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**Reply Refer To:** 2630 (FS)/ 1736 PFP (BLM) (OR-935) P

**Date:** May 21, 2003

**FS-Memorandum**

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**To:** Forest Service Forest Supervisors within the Area of the Northwest Forest Plan and Bureau of Land Management District Managers (Coos Bay, Eugene, Lakeview, Medford, Roseburg, Salem) and Field Managers (Klamath Falls and Tillamook, OR and Arcata, Redding and Ukiah, CA)

**Subject:** Survey and Manage Guidelines for Undescribed/Potential New Species

The implementation of Survey and Manage (S&M) Standards and Guidelines has many unique challenges. Not the least is the continual taxonomic work related to these rare and little known species.

The dynamic nature of S&M species classification can create management challenges unless a uniform and consistent approach is in place. The Record of Decision (ROD) is clear in how to handle species that are being newly described.

Because of the importance of this issue, that direction is reiterated in the attached document. If any additional questions remain please direct them toward our Interagency Program Manager, Terry Brumley, at 503-808-2968.

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1 Attachment

1- [Survey and Manage Guidelines for Undescribed/Potential New Species](#) (2pp)

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## Survey and Manage Guidelines for Undescribed/Potential New Species

In response to several questions from field units, regarding the proper consideration of potential known sites for Survey and Manage (S&M) species with taxonomic uncertainty, two common situations of taxonomic confusion are being addressed in this document: **1)** Some specimens are identified as potential new taxa or as undescribed species by specialists working on contract to the government. These are commonly identified using the genus name plus some other designator (e.g. “*Vespericola* new species 36” or “Smith’s *Vespericola*”), indicating that they are not formally described scientific taxa under the rules of the International Code of Zoological Nomenclature (ICZN) or International Code of Botanical Nomenclature (ICBN). **2)** Some specimens are identified using the “cf.” designation (e.g. “*Vespericola* species cf. *oregonensis*”).

1. **Potential new species:** In many cases, potential new taxa are subsets, clades, or populations of existing described species. This is true if the specimens fit the range of variation for a described species and are keyed out to that species using available taxonomic keys, even though genetic, morphological, or other preliminary research suggests that the clade should be described as a distinct taxon in the future. These situations are called “species complexes.” The precedent for dealing with species complexes is described in detail for *Prophysaon coeruleum* on pp. 41-43 of the 2001 S&M ROD. That decision recognized that if and when a new species description is published, it may delineate the new species based on different criteria than are currently anticipated. In order to avoid the untenable situation of anticipating future taxonomic descriptions, the agencies decided to follow current published taxonomy (as defined by ICZN or ICBN) and consider all members of the species complex as the single species until a formal taxonomic revision is completed. As a result, in the 2001 decision, several potential new taxa (identified by preliminary genetic and morphological work) were considered together as *Prophysaon coeruleum* under existing taxonomy, and the resulting abundance, in part, led to the species being dropped from the S&M list in Oregon.
2. Other S&M taxa represent analogous species complexes: *Helminthoglypta talmadgei* contains two distinct clades, commonly identified by specialists as “Siskiyou *Helminthoglypta*” and “Schlick’s *Helminthoglypta*,” and possibly a third, “southern Trinity *Helminthoglypta*,” that are likely to be described as separate species in the future. However, under current taxonomy these clades all belong to *H. talmadgei* and were considered as such for analyses in the 2001 and 2002 Annual Species Reviews and in draft Management Recommendations for the species. Similarly, genetic evidence suggests that *Hemphillia glandulosa* and *Hemphillia burringtoni* may each represent several potential new species, but they were each considered as a single species under current taxonomy in the 2002 Annual Species Review.

The S&M taxa experts should use the following guidelines in interpreting the policy described on pp. 41-43 of the 2001 ROD:

Attachment 1-1

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- Specimens should be recorded and managed as belonging to a S&M species if:
    - a. they are most accurately keyed out to a S&M species, using the existing taxonomic descriptions of known species published under ICZN or ICBN rules; i.e. no other published species description fits more accurately, and
    - b. other information, such as collection location, is consistent with assignment to the S&M species.
  - If a specimen keys out to a S&M species as described above, but appears likely to fit the description of an anticipated new taxon to be described in the future, the relevant characters should be documented in the Interagency Species Management System (ISMS). This should be done in the Observation notes field of the Fauna Observations block or, if a voucher collection is made, in the notes field of the Species Collections block.
  - Specimens that are unidentifiable (e.g. can only be identified to genus level) should not be recorded or managed as S&M known sites.

- In a few cases, undescribed species are (A.) well-defined, (B.) were acknowledged in the 1993 FEMAT report, (C.) do not fit the range of variation of any formally described species, and (D.) are recognized in available taxonomic keys (examples include *Oreohelix* n. sp. 1 or *Fluminicola* n. sp. 3 on the S&M list). In these cases, specimens would be recorded and managed as these (undescribed) taxa.

**2. Cf. designation:** The designation “cf.” stands for the Latin *confer*, the imperative form of the verb *conferre*, which means “to compare.” This term is sometimes used loosely in taxonomy, with a few possible meanings. In some situations it can be translated as “looks like a potential new species, but under current taxonomy fits the description of species X.” In this case, the guidelines above apply. In other situations cf. can be translated as “species X is my best guess, but some of the characters are not quite right” or “species X is my best guess, but some characters are not visible because the specimen is a juvenile/damaged/too old/etc.”

The following guidelines should be used regarding the “cf.” designation:

- S&M taxa experts should avoid using “cf.” in any situation. Taxa experts should identify specimens either as a species (e.g. “*Vespericola oregonensis*”) or subspecies if appropriate, or as an unidentifiable member of a larger taxonomic group (e.g. “*Vespericola* sp.” if identifiable only to genus level).
- When private contractors apply the “cf.” designation, field units and taxa experts should use notes or other information to determine the source of uncertainty. Contractors should be encouraged or required to document their uncertainty and rationale.
- The agencies’ designated taxa experts should make the final decision on the most appropriate identification of specimens, either as a recognized species or as unidentifiable. This determination should be documented in the Collections block in ISMS.
- Specimens that are unidentifiable (e.g. can only be identified to genus level) should not be recorded or managed as S&M known sites.