical portion of total project budget, but also because their grants helped signal to other donors that their projects were worthy of funding, and in a smaller number of cases, released funding from other donors that required a formal match (Figure 8). This emphasizes the leadership role that these programs can, and do, play in conservation.

**Fig. 8: Importance of POF & LL Funding in Project Finance**



During stakeholder interviews many people stated that the POF and LL programs had played a critical role in conserving longleaf pine and associated species. Even in cases where grantees said projects would have proceeded in the absence of NFWF funds, the funds allowed them to achieve their goals much more quickly. It is also clear that longleaf forests and associated species have been reduced to a tiny fraction of their former range, and that many factors threaten remaining habitat and species. According to stakeholders, POF and LL funding have played a notable role in improving this situation.

**3.4 What key variables limit or enable conservation performance?**

Grantees reported on the importance of nine broad classes of factors that either impeded or enabled their efforts, as well as adding any other important limiting factors that were not on the list. The following sections describe the most important limiting factors, broken down by conservation target.

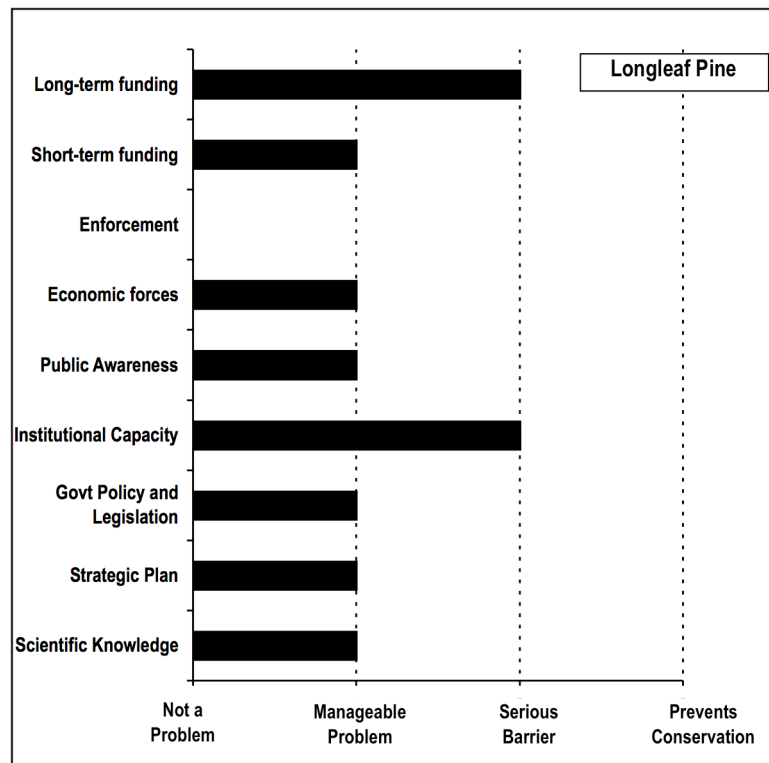
*Longleaf Pine*

In the category of longleaf pine projects, grantees identified two limiting factors as serious barriers to conservation: *long-term financing* and *institutional capacity*.



- The successful restoration and conservation of longleaf forests requires periodic prescribed burns – an unavoidable and essential management cost. Additional management actions may be required if natural groundcover is to be fully restored. In aggregate, grantees indicate that shortage of *long-term financing* is a serious barrier to the conservation of longleaf forests. An argument can be made that the short-term costs to conduct initial restoration work are the greatest investment, and many grantees report that these funds are often hard to raise. For example, grantees working on state lands in Georgia point out that once sites have undergone initial prescribed burns and/or planting, these sites can be maintained with government sources of funding. In the counter-example of Florida, however, funding to manage states lands is scarce.
- *Institutional capacity* is a related limiting factor. At present there are insufficient personnel with training to restore and manage longleaf forests. This is especially important as it relates to prescribed burning, an essential component of longleaf forest management.

**Fig. 9: Limiting Factors to Longleaf Pine Restoration and Conservation**



Grantees identified an additional six factors as manageable problems, and suggested an additional factor.

- *Short-term funding* is difficult to find, and the initial costs of restoring longleaf are great. LL fills an important niche in this regard, but more funding is needed.
- *Economic forces* are causing the conversion and fragmentation of natural habitat, largely as the result of sprawling development in the region. In addition, financial returns are

perceived to be lower for longleaf forestry on private lands versus plantation forestry with other species or conversion to other land uses<sup>4</sup>.

- *Public awareness* of the importance of prescribed fires will be essential if restored longleaf forests are to be managed into the future. With increasing development of surrounding areas, making prescribed fire compatible with urban areas will be a major challenge.
- *Government policy and legislation* does not fully support prescribed burning as an environmental priority. One example is EPA air quality regulations in “non-attainment areas” like the Atlanta metro area, which restrict this source of particulate emissions.
- The lack of a regional *strategic plan* for longleaf restoration is a barrier for prioritizing sites for restoration; however, this is a manageable problem, as there appears to be general consensus about where to work in the interim while a strategic plan is developed.
- Grantees rank *insufficient scientific knowledge* as a manageable problem. This limiting factor may be understated, however. Experts with whom we spoke indicated that methods for planting longleaf, although improving over time, largely mimic industrial forest plantation establishment rather than ecosystem restoration. Little research has been done on restoring groundcover – the component of longleaf ecosystems that houses the biodiversity for which longleaf is famous. Further to this point, there are few examples of restored longleaf forests more than 35 years old. According to scientists working in the field, the full range of scientific issues that need to be addressed to achieve longleaf ecosystem restoration have yet to be encountered.
- An additional limiting factor is the *lack of seeds and seedlings* for restoration work. This is attributable to the fact that high longleaf seed production years occur infrequently, and the limited capacity of private vendors to produce seedlings. High demand for seedlings from participants in the Conservation Reserve Program has aggravated this problem by driving up prices and reducing availability of seedlings for restoration outside of the program. This may prove to be a very serious issue for LL grantees in the near term.



David Printiss, TNC Program Director for Northwest Florida, explains wiregrass restoration at Apalachicola Bluffs and Ravines Preserve. Indirect benefits of this project have been the building of capacity in the region in prescribed burning as well as the production of groundcover seeds that have been shared with state agencies for restoration of other sites.

<sup>4</sup> There is uncertainty about the yield curves for longleaf pine, making it difficult to say conclusively what the financial returns on forestry may be. However, many landowners perceive the returns to be lower because of higher establishment costs, and in some cases slow initial development after establishment.

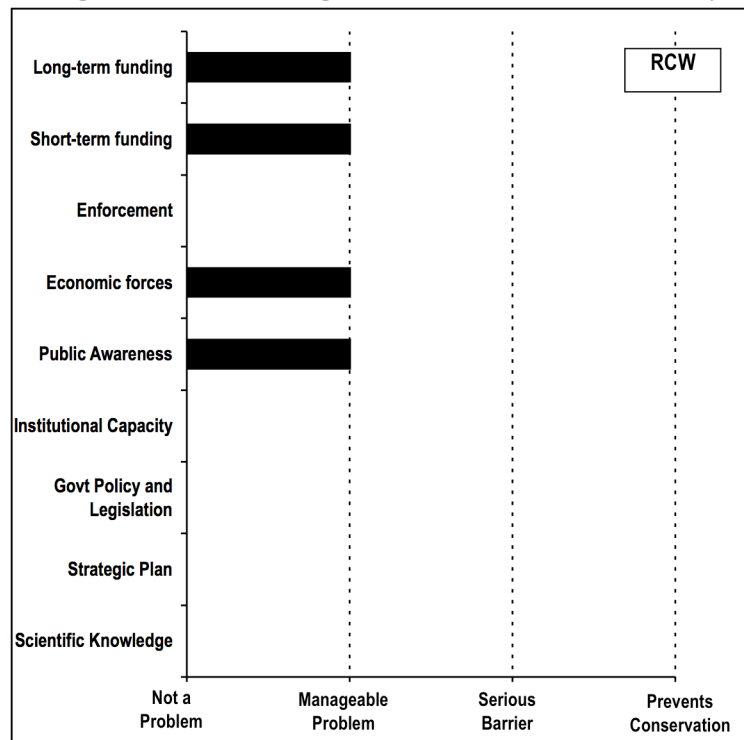
*Red-Cockaded Woodpeckers (RCWs)*

Grantees with projects focused on RCW recovery present a more sanguine view of limiting factors, with no factors posing a serious problem. In part, this is due to: a) the considerable support the species has received (including POF); b) the fact that suitable habitat for RCW re-introduction has been identified under the RCW Recovery Plan; and, c) that translocation of birds is a well-understood and reliable means of restoring local populations.

Grantees listed four factors that limit progress, but that are manageable problems.

- *Long-term financing* is needed to ensure that properties that are receiving translocated birds are managed properly over the long term. This may be especially important on U.S. Forest Service lands, where funding is scarce for management. This is not the case for U.S. military bases, which are doing a good job managing natural habitat and conserving RCW populations.
- *Short-term financing* is needed simply to increase the number of biologists monitoring RCW populations, a pre-cursor to translocation. This is the rate-limiting factor in RCW recovery.
- *Economic forces* that limit RCW recovery are essentially the same forces that threaten their natural longleaf habitat over the broader landscape, as described above.
- *Public awareness*, especially as it relates to the need to maintain RCW habitat, such as through the Safe Harbor program, can be improved.

**Figure 10: Limiting Factors to RCW Recovery**

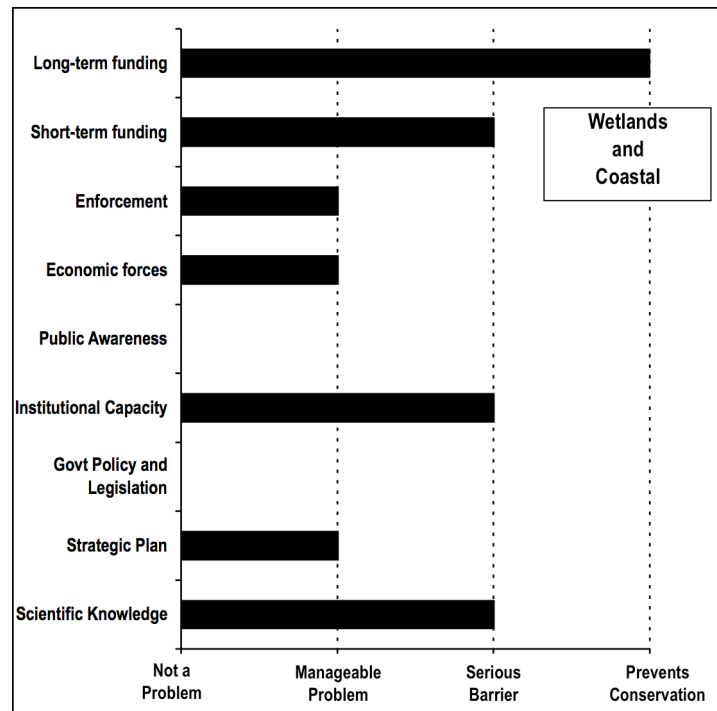


*Wetlands and Coastal Habitat*

The POF portfolio of wetlands and coastal projects is small and contains an assortment of project types ranging from research to restoration activities. Given this small and heterogeneous data set, it is difficult to make conclusive statements about the category, although we recognize that long-term wetlands conservation face a number of challenges.

In contrast to RCWs, grantees involved in the conservation of wetlands and coastal habitat felt that many serious barriers remained for these ecosystems. Among them, scientific knowledge of the species that inhabit wetlands is relatively poor – POF’s grant to fund work on secretive marsh birds is notable in this light. Given the high costs of wetlands restoration and the attention it currently receives from regulatory mitigation (e.g. Clean Water Act, Section 404), POF may have found an important niche in researching the conservation biology that can guide other funders in their restoration work.

**Fig. 11: Limiting Factors to Wetlands and Coastal Habitat Restoration and Conservation**



Enabling Factors

Grantees working on all categories of conservation projects also provided open-ended descriptions of enabling factors -- those that had helped the successful launch and implementation of their projects (Table 11). Leading the list of enabling factors is awareness and interest expressed by others in the grantee’s project and its goals, including by the general public, project partners, and agency staff. The availability of additional project resources was the next most commonly cited enabling factor by grantees. Resources included the availability of matching funds, additional financial resources, access to in kind support, and volunteers. Strong technical capacity was also

cited as an enabling factor, whether it was provided by project staff, external experts, or through professional associations. Factors that facilitated working with landowners also enabled some projects, whether individually, with leaders, or through associations. A smaller number of projects cited scientific understanding as an enabling factor that helped grantees understand the management actions required to achieve their conservation objectives. One grantee somewhat surprisingly cited Hurricane Katrina as an enabling factor because it demonstrated longleaf pine's superior ability to survive natural disasters of this type.

**Table 11: Enabling Factors for Successful Projects and Frequency Cited by Grantees**

Enabling Factor	Sub-total	Total
<b>Stakeholder awareness and interest</b>		<b>14</b>
Stakeholder awareness and interest in project goals	4	
Project partners supportive	6	
Committed agency staff	4	
<b>Additional Project Resources</b>		<b>7</b>
Other sources of financial support	4	
Availability of matching funds	1	
Access to in kind support	1	
Volunteer network	1	
<b>Availability of technical support</b>		<b>6</b>
Access to technical experts	3	
Technical competency of project staff	1	
Sharing experienced with colleagues informally or formally	2	
<b>Landowner awareness and interest</b>		<b>6</b>
Pre-existing landowner associations	2	
Support from local landowners leaders	1	
Motivated, interested landowners	2	
Landowner/industry awareness	1	
<b>Scientific basis</b>		<b>4</b>
Scientific understanding	4	
<b>Project Attributes</b>		<b>2</b>
Pre-existing projects easily scalable	1	
Good institutional relations and cooperation (agencies, NGOs, etc)	1	
<b>Grantee Attributes</b>		<b>1</b>
Reputation of grantee	1	

**Theme 4: Sustainability of Conservation Gains**

**4.1 Have conservation gains been sustained after project funding concluded? Are gains likely to be sustained in the future?**

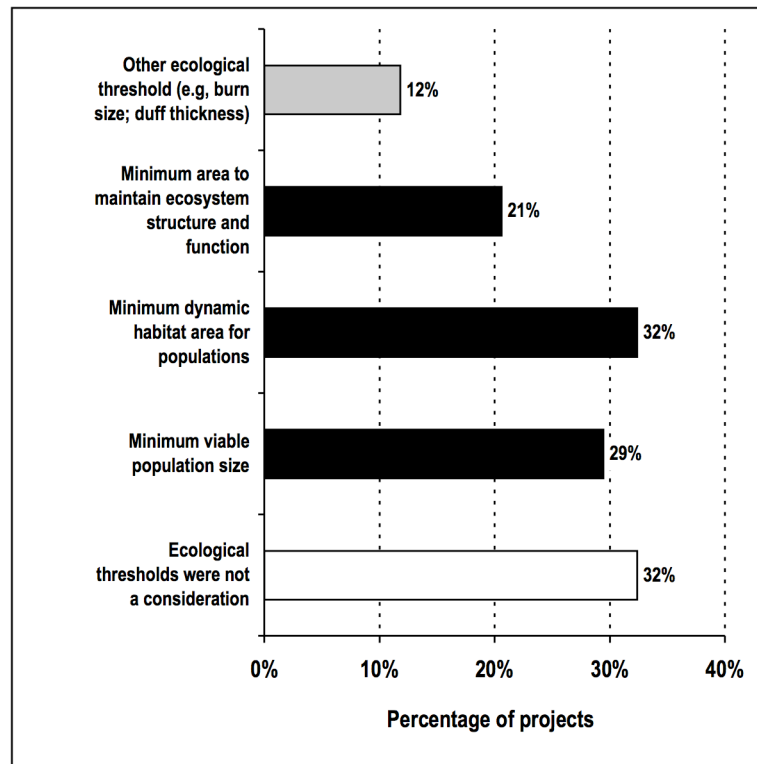
We assess the sustainability of gains made by POF and LL in two ways. First we ask whether project designs account for ecological scale requirements that will help maintain biological values over time. Second, we return to the limiting factors analysis to identify factors that could undermine conservation efforts at sites over the long term.

*Ecological Scale*

Ecological thresholds are determined by the minimum requirements for a population or ecosystem to persist over time. Ecological thresholds for populations are typically determined by the minimum number of individuals in a population required to withstand stochastic population fluctuations. Ecological thresholds for habitats or ecosystems are typically determined by the minimum size required to maintain key species and ecological processes. Projects that do not achieve ecological thresholds, either by virtue of their own scale or through the combined scale of the project plus contiguous areas or associated conservation projects, face the risk of declining species populations or degraded ecosystem structure and function. Thresholds commonly used in conservation biology include: minimum viable population size, minimum dynamic habitat area for species populations, and minimum area to maintain ecosystem structure and function.

According to our survey of projects in the POF and LL portfolio, about one-third of site-based projects do not consider ecological thresholds in design (Figure 12). Twelve percent of projects cited alternative ecological thresholds (e.g., depth of duff layer), although in cases where this is the sole threshold it was often insufficient for ensuring ecological sustainability of the project.

**Fig. 12: Ecological Thresholds Considered in Site-Based Projects (projects may use multiple thresholds)**



Insufficient knowledge may prevent determining the ecological requirements of some species or ecosystems. As scientific understanding improves, the sustainability of these projects should be reassessed.

Perhaps the best designed projects in the POF and LL portfolios are the RCW translocation projects. Because RCWs are listed as endangered species and therefore have a recovery plan and are well-researched, there are clear targets for habitat size, number of family units in a population, and number of populations. LL also includes longleaf pine projects that aimed to actively establish understory vegetation in addition to longleaf pine trees and were of a scale necessary to replicate natural fire regimes. These projects might serve as an example of the type of ecological planning that other projects should strive for, and to the extent possible, the programs can assist grantees in achieving by explicitly requiring treatment of this issue in grant proposals.

### *Limiting Factors*

Limiting factors analysis can also shed light on the sustainability of the gains achieved by projects in the two programs. In the category of longleaf pine restoration, some projects did not have secure long-term financing in place to cover the recurrent costs of regular prescribed burns and monitoring. Without an explicit provision to fund long-term management of restored sites, there is a risk that the intended ecological benefits of these projects will not be maintained or realized in the long run.

In the case of RCW projects, one might argue that the grantee's perspective is narrowly focused on achieving the goals of the RCW Recovery Plan. Given a broader goal of reintroducing RCWs across the landscape of both private and public landholdings, the limiting factors to restoring longleaf pine forests would also apply to RCW.

### *Closer Examination of Long-Term Finance*

Because long-term financing is an important limiting factor for most conservation programs, and it is essential to sustaining project gains, we examined this issue more deeply in the grantee survey. Survey data and interviews indicate that POF and LL are similar to most conservation programs in two important respects: a) the programs provide funding for a limited time; and, b) grantees are responsible for securing long-term funding, but this is rarely possible for grantees to guarantee.

For POF and LL, some projects receive funding from government budget allocations. This funding is relatively stable, but often insufficient to cover all management needs. Fundraising from private sources can be considered a reliable source of funding for sophisticated grantees like The Nature Conservancy, but less so for other organizations.

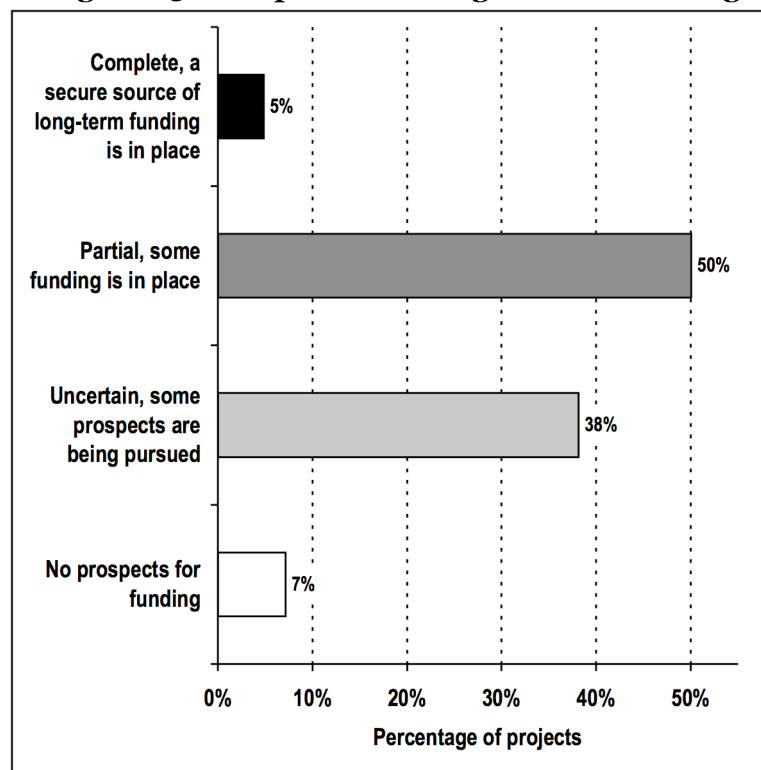
Given this context, the question that should be addressed by any conservation program is whether there exists sufficient assurance that the achievements financed by the program can be sustained by the grantee. Three findings in the evaluation are important to this discussion.

- We find that POF and LL provide the central core funding for grantees' projects in the majority of cases (Figure 7).
- In response to the question: "What is the long-term funding situation for maintaining the conservation gains made by your project?" most grantees (50%) indicated that partial funding is in place, and the next largest group (38%) responded that future funding is uncertain and that prospects are being pursued (Figure 13).
- We understand that grant selection for POF and LL includes a vetting process by NFWF to ensure that long-term financing can be secured by grantees. However, the project proposals

reviewed for this evaluation did not require an explanation of how the projects will finance themselves and maintain conservation gains after completion of the grant.

While it is not necessary that all projects show secure long-term funding to be worthy grant recipients, it is prudent to understand the level of uncertainty associated with each project in order for the programs to manage this risk. To do so, the programs should consider developing a definition of “long-term finance” and request grantees to provide more information about their long-term funding situation. Upon review of this information, if the risk to sustainability from uncertain long-term financing is deemed too great, the programs may choose to: a) decline funding to high-risk candidates; b) assist candidates in developing financing plans; or, c) alter the grant making approach to extend the length of time the program commits to a site, and/or provide long-term financing, such as endowments for the management of conservation areas.

**Figure 13: Prospects for Long-Term Financing**



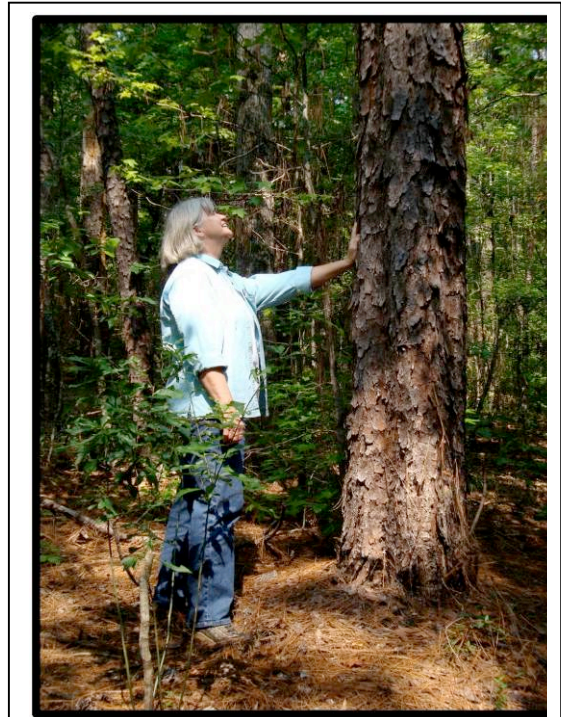
### *Overcoming Limiting Factors*

In many cases grantees are working to overcome the factors that limit the viability of their projects. A sample of their efforts includes:

- *Short-term financing*: some grantees are targeting state and federal government agencies as potential donors, while others are coordinating with government to improve the efficacy of spending on conservation issues.
- *Long-term financing*: similar to actions taken to resolve short-term funding needs, grantees are seeking long-term funding commitments from government to sustain conservation management (e.g. state government commitments to perform prescribed burns).



- *Scientific knowledge:* applied research efforts by grantees continue, with focus on critical research topics such as wildlife management and longleaf restoration methodology (e.g. Tall Timber's research on growing season burning impacts on northern bobwhite quail, Auburn University's Center for Longleaf Pine Ecosystems).
- *Strategic plan:* with the help of POF and LL and others, conservation practitioners are developing strategic plans for those targets that lack them (e.g. East Gulf Coastal Plain Joint Venture, Longleaf Alliance, Gulf Coastal Plain Ecosystem Partnership).
- *Government policy & legislation:* a number of grantees have activities that focus on improving the farm bill as it relates to conservation needs (e.g. supporting longleaf restoration), and others are supporting local fire councils to facilitate the use of prescribed fire.
- *Institutional capacity:* several grantees are training government agencies in longleaf management, especially prescribed burning (e.g. The Nature Conservancy is training government personnel throughout the region in prescribed burning techniques).
- *Public awareness:* a number of grantees have conducted educational programs for schoolchildren (e.g. Georgia Wildlife Federation's Schoolyard Habitat program), the general public (e.g. environmental interpretive center exhibits at St. Andrews State Park) as well as training private landowners in conservation management (e.g. American Forest Foundation's Forested Flyways program).
- *Economic forces:* grantees have limited ability to broadly confront economic forces such as development, but site-level measures such as enacting conservation easements to restrict development are common. In addition, some grantees are working to better understand and document the financial returns from longleaf forestry. They intend to communicate this information to private landowners in order to help address perceptions about substandard financial returns.
- *Enforcement:* this is not a serious barrier for most grantees and therefore not a focus of effort.



Sharon Hermann of Auburn University examining mature longleaf pines that will seed into nearby gaps created in order to develop natural regeneration methods for montane longleaf.

**Theme 5: Communication of POF and LL Achievements**

**5.1 Do grantees communicate their achievements to environmental stakeholders and the larger public ?**

The majority of grantees communicate their achievements to all relevant stakeholder groups (Table 12). The core media used by grantees are their websites and own publications. In addition, grantees most commonly rely on newspaper articles to communicate with the general public and the private sector, and use meetings and events to communicate with local and federal governments, conservation groups, landowners, and the scientific community. Grantees also use other media to a lesser extent, such as phone, radio, magazines, signage at sites, and scientific articles. It is notable that for some stakeholder groups, grantees do not use the methods they believe are most effective for reaching those groups. We discuss this further in Section 5.2.

**Table 12: Common Media for Grantees to Communicate to Stakeholders**

Stakeholder Group	Percent Grantees Communicating	Media Used by Grantees to Communicate Achievements			Best way to reach this group
		Most common	2nd most common	3rd most common	
Local government	68%	Website	Own publication	Meeting/Event	Meeting/Event
State government	83%	Own publication	Email	Website	Meeting/Event
Federal government	85%	Own publication	Email	Meeting/Event	Meeting/Event
Conservation groups	85%	Own publication	Meeting/Event	Website	Meeting/Event
Landowners & land managers	78%	Own publication	Meeting/Event	Website	Meeting/Event
General public	85%	Newspapers	Website	Own publication	Newspapers
Private sector	68%	Newspapers	Website	Own publication	Newspapers
Students & Teachers	73%	Website	Own publication	Newspapers	Meeting/Event
Scientific community, academia	78%	Website	Meeting/Event	Own publication	Scientific article

Grantees report that in nearly all cases, they recognize the contribution of both NFWF and Southern Company when communicating their achievements.

Stakeholder interviews revealed that most are familiar with the POF and LL programs, and recognize Southern Company’s role in funding these projects. Few stakeholders were familiar with all projects the programs had funded however. Stakeholders generally recognized projects that were local to their areas, as well as some of the larger and higher profile projects, including Georgia DNR’s protection and restoration of a large longleaf forest near Silver Lake in southwest Georgia and the USFWS’ RCW translocation project. Virtually all stakeholders felt that POF and LL programs were making a significant difference to the conservation of birds and longleaf forests in the Southeast.



Examples of signage at project sites acknowledging Southern Company and National Fish and Wildlife Foundation: a) along nature trail maintained by Georgia Wildlife Federation; b) Mars Memorial Wildlife Refuge in Mississippi.

## 5.2 Do grantees, funders, and environmental stakeholders have suggestions on how best to communicate achievements of POF/LL?

Our experience in evaluating conservation programs funded by corporations shows that the best way to communicate the benefits of the programs is via the grantees in local media. In a 2003 survey we conducted of environmental stakeholders in states around the Gulf of Mexico, we found that corporate advertising of conservation programs is often dismissed as “greenwashing.” However, when environmental stakeholders hear about *local* projects from grantees themselves, or even better from the *local* independent press, they are likely to develop a favorable impression of the corporation and its program. For this reason, we focus here on how grantees can improve their communication of project results.

Grantees generally felt that a dual strategy of disseminating their achievements through newspapers and meetings/events would be most effective in reaching relevant stakeholder groups (see above Table 11). With respect to proactively generating media coverage for their projects, grantees cited the following as strategies that they had used successfully.

- The most common approach was to issue press releases.
- The next most common approach was to invite media to a high profile event -- interest can be generated by inviting a high-ranking politician to the event, by some dramatic aspect of the project such as a prescribed burn, or by linking the project to a related higher profile conservation project that was not funded by the two programs.
- The third most common approach was to initiate contact with reporters in an attempt to interest them to cover the grantee’s project. For some grantees this was a one-off contact; other grantees cultivated a long-term relationship with reporters and had regular contact.
- Finally, some grantees wrote unsolicited stories and submitted them to magazines.

“We were able to tie this project in with the dedication of the Cahaba River NWR so we had television, radio and newspaper coverage that specifically mentioned this effort, NFWF and Southern company.”  
– Keith Tassin, TNC

Some of the barriers that grantees cited in terms of attracting press coverage included:

- Insufficient experience or knowledge in writing press releases or engaging reporters;
- Lack of time; and,
- A bias in mainstream media against covering stories from sportsman organizations.

Overall, it appears that grantees could do more to communicate the results of their projects, and Southern Company and NFWF’s role in funding them. It was our hope to make a collection of all the newspaper clippings or other media mentioning their projects (and acknowledging Southern Company and NFWF), but only four grantees responded to our request for these materials (Georgia DNR, Quail Unlimited, Berry College, and Mississippi Department of Wildlife, Fisheries, and Parks).

Two of the three most commonly used media are passive (websites and own publications). For some stakeholder groups, grantees recognize that other media are more effective (e.g., events and meetings) but most grantees do not pursue these (see Table 12). Various grantees also said that they would be happy to do more communications work, but they had not realized the importance to NFWF and Southern Company.

Current contract language requires grantees to recognize NFWF and Southern Company's contributions *when* they communicate should they choose to, but does not *require* them to communicate.

Following are suggestions for the grant programs to support grantees in communication.

- Strengthen contract language to require grantees to issue and disseminate at least one press release for their project. Accompany this with an offer of guidance on how to write and place press releases.
- Consider sponsoring more meetings and events for all levels of government, conservation groups and landowners to convey program achievements.
- Finally, even though websites were not listed as the most effective means to reach any stakeholder group, as a low cost option, it may be worth requiring grantees to describe their projects on their websites (currently only 49% of grantees do), and provide links to NFWF and Southern Company websites (currently only 15% of grantees do).

## **Theme 6: Improving Performance Measurement and Evaluation**

### **6.1 How can quantitative and qualitative performance metrics of POF and LL be improved, at the project *and* program level? Is it possible to measure cost-effectiveness and “return on investment”?**

In Section 2 of this report we summarize the metrics used in POF and LL to measure performance. In this section we assess the effectiveness of those metrics and provide recommendations on how to improve *and* implement them. Our recommendations take into account the importance of cost and practicality. We have vetted these recommendations with experts in the field and NFWF staff for suitability to these programs. Further, our recommendations address issues that are currently a focus of improvement at NFWF and are therefore potentially timely inputs for orienting the formation of the organization's Keystone Initiatives.

#### *Observations on Current Metrics*

Current performance measurement is dominated by readily measured actions, which the program uses as partial proxies for ecological change. For habitat projects, the most commonly used metrics are acres of habitat “restored” or planted to longleaf forest. For projects focused on species recovery, such as RCWs, grantees most often use metrics such as number of birds monitored and translocated. Across outreach and education projects, grantees typically count the number of individuals that participate.

In terms of the utility of these metrics for evaluating the ecological impacts of the programs, we have the following observations.

- Habitat metrics such as “acres planted” and “acres restored” indicate little about what has been accomplished in ecological terms. In the case of longleaf restoration, current metrics tell us about important steps towards restoring the longleaf ecosystem, such as area planted with longleaf seedlings or acres of existing forest that are treated to remove competing hardwoods. However, these metrics provide only a partial picture of the longer, and more

complex, process of ecosystem restoration. This section of the report focuses on improving these metrics.

- Species metrics, in particular those used for RCWs, are useful. Part of the reason is that grantees translocate RCWs to sites with high quality habitat, and so the majority of transplanted birds thrive. However, species-level projects where habitat conditions are less controlled could benefit from closer integration of species and habitat metrics.
- Education presents an enormous challenge for performance measurement and the programs' current approach of counting participants is common and likely the only practical approach for this relatively small set of projects. Since this is the case with other NFWF programs, the organization should consider improving its general understanding of how education affects behavior of participants vis a vis specific conservation targets across all programs.

We will focus the remainder of this discussion on habitat metrics because an improvement here would benefit both habitat and species projects.

### *Habitat Quality Metrics and Benchmarking*

The main reason current habitat metrics do not reveal adequate ecological information is that grants typically fund a single activity (e.g. tree planting or prescribed burns) at one point in time. However, in the case of longleaf ecosystems, habitat creation or restoration is accomplished by a series of activities over a much longer period of time. In order to show the impact of these activities, we need a measure of the condition of the ecosystem before and after the activity, and some sense of how far along the habitat creation/restoration process the project moved the site. Right now we only know the number of acres that were planted or that received a restoration treatment. This is roughly analogous to a hospital rating its performance based on the volume of surgeries it performs without reporting the condition of the patients before and after their visit.

According to experts interviewed for this evaluation, a great deal remains to be learned about longleaf habitat creation/restoration. For this reason, not all grantee activities will be equally successful. Monitoring habitat quality will help reveal what activities are and are not effective. This information will help NFWF and Southern Company to be more effective grant makers, and it also creates the opportunity for POF and LL to serve as engines of learning for the broader conservation community by monitoring and documenting the effectiveness of grantee activities. As one stakeholder put it, "what these programs can accomplish in terms of area impacted is a drop in the bucket compared to efforts like the Conservation Reserve Program, but how they are different is the impact they can have on developing new techniques and making those large-scale programs better."

Due to the ease with which it can be communicated, it will be necessary to continue to measure and communicate program gains in terms of the acreage of project activities. Buttressing this information with measures of habitat quality may sound daunting, but there are a variety of ways that this can be accomplished, some simple and others complex.

The core elements of measuring the changes of ecosystem quality resulting from projects are:

- Developing a method to measure habitat quality at project sites;
- Requiring pre- and post-project measurement of habitat quality;
- Rating habitat quality measures against a desired benchmark for that ecosystem.

Simple methods for measuring habitat quality can stress practicality, so that a competent forester can implement them easily. Habitat quality of longleaf could be measured in terms of: a) basal area of longleaf and hardwood trees; b) size distribution of longleaf and hardwood trees; and c) characterization of the forest understory by life form (e.g., forbs, graminoids, shrubs and young trees). If desired, this assessment could be made more complex by adding a number of additional measures such as: openness of canopy as measured by amount of light at different levels in the forest; thickness of duff layer on forest floor; diversity of species in the understory; presence of invasive species; and, diversity of other taxonomic groups in the forest, such as birds. But even the simplest measures would represent a significant advance over only considering area-based measures such as acres planted, or acres burned. The chosen method of habitat measurement should be conducted before and after the project. This will provide a basis for determining how much change resulted from the activities funded by the grant. *If grantees are unable to perform the basic measures described here, they are probably not qualified to receive a grant to perform ecosystem restoration.*

It will also be helpful for grantees to provide a summary of the management regime at their sites, especially recent history of prescribed fire, mechanical and chemical treatments, and plans and funding for continuing management in the future. This will provide important information about how the grant fits into a larger habitat creation/restoration process and how sustainable the gains from the project will be.

One final step will be to put this information into a form that quantifies how much progress the project has made towards the goal of creating a healthy longleaf ecosystem. The programs can choose what they consider a reasonable benchmark -- one definition might be the characteristics of a longleaf forest that supports certain wildlife species, such as RCWs<sup>5</sup>. Habitat quality measures for a given site can then be expressed as a percentage of the quality measures of the benchmark. In other words, a site that is roughly halfway through the restoration process may receive a score of 50%. Restoration activities funded by a project might bring it forward to a score of 70% by removing invasive vegetation through a prescribed burn, an improvement of 20 percentage points. “Benchmarking”, as this is called, is an approach that is gaining increasing popularity in ecosystem restoration programs because it very practical for field practitioners to implement and it provides a readily understood performance metric.

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<sup>5</sup> As longleaf forest ecosystems vary geographically, regional benchmarks would be needed. This would capture the differences seen, for example, in montane forests versus those in the Florida panhandle.



**Example: Measuring habitat quality and benchmarking**

In this side-by-side comparison of two sites in the LL portfolio, one can readily see the differences – although the conservation gains of both sites are counted identically using current metrics.

On the left, the forest exhibits the characteristics of a healthy longleaf forest. It has the appropriate basal area and size distribution of longleaf pines, with few or no other tree species, and the groundcover is dominated by wiregrass and other species native to longleaf forests. This forest supports a range of wildlife species, including RCWs, and could serve as a benchmark for restoration.

On the right is a forest in the early stages of restoration. Clearly visible is thick hardwood growth in the midstory (i.e. high proportion of basal area relative to longleaf), inhibiting the presence of native wiregrass groundcover or recruitment of longleaf pine seedlings. This forest was recently burned, and will require a great deal more restoration management to become a healthy longleaf forest that supports native wildlife such as RCWs.

The difference between the two can be expressed as a percentage difference in habitat quality of the forest under intensive restoration treatment (right side) with the benchmark forest (left side). Those comparisons, if made pre- and post-treatment, provide a measure of the ecological gains attributable to a grant.

*Ecosystem Acres*

An interesting spin on the benchmarking concept is the further compression of benchmarking metrics into a single metric that expresses both quality and area in a single number of *ecosystem acres*.

$$\text{Ecosystem Acres at Site}_i = \text{Acres of habitat} \times \text{Habitat quality}$$

In this equation, habitat quality is a number between 0 and 1, representing the percentage benchmarking score calculated above.

For example, one thousand acres of longleaf with a habitat quality score of 0.5 (50%) is equivalent to 500 “ecosystem acres” of the longleaf benchmark ecosystem.

At a program level, performance can be quantified as gains in “ecosystem acres” summed across all  $n$  project sites in the portfolio.

$$\sum_{i=1}^n (\text{post-project Ecosystem Acres Site}_i - \text{pre-project Ecosystem Acres Site}_i)$$

A similar system, called the “habitat hectares” approach, is currently in use by regulators of restoration work in Australia<sup>6</sup>, and is now being proposed as an international standard for measuring the benefits of biodiversity offset projects<sup>7</sup> (Appendix E provides selected literature on the method).

Ecosystem acres may be too complex to communicate program impact to the general public, and current metrics may continue to have a role in this regard. However, as we discuss in the next section, ecosystem acres resolves several major difficulties faced by grant makers in the conservation field, and may therefore make a significant contribution to program management.

### *Surmounting Three Majors Barriers: Attribution, Unitary Metrics, and Cost Effectiveness*

Benchmarking, and combining quantity and quality metrics into ecosystem-acres, provides solutions to three problems that have vexed NFWF (and other conservation funders) for some time.

- *Attributing program impacts:* benchmarking isolates the ecological change resulting from actions specifically funded by the programs, and places them into the broader context of the longer-term restoration process that may be assisted by other donors.
- *Quantifying program performance in a unitary metric:* ecosystem acres combines numerous relevant performance measures in a single unit allowing the direct comparison of projects working in the same habitat, and the summation of program achievements in a single number.
- *Calculating cost-effectiveness of projects and programs:* Simply dividing the gains of a project, or the program overall, by their cost, we can calculate cost-effectiveness. This was previously not possible because there was no comparable measure of performance across projects.

$$\text{Cost effectiveness} = (\text{post-project Ecosystem Acres} - \text{pre-project Ecosystem Acres}) / \text{Cost}$$

The successful application of these simple approaches could vastly improve the programs’ ability to identify the most cost-effective projects, and to use evaluation results to build (and communicate) knowledge about longleaf restoration techniques in terms of their ecological and cost-effectiveness. These implications for NFWF’s Keystone Initiatives could be manifold.

### *Implementation*

Practicality and affordability are essential for a successful performance measurement system. Obviously performance measurement requires technical skills and will incur costs. However, performance measurement is a mandate of the Board of Directors of NFWF because it generates the

<sup>6</sup> Parkes, D., G. Newell and D. Cheal. 2003. Assessing the quality of native vegetation: The ‘habitat hectares’ approach. *Ecological Management & Restoration* 4(supplement), pp.S29-S3.

<sup>7</sup> For more information on the international biodiversity offset standards in development and the use of ‘habitat-hectares’, see <http://www.forest-trends.org/biodiversityoffsetprogram/>



essential information needed to manage its programs effectively. Therefore, the challenge is to find a way to implement the above described metrics in a way that requires a minimum of technical assistance and cost.

Based on our consultations with grantees, experts in the field, and NFWF, we believe that a practical and affordable approach is to rely on grantees to perform field measurements (as mentioned above, the methods proposed here should be within the competency of grantees performing restoration work) and to engage a third party to assist them in their efforts (e.g. Long Leaf Alliance, Joseph W. Jones Ecological Research Center, or a university). The third party would perform six important functions:

- Finalize the methodology to measure habitat quality at project sites and to develop a guidance document, training videos, and data input template for grantees to use in the field;
- Develop relevant benchmarks, including for different types of longleaf forests;
- Assist by telephone, as needed, those grantees that require clarification on how to perform habitat measurements;
- Perform spot checks of grantee measurements to ensure that guidance is followed correctly and that data is unbiased;
- Aggregate and analyze performance data from all projects, for purposes of adaptive management of the programs and to communicate to the broader conservation community.
- Improve transparency and credibility to the programs' reporting of results.

There are currently no “rules of thumb” about the amount of money that a conservation program *should* spend on monitoring. The cost is a function of the level of measurement desired by donors, and will vary considerably across institutions according to the level of rigor they demand. In this case, based on our experience and consultations with experts, we believe that engaging a third party should cost in the range of \$50,000 per year, with an additional \$50,000 in the first year to finalize and write up the field methodology and establish benchmarks<sup>8</sup>.

The selection of a third party can be done through a competitive grant making process. A third party should be selected on the basis of cost, technical skills, level of services that can be provided (e.g. site visits will be the most costly, but very important for ensuring quality), and their ability to network with experts across the geographic range of the projects to be evaluated to get input on benchmarking and to assist in site visits. A final, and very important consideration, is the ability of the third party to share the results with others working on the same habitat. For example, Longleaf Alliance could not only disseminate important learning that comes out of the programs, but could actually introduce similar performance measurement to other organizations, resulting in a large-scale sharing of information that could vastly accelerate learning about longleaf restoration. As mentioned earlier, the ability of POF and LL to share important new learning may ultimately be its greatest influence in longleaf restoration.

This suggested approach has several risks that need to be managed. First, it will be essential that grantees have a constructive relationship with the organization assisting in performance

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<sup>8</sup> We assume a level of effort of 45 days per year by a technical expert with a daily rate (fully loaded with overhead costs) of \$1,000 per day. The third party conducts 10 site visits per year, each with a travel cost of approximately \$300. Additional startup costs in the first year include a level of effort of 40 days.

measurement, especially if the grantee already has their own well-developed monitoring program and resents the intrusion by an external party. Second, given the heterogeneity of the landscape, consideration will be necessary to involve local experts in the design and implementation of the monitoring program. Finally, ecosystem restoration is an area of continuous innovation – greatly needed to improve current methods. A unified monitoring system should guard against imposing rigid protocols that stifle innovation. All of these risks can be managed.

### *Length of Grant Commitment*

It merits mention here that the current shift towards multi-year grant commitments will make our suggestions increasingly viable and useful. It is also a fact that ecological impacts are better observed over longer periods of time. Therefore a provision for post-project measurements after the grant period may be called for.

### *Carbon Sequestration*

Carbon sequestration, a secondary benefit of habitat restoration, also merits discussion in this section. To date, the program has made no formal attempt to estimate carbon sequestration in restored forests apart from tallying the area of land planted or managed. As we understand it, there are no plans by Southern Company to seek formal credit for carbon sequestration from POF and LL programs, and therefore there is no apparent need for a technically robust quantification of carbon benefits. However, NFWF may wish to consider developing a standardized approach to carbon accounting for projects it funds and administers so that it can base reporting across all of its programs on a consistent method.

While at a superficial level it is true that a growing tree sequesters carbon, it is not clear that projects in these grant portfolios necessarily result in a net increase in carbon sequestration, compared to a counterfactual scenario of what would have happened in the absence of the projects. Among other things, a defensible statement about the net carbon sequestration of projects requires:

- information on the above and below ground carbon storage of longleaf pine forests as they mature, and the impact of different management regimes such as planting density and prescribed burning;
- information on the above and below ground carbon storage of the land use that the longleaf stand replaces; and,
- information on the carbon implications of the “without grant” scenario – in other words, what would have happened on the site without the grant (e.g. a plantation of a different faster growing tree species, harvest of existing forest stand, etc.).

A consideration of different types of longleaf projects can help illustrate how much the carbon sequestration impacts of a project may vary. The establishment of longleaf forests on agricultural land, for example, should result in increases in carbon sequestration and storage; however, the restoration of longleaf forests on sites that require the removal of hardwood forests, or other species of pine under different management regimes, is far less certain. It may even be possible that restoration of longleaf forests reduces carbon stored and sequestered in certain cases.

Increasing concern about climate change may result in greater scrutiny of corporate reporting about carbon sequestration – whether or not they are made for purposes of formal crediting. The program’s statement that “Longleaf Legacy also helps sequester carbon through tree planting” may

be viewed with some skepticism. As such, NFWF and the Southern Company may want to start a dialog about the carbon sequestration benefits of the programs and consider at least three options:

1. Soften the statements so that it is apparent that program staff is aware that LL and POF projects do not necessarily result in a net increase of carbon sequestration.
2. Increase the rigor with which carbon accounting is carried out at the project level so that any actual or implied reporting about the carbon benefits of the programs can be substantiated. Such efforts might include adoption of best practices with respect to accounting such as the development of accounting boundaries, baselines, and additionality. It may be appropriate for NFWF to take the lead on this, as guidelines for carbon accounting of its projects could be used across all of its programs<sup>9</sup>.
3. Remove statements about carbon sequestration from program materials.

It merits mention here that rigorous quantification of carbon sequestration in longleaf ecosystems has not been undertaken<sup>10</sup>. If the donors choose to pursue option 2 above, it should be done with knowledge that empirically rigorous reference tables based on actual measurements of above and below ground carbon sequestration of longleaf across are not available and approximations will need to be used in the interim.

Finally, it also merits mention that focus on carbon sequestration may distract from the biodiversity goals of the program. Any recommendation followed to improve the rigor of carbon accounting should be accompanied by continued focus on the biodiversity goals of the program.

## **6.2 Is there a single metric (or critical few metrics) that can be applied across both programs for measuring the collective impacts of the projects?**

As discussed in Section 6.1, the *ecosystem acres* approach provides a unifying metric for measuring the impacts of the species and habitat projects in the two programs. It is a direct measure of the goal of creating functioning longleaf ecosystem, *and* can be translated into “bird equivalents” for the bird conservation projects in the POF program, based on knowledge of the value of particular habitats for bird species.

Nevertheless, we advise supplementing habitat metrics with direct measures of the response of certain bird species, particularly those where the POF program has an emphasis, such as RCW. Not only will species monitoring confirm that habitat measures are reliable indicators of a species’ response to project activities, but the results of species-level monitoring can be used to build support among donors and the general public for the projects.

## **6.3 How are POF/LL objectives strategically linked to NFWF’s keystone and other initiatives? Can these linkages be strengthened? How can project and programmatic performance measurement support the linkages to NFWF’s keystone and other initiatives?**

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<sup>9</sup> The work of the Greenhouse Gas Protocol, the Winrock Foundation, the Voluntary Carbon Standard, the Chicago Climate Exchange and others can provide a useful base for developing guidelines.

<sup>10</sup> Although there are some reference values available for longleaf sequestration (e.g., Georgia Carbon Sequestration Registry’s *Forest Carbon Estimation Protocol*), many experts interviewed during the course of this evaluation felt that current knowledge for the forests with which they were familiar was insufficient to do a reliable carbon accounting.

NFWF has recently introduced a new organizational framework that divides its core efforts into issue-specific “keystone initiatives.” Complementing the keystone initiatives are “charter initiatives,” such as POF and LL, which focus on issues of particular interest to a corporate or government agency partner. In some cases charter initiatives may be strategically linked with keystone initiatives.

It is premature to answer how POF and LL are linked to the keystone initiatives as relevant keystone initiatives have yet to be developed. NFWF’s Board of Directors recently approved a southeastern grassland keystone initiative for bird conservation, for which a strategic plan will be developed by November 2008. As yet, there are no habitat keystones approved for the eastern U.S., but at some point in the future there will likely be a longleaf keystone initiative geographically focused around SE military bases.

The best way to strategically integrate the keystone initiatives (when they are available) with POF and LL will be to either integrate their own respective strategic plans, or to have them jointly support strategic plans developed by third parties. POF does not need a strategic plan for bird conservation projects, as prioritization schemes and plans exist that both POF and the keystone initiative can support (Table 6). In contrast, at least in the interim until prioritization schemes and strategic plans are available from organizations like Longleaf Alliance, NFWF should develop a written strategic plan that guides longleaf project selection. Encouragingly, interviews with program staff indicate that a strategic plan is currently under development. Once the longleaf keystone is developed, NFWF staff can ensure that the LL plan supports the keystone work for shared conservation targets. Strategic plans developed for LL should be able to neatly nest into the larger strategies for the keystone initiatives.

Regardless of the approach taken, we recommend that any strategic plans developed or supported by POF and LL should acknowledge enabling factors and address the limiting factors identified in this evaluation. Otherwise, unless the full range of factors that may impact project performance are considered and managed, it may not be able to sustain project gains over the long-term.

We also recommend that program staff strengthen their formal understanding of all the significant players that are working in the same landscape and whose activities affect important limiting factors (both positively and negatively). For example, a major actor in longleaf restoration that is not present in the current POF and LL strategies is the Conservation Reserve Program (CRP). The CRP has invested millions of dollars into longleaf restoration and according to our interviews has funded the planting of over 100,000 acres of longleaf. In this regard, CRP is doing much to overcome the barrier of short-term financing for longleaf restoration on private lands. It does not, however, address the scientific uncertainties in longleaf restoration methodology, nor does it ensure long-term results (landowner commitments are only 15 years). An enormous opportunity to build upon the momentum of CRP and leverage its gains through POF and LL has gone untapped to date (e.g., work to establish long-term commitments to conserve replanted forests under CRP).

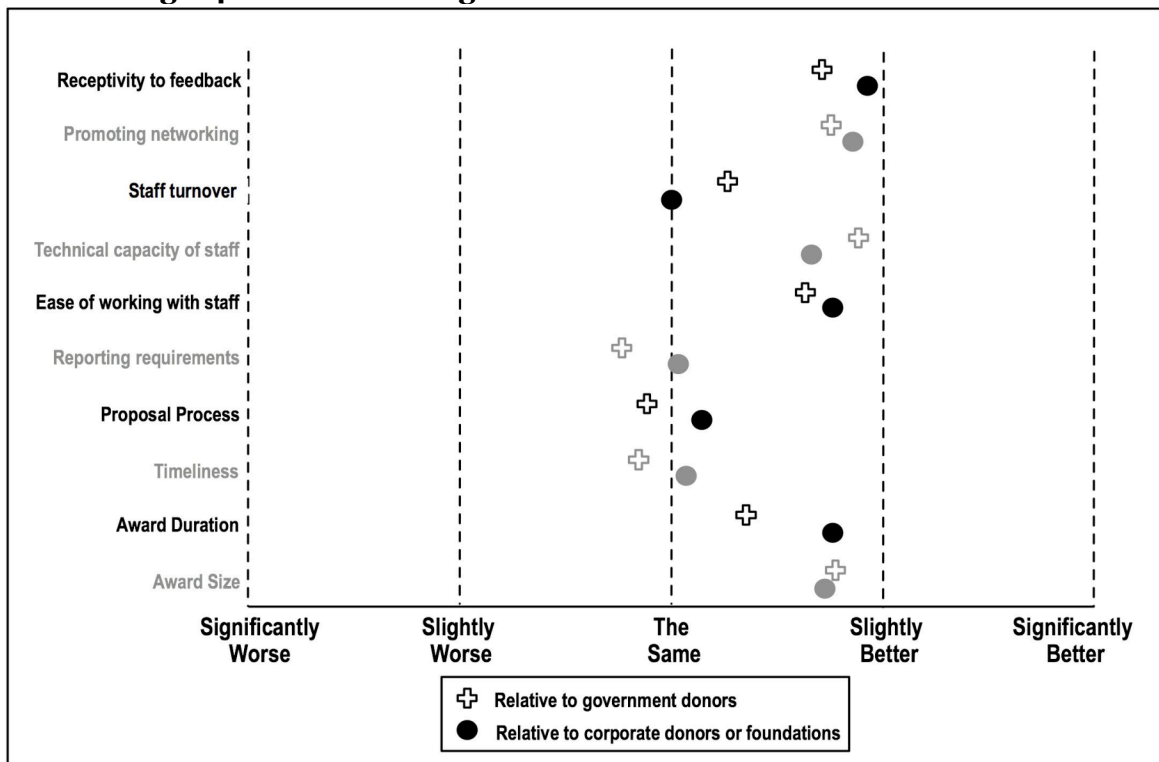
**Theme 7: NFWF Grant Management**

**7.1 What do grant recipients consider the strengths and weaknesses of NFWF’s grant management process?**

On average, grantees rated NFWF’s administration of the two programs as about the same, or slightly better, than other government, corporate, or foundation donors (Figure 14). The average results shown in Figure 14 mask the fact that a large number of grantees ranked NFWF as significantly better than all other donor types. On the other hand, for the traits of promptness of delivering funding, the proposal process, and reporting requirements, a small but significant number of grantees ranked NFWF as significantly worse than other donors. These negative ratings tended to be from university grantees, where it seems that there is a systemic incompatibility between the NFWF and university administration systems.

Grantees provided specific feedback on the strengths and weaknesses of program administration. One of the most commonly cited strengths is the quality of the employees. Some of the most commonly cited weaknesses include: too frequent and complex reporting requirements; delays in approving proposals and releasing funding; and, inability to recover indirect costs. At the time of writing this evaluation report, NFWF introduced a new streamlined final project reporting form in response to grantee feedback. A move to multi-year grants also promises to reduce administrative workload and delays associated with the re-submission of grant proposals each year to continue a single project.

**Fig. 14: Grantee Rating of NFWF Administration of POF & LL**



Of special note is the value that grantees placed on the Annual Stewardship meeting hosted by Southern Company. All grantees felt that the meeting was useful. The most commonly cited benefits of attending the meeting included the opportunity to network, to share experiences, and to gain exposure to new ideas (Table 13).

The meeting format has achieved a good balance on key aspects such as length of presentations, types of field trips, and the range of attendees at meetings, with approximately equal numbers of grantees citing these as strengths and weaknesses.

“The grantees' presentations are the most stimulating part of the conference, and I always appreciate Peter Stangel's way of leading discussion of issues to stimulate exchange of ideas. The conference is always held in an interesting setting, with hospitality that is much appreciated. I have also enjoyed and learned from field trips. Don't change anything!”

**Table 13: Cited Benefits of Attending Stewardship Meeting  
(Based on Open-Ended Survey Responses)**

Benefit from attending stewardship meeting	Times cited
Networking	21
Sharing experience	7
Exposure to new ideas	4
Capacity building	3
New opportunities	1
Meet NFWF staff	1
Learn about Southern Company	1
Learn about new opportunities	1
Keeping up to date	1
Brainstorming	1
Attracting new partners	1

## DISCUSSION AND RECOMMENDATIONS

POF and LL are to be congratulated on their significant achievements to date. Some 4,200 acres of longleaf forest have been established, either by creating new forests, or converting plantations of other tree species. More than 12,000 acres of existing longleaf forests have been treated through burning and mid-story removal. When current projects are completed, the sum of new and treated forests should total approximately 30,000 acres. Nearly 48,000 acres of different habitats are under improved stewardship. Approximately 133,000 people have received some form of conservation education, and an additional 201,000 were potentially exposed to a conservation message via visits to birding sites and nature trails.

Among other changes we have observed at NFWF in recent years, we applaud the shift towards multi-year grants. This is having multiple positive effects, such as reducing administrative burdens and putting money on the ground more efficiently, creating a more conducive environment implementing for more sophisticated performance measurement, and potentially creating a more stable financial platform for grantees to take on greater challenges.

Program staff can now consider ways to build upon their accomplishments and further strengthen their efforts. The challenges facing POF and LL, such as ensuring sustainability and developing meaningful performance measurement, are common to most conservation programs. In this report we make a series of recommendations for addressing these and other challenges.

*Conservation priorities:* A significant percentage of projects do not address the conservation priorities identified by an ecological prioritization scheme. This is because prioritization schemes may not be available for a conservation target (e.g., longleaf pine), or, the conservation target is somewhat vague, such as for some of the education, training and awareness projects. Over time, program staff should seek to ensure that as many grants as possible fund activities that address conservation priorities. This can be accomplished by investing in the development of prioritization schemes where they are lacking (such as POF is doing with its grant to the East Gulf Coast Plain Joint Venture), and by ensuring that all projects address these priorities. In particular, honing the focus of some of the education grants may be beneficial.

*Ecological scale:* About a third of the site-based projects in the POF and LL portfolios do not use ecological thresholds to determine the minimum scale at which project activities should be carried out. In some but not all cases this is due to a lack of sufficient ecological information. At the same time, the programs fund projects, such as the RCW translocation work, that are a model of ecological planning. Over time, the programs should seek to increase the percentage of projects that address ecological scale requirements when planning site-based activities.

*Limiting factors:* This report identifies factors that present challenges to projects addressing different conservation targets. By doing so, it provides a basis upon which to direct investments in non site-based conservation activities, such as education and research. Program staff should either consider directly funding work to address the most serious limiting factors, or ensure that another institution is working to overcome them. Understanding and addressing these factors as a program will be important for success, and we encourage program staff to periodically work with grantees to update the limiting factors analysis.

*Communication of program impacts:* The most effective way to communicate the good work of POF and LL is via its grantees. Following are suggestions for the grant programs to support grantees in communication.

- Strengthen contract language to require grantees to issue and disseminate at least one press release for their project. Accompany this with an offer of guidance on how to write and place press releases.
- Consider sponsoring more meetings and events for all levels of government, conservation groups and landowners to convey program achievements.
- Finally, even though websites were not identified as the most effective means to reach any stakeholder group, as a low cost action it may be worth requiring grantees to describe their projects on their websites, and provide links to NFWF and Southern Company websites.

*Performance measurement:* Performance measurement can be applied more consistently across grantees, and the metrics can be improved to reveal more about the ecological gains of the programs. We recommend the use of an ecosystem benchmarking method that should be practical and affordable. Combining measures of habitat area with habitat quality allows for a single performance metric that provides a platform for evaluating program effectiveness in the future, including measuring cost-effectiveness of investments.

Engaging a third party, such as a research institution, to assist in implementing these methods could: a) enhance the quality of the method; b) facilitate the development of ecosystem benchmarks; c) provide assistance and supervision to grantees in performing field measurements; d) enable adaptive management by the program, and the larger conservation community, using the performance results; and, e) improve transparency and credibility to the programs' performance reporting.

Finally, Southern Company and NFWF should begin a dialogue about the rigor they wish to put behind statements about carbon sequestration, and consider whether to soften statements about carbon sequestration or invest in better means to quantify the actual impacts of the programs.

We emphasize that evaluations typically identify *challenges* to programs, but it is not usually appropriate for evaluators to be highly prescriptive in how program staff should address these challenges. Rather, evaluations should offer some possible solutions, but leave it to program staff with their greater familiarity to identify how best the programs can confront the challenges. Also, not all challenges must be overcome immediately, and many are best approached over time. The strong and effective partnership between Southern Company and NFWF is an excellent base upon which to take on these challenges. Regardless of the speed and success in overcoming the challenges identified here, POF and LL will remain excellent programs that have a tremendously important positive impact on conservation in the region.



**APPENDIX A: EVALUATION FRAMEWORK**

<b>Power of Flight (POF) &amp; Longleaf Legacy (LL) Evaluation Framework</b>		
<b>Question</b>	<b>Data Collection</b>	<b>Analysis</b>
<b>Theme 1: Alignment of POF and LL with Conservation Priorities</b>		
1.1 Do POF/LL actively consider the conservation priorities of other institutions in the grant making process? If so, how? If not, why not?	NFWF interviews	Determine if systematic (or other) approach is used by NFWF to address and document other institutions' conservation priorities.
1.2 Where do POF/LL projects fit within the priorities of other institutions, whether they were actively considered or not?  -Based on technical analysis of POF/LL projects vis a vis other institutions' priorities?  -Based on opinion of the institutions that are authoring those priorities?	Project files  Grantee self-evaluation survey  Stakeholder interviews (esp. Joint Ventures)  Expert Panel  NFWF interviews	Analyze project distribution across a range of conservation prioritization schemes identified from project files and web surveys.  Collect stakeholder and expert opinions about how well POF & LL projects fit within range of prioritization schemes, in particular from the institutions that authored the prioritization schemes.
<b>Theme 2: Performance Measurement in Practice</b>		
2.1 How have conservation gains been measured <i>quantitatively</i> and reported by grant recipients at the project level?	Project files	Compile frequency and type of quantitative metrics mentioned in project documentation.
2.2. When not captured through quantitative measures, how have conservation gains been reported qualitatively?	Project files	Compile frequency and type of qualitative measures mentioned in project documentation.
2.3 How have conservation gains been measured <i>quantitatively and qualitatively</i> and reported by NFWF at the programmatic level?	NFWF document review  NFWF interviews	Compile frequency and type of quantitative & qualitative measures in NFWF documentation to SoCo.

Theme 3: Performance		
<p>3.1 What have been the direct conservation gains attributed to POF/LL, as measured by quantitative and qualitative metrics identified from 2.1. and 2.2, and others provided by grantees in the evaluation?</p> <p><i>Qualitative direct</i> impacts are the result of grantees actions, but are not measured (e.g. spillover benefits for other conservation priority targets).</p>	<p>Project Files</p> <p>Grantee self-evaluation survey</p> <p>Site Visits</p>	<p>Determine if monitoring and evaluation is conducted, from which gains are reported.</p> <p>Compile values for each measure identified in 2.1 and 2.2, and additional metrics from web surveys.</p> <p>Compare values as reported in project files vs. web survey.</p> <p>Determine if metrics relate to ecological thresholds (Min Habitat, Min Viable Pop, etc.)</p>
<p>3.2 Are there instances of indirect conservation benefits of POF/LL? If so, document anecdotes and examples that arise. Examples may include: spinoff initiatives; catalytic events; partnerships; leveraging of funding.</p> <p><i>Indirect benefits</i> are the results of actions of others, but that were catalyzed or influenced by the grantee.</p>	<p>Project Files</p> <p>Grantee self-evaluation survey</p> <p>Site Visits</p> <p>Stakeholder interviews</p> <p>NFWF Interviews</p>	<p>Compile examples from project files, open-ended survey questions, site visits, and stakeholder interviews.</p>
<p>3.3 What is the probability that such outcomes specified in 3.1 and 3.2 would have occurred in the absence of either POF or LL?</p>	<p>Grantee self-evaluation survey</p> <p>Site Visits</p> <p>Stakeholder interviews</p> <p>Expert Panel</p>	<p>Assess:</p> <ul style="list-style-type: none"> <li>-range of other funding sources for these types of projects</li> <li>-relative contribution of NFWF</li> <li>-NFWF's role in "signaling" project for other donors</li> <li>-NFWF's role in releasing matching funding</li> </ul> <p>Determine if monitoring and evaluation approach includes baseline measures and counterfactuals.</p> <p>Qualitatively assess whether program outcomes counter- or reinforce background trends in the status of the conservation target. [Will not be possible to <i>quantify</i> additionality].</p>
<p>3.4 What key variables limit or enable project performance?</p>	<p>Grantee self-evaluation survey</p> <p>Site Visits</p>	<p>Assess limiting and enabling factors faced by all projects (<i>before</i> and <i>after</i> project):</p> <ul style="list-style-type: none"> <li>-Project design (threats-based, appropriate scale)</li> <li>-Management system</li> </ul>

		<ul style="list-style-type: none"> <li>-Gov't policy &amp; legislation</li> <li>-Institutional capacity</li> <li>-Economic factors</li> <li>-Financial sustainability</li> <li>-Other: open for site managers to offer other themes</li> </ul> <p>Compare POF&amp;LL funding to needs as described by limiting and enabling factors.</p>
<b>Theme 4: Sustainability</b>		
<p>4.1 Have conservation gains been sustained after project funding concluded? Are gains likely to be sustained in the future? [Relevant time periods may be context/target specific, TBD]</p>	<p>Project Files</p> <p>Grantee self-evaluation survey</p> <p>Site Visits</p>	<p>Describe relevant time periods for different types of conservation targets.</p> <p>Determine if ecological thresholds (Min Habitat, Min Viable Pop, etc.) have been attained.</p> <p>Assess limiting factors faced by all projects (<i>before</i> and <i>after</i> project), determine trends in improvement and values once NFWF funding ends. Break out by categories of projects (e.g. research, habitat, education, etc.). Document degree of control over these factors:</p> <ul style="list-style-type: none"> <li>-Project design (threats-based, appropriate scale)</li> <li>-Management system</li> <li>-Gov't policy &amp; legislation</li> <li>-Institutional capacity</li> <li>-Economic factors</li> <li>-Financial sustainability</li> <li>-Environmental factors</li> <li>-Other: open for site managers to offer other themes</li> </ul> <p>Collect examples of challenges to sustaining conservation gains and innovative approaches observed in the portfolio.</p>
<b>Theme 5: Communication of POF/LL Achievements</b>		
<p>5.1 Do grantees communicate their achievements to environmental stakeholders and the larger public? If so:</p> <ul style="list-style-type: none"> <li>-to whom, and through which media?</li> <li>-are NFWF and SoCo credited?</li> <li>-which grantee results do environmental stakeholders</li> </ul>	<p>Project Files</p> <p>Grantee self-evaluation survey</p> <p>Samples of communications</p>	<p>Compile frequency and type of communication media used by grantees to communicate achievements. Distinguish between acknowledgment placed on grant products (journal paper, placards at sites, handouts) and explicit media efforts (radio, tv, newspapers and magazines).</p>

<p>value most highly? -are environmental stakeholders aware of SoCo's role in funding these projects?</p>	<p>(required in survey) Site Visits Stakeholder Interviews</p>	<p>Catalogue stakeholder groups <i>intended</i> to be reached by media. Rank types of results environmental stakeholders believe to be important. Rate awareness and understanding of POF &amp; LL projects among environmental stakeholders, including SoCo's role as funder of projects.</p>
<p>5.2 Do grantees, funders, and environmental stakeholders have suggestions on how best to communicate achievements of POF/LL?</p>	<p>Grantee self-evaluation survey Site Visits Stakeholder Interviews NFWF Interviews</p>	<p>Collect opinions on how best to communicate results, best ways, outlets, to communicate.</p>
<p><b>Theme 6: Improving Performance Measurement and Evaluation</b></p>		
<p>7.2 How can quantitative and qualitative performance metrics of POF/LL be improved, at the project <i>and</i> program level? Is it possible to measure cost-effectiveness and "return on investment"?</p>	<p>Grantee self-evaluation survey Site Visits Stakeholder Interviews NFWF Interviews Expert Panel</p>	<p>Document relationship between POF &amp; LL's Programmatic Strategies and performance metrics used to measure progress towards their stated objectives. Assess degree to which limiting and enabling factors are integrated into programmatic metrics. Assess use of baselines, counterfactuals (change in absence of project), and measures relative to target goals based on ecological or other relevant rationale. Assess comparability of metrics across projects. If comparable metrics exist, is context sufficiently homogeneous across sites to make valid comparison? If so, analyze viability of cost-effectiveness and ROI measures. Query grantees during site visits as to the feasibility of new metrics.</p>

<p>7.3 Is there a single metric (or critical few metrics) that can be applied effectively across both programs for measuring the collective impacts of the projects?</p>	<p>No additional data collection</p>	<p>Isolate common metrics to POF &amp; LL, analyze the impacts captured by these metrics and those not captured.</p> <p>Examine possibilities, based on analysis in 6.1, of new programmatic metrics based on limiting and enabling factors.</p>
<p>7.4 How are POF/LL objectives strategically linked to NFWF's keystone and other initiatives? Can these linkages be strengthened? How can project and programmatic performance measurement support the linkages to NFWF's keystone and other initiatives?</p>	<p>Interviews with NFWF</p>	<p>Compare results of 6.1 and 6.2 to Keystone Initiative performance criteria, ascertain potential linkages.</p>
<p><b>Theme 7: NFWF Grant Management</b></p>		
<p>7.1 What do grant recipients consider the strengths and weaknesses of NFWF's grant management process?</p>	<p>Grantee self-evaluation survey</p> <p>Site Visits</p> <p>Interviews with NFWF</p>	<p>Compile rankings of NFWF performance relative to other sources of grant funding, on following criteria:</p> <ul style="list-style-type: none"> <li>-Proposal process</li> <li>-Reporting requirements</li> <li>-Prompt delivery of funding</li> <li>-Technical assistance</li> <li>-Knowledgeable and effective staff</li> <li>-Other</li> </ul> <p>Collect open-ended suggestions for improvement from grantees. Discuss with NFWF to determine viability, and practical considerations in making suggested changes.</p>

**APPENDIX B: GRANTS REPRESENTED BY GRANTEES INTERVIEWED**

<b>Grant No.</b>	<b>Year</b>	<b>Grantee</b>	<b>Project Title</b>
2002-0369-001	2002	U.S. Fish and Wildlife Service - Region 4	Apalachicola NF Red-Cockaded Woodpecker Monitoring
2002-0369-004	2002	Quail Unlimited, Inc.	Quail Habitat Restoration in the Southeast
2002-0369-007	2002	Georgia Wildlife Federation, Inc.	Urban Conservation and Education Initiative
2004-0125-000	2004	Georgia Department of Natural Resources	Georgia State Parks Longleaf Pine Restoration
2004-0129-000	2004	The Nature Conservancy	Cahaba River Mountain Longleaf Pine Reforestation
2004-0159-000	2004	Georgia Department of Natural Resources	Panola Mountain (GA) Bird Conservation Park
2004-0162-000	2004	Auburn University	East Gulf Joint Venture Habitat Conservation Tools
2004-0166-000	2004	Tall Timbers Research, Inc.	Red Hills Red-Cockaded Woodpecker Conservation
2005-0067-000	2005	Quail Unlimited, Inc.	Quail Habitat Restoration in the Southeast-II
2005-0071-000	2005	U.S. Fish and Wildlife Service	Apalachicola Red-Cockaded Woodpecker Monitoring-II
2005-0101-000	2005	Georgia Wildlife Federation, Inc.	Urban Conservation and Education Initiative-II
2005-0135-000	2005	Tall Timbers Research, Inc.	Pebble Hill/Tall Timbers Longleaf Reforestation
2005-0136-000	2005	The Nature Conservancy	Perdido River (FL) Longleaf Pine Restoration
2005-0138-000	2005	National Wild Turkey Federation, Inc.	Red-Cockaded Woodpecker Habitat Restoration (AL)
2005-0161-000	2005	Mississippi State University	Monitoring and Conservation of Marshbirds (MS)
2005-0163-000	2005	Tall Timbers Research, Inc.	Effects of Seasonal Burns on Breeding Birds (GA)
2005-0222-000	2005	The Nature Conservancy	South Georgia Longleaf Pine Habitat Restoration
2006-0023-000	2006	Mississippi State University	Longleaf Restoration on Private, Non-Industrial La
2006-0063-000	2006	U.S. Fish and Wildlife Service	Apalachicola Red-cockaded Woodpecker Monitoring-III
2006-0138-000	2006	The Nature Conservancy	Apalachicola Bluffs (FL) Longleaf Pine Restoration
2006-0138-000	2006	The Nature Conservancy	Apalachicola Bluffs (FL) Longleaf Pine Restoration
2006-0154-000	2006	Francis M. Weson Audubon Society	Gulf Coast Urban Education Initiative (FL)
2006-0156-000	2006	Mississippi State University	Monitoring and Conservation of Marshbirds (MS) II
2006-0158-000	2006	Georgia Wildlife Federation, Inc.	Urban Conservation and Education Initiative III
2007-0011-000	2007	School of Forestry and Wildlife Science, Auburn University	Restoration of Montane Longleaf Forest
2007-0014-000	2007	U.S. Fish and Wildlife Service	Apalachicola Red-cockaded Woodpecker Monitoring - IV
2007-0016-000	2007	Quail Unlimited Inc.	Quail Habitat Restoration in the Southeast - III
2007-0068-001	2007	Mississippi Department of Wildlife, Fisheries and Parks	T.M. Wildlife Reserve Longleaf Restoration Project (MS)

2007-0069-003	2007	Mississippi State University	Monitoring and Conservation of Marshbirds (MS) III
2007-0069-006	2007	Francis M. Weston Audubon Society	Gulf Coast Urban Education Initiative-II
2008-0044-002	2008	The Nature Conservancy - Florida	Perdido River (FL) Longleaf Pine Restoration - II
2008-0044-003	2008	Georgia Department of Natural Resources	Longleaf Pine Acquisition in Southwest Georgia
2008-0044-004	2008	Longleaf Alliance and Auburn University School of Forestry and Wildlife Sciences	Longleaf Pine Restoration Initiative
2008-0045-001	2008	Milliken Forestry Company, Inc.	Apalachicola Red-cockaded Woodpecker Monitoring V

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**APPENDIX C: GRANTEES AND STAKEHOLDERS INTERVIEWED**

<b>Name</b>	<b>Position</b>	<b>Institution</b>	<b>Address</b>	<b>State</b>	<b>Grant-ee</b>	<b>Other</b>
<b>Site Visits</b>						
Mark Woodrey	Research Coordinator/Research Biologist	Mississippi State University - Coastal Research and Extension Center	Grand Bay National Estuarine Research Reserve, 6005 Bayou Heron Road Moss Point, MS 39562	MS	x	
Kathy Shelton	State Wildlife Grants Program Biologist	Mississippi Museum of Natural Science	2148 Riverside Drive, Jackson, Mississippi 39202-1353	MS	x	
Russ Walsh	District Biologist	Mississippi Department of Wildlife, Fisheries and Parks	211 Critz St. N Wiggins, MS 39577	MS		x
Glenn Hughes	Extension Professor	MSU Extension Service	P.O. Box 348 Purvis, MS 39475	MS	x	
James McHugh	Wildlife Diversity Coordinator	Alabama Division of Wildlife & Freshwater Fisheries -	64 North Union Street, Montgomery, Alabama 36130	AL		x
Cynthia Ragland	District Ranger	USDA Forest Service	Talladega National Forest, Oakmulgee District, AL (Brent)	AL		x
Joe Koloski	Senior Regional Biologist	National Wild Turkey Federation	414 Brenmar St. Brandon, MS 39042	AL	x	
Keith Tassin	Director of Science and Stewardship	The Nature Conservancy - Alabama Chapter	2100 1st Avenue North, Suite 500, Birmingham, AL 35203	AL	x	
Sharon Hermann	Visiting Assistant Professor HERMASM	Department of Biological Sciences	331 Funchess Hall, Auburn University, Auburn, AL 36849-5407	AL	x	
John Kush	Research Fellow IV	School of Forestry & Wildlife Science	108 M. White Smith Hall, Auburn University, AL 36849-5418	AL		x
Kevin Kleiner	Alabama Gap Analysis Project	Alabama Cooperative Fish and Wildlife Research Unit	Auburn University, AL 36849-5418	AL	x	
Dean Gjerstad	Professor and Co-Director of the Longleaf Alliance.	School of Forestry and Wildlife Sciences	602 Duncan Drive/Suite 3305, Forestry and Wildlife Sciences Bldg., Auburn University, AL 36849-5418	AL	x	
Jerry McCollum	President/CEO	Georgia Wildlife Federation	11600 Hazelbrand Rd, Covington, GA 30014	GA	x	
Terry Tatum	Vice President - Development	Georgia Wildlife Federation	11601 Hazelbrand Rd, Covington, GA 30014	GA	x	
Cindy Reitinger	State Naturalist	Georgia Department of Natural Resources: State Parks & Historic Sites	2 Martin Luther King Jr. Drive, SE, Suite 1352 East, Atlanta, GA 30334-9000	GA	x	



Jim Weeks	Landscape Architect	Georgia Department of Natural Resources: State Parks & Historic Sites	3 Martin Luther King Jr. Drive, SE, Suite 1352 East, Atlanta, GA 30334-9000	GA	x	
Randy Tate	Director of Science and Stewardship	The Nature Conservancy	1330 West Peachtree Street, Suite 410, Atlanta GA 30309	GA	x	
Eric Hunter	Grants Specialist	The Nature Conservancy	1331 West Peachtree Street, Suite 410, Atlanta GA 30309	GA	x	
Lindsay Boring	Director and Scientist (Forest Ecology)	Joseph Jones Ecological Center	Route 2, Box 2324, Newton, GA 39870	GA		x
L. Katherin Kirkman	Associate Scientist (Plant Ecology)	Joseph Jones Ecological Center	Route 2, Box 2324, Newton, GA 39871	GA		x
Lora Smith	Associate Scientist (Wildlife Ecology)	Joseph Jones Ecological Center	Route 2, Box 2324, Newton, GA 39872	GA		x
Steve Jack	Conservation Ecologist and Applied Forest Scientist	Joseph Jones Ecological Center	Route 2, Box 2324, Newton, GA 39873	GA		x
Jonathan Stober	Wildlife Monitoring Biologist	Joseph Jones Ecological Center	Route 2, Box 2324, Newton, GA 39874	GA		x
Reggie Thackston	Private Lands Program Manager	Georgia Department of Natural Resources: Wildlife Resources Division (Quail Unlimited grant)	Georgia DNR, Wildlife Resources Division, 116 Rum Cr. Drive,	GA	x	
Phil Spivey	Wildlife Biologist	Georgia Department of Natural Resources: Wildlife Resources Division	PO Box 6385, Thomasville, GA 31758	GA	x	
Jim Cox	Research Biologist	Tall Timbers Research Station and Land Conservancy	13093 Henry Beadel Dr., Tallahassee, FL	FL	x	
Ron Masters	Director of Research	Tall Timbers Research Station and Land Conservancy	13094 Henry Beadel Dr., Tallahassee, FL	FL	x	
Kelli Flournoy	Office Manager	The Nature Conservancy	10394 NW Longleaf Drive, Bristol, FL 32321	FL	x	
David Printiss	Program Director: Northwest Florida	The Nature Conservancy	10395 NW Longleaf Drive, Bristol, FL 32321	FL	x	
Adlai Platt	Preserve Manager: Perdido Nature Preserve	The Nature Conservancy	4025 Highway 178, Jay, FL	FL	x	
Jennifer Hale	Naturalist	Roy Hyatt Environmental Center (Audobon Grant)	1300 Tobias Rd., Cantonment, FL 32533-9623	FL	x	
<b>Phone Interviews</b>						
Al Schotz	Botanist/Ecologist	Alabama Natural Heritage Program	1090 South Donahue Drive, Auburn University, AL 36849	AL		x

Ralph Costa	Former Wildlife Biologist	USFWS	513 Brookside Acres Rd, Mountain Rest, SC 29664	Multiple	x	x
Will McDow	Forester, Southeast Region	Environmental Defense	4000 Westchase Blvd, Suite 510, Raleigh, NC 27607	Multiple		x
Jimmy Bullock	Wildlife and Forest Manager	Resource Management Services, LLC	31 Inverness Center parkway, Suite 360, Birmingham, Alabama, 35242	AL		x
Jeff Walters	Harold Bailey Professor, Avian Ecology Group	Virginia Polytech	4081 Derring Hall; 2125 Derring Hall Blacksburg, VA 24061	Multiple		x
Ben Wigley	Manager of the Sustainable Forestry and Wildlife Program	National Council for Air and Stream Improvement	NCASI, PO Box 340362, Clemson, SC	Multiple		x
Dean Demarest	FWS Region 4 Migratory Bird Office	USFWS	1875 Century Blvd, Suite 240, Atlanta, GA 30345-3319	GA		x
Alison Vogt	Coordinator	East Gulf Coastal Plain Joint Venture	602 Duncan Drive Room 3236 Auburn, AL 36849-5418	AL	x	x
<b>NFWF</b>						
Suzanne Sessine	Assistant Director, Southeast	National Fish and Wildlife Foundation	1120 Connecticut Avenue, NW; Suite 900, Washington, DC 20036	DC		
Peter Stangel	Director, Science and Evaluation	National Fish and Wildlife Foundation	1120 Connecticut Avenue, NW; Suite 900, Washington, DC 20036	DC		
Dan Petit	Director, Bird Conservation	National Fish and Wildlife Foundation	1120 Connecticut Avenue, NW; Suite 900, Washington, DC 20036	DC		
Tim Male	Director, Wildlife and Habitat Conservation	National Fish and Wildlife Foundation	1120 Connecticut Avenue, NW; Suite 900, Washington, DC 20036	DC		
Christina Kakoyannis	Evaluation Officer	National Fish and Wildlife Foundation	1121 Connecticut Avenue, NW; Suite 900, Washington, DC 20036	DC		
<b>Southern Company</b>						
Leslie Montgomery	Environmental Stewardship Program Manager	Southern Company	600 N. 18th Street, 14N-8195   Birmingham, AL 35203	GA		
Carlton Chambers	Land Maintenance Coordinator	Georgia Power	7821 River Road, Waynesboro, GA 30830	GA		
<b>Advisory Committee</b>						
Todd Engstrom	Associate Director	Florida State University Coastal and Marine Lab	3618 Highway 98, St Teresa, FL 32358-2702	FL		

Jim Sweeney	Professor & Associate Dean	Warnell School of Forest Resources	University of Georgia, Athens, GA 30602-2151	GA		
Nathan Klaus	Senior wildlife biologist	Georgia Department of Natural Resources, Wildlife Resources Division	116 Rum Creek Drive, Forsyth, Georgia 31029	GA		

**APPENDIX D: MAPPING OF PRIORITIZATION SCHEMES AND GRANTEES**

Organization	Audubon Society Watch List	District Environmental Impact Assessment	ESA/Recovery Plan	Forest Legacy Assessment of Need - Georgia Forestry Commission	International recovery plan	Longleaf Alliance	National Forests in Alabama Revised Land and Management Plan	Natureserve	North American Waterbird Conservation Plan	North American Waterfowl Management Plan	North American Wild Turkey Management Plan	Northern Bobwhite Conservation Initiative	Partners in Flight	Partners in Flight - National landbird conservation plan	South Atlantic Migratory Bird Initiative	State Park	State priority/threatened species	State Wildlife Action Plan	Swallow-tailed Kite Conservation Alliance	TNC Ecoregional Plan	U.S. North American Bird Conservation Initiative (NABCI)	US Shorebird Conservation Plan	USFWS Priority habitats	Western Hemisphere Shorebird Reserve Network	Total	
Alabama State Parks Division																		X							1	
American Forest Foundation												X	X								X					3
Applied Research Center of Alabama							X																		1	
Atlanta Audubon Society	X																	X					X		2	
Auburn University														X				X							2	
Audubon Mississippi																		X							1	
Avian Research and Conservation Institute													X						X						2	
Berry College																									0	
Council For Environmental Education																									0	
Ecosystem Restoration Support Organization, Inc.																	X								1	





## APPENDIX E: HABITAT HECTARES LITERATURE

Eyre, T.J., A.L. Kelly, V.J. Nelder. 2006. *BioCondition: A Terrestrial Vegetation Condition Assessment Tool for Biodiversity in Queensland – Field Assessment Manual*. Queensland, Australia: Environmental Protection Agency.

Gibbons, P. and D. Freudenberger. 2006. An overview of methods used to assess vegetation condition at the scale of the site. *Ecological Management & Restoration* 7 (S1), pp. S10-S17.

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Oliver, I. 2002. An expert panel-based approach to the assessment of vegetation condition within the context of biodiversity conservation (Stage 1: the identification of condition indicators). *Ecological Indicators* 2, pp. 223-237.

Oliver, I., A. Ede, W. Hawes and A. Grieve. 2005. The NSW environmental services scheme: results for the biodiversity benefits index, lessons learned and the way forward. *Ecological Management & Restoration* 6(3), pp. 197-205.

Parks, D., P. Lyon. 2006. Scene-setting short notes. *Ecological Management & Restoration* 7(S1), pp. S3-S5.

Parkes, D., G. Newell and D. Cheal. 2003. Assessing the quality of native vegetation: The 'habitat hectares' approach. *Ecological Management & Restoration* 4(supplement), pp.S29-S3.

Parkes, D., G. Newell and D. Cheal. 2004. The development and raison d'être of 'habitat hectares': A response to McCarthy et al. (2004). *Ecological Management & Restoration* 5(1), pp. 28-29.

# Power of Flight/Longleaf Legacy Evaluation

## 1. Welcome

As described to you in Suzanne Sessine's recent email, the National Fish and Wildlife Foundation (NFWF) and Southern Company have contracted Hardner & Gullison Associates LLC (HGA) to conduct the first evaluation of the Power of Flight and Longleaf Legacy funding programs.

The objective of the evaluation is NOT to call out the performance of any grantee in particular, but rather, to assess the performance of the portfolio of grants made to date, and to determine if there are ways to improve the two programs.

In appreciation for filling out this survey, we will happy to send you a summary of the evaluation of the two programs, once the results have been presented to NFWF and Southern Company.

Your answers to this survey are CONFIDENTIAL. We hope that you will take advantage of this opportunity to provide frank and comprehensive feedback that can be used to improve the conservation impact of these two programs.

We would be very grateful if you would COMPLETE THE SURVEY BY JUNE 6. If you have any questions about the survey, or if you cannot meet this deadline, please contact me by phone between 9:00 AM and 5 PM Pacific Time, or by email.

Thank you in advance for your participation.

Ted

Ted Gullison  
Hardner & Gullison Associates, LLC  
email: ted@hg-llc.com  
phone: 250.245.3801



# Power of Flight/Longleaf Legacy Evaluation

## 2. Survey Directions

You may wish to first review all the questions in order to know what information will be required of you, and to estimate the time it will take to complete the survey. We do not expect it to take more than 1-2 hours of your time; the actual length it takes you will depend on the amount of information and experience you have to share. The majority of questions have drop-down menus, or require only that you check boxes, and so you will be able to advance through the survey quite quickly.

You can move back and forth through the survey (for example, you may return to questions and change your answers) using the navigation buttons at the bottom of each page after first entering your personal information in the required fields on the next page. Please DO NOT use the navigation buttons on your browser.

If you have received multiple grants, and they are a continuation of the same project, then please fill this survey out only once.

If you are unable to complete the survey all at once, you may exit it and return using the same link in the email that you used to access the survey the first time (remember not to delete that email!). Your previous answers will be displayed up until the most recent fully completed page (pressing NEXT at the bottom of a page saves your responses from that page to our on-line database).

ONCE YOU CLICK "Done" ON THE LAST PAGE, THE SURVEY WILL BE CLOSED AND CANNOT BE RE-ENTERED.

# Power of Flight/Longleaf Legacy Evaluation

## 3. Contact information

**\* 1. Name of project**

**\* 2. Your name (for follow-up only, responses to this survey will not be attributed to you)**

**3. Your institution**

**4. Your position**

**\* 5. How can you best be reached (phone number and/or email address)?**

**6. If we had the opportunity to interview you, would you be able to take us to a field site of your project within close proximity of your office (less than 1 hour drive)?**

Yes

No

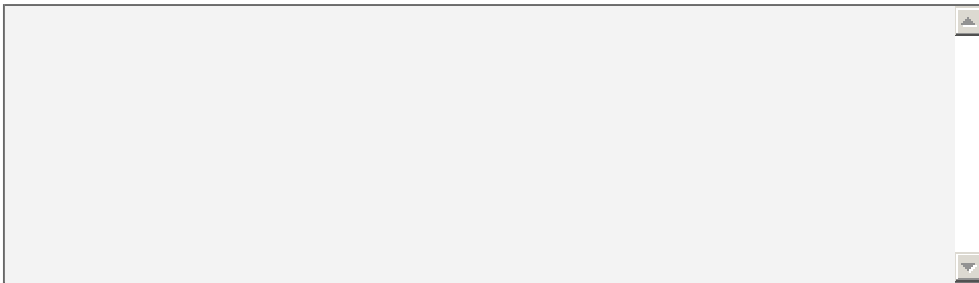
## Power of Flight/Longleaf Legacy Evaluation

**7. Part of our evaluation involves meeting with other individuals or organizations that have been interested in, involved with, or impacted by the Power of Flight and Longleaf Legacy programs. Would you recommend anyone that we could contact to discuss your project and the conservation issues in your area?**

**Examples might be: gov't agencies, conservation organizations, community leaders, landowners, consulting land managers, researchers, and educators.**

**If so, please provide us with as much contact info as possible, and briefly describe their relationship to your project.**

**(Ex: John Doe, Whitetail Unlimited, 555-555-5555, john@whitetail.org -- collaborating organization)**



# Power of Flight/Longleaf Legacy Evaluation

## 4. Conservation Priority and Design

This section of the survey is designed to help us understand how grantees design their projects, and in particular, the role of conservation prioritization schemes.

**1. Please specify the conservation "target" of your project. We use the word "target" to mean the species, habitat or ecosystem that you are trying to conserve. Please specify up to three, in decreasing order of priority. If your target is not a specific species or ecosystem, such as in an education project on environmental awareness, select "not specific".**

Conservation Target

Conservation Target #1

Conservation Target #2

Conservation Target #3

If you selected "none of these" or "not specific", please describe target here.

**2. In the design of your project, did you consider ecological thresholds (e.g. minimum viable population size) in determining the scale or other characteristics of your project?**

- No, ecological thresholds were not a consideration
- Yes, minimum viable population size
- Yes, minimum dynamic habitat area for populations
- Yes, minimum area to maintain ecosystem structure and function
- Yes, other ecological threshold

If you selected "other ecological threshold" above, please describe threshold here

# Power of Flight/Longleaf Legacy Evaluation

## 3. Did the conservation priorities of any of the following entities influence your project design?

	Not a consideration	Moderate influence	Important influence	Dominant influence
My own organization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local private landowners	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local government	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conservation groups	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
State agencies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Federal agencies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If you selected "Other" above, please specify

## 4. Based on your answers above, if the priorities have a formal name (e.g. "Northern Bobwhite Quail Initiative"), please specify the ones that had the most influence on your project design.

Priority scheme #1:

Priority scheme #2:

Priority scheme #3:

## 5. Did you contact any of the institutions affiliated with these prioritization schemes when designing your project?

Yes

No

N/A -- Didn't list any formal prioritization schemes above

## 6. Did you communicate the results of your project to them?

Yes

No

N/A -- Didn't list any formal prioritization schemes above

N/A -- Do not yet have reportable results

# Power of Flight/Longleaf Legacy Evaluation

**7. If you answered "Yes" to question 5 or 6 above, please provide contact names (and email or telephone if possible) of organizations and individuals with whom you communicated. (Ex: John Doe, Whitetail Unlimited, 555-555-5555, john@whitetail.org)**

Priority scheme #1 --  
contact info:

Priority scheme #2 --  
contact info:

Priority scheme #3 --  
contact info:

# Power of Flight/Longleaf Legacy Evaluation

## 5. Project Monitoring

**1. Please describe the elements of the monitoring and evaluation system that you have in place to track your project's impacts:**

	Not performed	Performed informally	Performed formally, but needs improvement	Performed formally with reliable approach
Monitoring of conservation target (by you or other organization)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Baseline Study (status of target before project)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Counterfactual (control site/group or projection of target's status in absence of your project)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documentation (analysis and writeup of project performance)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**2. If monitoring is performed, who does it (you may select more than one)?**

- My organization
- Other organization
- N/A - my project has no monitoring

If other organization, please name them

**\* 3. Please tell us if your project has reportable results at this time (either you have completed your project, or it is ongoing and has generated some reportable results already).**

- Yes
- No

# Power of Flight/Longleaf Legacy Evaluation

## 6. Project Results

**1. In this question, we are interested in hearing about the DIRECT impacts of your project - in other words, the impacts that flowed directly from your actions.**

**(The INDIRECT impacts of your project are conservation impacts caused by the actions of others, but for which your project is partly responsible. For example, if your reforestation project catalyzed other landowners to reforest their own lands, this would be an indirect impact of your project. We will ask you to provide information on the indirect impacts of your project in a different question.)**

**Please choose (or supply) the metric that best describes your achievements. To avoid us double-counting, please do not report on the same achievement using different metrics.**

**If your project lasted more than one year, please sum the gains for all years of the project.**

# of acres of NEW longleaf pine forest established (planting and maintenance)	<input type="text"/>
# of acres of EXISTING forest converted to longleaf pine (planting and maintenance)	<input type="text"/>
# of acres of EXISTING longleaf pine forest treated (e.g., burning, midstory removal, etc)	<input type="text"/>
# of acres with improved stewardship practices	<input type="text"/>
% change in target species population (specify geographic area and baseline population size)	<input type="text"/>
# of individuals of target species managed	<input type="text"/>
# of individuals of target species translocated	<input type="text"/>
# of nest sites managed (e.g., monitored, protected)	<input type="text"/>
# of breeding clusters/colonies managed (e.g., monitored, protected)	<input type="text"/>
# of landowners educated	<input type="text"/>
# of school children educated	<input type="text"/>
# of public educated	<input type="text"/>
# of visitors (at, for example, birding sites or nature trails)	<input type="text"/>
# of scientific publications	<input type="text"/>
Other #1 (quantitative only, please)	<input type="text"/>
Other #2 (quantitative only, please)	<input type="text"/>
Other #3 (quantitative only, please)	<input type="text"/>



# Power of Flight/Longleaf Legacy Evaluation

**2. If you measured your impacts relative to a particular ecological threshold (e.g. minimum viable population size, minimum dynamic area for populations, or minimum area to maintain ecosystem structure and function), please tell us as specifically as possible the results. If possible, express in absolute and percentage terms (e.g., the population of Species A increased in size by 30 individuals to a total of 60 individuals (a 100% increase), towards our goal of a minimum viable population size of 120 individuals).**

**3. Are there other DIRECT impacts of your project that you have not measured, but can discuss qualitatively? (e.g., changes to your own management practices resulting from a grant to conduct applied research; benefits to non-target species that are not well quantified).**

**Please list up to three.**

Other direct impact #1

Other direct impact #2

Other direct impact #3

**4. Please list up to three INDIRECT impacts of your project. Some examples of indirect impacts include spin-off initiatives, your project catalyzing or inspiring the work of others, partnerships etc.**

Indirect impact #1

Indirect impact #2

Indirect impact #3

**5. If you completed your project more than a year ago, have you monitored your target since then and if so what did you find? Were your achievements maintained, did they build on themselves, or deteriorate?**

## Power of Flight/Longleaf Legacy Evaluation

**6. Forgetting for a moment about donor requirements, tell us what is the best timeframe for meaningfully measuring success of a project like yours?**

- I do not know
- <1 year
- 1-2 years
- 3-5 years
- 5-10 years
- 10+ years

**7. What types of metrics should be used for measuring success on that timeframe, if other than the ones you reported above?**

**8. In retrospect, would you change the way that you reported the impacts of your project to NFWF?**

# Power of Flight/Longleaf Legacy Evaluation

## 7. Project Funding

**1. What percentage of your project's funding came from a Power of Flight or Longleaf Legacy grant(s)? When estimating the funding from all sources, please include in-kind contributions.**

**2. If your project is part of a larger program focused on the same conservation target, what percentage of your overall program funding is from a Power of Flight or Longleaf Legacy grant(s)? Again, when estimating the funding from all sources, please include in-kind contributions.**

**3. Are there many other donors funding your type of project?**

- Power of Flight and/or Longleaf Legacy are the main donors
- A few other significant donors
- Many other significant donors

**4. If other types of donors are available to support your type of project, please provide their names here.**

Private Foundation(s)	<input type="text"/>
Conservation Group(s)	<input type="text"/>
Corporate Donor(s)	<input type="text"/>
Individual(s)	<input type="text"/>
State Gov't Agency(ies)	<input type="text"/>
Fed Gov't Agency(ies)	<input type="text"/>

**5. What best describes the amount of funding generally available to you and others for the type of work performed in this project?**

- Grossly insufficient
- Insufficient
- Sufficient
- More than sufficient

# Power of Flight/Longleaf Legacy Evaluation

**6. What was the importance of Power of Flight or Longleaf Legacy funding for your project? Please rate the following attributes on a scale from "not important" to "critical".**

	Not important	Helpful	Very helpful	Critical
Forming a significant portion of total project budget	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Signaling to other donors that project was worthy of funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Releasing funding from other donors that require a formal match	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

**7. What is the long-term funding situation for maintaining the conservation gains made by your project?**

- No prospects for funding
- Uncertain, some prospects are being pursued
- Partial, some funding is in place
- Complete, a secure source of long-term funding is in place

# Power of Flight/Longleaf Legacy Evaluation

## 8. Limiting and Enabling Factors

Many factors can impede progress in conservation and threaten long-term viability of achievements. In this section we seek to develop an understanding of those factors and how they may have changed during your project (through the efforts of you or others).

**1. Please rank the importance of the following "limiting factors" to the conservation of your target species or ecosystem, at both the start of your project, and at the end of it.**

	Before project began	After project completed
Insufficient scientific knowledge about conservation target (e.g. habitat requirements of target species)	<input type="text"/>	<input type="text"/>
Lack of strategic plan supported by key institutions for the conservation of your target	<input type="text"/>	<input type="text"/>
Lack of supportive government policy and legislation (e.g. tax treatment of forest land not supportive of conservation)--Note, if policies conflict, estimate the NET limitation it poses	<input type="text"/>	<input type="text"/>
Insufficient capacity of relevant institutions (e.g. state agency lacks personnel)	<input type="text"/>	<input type="text"/>
Lack of public awareness and support (e.g. landowners unaware of needs of wildlife on their lands)	<input type="text"/>	<input type="text"/>
Economic forces (e.g. land development, timber market)	<input type="text"/>	<input type="text"/>
Insufficient enforcement of conservation/wildlife regulations (e.g. protection of nesting sites)	<input type="text"/>	<input type="text"/>
Insufficient short-term funding to conduct project	<input type="text"/>	<input type="text"/>
Insufficient long-term funding to continue project (e.g. ongoing management requirements such as	<input type="text"/>	<input type="text"/>

# Power of Flight/Longleaf Legacy Evaluation

prescribed burns)

Other #1

Other #2

Other #3

If you chose "other", please list here

**2. For those limiting factors that continue to be a "serious problem" or "prevent conservation" at present, please describe how you (or others) are working to overcome them.**

**3. Certain factors may also be "enabling", and make otherwise difficult conservation projects possible. For example, a group of forward-thinking and motivated landowners may provide a critical base for launching a landowner stewardship program, or an understanding school board may make the launch of an environmental education program possible. Please list up to three enabling factors that helped make your project possible.**

Enabling factor #1

Enabling factor #2

Enabling factor #3

# Power of Flight/Longleaf Legacy Evaluation

## 9. Communicating the results of your project

In this section we seek to understand more about how and to whom grantees communicate the results of their projects.

### 1. Please tell us how you communicated the results of your project to particular groups.

	Website	Email	Phone	Own publication	Radio	News-papers	Magazines	Signage at site	Meeting/Event	Scientific article	Other
Local government	é	é	é	é	é	é	é	é	é	é	é
State government	é	é	é	é	é	é	é	é	é	é	é
Federal government	é	é	é	é	é	é	é	é	é	é	é
Conservation groups	é	é	é	é	é	é	é	é	é	é	é
Landowners & land managers	é	é	é	é	é	é	é	é	é	é	é
General public	é	é	é	é	é	é	é	é	é	é	é
Private sector	é	é	é	é	é	é	é	é	é	é	é
Students & Teachers	é	é	é	é	é	é	é	é	é	é	é
Scientific community, academia	é	é	é	é	é	é	é	é	é	é	é
Other group	é	é	é	é	é	é	é	é	é	é	é

If you chose "Other group", please specify whom

### 2. If you have communicated with a particular group, please indicate whether you gave credit to NFWF and Southern Company for funding your work.

	No, we did not	Just NFWF	Just Southern Company	Both NFWF and Southern Company	Did not communicate with this group
Local government	é	é	é	é	é
State government	é	é	é	é	é
Federal government	é	é	é	é	é
Conservation groups	é	é	é	é	é
Landowners & land managers	é	é	é	é	é
General public	é	é	é	é	é
Private sector	é	é	é	é	é
Students & Teachers	é	é	é	é	é
Scientific community, academia	é	é	é	é	é
Other group	é	é	é	é	é

# Power of Flight/Longleaf Legacy Evaluation

## 3. For each stakeholder group, please indicate the most effective medium of communication in your experience.

I have found the most effective medium for communicating with this stakeholder group is...

Local government	<input type="text"/>
State government	<input type="text"/>
Federal government	<input type="text"/>
Conservation groups	<input type="text"/>
Landowners & land managers	<input type="text"/>
General public	<input type="text"/>
Private sector	<input type="text"/>
Students & Teachers	<input type="text"/>
Scientific community, academia	<input type="text"/>
Other group	<input type="text"/>

If you chose "Other medium", please specify here:

## 4. Do you mention your project on your website? Is it linked to the NFWF or Southern Company websites? Please tick all that apply:

- We have a website
- We mention our project on our website
- We credit NFWF for funding our project
- We credit Southern Company for funding our project
- We provide a link to NFWF's website on our website
- We provide a link to Southern Company's website on our website

If you have a website, please tell us the URL:

## 5. Have you been able to attract independent media to cover your project (e.g. newspaper/magazines, radio program, television news or outdoor program)? If so, tell us how you engaged them.

## 6. If you have tried, but have not been able to engage independent media, did you confront any specific obstacles? Is this anything that NFWF or Southern Company could help grantees to overcome?



# Power of Flight/Longleaf Legacy Evaluation

**7. NFWF and Southern Company would like to collect samples of media coverage of grantee projects (e.g. newspaper articles, videos, magazines, etc).**

**Please let us know if you can send us examples of media coverage of your project (we'll provide an address at the end of the survey):**

- Yes, please expect something from us by regular mail
- Yes, please expect something from us by email or ftp
- No, we are not able to send you the media coverage of our project
- No, there was no media coverage of our project

If you are unable to send us the media coverage that occurred, can you tell us what it was?

**8. Do you have suggestions for particularly effective outlets for communicating the results of your type of project with specific stakeholder groups (e.g., the name of a magazine, or a specific conservation conference)?**

Local government	<input type="text"/>
State government	<input type="text"/>
Federal government	<input type="text"/>
Non-governmental organizations	<input type="text"/>
Landowners	<input type="text"/>
General public	<input type="text"/>
Private sector	<input type="text"/>
Students	<input type="text"/>
Scientific community	<input type="text"/>
Conservation practitioners	<input type="text"/>

# Power of Flight/Longleaf Legacy Evaluation

## 10. Administration of Programs

**1. The goal of the Power of Flight Program is to conserve birds characteristic of the southern US. Projects include habitat restoration and management; environmental education involving birds (particularly in urban areas); applied research; and tourism development. Focal species include red-cockaded woodpecker, northern bobwhite quail, species that have range overlapping with Southern Company's operating area (e.g., painted bunting, swallow-tailed kite etc.) and coastal waterbirds. Priority is also given to projects on county, state and federal lands.**

**The goal of the Longleaf Legacy Program is to help restore the South's longleaf pine ecosystem, as well as to sequester atmospheric carbon. Funding priorities include: restoration of longleaf on public lands (which includes conversion of non-native pine plantations); re-establishment of longleaf on sites adjacent to or near existing stands; replanting areas that are high priority for wildlife conservation; and outreach to private landowners.**

**Given the objectives of these two programs, how effective do you feel that they have been? Are there important conservation needs that are not being addressed?**

**2. If you participated in an annual grantee meeting of the Power of Flight or Longleaf Legacy programs, how did you find it?**

	Not useful	Useful	Very useful	Extremely useful
Overall impression of meeting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**3. Has attending the annual grantee meeting helped you in any specific way (e.g. networking, problem solving, capacity building, new opportunities, etc.)? Give us a specific example, if you've got one.**

**4. Please comment on any strengths of the annual grantee meeting that you would like to see continue in future meetings.**

# Power of Flight/Longleaf Legacy Evaluation

**5. Please describe any weaknesses of the annual grantee meeting that you feel could be improved.**

**6. How do you find NFWF's administration of the Power of Flight and/or the Longleaf Legacy programs relative to other GOVERNMENT donors?**

	Significantly worse	Slightly worse	Same	Slightly better	Significantly better
Size of award	⌋	⌋	⌋	⌋	⌋
Duration of award	⌋	⌋	⌋	⌋	⌋
Promptness of delivery of funding	⌋	⌋	⌋	⌋	⌋
Proposal process	⌋	⌋	⌋	⌋	⌋
Reporting requirements	⌋	⌋	⌋	⌋	⌋
Ease of working with staff	⌋	⌋	⌋	⌋	⌋
Ability of staff to understand technical conservation issues	⌋	⌋	⌋	⌋	⌋
Continuity of staff	⌋	⌋	⌋	⌋	⌋
Networking you with other grantees	⌋	⌋	⌋	⌋	⌋
Receptiveness to your feedback on ways to improve the program	⌋	⌋	⌋	⌋	⌋

Any additional comments are welcome

# Power of Flight/Longleaf Legacy Evaluation

## 7. How do you find NFWF's administration of the Power of Flight and/or the Longleaf Legacy programs relative to other CORPORATE or FOUNDATION donors?

	Significantly worse	Slightly worse	Same	Slightly better	Significantly better
Size of award	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Duration of award	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Promptness of delivery of funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Proposal process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reporting requirements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ease of working with staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability of staff to understand technical conservation issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Continuity of staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Networking you with other grantees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Receptiveness to your feedback on ways to improve the program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Any additional comments are welcome

## 8. Overall, are there any particular strengths of the Power of Flight and Longleaf Legacy programs that you would like to comment on?

## 9. Do you have any specific suggestions on how the Power of Flight and Longleaf Legacy programs could be improved?

# Power of Flight/Longleaf Legacy Evaluation

## 11. Optional Final Comments

**1. Please use this space for any final comments you'd like to add (something we forgot to ask in the survey, something you wish to emphasize, etc). If you have no further comments, please proceed to the next and final page.**

# Power of Flight/Longleaf Legacy Evaluation

## 12. The End

Thank you very much for taking the time to complete this survey.

Please submit any documentation by mail, email, or ftp.

Mail:  
Hardner & Gullison Associates, LLC  
15 Woodland Drive  
Amherst, NH 03031  
Tel: 650-283-8080

Email:  
ted@hg-llc.com

FTP:  
For electronic transfer of files >10MB, we recommend a free on-line ftp site  
[www.yousendit.com](http://www.yousendit.com)

You will be sent a summary of the evaluation once the evaluation is complete and the results have been presented to the Southern Company and NFWF.

When you hit "done", your survey is complete and you will no longer have access to it.