



Department of Conservation

Te Papa Atawhai

Community groups—for your information about the translocation process documents

These documents have been written for Department of Conservation (DOC) staff as well as community groups. As a result, it includes DOC-specific terms (which are usually defined) and references to document numbers (DOCDM-...) for use by DOC staff. The majority of these documents will be available on the [DOC website](#). For further information, please email sop@doc.govt.nz.

Reporting Instructions

For further information on reporting requirements, refer to:

- Section 10 of 'Translocation SOP for DOC translocations' ([DOCDM-315121](#)); or
- Section 9 of 'Translocation Guide for Community Groups' ([DOCDM-363788](#) available from your local DOC office, or the [DOC website](#)).

Introduction

There are two types of report to be prepared—transfer reports and monitoring reports.

A **transfer report** provides an account of:

- The collection, holding, transport and release of the species
- Lessons learnt
- Recommendations for future transfers¹

Transfer reports are usually due within two months of the transfer (check the due dates on your approved proposal).

A **monitoring report** provides a full account of:

- Results of the monitoring of the translocated species (e.g. following release, breeding season)
- Evaluation of the results
- Lessons learnt
- Recommendations for adjustments to the management regime
- Information gaps that could be attended to in future translocations²

¹ Transfer is the part of the translocation that involves the physical movement of the plants or animals from one location to another and their release or planting at the new site.

² Translocation is defined here as the managed movement of live plants or animals (taonga) from one location to another. Translocation covers the entire process, including planning, the transfer, release, monitoring and post-release management (up to some predetermined end point) A translocation can consist of one or more transfers.

- Recommendations for future translocation projects

Monitoring reports are usually due within two months of the monitoring programme coming to an end.

When the monitoring programme is ongoing, monitoring reports are to be produced annually/or at the end of each monitoring period if the monitoring period is longer than a year (check the due dates on your approved proposal).

Sometimes it will be logical to combine transfer and monitoring reports into one report—this is usually when the monitoring is done immediately after the transfer (i.e. all sections of the methods and results tables are completed in one report).

Reporting should place emphasis on lessons learnt, explaining when plans were changed and why, and how any unexpected problems were dealt with. **Aim to make the report as useful as possible to guide someone undertaking a similar translocation at a later date.**

How to use these instructions

Complete all sections of the report using the instructions (the text in black font), which can be deleted afterwards. The text in **teal-coloured** font should be retained in your report. Some information can be taken from the approved translocation proposal. Section 3: Methods, 4: Results, and 7: Discussion are presented in tables only to make it easier to see the information required for each type of report. You do not need to follow the table layout when writing your report.

See the **example reports** for a suggested layout:

- Reporting worked example 1—shore plovers transfer and monitoring report ([DOCDM-165359](#), [DOC website](#))
- Reporting worked example 2—North Island robins transfer report ([DOCDM-632593](#), [DOC website](#))
- Reporting worked example 3—North Island robins monitoring report ([DOCDM-629927](#), [DOC website](#))

Information table

Report title	<Report type 'Transfer' and/or 'Monitoring'> Report on the transfer of <what> from <where> to <where> on <when>.
Confidentiality of information in this report	
<ol style="list-style-type: none"> 1. Information made available through this report is provided on the basis that it may assist with future translocations, and so that those carrying out translocations and researchers can share the information for that purpose. 2. Ownership of the information for any other purpose remains with the individual or organisation reporting or contributing this information. 3. In particular, this information should not be given to the media or used in academic or other publications without the specific and written approval of the original source (owner) of this information. 	
Report date	Date the report is completed.

Report writer	Report writer's name, organisation/community group/position, and address (including email).
Project manager	Project manager's name, organisation/community group/position and address (including email).
Type of translocation	Take from section 1.3 in the approved proposal.
Species transferred	State the species transferred. Include: <ul style="list-style-type: none"> • Scientific name • common names • threat status ³ • number transferred, their age and sex
Release site	Name of release site (in full) or Conservation Unit Name (DOC to provide if applicable) Conservation Unit Number (DOC to provide if applicable) Grid Reference (NZMS 260 map series) GIS Reference (DOC to complete if applicable)

1. Summary

Provide a brief summary of the translocation project (refer to section 1.5: Translocation overview of the approved proposal) and the outcomes of the transfer (or the outcomes of the monitoring if this is a monitoring report).

Include:

- The main aim of the translocation project and how it was carried out
- The date(s) of transfer(s)/release(s)
- How many were transferred, their age and sex
- Mention of any captive holding period (if this is a transfer report)
- Main results and conclusions

2. Introduction

Background/context

Provide background/context information on the translocation (take from sections 2.1: Reason and 2.3: Context of the approved proposal).

³ NZ threat classification systems and lists are found on the DOC website: <http://www.doc.govt.nz/publications/conservation/nz-threat-classification-system/> (Viewed 19 September 2012)

Previous transfers/monitoring (only for translocations that involve multiple transfers)

Provide a summary of the results of any previous transfers and monitoring that have taken place to date as part of this translocation⁴. Include any reports on previous transfers in the reference section.

Release site

Provide a description of the release site including location, size and habitat (take from section 5.3.2: Description of release site of approved proposal).

Conservation outcomes

State the conservation outcomes from section 2.4 of the approved proposal.

Operational targets

State the operational targets from section 2.5 of the approved proposal.

Research objectives

If applicable, state the research objectives from section 2.6 of the approved proposal.

3. Methods

If writing a transfer report:	If writing a monitoring report:
<p>Describe in detail the methods used for the transfer (i.e. how did you do it?), using and amending, if necessary, the subheadings below that are relevant to your project.</p> <p>For each subheading, refer back to the methods described in Section 8: Translocation design of the approved proposal, and report on any changes that were made to the transfer methods and why the changes were made (e.g. changes due to: improvisations on the transfer day; or in the case of multiple transfer proposals—amendments made to the translocation design as a result of learning from initial transfers).</p>	<p>The monitoring programme</p> <p>Outline the research and/or monitoring programme (refer to Section 10: Research and monitoring in the approved proposal)</p> <p>Monitoring methods</p> <p>Describe in detail the methods used for monitoring of the species, and report on any changes in the monitoring programme from that in the translocation proposal and why the changes were made</p>
<p>Personnel</p> <p>State how many people were involved in the work, who they were, what they did and how long it took. This information can assist managers planning future translocations.</p>	<p>See also bottom of table</p>
<p>Quarantine, disease screening and health</p> <p>Confirm that the quarantine and disease screening</p>	

⁴ The term ‘translocation’ covers the entire process of the translocation project—including planning, the transfer(s), monitoring and post-release management. ‘Transfer’ is the part of the translocation that is physically moving a plant/animal from one place to another.

If writing a transfer report:	If writing a monitoring report:
<p>outlined in the translocation proposal was undertaken, describing in detail the methods used to acquire samples and, if quarantine occurred, how the animals were housed. Describe what other health checks were done.</p>	
<p>Other pre-transfer preparations</p> <p>This could include things such as: steps taken to prepare captive-bred animals for the wild (refer to Section 8.4: Pre-transfer preparation of animals of the approved proposal); or, for example, training robins to approach people for mealworms to make it easier to catch them later.</p>	
<p>Source and composition of transfer population</p> <p>State the source and composition of the transfer group, including age, sex ratio, singles/pairs, total number of individuals. When a species is sourced from captivity/cultivation, state the wild origin of that population. Report on any changes from the approved proposal (refer to section 4.2: Source population and section 8.2: Composition), why the changes were made and any implications for the translocated population.</p>	
<p>Capture (or collection) and handling techniques</p> <p>Describe the techniques used to capture/collect the species. Describe any procedures carried out on the animals during handling, such as banding, measuring, weighing, sexing, taking samples etc.</p>	
<p>Transfer</p> <p>Describe how the species was transported, including the type of transfer box.</p>	
<p>Temporary aviary/enclosure set-up and captive husbandry (if applicable)</p> <p>Describe how the aviary/enclosure was set up and furnished, how the animals were cared for, what they were fed and how much/often, and how long they were held in the aviary/enclosure.</p>	
<p>Release</p> <p>Describe how the species was released or planted, including time of day, distribution of animals around the release site, whether it was a delayed or</p>	

If writing a transfer report:	If writing a monitoring report:
immediate release.	
Post-release management	
Describe any short-term management undertaken at the release site to facilitate the establishment of the transferred species (refer to section 8.8: Post-release management in the approved proposal)	
Describe any post-release management required for other species or the site as a result of this translocation and why it was needed (refer to section 6: Ecological impacts at release sites in the wild in the approved proposal).	

4. Results

If writing a transfer report:	If writing a monitoring report:
Describe in detail the results of the transfer (i.e. what happened?), using the same relevant subheadings from the methods section.	Describe in detail the results of the research and/or monitoring programme. Evaluate the monitoring results including: <ul style="list-style-type: none"> • Comparing results to conservation outcomes, operational targets and research objectives • Trends over time, etc What are the implications for the transferred species?
Quarantine, disease screening and health Document the results of the quarantine and disease screening. Comment on the health of the individuals before, during and after translocation (i.e. comment on whether any individuals animals died during capture, holding and movement and if so, how many and why) and describe any treatments given. Attach any disease screening or pathology results as an appendix.	See bottom of table
Other pre-transfer preparations If applicable, describe how the species responded to any other pre-transfer preparations and how well they worked.	

If writing a transfer report:	If writing a monitoring report:
<p>Capture (or collection) and handling</p> <p>Describe what/how many were captured and handled, how long it took, weather conditions⁵ and any problems that occurred.</p> <p>Attach tables as an appendix, with details of any banding, measuring, weighing, sexing, samples taken, etc. as applicable.</p>	
<p>Transfer</p> <p>Describe how well the transfer went, including weather conditions and the length of time the transfer took.</p>	
<p>Temporary aviary captive husbandry (if applicable)</p> <p>Describe how the animals behaved during their temporary holding, what worked well and whether there were any problems. Describe weather conditions during holding.</p>	
<p>Release</p> <p>Describe how the species behaved once released, weather conditions⁵, and whether everything went to plan.</p>	
<p>Post-release management</p> <p>State the results of any short-term management undertaken at the release site to facilitate the establishment of the transferred species</p> <p>State the results of any post release management required for other species or the site as a result of this translocation.</p>	
<p>Consultation and community relations</p> <p>Refer to section 11: Consultation and community relations of the approved proposal:</p> <ul style="list-style-type: none"> • Briefly describe what consultation was undertaken with iwi affected by the proposal and affected/interested parties and the outcomes • Briefly list the public participation and media opportunities undertaken and the outcomes • Briefly state how the public interest issues were 	<p>Consultation and community relations</p> <p>Refer to section 11: Consultation and community relations of the approved proposal:</p> <ul style="list-style-type: none"> • Describe any ongoing communication with iwi affected by the proposal and affected/interested parties and the outcomes • Describe any public participation and media opportunities undertaken and the outcomes

⁵ Quantifiable information describing weather conditions is more useful, .e.g. reporting 'there was a gale force southerly for 5 hours' is more informative than 'the weather was bad'.

If writing a transfer report:	If writing a monitoring report:
<p>managed and the outcomes</p> <p>Comment on the entire consultation and community relations process. What would you repeat, what would you change for future translocations and explain why—these are the lessons learnt.</p>	

5. Other observations

Record other observations that you think are important. State what you think and why, stating clearly the evidence upon which you base these observations.

6. Costs

The purpose of this section is to provide information on whether the budget was realistic and, if not, what sort of things cost more or less than expected. Information provided here will help people estimate the costs for future translocations. What budget would you recommend in future?

Description	Approved budget	Actual costs	Explanation
<ul style="list-style-type: none"> List specific items approved in budget. Restate from section 12: Budget of the approved proposal List additional expenses not originally budgeted for 	<p>Give budgeted cost for each item. Restate from section 12: Budget of the approved proposal</p>	<p>Give actual cost for each item in description</p>	<p>Explain:</p> <ul style="list-style-type: none"> Any differences between budgeted and actual costs Additional expenses
TOTAL	\$	\$	

7. Discussion and recommendations

If writing a transfer report:	If writing a monitoring report:
<p>Discuss the results of the transfer and any other aspects of the translocation and state any conclusions drawn from the results (i.e. was the transfer successful/worthwhile? Were targets met? Are the desired outcomes [outlined above in this report (section 2: Introduction)] likely to be achieved?).</p>	<p>Discuss the results of the transfer and monitoring and any other aspects of the translocation and state any conclusions drawn from the results (i.e. was the translocation successful/worthwhile? Were targets met? Are the desired outcomes [outlined above in this report (section 2: Introduction)] likely to be achieved?).</p>
Provide clear recommendations for future	Provide clear recommendations for future

<p>If writing a transfer report:</p> <p>translocations and the reasons for them:</p> <ul style="list-style-type: none"> • Comment on each step in the transfer process, what you would repeat, what you would change for future transfers and explain why—these are the lessons learnt 	<p>If writing a monitoring report:</p> <p>translocations and the reasons for them:</p> <ul style="list-style-type: none"> • Comment on the management regime and the monitoring programme, what you would repeat, what you would change for future translocations and explain why—these are the lessons learnt
Add recommendations arising from the consultation and community relations process.	
Add recommendations relating to the budget.	
List any recommendations for changes needed to DOC policy, SOPs or best practice based on experience in this translocation. Provide reasons for them.	

8. Acknowledgements

An opportunity to thank those involved, sponsors etc.

9. References

References need to be specific and traceable. Make sure all references cited in the report are also listed in the reference list and vice versa.

Translocation proposal	Restate the translocation title from section 1.1 in the approved proposal. State DME number (for DOC reports) and/or file details.
Workplan (DOC reports only)	Title of workplan. State file details where workplan is held.
Transfer report(s)	Title of report. State DME number (for DOC reports) and/or file details. List all reports associated with this translocation if there were multiple transfers.
Monitoring report(s)	Title of report. State DME number (for DOC reports) and/or file details. List all reports associated with this translocation if covering multiple monitoring periods/years.
Other	For example, references cited in text such as scientific papers.

Appendices

Appendix 1	Appendices as required. E.g. media releases, field data, maps.
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Go to:

- Reporting worked example 1—Shore plover transfer and monitoring report ([DOCDM-165359](#), [DOC website](#))
- Reporting worked example 2—North Island robins transfer report ([DOCDM-632593](#), [DOC website](#))
- Reporting worked example 3—North Island robins monitoring report ([DOCDM-629927](#), [DOC website](#))
- Translocation Standard Operating Procedure (SOP)—planning through to reporting for DOC translocations ([DOCDM-315121](#))
- Return to Translocation Guide for Community Groups ([DOCDM-363788](#), [DOC website](#))
- Processing translocation proposals SOP ([DOCDM-315123](#))
- Translocation Proposal Form ([DOCDM-59825](#), [DOC website](#))
- Explanatory Notes for the Translocation Proposal Form ([DOCDM-774881](#), [DOC website](#))