Procedures for Rating Natural Areas
North Carolina Natural Heritage Program
January 2015

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Introduction

The North Carolina Natural Heritage Program (NCNHP) is charged under the Nature Preserves Act (G.S. 113A-164.1 to 164.11) with compiling and maintaining information relevant to the protection of North Carolina’s most significant natural areas. Since its establishment in 1976, NCNHP has focused on measures related to biodiversity, giving special attention to areas important for the protection of the state’s native plants and animals at the population, community, and ecosystem levels of biological organization. In the development of specifications and standards for species and communities, NCNHP participates in the international network comprised of Natural Heritage Programs, Conservation Data Centers, and NatureServe, a non-profit conservation organization established partly to support this endeavor.

The standard Natural Heritage methodology is designed to address both species and natural communities, referred to collectively as “Elements” of biodiversity. This standard methodology is used to define the rarity of particular Natural Heritage Elements and to delineate individual occurrences of these Elements across the landscape. In assigning priorities for conservation, NCNHP gives special emphasis to natural areas that support populations of rare species or rare or high quality natural communities. A key product resulting from this information is the assessment of conservation priorities for the natural areas that have been identified. In order to assign conservation priority for each natural area, the two rating systems use Elements, Element Ranks, Element Occurrences, and Element Occurrence Ranks to assign conservation priority.

The NCNHP revised its process for establishing conservation priorities among the 2,400 natural areas that have been identified through field investigations. Our current procedure requires extensive staff expertise and resources, which results in ratings of National, State, Regional, and Local significance. A more detailed description of that process is available upon request.

We replaced the current process with two new procedures:

1. Element Representation Rating results in a set of natural areas which represents the best known examples of our conservation targets.
2. Element Collective Value Rating rates each natural area based on the number and rarity of the elements it contains.

Each natural area will be assigned two values, a Representation Rating (R1-R5) and a Collective Value Rating (C1-C5). The two indices measure different and complementary qualities of each natural area. Though given numerical labels, the values cannot reasonably be combined mathematically and both values will be used.

These new procedures provide several advantages:

- The new ratings are derived directly from the database which requires that all information relevant to the natural area is documented and is easily retrievable.
The new ratings can be calculated quickly, allowing ratings to be assigned to new a natural area as needed and allowing the entire set of natural areas to be updated often. Two distinct characteristics of each natural area are evaluated and reported, providing more clarity about the ecological significance of each natural area. Greater natural area rating consistency is achieved across the different types of elements that are tracked by NCNHP.

The processes are built upon standard components of the natural heritage methodology that is used by more than 80 programs from the United States, Canada and Latin America. More information about these components is provided below.

**Basic Components of the Natural Heritage Methodology**

1. **Identification of conservation targets (Natural Heritage Elements) and assigning Element Ranks**

Determining which plants and animals are thriving and which are rare or declining is crucial for achieving conservation of the species, habitats and ecosystems in greatest need of our conservation efforts. NatureServe and its member Natural Heritage Programs have developed a consistent method for evaluating the relative imperilment of both species and natural communities based on the best available information. These assessments lead to the designation of a conservation rank.

Conservation ranks reflect the relative risk of extinction faced by each element. Values range from critically imperiled (1) to demonstrably secure (5). Imperilment is assessed and documented at three distinct geographic scales: global (G), national (N) and subnational (S) (i.e., state/province/municipal). Thus, each Element receives ranks at all three scales (example: red-cockaded woodpecker has a conservation status rank of G3, N3, and S2 in North Carolina). These ranks are based on the best available information for a variety of factors, such as species abundance, geographic distribution, population trends, and threats. (Documentation of the methods for developing these assessments is available at [www.natureserve.org/explorer/ranking.htm](http://www.natureserve.org/explorer/ranking.htm).)

Global conservation assessments (assigning G-Ranks) generally are carried out by NatureServe scientists (integrating information from the biologists who work in state and provincial member programs), with input from other experts. The NCNHP is responsible for working with partners to conduct conservation assessments to assign state ranks or S-Ranks. For most elements, North Carolina only utilizes the Global and the State Ranks. These assessments are widely used throughout the conservation community and are regarded as highly credible by scientists, government agencies and private-sector organizations.

Based upon the conservation ranks, NCNHP has identified 1,662 elements that are considered conservation targets and are tracked by the program. These conservation
targets include all community types, because protecting natural communities serves to protect species with insufficient data for ranking and to preserve the characteristic interactions among species that frequently co-occur. The complete list of these tracked elements is available upon request or can be found on our website. www.ncnhp.org.

2. Mapping Element Occurrences

At the core of the Natural Heritage methodology is the concept of the Element Occurrence (EO) which is the specific location of a species or ecological community. An Element Occurrence generally represents the geo-referenced biological feature that is of conservation or management interest. An Element Occurrence record is a data management tool that has both spatial and tabular components, including a mappable feature and its supporting database. EO’s are typically represented by bounded, mapped areas of land and/or water. EO records are most commonly created for current or historically known occurrences of natural communities or native species of conservation interest. They may also be created, in some cases, for extirpated occurrences. NCNHP records and maps the Element Occurrences for the 1,662 elements the program has chosen to track. As of October 2012, 26,189 EO’s were mapped.

3. Assigning Element Occurrence Ranks

Each EO is assigned an Element Occurrence Rank. These ranks provide a succinct assessment of estimated viability, probability of persistence, or state of communities relative to the natural reference state (based on condition, size, and landscape context) of each occurrence of a given Element. In other words, EO ranks provide an assessment of the likelihood that, if current conditions prevail, a specific occurrence will persist for a defined period of time (the time varies by element but is typically 20-100 years). EO ranks are assigned on the basis of data obtained from recent field surveys (except for historical occurrences) by knowledgeable individuals. EO ranks may be used effectively in conjunction with Element conservation ranks to guide which EO’s should be recorded and mapped, and to help prioritize EO’s for purposes of conservation planning or action, both locally and throughout the range of the element.

4. Mapping Natural Areas

Once element occurrences are mapped, the broader habitat is reviewed and, when appropriate, a natural area is identified and mapped. A natural area is an area of land or water identified as having special importance for the preservation of the natural biodiversity of North Carolina. Biodiversity is generally recognized in the scientific community to refer to the diversity, not only of species but also of natural communities and ecosystems, as well as genetically distinct populations below the species level. NCNHP gives particular weight to natural areas in conservation planning, due both to our legislated mandate to define and inventory natural areas and to our belief that protecting high quality natural areas is key to conserving the rare as well as the more
common species they support. Natural area protection for the preservation of the natural biodiversity of North Carolina is the fundamental objective of defining natural areas.

A natural area contains one or more occurrences of a rare plant or animal, or a rare or high quality natural community. A natural area includes the area needed to sustain the EO’s, including ecological processes necessary for maintaining suitable habitat. Natural (not introduced), viable occurrences must be present in order to define a natural area. Natural area boundaries can be delineated to include areas not occupied (or utilized) by the EO’s, but which are essential for the continued survival of the EO’s within the natural area. This unoccupied area must serve important ecological functions that help maintain the viability of the natural area or that contribute to the other functions attributed to the natural area. Where more than one element occurs within a natural area, the boundary expands to accommodate the needs of each of the elements.

5. Assigning Conservation Priority Ratings to Natural Areas

Natural areas are evaluated to determine qualification for the program’s Dedication and Registry programs, and to encourage and focus conservation actions on the highest priority natural areas. Information about natural areas is made available to other users for conservation and planning purposes.

Natural Area Rating Summary

NCNHP established two distinct processes described below for assigning natural area conservation priorities. One procedure is designed to represent a natural area’s potential to contribute to a collection of the best natural areas for each tracked element. The second procedure evaluates the conservation value of each natural area based on the “element collective value” or number and rarity of the species and community types occurring within the specific natural area. If adopted, this paired rating system would provide two distinct values for each natural area, one which reflects the biodiversity of the state and one which reflects the overall biodiversity of each natural area.

A specific goal of establishing new rating systems is to move to operations that are derived directly from information that is contained in the database. This will require staff to document their evaluations and will increase the likelihood that all natural areas will be treated consistently. A key benefit of depending on database-driven answers is that errors in the database will be more quickly identified and corrected.

The Nature Preserves Act requires publication of a biennial report with specific recommendations, due on or before February 15 of odd-numbered years. Natural areas will be evaluated each year by NCNHP staff, reviewed by the Natural Heritage Advisory Committee, and included in the NCNHP Biennial Report. Individual natural area ratings will be evaluated as
needed. Each year, natural area ratings will be provided in a report that can be downloaded from the NCNHP website, and the ratings will be incorporated into the attribute tables of GIS shape files that are distributed quarterly to our conservation partners. NCNHP staff and partners can use the ratings to inform conservation actions, including appropriateness for Registry or Dedication, and the allocation of resources for funding, management, and biological inventory.
Element Collective Value Rating System

Introduction
The State Nature Preserves Act (G.S. 113A-164.4) calls for the NC Natural Heritage Program to create a system to classify the natural heritage resources of the state and to create a system of registered and dedicated natural areas. The associated Administrative Code (15A NCAC 12H .0202(a)) provides the following criteria for eligibility (the criteria in bold are addressed by the natural area rating procedures described here):

(a) For an area to qualify as a natural heritage area and thus be eligible for registration, or dedication, it must possess one or more of the following natural values:
   (1) a habitat for individual species of plants or animals that are in danger of or threatened by extirpation;
   (2) an exemplary terrestrial natural community;
   (3) an exemplary aquatic community;
   (4) an outstanding geologic or geomorphic feature that illustrates geologic processes or the history of the earth;
   (5) a unique or unusual natural feature such as old growth forest conditions or unusual vegetation types; or
   (6) other biological or ecological phenomena of significance, such as a major bird rookery or bat colony.

(b) In addition to the criteria stated in (a) of this Rule, an area shall be evaluated with respect to the following factors:
   (1) presence of natural values not adequately represented in previously registered natural heritage areas;
   (2) diversity of natural types of flora and fauna;
   (3) quality and viability of the natural features (i.e., self-sufficiency of the natural ecosystem when properly managed; degree of vulnerability to disturbances and intrusions);
   (4) absence of damaging land uses, logging, grazing, erosion, intrusion by exotic species, etc., or extent to which past disturbances have altered natural features; Considering that nearly all areas of the state have been altered by human intrusions to some extent and considering that certain natural elements require manipulative management, an area should not be denied recognition solely because of past disturbances;
   (5) capability of being managed so as to protect and maintain natural features in a natural condition; A buffer zone is desirable to assure protection (a buffer zone, where possible, should follow naturally defensible boundaries and should help protect the natural area against adverse effects from use and development of adjacent land; the buffer zone may be included in the designated area but need not itself possess special natural values);
   (6) compatibility of protective management practices with current use practices on adjacent lands; or
   (7) scientific and educational value.

To better implement items (a) (1), (2), (5), and (6), and (b) (2), (3) and (7) of the State Nature
Preserves Act, NCNHP uses an Element Collective Value Rating System, with number of Elements weighted by rarity, to rate identified natural areas.

The Element Collective Value Rating for each natural area is a measure of the number of elements at a given natural area, and the rarity of those elements, weighted in terms of both global rarity and state rarity. The weights for rarity were selected to balance the values of number of elements at a natural area and the rarity of the elements. This rating system will be used along with the Element Representation Rating system, which is designed to represent the natural areas of highest significance for each element; that rating focuses on the quality and viability of the element occurrences in the natural area.

**Element Collective Value Rating Principles**

The rating provides a score to a natural area based on both the number of elements at a natural area, and the rarity – both global and state – of each element in the natural area. Thus, the Global Rank (G-Rank) and State Rank (S-Rank) of elements are used in the scoring.

The score of a natural area is based on the cumulative scores of each of the extant elements in the natural area, based on scores given at each level of G-Rank and S-Rank. The scoring is first given to the G-Ranks. The S-Ranks are listed, in descending order, before moving down to the next G-Rank level. However, Global Ranks of G4 and G5 are given equal weight in the scoring, as are State Ranks of S4 and S5 (Table 1).

The values used to weight elements by rarity are meant to convey a relative measure of importance for conservation and are not intended to indicate interchangeability or exchangeability of elements.

**Element Collective Value Rating Procedure**

**Step 1. Select Element Occurrences**

To qualify for inclusion in the rating system, EO’s must be naturally occurring (not introduced), have EO viability ranks of A (excellent), B (good), C (fair), D (poor), E (extant, but viability not assessed) or F (failed to find, but believed extant), and occur in a natural area. EO Ranks of H (historical) or X (extirpated) for an element in a natural area are not included or scored. Stand-alone and sub-EO’s are used for this calculation; thus, for occurrences that occur in multiple patches, only the portion of the occurrence that is known to occur at the natural area is used to generate a natural area rating.

**Step 2. Element Scoring**

The scores are assigned to each selected element occurrence on a 10-point scale, with the rarest combination (G1S1) given the highest score. This 10-point scale is used to assign the relative contribution of an element to the significance of a natural area, with the rarest element having 10 times the value as a low-ranked (S4, S5, G4, and/or G5) element. An element with a mid-range of rarity – a G3S3 (5 points), is thus considered to have one-half the significance of a G1S1, but 5 times the significance for protection as a G5S5. Elements that have multiple
occurrences or sub-occurrences within a natural area are counted only one time for each natural area. This avoids artificially inflating scores for natural areas where multiple sub-EO’s have been delineated.
Table 1: Collective Value Point Scoring for each G-Rank and S-Rank combination

<table>
<thead>
<tr>
<th>G-Rank</th>
<th>S-Rank</th>
<th>Element Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>G1</td>
<td>S1</td>
<td>10</td>
</tr>
<tr>
<td>G2</td>
<td>S1</td>
<td>9</td>
</tr>
<tr>
<td>G2</td>
<td>S2</td>
<td>8</td>
</tr>
<tr>
<td>G3</td>
<td>S1</td>
<td>7</td>
</tr>
<tr>
<td>G3</td>
<td>S2</td>
<td>6</td>
</tr>
<tr>
<td>G3</td>
<td>S3</td>
<td>5</td>
</tr>
<tr>
<td>G4/G5</td>
<td>S1</td>
<td>4</td>
</tr>
<tr>
<td>G4/G5</td>
<td>S2</td>
<td>3</td>
</tr>
<tr>
<td>G4/G5</td>
<td>S3</td>
<td>2</td>
</tr>
<tr>
<td>G4/G5</td>
<td>S4/S5</td>
<td>1</td>
</tr>
</tbody>
</table>

Step 3. Assigning Natural area Scores
For each natural area, the scores for occurrences of each element are added to give the final “Collective Value Score” for the natural area. (For example, if a natural area has four elements: a G2S2, a G3S1, a G5S1, and a G5S3, it scores: 8 + 7 + 4 + 2 = 21 points.

There are 5 Categories of “natural area significance” for the Element Collective Value Rating. These Categories are Exceptional (C1 rating), Very High (C2 rating), High (C3 rating), Moderate (C4 rating), and General (C5 rating), based on point scoring of the elements within a natural area. From Table 2 (below), a site that scores 21 points, as in the above example, is given a Moderate (C4) Collective Value rating.

Table 2: Collective Value Ratings

<table>
<thead>
<tr>
<th>Collective Value Rating</th>
<th>Cumulative Element Score</th>
<th>Minimum Number of Elements</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1 (Exceptional)</td>
<td>91 and above</td>
<td>10</td>
</tr>
<tr>
<td>C2 (Very High)</td>
<td>61-90</td>
<td>7</td>
</tr>
<tr>
<td>C3 (High)</td>
<td>31-60</td>
<td>4</td>
</tr>
<tr>
<td>C4 (Moderate)</td>
<td>11-30</td>
<td>2</td>
</tr>
<tr>
<td>C5 (General)</td>
<td>2-10</td>
<td>1</td>
</tr>
</tbody>
</table>

The lower limit (91 points) for an Exceptional (C1) natural area requires a minimum of 10 elements at a natural area. That is, 10 (the score for the rarest element – a G1S1) x 9 = 90, which is the maximum score for a natural area rating of Very High. Therefore, a natural area must score at least 91 points to be Exceptional. Likewise, a Very High (C2) natural area requires a minimum of 7 elements (as 6 elements can score a maximum of only 60 points), and a High (C3) natural area requires a minimum of 4 elements. A Moderate (C4) natural area requires a minimum of 2 elements. A General (C5) natural area can have between 1 and 10 elements.
(though if 10 elements, all would have to score only a single point).
Additional Information Regarding Ranking

Rules for scoring, for intermediate or other unconventional ranks, are derived from NatureServe Element rank rounding rules as described below.

A. Elements with range ranks spanning two levels should be treated as if they had the higher of the two ranks (e.g., treat G2G3 as G2).

B. Elements with range ranks spanning three levels should be treated at the middle rank (e.g., treat (e.g., G3G5 as G4).

C. Elements with T ranks attached to their global ranks should be treated as if the T ranks were G ranks (e.g., treat a G4T1 as G1).

D. Elements with “Q”s attached to their global ranks should be treated as if there were no “Q”s (e.g., treat G4Q as G4).

E. Elements with “?” attached to their ranks should be treated as if there were no question mark (e.g., treat G3? as G3).

F. Elements with a non-numeric ranks should be treated as if they are G5 (e.g., treat GU or GNR as G5).
Element Representation Rating System

Introduction
The State Nature Preserves Act (G.S. 113A-164.4) calls for NCNHP to classify the natural heritage resources of the state and to create a system of registered and dedicated natural areas. The associated Administrative Code (15A NCAC 12H .0202(a)) provides the following criteria for eligibility. The criteria in **bold** are addressed by the natural area rating procedures described here.

G.S. 113A-164.4
(a) For an area to qualify as a natural heritage area and thus be eligible for registration, or dedication, it must possess one or more of the following natural values:

(8) a habitat for individual species of plants or animals that are in danger of or threatened by extirpation;

(9) an exemplary terrestrial natural community;

(10) an exemplary aquatic community;

(11) an outstanding geologic or geomorphic feature that illustrates geologic processes or the history of the earth;

(12) a unique or unusual natural feature such as old growth forest conditions or unusual vegetation types; or

(13) other biological or ecological phenomena of significance, such as a major bird rookery or bat colony.

To better prioritize natural areas and improve implementation of items (a) (1), (2), (3) (5), and (6) of the State Nature Preserves Act, NCNHP uses a rating system that identifies the highest quality occurrences of each element. This system is based on the idea of a portfolio, a complementary set of natural areas selected to optimally protect the wide spectrum of elements of diversity that we track. The emphasis is on protecting the best occurrences (as indicated by Element Occurrence Rank) of each element, attempting to ensure that no elements are ignored and that emphasis among them is balanced.

NCNHP uses EO ranks (see Element Occurrence Ranks above) to determine the natural areas containing the 10-12 best occurrences of each element. The conservation priority of these occurrences will be assigned using the categories listed in Table 3. When there are more than 12 occurrences of a G1-G2 element or 10 occurrences of a G3-G5 element, the remaining natural areas containing occurrences will be assigned to the General category as described below. Information about these natural areas and the element occurrences will continue to be maintained in the database. These occurrences, and the associated natural areas, will continue to be conservation targets, but they will be given lower priority.

Collectively, these natural areas will make up a portfolio representing the best natural areas for each Element tracked by NCNHP. Each of the natural areas will be rated according to the importance of the Element Occurrences contained within the natural area.
<table>
<thead>
<tr>
<th>Representation Rating</th>
<th>Definition</th>
<th>Defining EO Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>R1 (Exceptional)</td>
<td>Natural area contains one of the best two examples of G1 or G2 Elements.</td>
<td>1st or 2nd</td>
</tr>
<tr>
<td>R2 (Very High)</td>
<td>Natural area contains the 3rd or 4th best examples in the state of G1-G2 Elements, and/or one of the best two examples of other Elements.</td>
<td>3rd or 4th 1st or 2nd</td>
</tr>
<tr>
<td>R3 (High)</td>
<td>Natural area contains the 5th to 8th best examples in the state of G1-G2 Elements and/or the 3rd to 6th best occurrences of any G3-G5 Element within it.</td>
<td>5th to 8th 3rd to 6th</td>
</tr>
<tr>
<td>R4 (Moderate)</td>
<td>Natural area contains the 9th to 12th best examples in the state of G1-G2 Elements within it and/or the 7th to 10th best occurrences of any G3-G5 Element within it;</td>
<td>9th to 12th 7th to 10th</td>
</tr>
<tr>
<td>R5 (General)</td>
<td>Natural area contains one of the 30 best examples in the state of Elements within it, which do not qualify for categories R1-R4.</td>
<td>13th to 30th 11th to 30th</td>
</tr>
</tbody>
</table>

**Element Representation Rating Procedure**

**Step 1: Select Element Occurrences.**
To qualify for inclusion in the rating system, EO’s must be naturally occurring (not introduced), have EO viability ranks of A (excellent), B (good), C (fair), D (poor), E (extant, surviving but viability not assessed) or F (failed to find, but believed extant), and occur in a natural area. Stand-alone and sub EO’s are used for this calculation; thus, for occurrences that occur in multiple patches, only the portion of the occurrence that is known to occur at the natural area is used to generate a natural area rating.

**Step 2: Determine the highest quality occurrences of each Element.**
The query, for each Element, sorts the EO’s from best to worst using data in the database and then assigns them to categories. The initial sorting is by EO rank. The EO’s are then further sorted to clarify which ones are the best within the same EO rank, breaking ties to determine which will be selected for the portfolio of highest quality occurrences (see Figure 2). Because the data fields are not universally filled out in the database, there is a hierarchy of fields that are used. Fields that are most accurate for the purpose of identifying the best EO’s are used first, and if they are unavailable or result in ties, the next most desirable fields are used. Use of

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1 According to NatureServe data standards, EO rank summarizes information on viability and value for conservation, incorporating condition, size, and landscape context.
all the fields in the hierarchy effectively eliminates ties and provides an unambiguous calculation of which EO’s are best to meet the conservation goals.

The order of data for tie-breaking among EO’s with the same EO ranks is shown below. See also the Decision Tree for a visual representation of tie-breaking criteria.

1. EO condition rating (for community EO’s, this rating assigns values A-D based on EO Rank Specifications (Specs), and is a measure of the quality of biotic and abiotic factors and processes within the EO, and the degree to which they affect the continued existence of the occurrence. Components of this factor are: development/maturity; ecological processes; species composition and biological structure; abiotic physical/chemical factors. If EO condition ratings are present for some EO’s and absent for others, EO rank is used again in the comparison to other condition ratings. This is justified because EO ranks are determined most strongly by condition. In community EO’s described longer ago, the EO rank often effectively represents condition alone.

2. EO acreage (observed area). Thirty-three percent of EO’s have recorded EO acreage, including most community EO’s.

3. Landscape context rating\(^2\) (for community EO’s, this rating assigns values A–D based on EO Rank Specs, and is intended to be a measure of the quality of factors and processes surrounding the EO, and the degree to which they affect the continued existence of the occurrence. Components of this factor are: landscape structure and extent surrounding the EO; development/maturity of the surrounding landscape context; ecological processes in the surrounding landscape; species composition of the surrounding landscape; abiotic physical/chemical factors in the surrounding landscape.

4. Aggregate acreage of community EO’s in the natural area (larger is better). This is used as a surrogate measure of the total size of the natural habitat in the natural area. Other things being equal (or unknown), EO’s in large natural areas are more likely to be larger and in good condition compared to those in small natural areas.

5. Total number of EO’s in the natural area (larger number of EO’s is better). This is a final measure for use in breaking ties in the absence of any other information. While different kinds of habitat tend to support different numbers of EO’s, within a given species, natural areas with more other EO’s are more likely to be large and in good condition than those that support fewer EO’s.

It should be noted that, if the ratings returned by this query seem unreasonable or inaccurate, a more detailed analysis of the data will be performed. If no condition or landscape context ratings have been entered for community EO’s, assigning them for the EO in question and competing EO’s will often clarify which is better. After further analysis, taxa-specific rules for breaking ties among EORs may be proposed.

\(^2\) Because ties are unlikely among the acreage values of observed area, landscape context and the subsequent criteria seldom come into play for Elements where observed areas are entered.
Step 3: Assign Element Importance Rank for each Element (Top ranked 1st-12th for G1-G2 and 1st-10th for G3-G5 Elements).

The Element Importance Ranks for all EO’s can be calculated quickly by a query in NCNHP database. Because we want to focus conservation priority especially on rare elements, only natural areas with the best 1-2 examples of G1 or G2 elements can be placed in the highest category. Thus, the best 12 occurrences of all G1 and G2 elements are selected and prioritized. The best 10 occurrences of all G3-G5 elements are selected and prioritized. The results can readily be sorted by Element rather than by natural area, to review the placement of a given EO relative to others.

Step 4: Assign Representation Rating to each natural area based on Element Occurrences present.

Natural areas are rated on the basis of the quality of the EO’s they contain. The highest Element Importance Rank in the natural area determines the natural area significance rating. This value is entered into the natural area record in Tracker. If the result is not reasonable, the user can review the underlying data, potentially enter more precise data, and re-run the query. In cases where the algorithm does not measure the most important ecological features of a natural area, NCNHP staff can override the calculated results and record justification comments in the Biotics database.

In rare cases where the most important features of a natural area are not adequately assessed by the query, NCNHP staff can override the calculated rating and assign another appropriate natural area rating, as long as supporting information for the assigned natural area rating is recorded in the database. Such cases will be discussed among staff and determined by consensus of staff with expertise about the natural areas or elements present. Examples include:

1. Natural Communities with outstanding condition (e.g., old growth forests) but smaller acreage than younger (but otherwise excellent) examples of the same natural community.
2. Natural areas that are known to be the nationally most outstanding examples of G3-G5 elements (e.g., Black River Cypress Swamp) can be elevated.
3. Natural areas with multiple sub-EO’s for the same element, where no sub-EO properly indicates the significance of the collection of the element at the natural area.
4. Cases where natural area delineation (historical splitting of natural areas that are contiguous) obscures the significance of a natural area, and where there are reasons not to lump the natural areas together.
5. Elements that have multiple A-ranked EO’s and the size and condition of the surrounding natural communities does not necessarily affect the viability of the target element (e.g., Gymnoderma lineare, Helianthus schweinitzii).
6. Natural areas with element occurrences that have insufficient data to determine significance can be down-ranked.
Step 1: For each Element, select all records that are:
- naturally occurring,
- within natural areas, and
- with EO Ranks A, B, C, D, E, or F

Step 2: From this group, determine the 10-12 best records of each Element (using Element Occurrence Ranks and supplemental information).

Step 3: Assign EO Importance Rank, by ranking the best EORs 1 – 12 (1 being the best).

Step 4: Assign each natural area a significance rating based on the highest EO Importance Rank occurring in the natural area.

Result: Collectively, these natural areas represent the highest quality occurrences of conservation targets tracked by NHP.

Figure 1: Steps for assigning representation ratings to natural areas
Goal: Select the best occurrences of each Element, and rank them in order of importance for conservation. For G1-G2 elements, select the top 12 occurrences. For G3-G5 elements, select the top 10 occurrences. To select the best occurrences, use EO Ranks. If multiple EO’s have the same EO Rank, use additional information, as follows:

Select 10-12 best Element Occurrences using EO ranks and assign EO Importance Ranks from 1 – 12, with 1 being the best.

Do EO Ranks for the 10-12 best occurrences result in “ties” for placement in 4 categories?

- No → Use EO Ranks to prioritize the occurrences.
- Yes → Can Condition Rating be used to break ties among EO Ranks (Natural Community EO’s)

- Yes → Use Condition Rating to break ties among EO Ranks.
- No → Can EO Observed Area be used to break ties among EO Ranks?

- Yes → Use EO Observed Area to break ties among EO Ranks.
- No → Can Landscape Context Rating be used to break ties among EO Ranks (Natural Community EO’s only)?

- Yes → Use Landscape Context to break ties among EO Ranks.
- No → Does natural area have Natural Community EO’s with Observed

- Yes → Use natural areas with largest total Natural Community acreage to break ties among EO Ranks.
- No → Use natural areas with largest number of EO’s to break ties among EO Ranks.
Figure 2: Decision tree for selecting best occurrences of each element for representation rating