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Memorandum

To: USDA Forest Service Forest Supervisors: Regions 5 and 6
 USDI Bureau of Land Management District Managers: Coos Bay, Eugene, Lakeview, Medford, Roseburg and Salem and Field Managers: Klamath Falls and Tillamook, OR and Arcata, Redding and Ukiah, CA

Subject: Centralized Process to Identify/Verify Survey and Manage Specimens Collected While Conducting Surveys

Pre-disturbance and strategic surveys are required for the majority of Survey and Manage (S&M) species under the Record of Decision and Standards and Guidelines for Amendments to the S&M, Protection Buffer and other Mitigation Measures. In recent years, a large number of known/suspected S&M specimens have been collected as a result of these surveys. Many of these specimens/species are very difficult to identify and require identification/verification from taxonomic experts.

This memorandum describes a centralized process (Enclosure 1) for identifying known and suspected S&M specimens (or those unknown specimens that cannot be identified) collected while conducting surveys. This procedure is essential to ensure that specimens are handled in a consistent manner and the data is standardized so it can be effectively used in the Annual Species Review process and amending management recommendations and survey protocols. Deviation from this procedure may lead to data not being considered in the Annual Species Review.

Field units conducting pre-disturbance and strategic surveys are asked to do the following with specimens collected from these surveys:

- Specimens (known/suspected S&M species and those that cannot be identified) collected from these surveys must be sent to the interagency taxa expert for identification/ verification. One specimen of lichens, bryophytes, and fungi should be collected at each potential site, whereas one mollusk specimen per survey area should be collected.
- Specimens collected from previous surveys, which have not been identified through the interagency taxa expert should be sent to them for verification.

A centralized system for identifying/verifying and cataloging voucher specimens will greatly improve data quality and consistency. The taxa expert's role will include quality

control of specimen identifications to ensure consistency. Regional level contracts have been or are in the process of being awarded; and qualified agency personnel have been hired to ensure that identifications are consistent and correct. Centralized contracting through the regional offices is the most fiscally efficient method and also reduces competition for the limited number of available taxonomic experts.

It is expected that S&M specimen identifications and field notification should take no longer than ten weeks (from the time they are received by the taxa expert). Field offices should include in enough project planning time for the identification of S&M specimens.

Further questions can be directed to any of the interagency taxa experts (Enclosure 2) or Bruce Rittenhouse, Strategic Survey Coordinator, at 503-808-2984.

Signed by
TERRY D. BRUMLEY
Survey and Manage Program Manager

Authenticated by
Cindy Fredrickson
Management Assistant

Enclosures

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cc: BLM Distribution
FS Region 6 WO-230 (Room 204 LS) - 1
R. Huff CA-330 (Paul Roush) - 1
Richard Helliwell CA-930 - 1
T. Brumley OR-930 (Ed Shepard) -1
Kathleen Cushman OR-933 (Janis VanWyhe) - 1
Judy Harpel OR-935 (Neal Middlebrook,
Mark Huff Russell Holmes, Kelli Van Norman,
Peggy Kain Stephanie Sprague, Paul Hohenlohe,
Pat Ormsbee Bruce Rittenhouse, Nancy Duncan) - 7
Chiska Derr
Deb Quintana-Coyer
FS Region 5
Paula Crumpton
Jan Ford
David Diaz
Bob Mobley
Kathy Anderson
FS PNW
Randy Molina
Tina Dreisbach
Dede Olson
Mike Castellano
Brian Biswell

FWS:
Barbara Amidon,
Laura Finley,
Monty Knudsen,
Steve Morey,
Heather Hollis

REO:
Jay Watson,
Debbie Pietrzak

Enclosure 1 Specimen Processing Description

The following requirements for voucher collections needing identification/verification will apply to all pre-disturbance and strategic survey fungi, lichen, bryophyte, and mollusk specimens. Field units are required to send all known or suspected S&M specimens collected while conducting surveys (pre-disturbance and strategic surveys) in the above taxa groups to the Interagency Taxa Expert for identification/verification (Enclosure 2).

These specimens should include known or suspected S&M species and other unknown specimens that cannot be identified at the field level. Common, non-S&M species are not to be sent to the taxa expert. Once the specimen has been identified, the field unit will be notified on the species determination. At the discretion of the taxa expert, specimens may be returned to the field units to provide local reference material following species identification.

For lichens, bryophytes and fungi at least one voucher specimen should be collected at each potential known site. For mollusks, one specimen should be collected per survey area (e.g. timber sale unit). The best available mollusk specimen, preferably an adult, should be collected. Instructions for handling and sending specimens are available from the taxa expert.

In the case of lichens and bryophytes the field unit can request from the taxa expert that a duplicate specimen be returned (they should collect enough material so that a duplicate specimen be returned). The following information must accompany each specimen: date of collection, collector, collection number, location (including directions, UTM coordinates, type of survey, habitat, etc.) and preliminary species identification, if available.

Verification and documentation of voucher collections is also needed for strategic and pre-disturbance surveys that have already been completed. All existing voucher collections from previous surveys that have not been identified/verified by the taxa expert (or regional contracts administered by the taxa expert) should be sent to the respective taxa expert for identification/verification. As above, specimens may be returned upon request at the discretion of the taxa expert. Each specimen should be accompanied by the above information along with the name of the person who made the species determination. This does not apply to those specimens that were identified by contractors for which the contract specified that ownership of the specimen would transfer to the contractor. In this case the repository of the specimens and ISMS location ID number should be provided.

The identification/verification of specimens has varied among the different taxa groups. For example, fungi

specimens to be identified typically have been sent to the S&M mycology lab in Corvallis. Due to the large number of specimens collected while conducting pre-disturbance and strategic surveys, the time it took to identify specimens did not occur in a timely fashion. This resulted in delays of project planning and implementation. As a result some field units decided to use other contractors to identify their specimens. In some cases

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when the interagency taxa expert reviewed these identifications they found misidentifications or the contractors kept the specimens.

For mollusk species, the identification of specimens has varied by field unit. Many of the identifications have been done by field crews (who have taken mollusk identification training) or sent to regional experts (agency personnel or contractors). As a result the criteria used for identification and the reliability of mollusk identifications has been inconsistent and quality control is not possible without a collected voucher specimen (in many cases mollusk collections were returned to where they were collected). Accuracy of specimen identification has been shown to be as low as 9 percent (Data from Northern California "GOBIG" surveys).

It is expected that S&M specimens will be identified in a timely manner. This is a result of no longer requiring pre-disturbance surveys for fungi, awarding centralized regional contracts with taxonomic experts that should allow for quality identifications and a quicker return of specimens, and having full time taxa experts for all taxa groups. It is expected that identifications should take no longer than 10 weeks for the field to be notified of identifications. Field offices should build in enough planning time to include the identification of S&M specimens.

During the latest species review process many of the locations of species were disputed because of identification concerns. Members of the review panels were not sure of the reliability of the person who identified specimens thus negating several apparent known sites. A centralized process of identifying specimens will eliminate these concerns.

Additionally, voucher collections will serve as documentation in the event that species management and the data on which it relies are challenged. These collections will be housed in university herbaria/museums or other public locations. Field units can request from the taxa experts specimens for training purposes. Voucher collections provide reference material for future management to ensure consistency of identification, particularly as personnel change.

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Enclosure 2 List of Regional Interagency Taxa Experts

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|-----------|--|
| Fungi: | Tina Driesbach PNW Forestry Sciences 3200 SW Jefferson Way Corvallis OR 97331 541-750-7404 tdreisbach@fs.fed.us |
| Mollusks: | Paul Hohenlohe PNW Forestry Sciences |

3200 SW Jefferson Way
Corvallis OR 97331
541-750-7403
phohenlohe@fs.fed.us
Judy Harpel
Gifford Pinchot National Forest
10600 NE 51st Circle
Vancouver, WA 98682
360-891-5121
jharpel@fs.fed.us

Bryophytes:

Lichens:

Chiska Derr c/o Judy Harpel
Gifford Pinchot National Forest
10600 NE 51st Circle
Vancouver, WA 98682
360-891-5121
cderr@fs.fed.us