IBMP Partner Protocols

Background and Purpose of the IBMP

The Federal and State Records of Decision (ROD) in December 2000 for the Interagency Bison Management Plan (IBMP) for Montana and Yellowstone National Park were the result of extensive deliberation and legal proceedings that yielded an unprecedented agreement amongst federal and state agencies (the "Partners").

Under the IBMP, the Partners harness their respective skills and operational resources to work cooperatively to achieve their shared goals: **conserve a wild, free-ranging bison population while concurrently protecting against transmission of brucellosis from bison to cattle**. To accomplish this goal the Partners generally meet 3-4 times yearly in public forum to consider prevailing conditions and review collected data, and, as necessary, develop and apply short- and long-term adaptive management adjustments to the IBMP.

The Partners are committed to employing an adaptive management framework, as signified by their signing and publication of an adaptive management plan on December 18, 2008. That plan, which serves as the basis for the IBMP Annual Report, is reviewed annually and updated as appropriate.

IBMP Partner Commitment, Approach, and Other Responsibilities

Commitment.—Each Partner commits to the overall IBMP goal of conserving a wild, free-ranging bison population while concurrently protecting against transmission of brucellosis from bison to cattle.

Approach.—The Partners will work as a collaborative, problem-solving body seeking to produce consensus management actions that address, to the greatest extent possible, the needs and interests of all participants. As part of their collaboration, the Partners will work jointly to educate each other on their differing values and interests, plus develop the baseline information needed for shared decision making.

Other responsibilities.—Partners recognize that they each retain their own independent goals and responsibilities. They are not required to relinquish or subjugate those individual mandates to be part of the Partner group.

IBMP Partner Organizations and Lead Partner

Makeup.—Nine organizations constitute the IBMP Partners, as shown below (note that the three tribal members—CSKT, ITBC, and NP—were invited to join the deliberative table as full Partners beginning at the November 2009 Partner meeting). Each of the Partners is responsible for naming a lead that will represent their group at quarterly meetings, and also a second to act on their behalf should the lead not be available (with the exception of MDOL and MBOL, who act as second for each other). Lead for each organization, followed by their seconds as of 1 January 2013 are shown in Table 1.

Table 1.—IBMP Partner organizations

Partner	Organization lead & second as of 010113	Past year as Lead Partner	Next years as Lead Partner	Notes
Confederated Salish and Kootenai Tribes (CSKT)	Leonard Gray Tom McDonald	NA	2014, 2020	In conjunction with ITBC, NP
Inter Tribal Buffalo Council (ITBC)	Ervin Carlson Jim Stone	NA	2014, 2020	In conjunction with CSKT, NP
Montana Board of Livestock (MBOL)	Mike Honeycutt	2009/10	2016, 2022	Act as a single entity
Montana Department of Livestock (Montana State Veterinarian; MDOL)	Martin Zaluski			
Montana Fish, Wildlife and Parks (MFWP)	Sam Sheppard Andrea Jones	2012	2018, 2024	
Nez Perce Tribe (NP)	Quincy Ellenwood Neil Thagard	NA	2014, 2020	In conjunction with CSKT, ITBC
National Park Service (NPS)	Dan Wenk Jennifer Carpenter	2008/09	2015, 2021	
USDA Animal and Plant Health Inspection Service (APHIS)	Don Herriott Ryan Clarke	2013	2019, 2025	
USDA Forest Service (USFS)	Mary Erickson Scott Barndt	2010/11*	2017, 2023	

* *From 2008 to 2011, the Lead Partner term extended from Nov 1 to Oct 31. The USFS carried through to Dec 31, 2011. From there forward, Partners agreed to set the Lead Partner term to the calendar year, from Jan 1 to Dec 31.*

LEAD PARTNER ROLE AND RESPONSIBILITIES

Lead Partner.—Each year the Partners will select, on a rotating basis (Table 1), a Lead Partner, who has the following responsibilities:

- Creating agendas, arranging telecon meeting lines and meeting locations, and leading all telecons.
- Compiling a list of any and all adaptive management changes completed during that year.
- Acting as the lead compiler and then author for the IBMP Annual Report, to be completed by the end of each calendar year.
- Updating, getting consensus signatures on, and posting the Operations Plan by December 31st of each year.
- Calling, organizing, and documenting Field Operations meetings.
- Paying for (a) a facilitator to work with the Partners through the year to facilitate meetings, manage the IBMP web information portal (www.ibmp.info), and complete other such items as the Lead Partner desires to delegate; (b) meeting space for regular IBMP Partner meetings; and (c) telecon access.
- All Partners agree to serve as the Lead Partner. Tribal entities will act as a single Partner when acting as and taking on the financial obligations of the Lead Partner. Likewise, MDOL and MBOL will be considered a single Partner when acting as and taking on the financial obligations of the Lead Partner.

GENERAL MEETING STRUCTURE, PROCESS, AND DECISION MAKING

Regular IBMP Partner meetings

- **Timing.—**Partners generally meet 3-4 times each calendar year with dates determined by consensus.
- **Agenda posting.—**Two weeks in advance of each quarterly meeting the Partners will post a draft agenda at www.ibmp.info.
- **Deliberative table.—**For quarterly meetings, each Partner provides one member at the deliberative table (i.e., nine deliberative Partners). Both Partners and their supporting staff are allowed to provide input during the flow of the meeting.
- **Interaction with the public.—**All Partner quarterly meetings are open to the public. The public will have 30 minutes at the end of each session to present their ideas to the Partners (typically 3 minutes per person, though can be more or less depending on the number signed up to speak). While in general the public does not participate in the general meeting, the Partners may choose to wave this stipulation at any time as done for many interactions with the Citizens' Working Group in 2011 and 2012.
- **Documentation of meetings.—**Meetings will be documented and posted to www.ibmp.info within one month of each meeting. The Lead Partner shall approve the report before posting. The report as initially posted will be marked as DRAFT. Partners will vote to accept the meeting notes as is or with modifications at the beginning of the next quarterly meeting. Once accepted, the notes will be re-posted on ibmp.info as FINAL.

Decision making and quorum rules

Briefing statements for introduction of concepts for Partner consideration

- Partners seeking IBMP consideration of new information related to science, policy, or as a precursor of an adaptive change, may chose to introduce that topic via a "briefing statement". The briefing statement shall be distributed to the Partners at least 4 weeks before the scheduled meeting. The lead time allows adequate time for Partner review, including sufficient time for Tribal Partners to consult with tribal councils, as needed. Likewise, Partners may request briefing statements be presented at a following meeting. The briefing statement should consist of
  - Agency proposing
  - Issue
  - Date
  - Contact
  - Background / situation appraisal / current state of knowledge
  - Requested change and reasoning

Method of decision making

Many decisions needed to implement the IBMP are connected directly to agency authorities and are the sole responsibility of individual agencies. However, broader strategies are developed by the collective group of agencies to accomplish the two IBMP goals. In cases where multiple agencies are responsible for making specific decisions, the following procedures describe the process.

- The Lead Partner is responsible for facilitating discussions and determining via vote if there is consensus regarding recommendations under consideration by the Partners.
- Each of the nine Partner organizations has one vote in multi-agency decisions. The Partners seek consensus (100%) for all decisions that they make as a group. For face-to-face meetings, votes are done with simple thumbs up or down, or in response to the question, "Are there any objections to the proposal on the table?" No objections equals consensus; i.e., consensus can be achieved if a Partner chooses to abstain from a vote. If a Partner is not represented, then it is assumed that they have no objection and hence consensus can still be achieved.
- Partner(s) having a minority opinion have an obligation to offer an alternative solution to seek further consensus.
- If full consensus is not possible then differences can be addressed by the dissenter(s) proposing an adaptive management change for the coming adaptive management cycle (described under the Adaptive Management and Annual Calendar sections of these protocols).

All nine Partners should participate in discussions regarding consensus-building decisions. As Table 2 indicates, however, none of the partners have responsibilities to participate in all the bison management activities described in the Interagency Bison Management Plan and subsequent adaptive management adjustments and operations plans. To reach a consensus decision regarding a particular bison management activity, each of the agencies that may be necessary to conduct that particular activity (Table 2) must either be present or defer participation. To defer participation, an agency must indicate to the Lead Partner that they do not wish to attend and will accept the decision of the other Partners. The Partners recognize that while they act in concert under the guidance of the ROD, each agency maintains its own mandates, responsibilities, and sovereignty.

Table 2.—Agency resource levels that may be necessary to conduct an array of bison management activities described in the Interagency Bison Management Plan and subsequent adaptive management adjustments.

Operation Size / Resources	MDOL	MFWP	NPS	APHIS	USFS	NPT	CSKT	ITBC
Media relations / Public information	√	√	√	√	√	√	√	√
Monitoring bison movements / distribution	√	√	√	NA	NA	NA	NA	NA
Human safety and property damage	√	√	√	NA	NA	NA	NA	NA
Hunting								
Biologists (modeling / recommendations)	NA	√	√	NA	NA	√	√	NA
Game wardens	NA	√	NA	NA	NA	√	√	NA
Law enforcement officers	NA	NA	√	NA	√	NA	NA	NA
Hazing								
Helicopter	√	NA	NA	NA	NA	NA	NA	NA
Horses and riders	√	√	√	√	NA	NA	NA	NA
ATVs	√	√	NA	√	NA	NA	NA	NA
Snowmobiles	√	√	NA	√	NA	NA	NA	NA
Law enforcement officers	√	√	√	NA	√	NA	NA	NA
Shooting								
Law enforcement officers	√	√	√	NA	√	NA	NA	NA
Lethal control teams	√	√	√	NA	NA	NA	NA	NA
ATVs	√	√	NA	NA	NA	NA	NA	NA
Snowmobiles	√	√	NA	NA	NA	NA	NA	NA
Tissue sample collectors	√	√	√	√	NA	NA	NA	NA
Capture								
Horses and riders	√	√	√	NA	NA	NA	NA	NA
ATVs	√	√	NA	NA	NA	NA	NA	NA
Snowmobiles	√	√	NA	NA	NA	NA	NA	NA
Law enforcement officers	√	√	√	NA	√	NA	NA	NA
Testing personnel	√	√	√	√	NA	NA	NA	NA
Bison handlers	√	√	√	NA	NA	NA	NA	NA
Vaccination	√	NA	√	√	NA	NA	NA	NA
Bison transfer and transport								
Inspectors	√	NA	NA	√	NA	NA	NA	NA
Vehicles, trailers, and drivers	√	√	NA	NA	NA	NA	NA	√
Distribution of meat, hides, etc.	√	NA	NA	√	NA	NA	NA	√
Research and disease surveillance	√	√	√	√	NA	NA	NA	NA
Quarantine operations	√	√	√	√	NA	NA	NA	√
Monitoring cattle turn-on and/or vaccination	√	NA	NA	√	√	NA	NA	NA

Teleconferences

- **Timing.—**As needed, between Partner quarterly meetings.
- **Participants.—**Each Partner provides a minimum of one member on the call (i.e., nine deliberative Partners).
- **Decision making.—**For telecons, the Lead Partner shall make a roll call vote of all Partners and record the vote. Decisions are made per the quorum mandates in the section previous to this.
- **Documentation.—**The Lead Partner is responsible for documenting telecons and having those summary notes posted to www.ibmp.info within two weeks of each telecon.
- **Public participation.—**The general public may attend any telecon that includes MDOL, MBOL, or MFWP as dictated by Montana's "sunshine law". The public is not allowed to interrupt or participate in the Partner discussions unless explicitly invited to do so by the Partners. At the start of each meeting, the Lead Partner should ask that any members of the general public identify themselves.

PROCESS FOR MAKING ADAPTIVE MANAGEMENT CHANGES TO THE IBMP AND RELATED OPERATIONS PLAN

The Partners agree to a multi-step process for developing adaptive management (AM) changes (Figure 1):

1. ***Proposed change introduced.—***Proposed AM changes can be brought forward by any Partner, under the following guidelines and expectations:
   a. The proposed change may arrive from many sources, for example from individual Partners, a group of Partners, or staff and/or subcommittees charged with suggesting AM changes.
   b. Changes may often be expected at the fall meeting, as collection of data for the annual IBMP report is nearing completion at this time, meaning analysis of the past year's data is possible per the standard AM cycle.
   c. A Partner vote (vote #1) is required (may be at a regular meeting, by telecon, or via email) with consensus agreement in principle to the AM change to move to the next step. If there is no consensus, the proposed AM change is modified to reach consensus or dropped from consideration.
2. ***NEPA/MEPA Analysis.—***Following Partner discussion, each agency will determine if there is a need for additional NEPA and/or MEPA (National and/or Montana Environmental Policy Act) compliance before the AM change can be implemented. Note: For minor edits, Partners may choose to forego analysis and/or signing (Figure 1).
   a. If the federal and state agencies determine no additional NEPA and/or MEPA compliance is needed, then a NEPA/MEPA sufficiency statement should be completed and the Partners will go to Step 3.
   b. If the federal and state agencies determine additional NEPA and/or MEPA compliance is needed, then a categorical exclusion (CE), environmental assessment (EA), or environmental impact statement (EIS) will be completed prior to deciding whether or not to implement the proposed AM change. As applicable, Federal Partners will sign the NEPA finding/decision document, while State agencies will sign the MEPA finding/decision document.
3. **Endorsing the proposed AM change.—**By show of vote (may be at a regular meeting, by telecon, or via email), Partners express consensus on the proposed AM change (vote #2). They may optionally choose to further consider the AM change, or may proceed to signature (#1). The adaptive management change is considered in effect when all signatures (#1) have been received.
4. ***Documenting AM change and communicating to the public.—***Once adopted, AM changes will be documented via:
   a. Meeting notes
   b. Adaptive Management page of the IBMP website (www.ibmp.info)
   c. An annual update of the AM plan, if changes have been made, published along with the IBMP Annual Report. This annual update does not require signatures as the individual AM changes have already been signed off by the Partners. Each year, the annual update will highlight the changes from the previous year's AM Plan.
   d. The facilitator will house original signed AM documents and be responsible for scanning and posting them.
5. **Operations Plan.—**The yearly Operations Plan (sometimes called "Winter Operations Plan") is built upon the most recent Adaptive Management Plan, including changes signed off on that year but not yet incorporated in the year-end compilation of a new Adaptive Management Plan. The draft Operations Plan is introduced and discussed during the late summer IBMP Partner meeting and finalized at the autumn meeting. The document requires signatures of all IBMP agencies as described in the Decision Making section of these protocols. The Lead Partner is responsible for updating, getting consensus signatures on, and posting the Operations Plan by December 31st of each year. The most-recent signed operating procedures will remain in effect until replaced by subsequent updates.

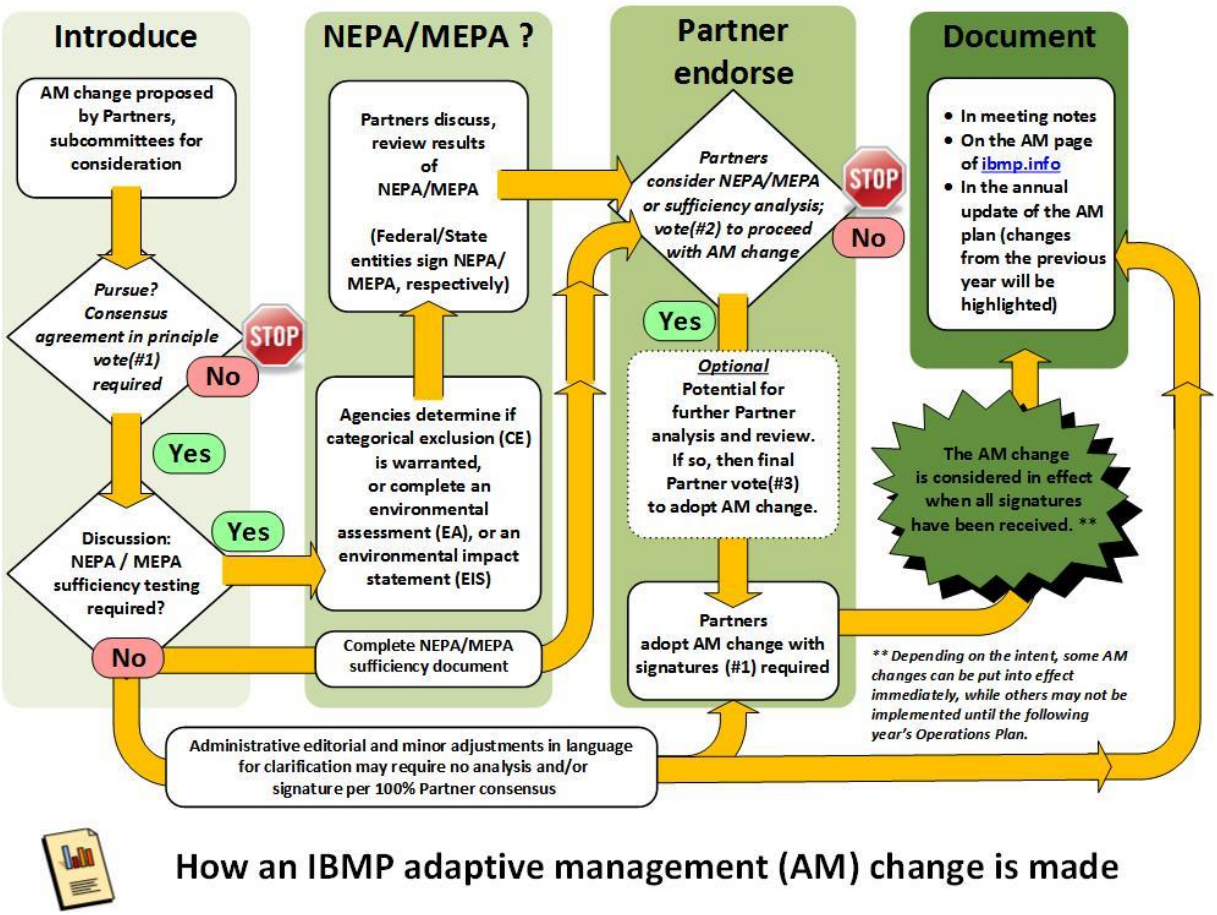

Figure 1.—The making of an IBMP adaptive management change.

ANNUAL REPORT TIMING / ANNUAL CALENDAR

The Lead Partner is responsible for producing the Annual Report, meaning completing their own section(s) of the report, plus collecting and compiling all sections from the eight other Partners, as well.

The Annual Report is written using the current AM Plan as the framework for the report. The IBMP Annual Report is a direct compilation and, as appropriate, evaluation of activities conducted and data gathered under the current Adaptive Management Plan. Partners who are shown as "lead" for each adaptive policy are responsible for reporting on the outcome of that policy for the year. As necessary, dissenting opinions and conflicting analyses from other agencies will be noted and/or described to indicate that there was not consensus on that particular activity or analysis.

Additionally, in August of 2012 the Partners added an annual reporting requirement to track progress toward those recommendations made by the Citizen Working Group (November 2011) that were accepted by the Partners. Again, Partners shown as "lead responsible party" for each Citizen Working Group recommendation will provide the update on the year's progress toward accomplishing that recommendation.

The Annual Report is scheduled for completion by December 31 of each year, with a general annual calendar as shown in Table 3.

Table 3.—Annual IBMP calendar

Jan 1	New Lead Partner assumes duties
Jan - Jun	Core season for IBMP field operations carried out under the Operations Plan
Spring meeting (generally May)	Review of winter operations to date and begin collecting, if applicable, ideas for adaptive management changes for the following winter.
Jun-Aug	(1) All Partners compile yearly data they are responsible for in preparation for Annual Report. (2) As needed, Partner or subcommittee discussions on proposed adaptive management efforts (i.e., operational changes) to be made for following winter given results of previous winter activities. (3) Develop recommendations for harvests/culling for the following winter. (4) Preparation of draft Operations Plan for the following year.
Summer meeting (generally Aug)	(1) Partner planning for completion of individual duties for Annual Report. (2) Reports of subcommittees, if applicable, on proposed new AM activities and continued collection of ideas for adaptive changes for the following winter. (3) Presentation and discussion of draft Operations Plan for the following year (including recommendations for harvests/culling).
Oct/Nov	(1) Compilation of Partner write-ups of their sections of the Annual Report. (2) Draft Annual Report completed and circulated for review to Partners. (3) Partners discussions (potentially telecons) regarding issues under consideration in draft Operations Plan for the following year.
Fall meeting (generally Nov)	(1) Partners review Draft Annual Report; commit to complete any remaining items by Dec 31. (2) Partners review and potentially agree to proposed adaptive management changes for the upcoming winter (if applicable, not every year will have AM changes). (3) Final Partner discussion and signature of Operations Plan for the following year.
Dec	Partners submit any modifications to Draft Annual Report.
Dec 31	(1) Previous year's Annual Report completed and posted to www.ibmp.info. (2) Lead Partner posts revised Operations Plan for the coming winter.

FINANCIAL OBLIGATIONS OF PARTNERS

As a member of the IBMP, Partners accept the following financial obligations:

- Lead Partner is responsible for paying for a facilitator to work with the Partners through the year to facilitate meetings, manage the IBMP web information portal (www.ibmp.info), and complete other such items as the Lead Partner desires to delegate.
- Host Partner (often but not always the Lead Partner) is responsible for acquiring and paying for meeting space for IBMP meetings.
- Lead Partner is responsible for paying for telecon access.
- Tribal entities will be considered a single Partner when taking on the obligations of the Lead Partner. Likewise, MDOL and MBOL will be considered a single Partner when taking on the obligations of the Lead Partner.
- All Partners are responsible for their own travel, lodging, and associated expenses for attending regular IBMP meetings.
- All Partners agree to periodically host regular IBMP meetings.
- Partners may at times share costs for activities such as Citizens' Working Group meetings.

RUNNING AND REPORTING ON FIELD OPERATIONS MEETINGS

- The Lead Partner is responsible for calling, organizing, and documenting Field operations meetings.
- Field operations meetings will be called as needed, pending field status.
- Field operations meeting notes will be posted to www.ibmp.info within two weeks of each meeting.

METHOD OF DOCUMENT REVIEW AND SIGNATURE

Periodically the IBMP Partners require the review of and signature on a document they have created. The Partners will use an online document sharing and electronic signing service to accomplish these tasks. The facilitator shall be responsible to track the signing process, aid Partners in the electronic signing process, and inform the Lead Partner of any issues.

Electronic document review

Document review, as needed, will be accomplished via email. Facilitator or Lead Partner will send document to all Partners. Each Partner will use the TRACK CHANGES function in MS Word to add their changes and insert their comments, then return to the facilitator who will compile all edits into a single document. Depending on the requests of the Partners, that document will be re-sent out with changes made, reviewed at the next IBMP meeting, etc.

Timeline for document review

Document review and, as applicable, signing is expected to take one month or less. This timeframe can be modified (a) by the Lead Partner, or (b) by a Partner advising the Lead Partner of its inability to meet timelines for legitimate reasons (as determined by the Lead Partner). Partners desiring to halt consensus agreement to a document must record their objection in writing (email acceptable) to the Lead Partner within the one-month period. Partners who do not record their objection to the document during the one-month period forfeit their right to stop Partner consensus agreement on that document and the document can be accepted as officially representing IBMP Partner policy or decree. For documents that require signing, a Partner not complying with the time stipulation shall have their signature recorded by the Lead Partner as “No objection stated as provided for in Partner Protocols”.

Electronic document signing

Document signing will be accomplished using an online signing service coordinated by the facilitator. That service may change over time; it is currently HelloSign.com.

AMENDMENTS TO THE PARTNER PROTOCOLS

These Protocols may be amended at any time by the Partners following the guidelines set forth in the section titled, “General Meeting Structure, Process, and Decision Making”.