

**Vegetation Classification Panel Meeting Minutes**  
**December 3<sup>rd</sup>, 2009**  
**Washington, DC**

**Action Items as outlined in meeting – arranged by lead person**

**Executive Committee:**

- Create a Panel document describing the activities for the coming year and update the FGDC Implementation Plan per Panel priorities and give these documents to Cliff Duke so that the next steps and budget priorities are clear. The Chair will be responsible for making consistent contact with Duke to keep him informed of ongoing/ changing priorities (Roberts).
- Decide on policy for NVC peer review board functioning
- Name the 5-6 peer review participants
- Staggered member terms will start from 2007 onward. (See revised Member Term handout - Mauldin)
- We should develop a short list of people to recruit onto the Panel and give to Dave Roberts to maintain

**Cliff Duke:**

- Revise budget to find funding for a new VegBank server and additional meetings
- Ten-year ESA Veg Panel budget for future funders

**Don Faber-Langendoen:**

- Get current draft of hierarchy into his poster with Chris Lea and Bob Peet...
- Aid the Executive Committee in deciding on the 5-6 peer review participants
- Post revised NVC data process and flow diagram

**Michael Jennings:**

- Make changes to bylaws:
  - \*The Chair serves for three years after which a new Chair will be appointed by the Executive Committee
  - \*Standardized bylaws with ESA bylaws to have all three Panel positions have terms of three years each
  - \*Remove term limits from the by-laws
  - \*Specify minimum level of member activity

**Todd Keeler-Wolf:**

- Send the workshop proposal out to the Panel and members should circulate to agencies
- Send out criteria for the groups/ macrogroups as modified by the discussion at the meeting with a timeline for comments.

**Orie Loucks:**

- Help identify individuals from Mexico to serve on the Panel

**Corrie Mauldin:**

- Revise Member Term spreadsheet to have all member terms start from 2007 onward and move inactive members into the 2010 class to have them roll off before more active members
- Help at some level with the peer review process as far as possible

- Need comments back on the VegWeb content spreadsheet by the end of December
- Schedule a call with the Panel in mid-January to discuss the Alvares review and other issues, including deciding on a regular Panel call schedule.

**Alexa McKerrow:**

- Contact Eileen Helmer to ask about her interest in serving on the panel
- Send workshop proposal out to the FGDC subcommittee
- Collect dataset proposals
- Check in with Michelle Cox about the National Military Fish and Wildlife Meeting (DoD) meeting in Detroit
- Email the Executive Committee to identify the need for them to address the issue of honoraria and to decide on review activities
- Email out the division-level document

**Serguei Ponomarenko:**

- Develop a summary of individuals and efforts in Canada

**Dave Roberts:**

- Describe the member activity required for the Panel more clearly in the appointment letter
- Inquire with inactive members as to their commitment to the Panel
- Keep an ongoing short list of potential members and follow up with Serguei, Orié and Alexa to inform list (and inform Mauldin)
- Make consistent contact with Duke to keep him informed of ongoing/ changing priorities
- Lead the review process and I will help with organizing them as well

**Ayzik Solomeshch:**

- Will send template for dataset proposals to the leads of each dataset

*\*Underlined text are action items with the person responsible in parenthesis; see also the Action Items section at the end of these notes*

## **December 3<sup>rd</sup> – Meeting at ESA**

### ATTENDEES

#### **Panel members:**

Michael Jennings (chairing) – The Nature Conservancy  
Bob Peet – University of North Carolina at Chapel Hill  
Alexa McKerrow – U.S. Geological Survey Bioinformatics Office (Raleigh, NC)  
Todd Keeler-Wolf – California Department of Fish and Game  
Chris Lea – National Park Service (Denver, CO)  
Don Faber-Langendoen – NatureServe  
David Tart – USDA Forest Service (Ogden, UT)  
Orie Loucks – Miami University of Ohio  
Ayzik Solomeshch – University of California-Davis  
Esteban Muldavin (afternoon) – University of New Mexico (phone)  
Scott Franklin – University of Northern Colorado  
Serguei Ponomarenko – NatureServe Canada  
Alan Weakley – University of North Carolina

#### **Other:**

John Dennis (presentation) – National Park Service  
Corrie Mauldin – ESA Staff  
Cliff Duke (check-in) – ESA Staff

### MINUTES

#### **Business**

##### ***Bylaws – Member terms and recruitment***

Michael Jennings – Having a chair-elect position would be less than ideal because the Panel does not have enough members to cycle through as Chair. The Panel agreed. The Chair serves for three years after which a new Chair will be appointed by the Executive Committee (Jennings). There will be no limit to the number of terms a person may chair.

The current term in the Panel bylaws for members is two years. That should be standardized to three years like the other ESA standing committees for all three Panel positions (Jennings): Chair (elected by the Executive Committee), Executive Members (appointed by President of ESA) and Regular Members (appointed by the Executive Committee).

A motion was passed for three-year member terms. At the end of each term the member may be reappointed or roll off. There will be no limit to the number of terms a member may serve.

Michael Jennings – We should stagger member terms to start at different years, so people roll off at different times. Several of the longest serving members could serve shorter terms, and so on.

As fresh start as new ESA standing committee, it was agreed that staggered member terms will start from 2007 onward. (See revised Member Term handout – Corrie Mauldin).

Orie Loucks – Do Panel members need to be ESA members? *No – it states in the Panel bylaws that members need not be “formally affiliated” with ESA. ESA bylaws do not mention this issue.*

It would be prudent to reach out to non-ESA members to increase the Panel’s visibility, etc. As we move forward into the type review process, we should give non-members some status in terms as being part of Panel/ review team.

Don Faber-Langendoen – We will be asking some individuals to serve as review board members, from which they will gain recognition for their service. Maybe there should be an editorial board.

Dave Tart – We could give people a certificate of participation.

Corrie Mauldin – The current bylaws also state that a member is not able to serve more than three terms.

Alan Weakley – Move that we remove term limits from the by-laws (Jennings).

Scott Franklin – Seconded and unanimous vote in favor.

Don Faber-Langendoen – We should probably put in place a way to require participation. Do we have a specification what constitutes activity?

Michael Jennings – We should specify the minimum level of activity (Jennings), or simply not reappoint those who are inactive. We must make it clear to incoming members what the expectations are when they start their appointment, like some involvement in subcommittee, etc.

Todd Keeler-Wolf – We could keep an informal list of those who have been to a meeting, been on calls, or reviewed and send letters to non-active members to remove them from the Panel.

Orie Loucks – Activity required could be stated more clearly in the appointment letter (Roberts), like attending a meeting within the three-year term, or participating in a subcommittee. If a member is not active the Chair has the power to decide whether to let them go at reappointment time. There are plenty of subcommittee opportunities on the Panel.

Alan Weakley – Move inactive members into the 2010 class to have them roll off sooner; have Dave Roberts inquire with them about reappointment.

Suggestions for removal:

Sherm Karl

Alejandro Montes

Steve Talbot (might use as review board member)

Michael Jennings – We should develop a short list of people to recruit onto the Panel

Orie Loucks – The Panel should bring on international people to diversify, one from Mexico, Serguei from Canada. In recruitment, look hard for international participants (Mexico, Caribbean, and Canada). I will help identify individuals from Mexico.

Ayzik Solomeshch – Next year's IAVS meeting is in Mexico. We should use that as an opportunity.

Serguei Ponomarenko – I will develop a summary of individuals/ efforts in Canada.

Alexa McKerrow will contact Eileen Helmer to ask about interest in serving on the panel.

Dave Roberts as Chair should keep ongoing list of potential members (and inform Mauldin).

Suggestions for potential members:

Carol Helmer (Bob Peet)

Carol Spurrier (Sherm Karl)

### ***Budget***

\*See 2009 budget for the Forest Service (this is more recent than the 2008 budget Alexa sent out at our meeting) – Corrie Mauldin

The Panel budget in Forest Service proposal has included funds for:

- Annual Panel meeting (this is outside the Panel meeting at ESA, we currently do not fund that meeting) for ~15 people (this was our December 2009 meeting)
- Three, 2-day meetings for 5-6 people
- One, 4-day meeting for ~10 people
- Two FGDC meetings for 2 people

Bob Peet – VegBank needs 3K for a new server at NCEAS (Duke)

The Executive Committee will create a Panel document describing the activities for the upcoming year and update the FGDC Implementation Plan document per Panel priorities and give them to Cliff Duke so that the next steps and budget priorities are clear. The Chair should be responsible for making consistent contact with Duke to keep him informed of ongoing/ changing priorities (Roberts).

Ayzik Solomeshch – Currently the budget includes support for panel, but does not include support for the peer review for the NVC.

Don Faber-Langendoen – Peer review process for the mid-levels might take more work than realized, we may need more meetings, etc. Dave Roberts will be leading the process and I will help with organizing them as well.

*\*Information from Cliff Duke\**

We received a pre-award letter to support this meeting. The full agreement (3-5 years) should be in place mid-December.

In January, there will be an update of the budget based on this meeting so the panel might be able to arrange another meeting. Corrie Mauldin will inquire about extra funds left over from this meeting to use for future meetings

Don Faber-Langendoen – We need someone to help coordinate the compiling of the review comments, this might represent a fair amount of work.

Cliff Duke – Who may help with that will depend on the process of the peer review and how that works. If it is formal technical consensus preparation that is the chair person's task.

Corrie Mauldin – I can commit to helping at some level with the peer review process as far as our funding allows me to.

Michael Jennings – We will talk this through with the Executive Committee.

Alexa McKerrow – Cliff, can you describe DataOne briefly.

Cliff Duke – It is a large NSF project to build cyber-infrastructure that supports environmental data. There is a project management plan submitted. I am on the education and outreach team.

Robert Peet – Would it make sense for us to be involved in this effort?

Cliff Duke – Be aware of what they are doing and there may be opportunities to volunteer for working groups.

## **2010 ESA Meeting (Education subcommittee)**

### ***Workshop***

Todd Keeler-Wolf submitted the proposal to ESA:

- Will take place at Ft. Necessity, from Saturday (July 31<sup>st</sup>) at noon to Sunday (August 1<sup>st</sup>) at 5:00pm
- Expect between 10-25 people
- Will include ruderal, plantation, old growth forest, and wetland vegetation

Michael Jennings – After the proposal has been accepted we should send it out to circulate among the agencies.

Todd Keeler-Wolf will send the proposal out to the Panel and members should circulate to agencies and Alexa McKerrow will send it out to the FGDC committee:

Tart – USFS; Keeler-Wolf – Wetlands; McKerrow – Fish & Wildlife; Lea and Stephanie Pearl – NPS.

Carol Spurrier – BLM?

### ***Organized Oral Session***

Ayzik Solomeshch submitted the proposal to ESA:

Ten speakers have been confirmed so ESA suggested two sessions. Bob Peet offered two more, so four more are needed.

### ***Organized Poster Session***

Alexa McKerrow – six posters submitted, we should know within the month if it is accepted. Chris Lea, Bob Peet and Don Faber-Langendoen need to get current draft of hierarchy in their poster. The session will be an intensive session with people moving quickly from one poster to the next.

## **Content Development**

### ***Review of agreements (at NVC) level***

- 1) Park Service and LANDFIRE have an agreement with NatureServe for groups/ macrogroups
- 2) There is no major agreement is yet underway for associations and alliances. Review will happen over the next few months.
- 3) ESA's agreement with FS for peer review should be in place by mid-December.

### ***Peer Review and Proceedings (Alvars)***

Don Faber-Langendoen will work on deciding the 5-6 participants

### ***Proposed datasets/ analyses***

There are four proposed datasets to consider for peer review as a demonstration:

- 1) California vernal pools (PI – Ayzik Solomeshch)
- 2) Appalachian Trail (PI – Chris Lea)
- 3) Longleaf Pine (PI – Bob Peet)
- 4) NW Forests, *less ready to be reviewed* (PI – Don Faber-Langendoen)

Michael Jennings – It would be useful to get proposals (1-2 pages) of each of these four datasets. We could use them to decide which might be the most exciting to agencies.

Ayzik Solomeshch will send template for proposals and Alexa McKerrow will collect proposals.

Orie Loucks – We can't just grab low-hanging fruit, need to review a balance of both complex and simple datasets. Running a complete dataset would show agencies what can be done. The longleaf pine dataset is less ready than the Appalachian Trail, and maybe less than the NW forests.

Mike Jennings – Remember that we have not yet been given the funding to review these further datasets, and that they are just seen as test, we should aim at getting the one done that best shows what can be done as an early product (this needs to be achieved without undo complication). Our goal is to not only test the technical aspects of the review software, but also demonstrate the social aspects – the classification process, etc.

Scott Franklin – Do any of these sets include government land? This is important that since we're going to government agencies for support.

Alexa McKerrow – We need more money to fund fuller reviews.

Dave Tart – The test doesn't have to be intensive as far as travel.

Alexa – The first review should be face to face to run through any problems, but after that it could be web-based... we should look for funding now for next year.

Bob – We could run some of the other datasets along with Alvars.

***Association/ Alliance screening – preliminary results***

\*See "Association and Alliance Screening Criteria – thresholds" – Don Faber-Langendoen

Don Faber-Langendoen – We are still working on trials for this. It would be worthwhile to screen the same associations that are going to be peer reviewed. Once that's finalized, if it takes up to 15 minutes per association (6,000), then it would take 100K to complete the screening.

Michael Jennings – In the ESA morning meeting yesterday we took an example provided by Robert Peet to compare to fields in the template. It is possible to get a good list of what else needs to be done to adequately describe a type. Reviewers will be central to identifying the potential improvements and future work.

Don – Maybe that type of information from the reviewers could be contained in the maintenance database – not the public database.

Alan – What about DoD land for primary data?

Chris Lea – I talked with Michelle Cox in Navy about potential projects.

Alexa McKerrow will check in with Cox about the National Military Fish and Wildlife Meeting (DoD) meeting in Detroit.

Michael Jennings – We could tap the Legacy program and local managers for data.



## Review

### ***Current draft of hierarchy to group level draft***

\*See “hierarchy19 group-system-assoc” – Don Faber-Langendoen

Don Faber-Langendoen – This spreadsheet is the best working knowledge of the types. It is now mostly complete up through the division level except for Alaska, the Caribbean. The Eastern U.S. is mostly available and the Western U.S. is close.

2/5 of lower 48 states will be ready for review by Dec 2010

3/5 of lower 48 states will be ready for review in January 2010

Don Faber-Langendoen – I need this reviewed and returned to me in the next 3 to 6 months. We need to decide who will review these groups – regional ecologists, etc. We need a clear next step with respect to communicating to the full panel what is going on with this data and the review process.

### ***Descriptions for a subset of upper level types***

\*See “Cool Temperate Forest-ESA call Nov 10” – Don Faber-Langendoen

Don Faber-Langendoen – We started with working list from HRWG (class, subclass and formation), published as an informative list in the 2008 NVCS. A few changes were made along the way, nothing extensive. An African project that used formation as starting point made some suggested changes, 80% stayed the same, and the most significant change was in wetlands group. Their alternative to the HRWG’s broader definition is to break wetlands out higher up in the hierarchy.

There is currently no funding to write formation descriptions; but we have worked on them over time and 25% are in draft form and the other 75% are incomplete. We’d prefer to have the upper level review later this year.

### ***Plan for review of the full suite of upper level types***

There are two main issues concerning the review:

- 1) To look at several possible arrangements of the hierarchy
- 2) The description of the types regardless of arrangement

Don Faber-Langendoen – If get permission from Greenwood Press, then this review could advance pretty quickly. A request was submitted in September and by February we should have an answer one way or the other. Divisions will be easy to do if Greenwood grants access, if not, this process will be more complicated. We should put this off until the fall so that we might get some international representation for the review of the upper levels of the hierarchy.

Perhaps we could use the IAVS as a platform for getting the formations reviewed (either through the review tool – or some sort of wiki).

There was consensus that at the division level the focus would be N. America, and the higher levels would be worldwide.

Alexa McKerrow – I will email the Executive Committee to identify the need for them to address the issue of honoraria and to decide on review activities.

***Descriptions for sample Groups, Macrogroups***

\*See “Summary of Criteria for evaluating Macrogroup and Group descriptions – test evaluation CA woodlands” – Todd Keeler-Wolf

Todd Keeler-Wolf – This summary (of the three mid-levels division, macrogroup, and group) is to standardize a review effort for the mid-levels of the hierarchy. The top down and bottom up perspective is important to this review.

Ayzik Solomeshch – Would it be reasonable to recommend discussion about which levels genus names are used, and the level where the species name comes in?

Todd Keeler-Wolf – We have to look, there is a lot of variability.

Don Faber-Langendoen – We have recommendations, let’s start applying those and see how it works.

Todd Keeler-Wolf – “Units are hierarchically related based on breadth of indicators aggregating –up into higher levels.”

TKW will send out the criteria as modified based on today’s comments with a timeline for comments. After revisions have been made Alexa McKerrow will set up a call for review of the questions. See 4:15 conversation about the peer review panels.

Michael Jennings – Who will give instructions for the review? Dave Roberts?

**Software Updates**

***NPS plot data***

\*FOIA PowerPoint – John Dennis

\*See three options on sensitive species under consideration for National Park Service I&M Vegetation Inventory Program – emailed out by Chris Lea

Chris Lea and John Dennis – discussion of NPS sensitive data and how to deal with it within NVC framework.

John Dennis – The legal and policy constraints under FOIA:

\*There are nine exemptions that, if met, records are protected from release (i.e. disclosure from another statute).

\*The goal of EFOIA is to make as many of the records available as possible. Once federal information is released to one person, it's released to all.

\*NPS will not release information based on confidentiality. There are five types of resource confidentiality: historic, archeology, cave, paleontological and park resources (NPS includes biological resources).

\*Two FOIA case examples:

USGS, grizzly bear records. Their argument was that the grizzly bear gene pool was the resource being protected (fuzzed the den locations by 1 mile).

Goshawk nesting sites. A judge upheld the agreement (fuzzed the nest sites by 1 mile).

Plot data are agency records. They may contain nature and species data, threatened and endangered species information and NPS resource information with specific locations.

With the information that does not contain nature and specific location, how should we make it clear to park service employees that they need to make information available and protect the resource at the same time?

There are three options under consideration for the "public" version posted to the web, the options for altering data to protect sensitive species.

Lea needs comments back from the Panel by the end of next week (December 11<sup>th</sup>).

Mike Jennings – How many species are we talking about?

Chris Lea – It is based on a park by park decision.

John Dennis – Resources are park specific.

Michael Jennings – Location is not so important to the classification of types.

John Dennis – Our goal is that the plot data be used within the legal requirements.

Alan Weakley – Often times the list of rare species is much broader than those that are likely to be exploited.

Mike Jennings - For agencies outside the park how does this impact their use of data?

Don Faber-Langendoen – I would not want plots with any species data removed. They could fuzz the location or if it's too small, not include the plot in the data shared.

Chris Lea – We could utilize a combination of these three options. Each user could decide on the appropriate approach. We want to fuzz as little as possible to make it usable as possible.

Bob Peet – VegBank has options of accuracy (levels 1-6) to allow flexibility in embargoed, open datasources.

Dave Tart – They could fuzz taxonomically or geographically.

Alan Weakley – it seems the more streamlined the decisions the better.

Dave Tart – in some part it depends on how comfortable you are with the confidentiality agreement.

John Dennis – This same rule applies to specimen labels.

***VegWeb site***

\*See “ESA websitedesign\_draft11Nov09” – Corrie Mauldin

Corrie Mauldin – If any on the Panel have major concerns with the current layout of content, please contact me by the end of this month (December). Otherwise, we will move forward with the content and design we have decided upon.

***Scaling analysis***

Chris Lea – I drafted a paper about the scaling issue and sent that out and got feedback. Dave Roberts has initially worked up 2 eastern and 2 western datasets. I sent Dave 20 datasets to broaden his analysis; we are waiting on Dave to conduct further analysis. I’ve also gotten a dataset from Dave Tart with 3,000 plots. At the NPS, we think the analysis shows some diff between the eastern and western datasets.

**Summary of future meetings/ opportunities**

***Regional Review Panels***

Don Faber-Langendoen – How do we handle this initial group/ macrogroup review? There are 320 groups for the lower 48 and 120 macrogroups. If the Panel wanted to tackle it, maybe one approach would be to take the division level and look at groups/ macrogroups within that level. Thirty or so groups could be combined, for instance, and the Panel or outside experts could get them done.

Alexa McKerrow will email out the division level document.

***January Call***

Don Faber-Langendoen – It would be helpful to have a mid-January call to discuss the revised criteria and divvy up the groups and recruit some interested folks for a coordinated review.

Corrie Mauldin – I will schedule a call with the Panel in mid-January to discuss this and other issues, including deciding on a regular Panel call schedule.