

2018 National Conservation Banking Training Course

FY18 Legacy Project #18-860
MIPR #HQ06428-12393

CLEARED
For Open Publication

Apr 12, 2021

Grant Period:

June 1, 2018 – January 31, 2020

Department of Defense
OFFICE OF PREPUBLICATION AND SECURITY REVIEW

FINAL REPORT

August 19, 2019

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Background:

The Conservation Banking Training Course is a continuation of similar courses that have been developed and implemented since 2010 as a multi-partner effort involving the US Fish and Wildlife Services (USFWS), US Army Corps of Engineers (USACE), US Department of Agriculture (USDA), US Marine Corps (USMC), US Army, Federal Highways Administration (FHWA), National Marine Fisheries Services (NMFS), Bureau of Land Management (BLM) and the National Mitigation Bankers Association (NMBA).

Activities / Project Outcomes:

The Conservation Fund developed and delivered the 9th national offering of the Conservation Banking Training Course September 17-21, 2018 at the National Conservation Training Center (NCTC) in Shepherdstown, WV. This course is designed to foster collaboration among regulators, bank and other mitigation sponsors, and users – ensuring that all entities have a thorough grounding in conservation banking policy in order to facilitate the establishment of banks and in-lieu fee programs on the ground. In addition to addressing core elements of conservation banking establishment and implementation, this advanced course also covers in-lieu fee programs and other credit trading systems and concepts. A total of thirty-two participants – including four from DOD – attended the training course.

Supporting Documentation:

- Agenda
- Participant List

CONSERVATION BANKING TRAINING COURSE

September 17-21, 2018

Course Agenda

National Conservation Training Center (NCTC)

Shepherdstown, WV

Training Course Description:

Conservation banking is a tool to conserve endangered, threatened, and other at-risk species and their habitat that reduces risks associated with the use of compensatory mitigation. Other benefits include:

- Regulatory efficiencies for agencies, industry, project proponents, bank sponsors, and credit buyers
- Increased transparency and predictability through advance planning at a landscape level
- Greater economic incentives for conserving species that result in effective and sustainable conservation outcomes

This course is designed to foster collaboration among regulators, bank and other mitigation sponsors, and users – ensuring that all entities have a thorough grounding in conservation banking policy in order to facilitate the establishment of banks and in-lieu fee programs on the ground. In addition to addressing core elements of conservation banking establishment and implementation, this advanced course also covers in-lieu fee programs and other credit trading systems and concepts.

Course Objectives:

- Provide a thorough grounding in the relevant federal policy and regulations guiding the review, establishment, and operation of conservation banks and in-lieu fee programs
- Enable participants to identify the need for and opportunities associated with conservation banking programs including economic benefits of third party compensatory offsets from both a bankers' and users' perspective
- Provide practitioners and reviewers expertise on how conservation banks and in-lieu fee programs are effectively and efficiently reviewed and overseen in both their establishment and operation
- Provide leadership and team building skills necessary to be an effective member of a conservation banking partnership and, for agency staff, an effective member of a Conservation Banking Review Team

Day 1: Monday, September 17th

- 8:00 – 9:00** **Welcome and Introductions / Overview of Course**
Katie Allen, The Conservation Fund
- 9:00 – 9:15** **BREAK**
- 9:15 – 10:45** **Session 1: Overview of Conservation Banking**
Shauna Everett, US Fish & Wildlife Service
Angela Somma, NOAA National Marine Fisheries
- 10:45 – 11:00** **STRETCH BREAK**
- 11:00 – 12:15** **Session 2: Environmental Markets**
Chris Hartley, USDA Office of Environmental Markets
Scott Chiavacci, US Geological Survey Science and Decisions Center
- 12:15 – 1:15** **LUNCH**
- 1:15 – 2:30** **Session 3: Review of the Federal Endangered Species Act (ESA) as Guiding Statute for Conservation Banking and other Ecosystem Services Market Tools**
Angela Somma, NOAA National Marine Fisheries
Charlotte Kucera, US Fish & Wildlife Service
- 2:30 – 2:45** **BREAK**
- 2:45 – 3:45** **Session 4: Voluntary Pre-Listing Mitigation**
Karen Anderson, US Fish & Wildlife Service
- 3:45 – 4:00** **STRETCH BREAK**
- 4:00 – 5:15** **Session 5: Role of Mitigation Review Teams & Development of Conservation Banking Instruments**
Shauna Everett, US Fish & Wildlife Service
Veronica Rowan, Department of Interior Solicitor's Office
- 5:15 – 5:30** **Wrap-Up to Day 1**
Katie Allen, The Conservation Fund

Day 2: Tuesday, September 18th

- 8:00 – 8:15** **Morning Announcements & Questions**
Katie Allen, The Conservation Fund
- 8:15 – 9:30** **Session 6: Using a Landscape-Scale Approach to Site Selection**
Anita Barstow, US Fish & Wildlife Service
Matt Gause, Westervelt Ecological Services
- 9:30 – 11:15** **EXERCISE I: Site Selection Considerations for Conceptual Bank Approval**
Katie Allen, The Conservation Fund
Greg DeYoung, Westervelt Ecological Services
- 11:15 – 12:30** **Session 7: Joint ESA-CWA Banks**
Steve Martin, US Army Corps of Engineers
Shauna Everett, US Fish & Wildlife Service
Greg DeYoung, Westervelt Ecological Services
- 12:30 – 1:30** **LUNCH**
- 1:30 – 3:00** **Session 8: Real Estate Assurances**
Steve Martin, US Army Corps of Engineers
Veronica Rowan, Department of Interior Solicitor's Office
- 3:00 – 3:15** **BREAK**
- 3:15 – 4:45** **Session 9: The Business of Banking**
Gray Stevens, Sandy Creek Partners, LLC
- 4:45 – 5:00** **Wrap-Up of Day 2**
Katie Allen, The Conservation Fund
- 7:00 – 9:00 pm** **Dessert Social & Optional Discussion Forum on Legal Issues**
Veronica Rowan, Department of Interior Solicitor's Office
Location: Roosevelt Room, Commons

Day 3: Wednesday, September 19th

- 8:00 – 8:15** **Morning Announcements & Questions**
Katie Allen, The Conservation Fund
- 8:15 – 10:00** **Session 10: Credit Determination**
Charlotte Kucera, US Fish & Wildlife Service
Greg DeYoung, Westervelt Ecological Services
Angela Somma, NOAA National Marine Fisheries
- 10:00 – 10:15** **BREAK**
- 10:15 – 11:30** **Session 11: Service Area Determination**
Anita Barstow, US Fish & Wildlife Service
- 11:30 – 12:30** **LUNCH**
- 12:30 – 1:45** **Session 12: Role of In-Lieu Fee (ILF) Programs and Conservation Banking**
Michelle Mattson, US Army Corps of Engineers
Shauna Everett, US Fish & Wildlife Service
- 1:45 – 5:00** **EXERCISE II: Crediting Methodology & Service Area Determination**
Katie Allen, The Conservation Fund
- 5:00 – 5:15** **Wrap-Up of Day 3**
Katie Allen, The Conservation Fund
- 6:00 – 9:00 pm** **OPTIONAL ACTIVITY: POTOMAC RIVER PADDLE TRIP**
Location: circular driveway outside dining hall
**be ready to load onto bus, having eaten and wearing 'wet clothes' by 5:45 pm!*
**Pre-registration required*
NOTE: Need to meet 10-person minimum!

Day 4: Thursday, September 20th

- 8:00 – 8:15** **Morning Announcements & Questions**
Katie Allen, The Conservation Fund

- 8:15 – 9:30** **Session 13: Short-Term Financial Assurances**
Steve Martin, US Army Corps of Engineers, Institute for Water Resources
Greg DeYoung, Westervelt Ecological Services
Veronica Rowan, Department of Interior Solicitor's Office
- 9:30 – 9:45** **BREAK**
- 9:45 – 10:45** **Session 14: Ecological Performance Standards & Credit Release**
Charlotte Kucera, US Fish & Wildlife Service
Matt Gause, Westervelt Ecological Services
- 10:45 – 11:00** **STRETCH BREAK**
- 11:00 – 12:00** **Session 15: Long-Term Management**
Matt Gause, Westervelt Ecological Services
- 12:00 – 1:00** **LUNCH**
- 1:00 – 2:00** **Session 16: Long-Term Stewardship Financing**
Stephanie Tom Coupe, National Fish and Wildlife Foundation
- 2:00 – 5:15** **EXERCISE III: Mock Review of a Banking Instrument**
Katie Allen, The Conservation Fund
- 5:15 – 5:30** **Wrap-Up of Day 4**
Katie Allen, The Conservation Fund

Day 5: Friday, September 21st

- 8:00 – 8:15** **Morning Announcements & Questions**
Katie Allen, The Conservation Fund
- 8:15 – 9:15** **Session 17: Due Diligence & Responsibilities for Oversight & Compliance**
Charlotte Kucera, US Fish & Wildlife Service
Veronica Rowan, Department of Interior Solicitor's Office
- 9:15 – 9:30** **BREAK**
- 9:30 – 10:30** **Session 18: Registries & RIBITS**
Mindy Selman, USDA Office of Environmental Markets
Steve Martin, US Army Corps of Engineers

10:30 – 10:45

STRETCH BREAK

10:45 – 12:00

Roundtable Discussion with Users & Bankers

Facilitator: Katie Allen, The Conservation Fund

Panelists:

Mike Ruth, Federal Highway Administration

Mark Matusiak, USACE Civil Works

Stephanie Perez-Arrieta, Federal Railroad Administration

Jennifer Oelke-Farley, Department of Defense

Greg DeYoung, Westervelt Ecological Services

Matt Gause, Westervelt Ecological Services

Gray Stevens, Sandy Creek Partners, LLC

12:00 – 12:15

Open Forum & Final Wrap-up

Katie Allen, The Conservation Fund

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September 17-21, 2018

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