

GUIDELINES FOR BOG TURTLE SURVEYS¹

(revised April 2006)

RATIONALE

A bog turtle survey (when conducted according to these guidelines) is an attempt to determine presence or probable absence of the species; it does not provide sufficient data to determine population size or structure. Following these guidelines will standardize survey procedures. It will help maximize the potential for detection of bog turtles at previously undocumented sites at a minimum acceptable level of effort. Although the detection of bog turtles confirms their presence, failure to detect them does not absolutely confirm their absence (likewise, bog turtles do not occur in all appropriate habitats and many seemingly suitable sites are devoid of the species). Surveys as extensive as outlined below are usually sufficient to detect bog turtles; however, there have been instances in which additional effort was necessary to detect bog turtles, especially when habitat was less than optimum, survey conditions were less than ideal, or turtle densities were low.

PRIOR TO CONDUCTING ANY SURVEYS

If a project is proposed to occur in a county of known bog turtle occurrence (see attachment 1), contact the U.S. Fish and Wildlife Service (Service) and/or the appropriate State wildlife agency (see attachment 2). They will determine whether or not any known bog turtle sites occur in or near the project area, and will determine the need for surveys.

- < If a wetland in or near the project area is *known* to support bog turtles, measures must be taken to avoid impacts to the species. The Service and State wildlife agency will work with federal, state and local regulatory agencies, permit applicants, and project proponents to ensure that adverse effects to bog turtles are avoided or minimized.
- < If wetlands in or adjacent to the project area are *not* known bog turtle habitat, conduct a bog turtle habitat survey (Phase 1 survey) if:
 1. The wetland(s) have an emergent and/or scrub-shrub wetland component, or are forested with suitable soils and hydrology (see below), *and*
 2. Direct and indirect adverse effects to the wetland(s) cannot be avoided.

See *Bog Turtle Conservation Zones*² for guidance regarding activities that may affect bog turtles and their habitat. In addition, consult with the Fish and Wildlife Service and/or appropriate State wildlife agency to definitively determine whether or not a Phase 1 survey will be necessary.

¹ These guidelines are a modification of those found in the final “Bog Turtle (*Clemmys muhlenbergii*), Northern Population, Recovery Plan” (dated May 15, 2001). Several minor revisions were made to facilitate survey efforts and increase searcher effectiveness. As additional information becomes available regarding survey techniques and effectiveness, these survey guidelines may be updated and revised. Contact the Fish and Wildlife Service or one of the state agencies listed in Attachment 1 for the most recent version of these guidelines.

² See Appendix A of the “Bog Turtle (*Clemmys muhlenbergii*), Northern Population, Recovery Plan” (dated May 15, 2001).

BOG TURTLE HABITAT SURVEY (= Phase 1 survey)

The purpose of this survey is to determine whether or not the wetland(s) are *potential* bog turtle habitat. These surveys are performed by a recognized, qualified bog turtle surveyor (contact the Service or the appropriate State wildlife agency to receive a list of recognized, qualified bog turtle surveyors). The following conditions and information apply to habitat surveys.

< Surveys can be performed any month of the year (except when significant snow and/or ice cover is present). This flexibility in conducting Phase 1 surveys allows efforts during the Phase 2 survey window to be spent on wetlands most likely to support bog turtles (*i.e.*, those that meet the criteria below).

< Potential bog turtle habitat is recognized by three criteria (*not all of which may occur in the same portion of a particular wetland*):

1. **Suitable hydrology.** Bog turtle wetlands are typically spring-fed with shallow surface water or saturated soils present year-round, although in summer the wet area(s) may be restricted to near spring head(s). Typically these wetlands are interspersed with dry and wet pockets. There is often subsurface flow. In addition, shallow rivulets (less than 4 inches deep) or pseudo-rivulets are often present.
2. **Suitable soils.** Usually a bottom substrate of permanently saturated organic or mineral soils. These are often soft, mucky-like soils (this does not refer to a technical soil type); you will usually sink to your ankles (3-5 inches) or deeper in muck, although in degraded wetlands or summers of dry years this may be limited to areas near spring heads or drainage ditches. In some portions of the species' range, the soft substrate consists of scattered pockets of peat instead of muck.
3. **Suitable vegetation.** Dominant vegetation of low grasses and sedges (in emergent wetlands), often with a scrub-shrub wetland component. Common emergent vegetation includes, but is not limited to: tussock sedge (*Carex stricta*), soft rush (*Juncus effusus*), rice cut grass (*Leersia oryzoides*), sensitive fern (*Onoclea sensibilis*), tearthumbs (*Polygonum* spp.), jewelweeds (*Impatiens* spp.), arrowheads (*Sagittaria* spp.), skunk cabbage (*Symplocarpus foetidus*), panic grasses (*Panicum* spp.), other sedges (*Carex* spp.), spike rushes (*Eleocharis* spp.), grass-of-Parnassus (*Parnassia glauca*), shrubby cinquefoil (*Dasiphora fruticosa*), sweet-flag (*Acorus calamus*), and in disturbed sites, reed canary grass (*Phalaris arundinacea*) or purple loosestrife (*Lythrum salicaria*). Common scrub-shrub species include alder (*Alnus* spp.), red maple (*Acer rubrum*), willow (*Salix* spp.), tamarack (*Larix laricina*), and in disturbed sites, multiflora rose (*Rosa multiflora*). Some forested wetland habitats are suitable given hydrology, soils and/or historic land use. These forested wetlands include red maple, tamarack, and cedar swamps.

Suitable hydrology and soils are the critical criteria (*i.e.*, the primary determinants of potentially suitable habitat).

< Suitable hydrology, soils and vegetation are necessary to provide the critical wintering sites (soft muck, peat, burrows, root systems of woody vegetation) and nesting habitats (open areas with tussocky or hummocky vegetation) for this species. It is very important to note,

however, that one or more of these criteria may be absent from portions of a wetland or wetland complex supporting bog turtles. Absence of one or more criteria does not preclude bog turtle use of these areas to meet important life functions, including foraging, shelter and dispersal.

- < If these criteria (suitable soils, vegetation and hydrology) are present in the *wetland*, then the *wetland* is considered to be potential bog turtle habitat, regardless of whether or not that portion of the wetland occurring within the project boundaries contains all three criteria. If the *wetland* is determined to be potential habitat and the project will directly or indirectly impact *any portion* of the wetland (see *Bog Turtle Conservation Zones*), then either:
 - < Completely avoid all direct and indirect effects to the wetland, in consultation with the Service and appropriate State wildlife agency, OR
 - < Conduct a Phase 2 survey to determine the presence of bog turtles.
- < The Service and appropriate State wildlife agency (see list) should be sent a copy of survey results for review and comment including: a USGS topographic map indicating location of site; project design map, including location of wetlands and stream and delineation of wetland type (PEM, PSS, PFO, POW) and “designated survey areas”³; color photographs of the site; surveyor's name; date of visit; opinion on potential/not potential habitat; a description of the hydrology, soils, and vegetation. A phase 1 report template and field form are available from the States and Service.

BOG TURTLE SURVEY (= Phase 2 survey)

If the wetland(s) are identified as potential bog turtle habitat (see Phase 1 survey), and direct and indirect adverse effects cannot be avoided, conduct a bog turtle survey in accordance with the specifications below. Note that this is *not* a survey to estimate population size or structure; a long-term mark/recapture study would be required for that.

Prior to conducting the survey, contact the appropriate State agency (see attached list) to determine whether or not a scientific collector's permit valid for the location and period of the survey will be required.

The Phase 2 survey will focus on the areas of the wetland that meet the soils, hydrology and vegetation criteria, as defined under the Phase 1 survey guidelines. Those areas that meet the criteria are referred to as “designated survey areas” for Phase 2 and Phase 3 survey purposes.

1. Surveys should only be performed during the period from April 15-June 15. For the Lake Plain Recovery Unit (see Recovery Plan), surveys should only be performed during the period from May 1 to June 30. This coincides with the period of greatest annual turtle activity (spring emergence and breeding) and before vegetation gets too dense to accurately survey. While turtles may be found outside of these dates, a result of no turtles would be considered inconclusive. Surveys beyond June also have a higher likelihood of disruption or destruction of nests or newly hatched young.

³ “Designated survey areas” are those areas of the wetland that meet the soils, hydrology and vegetation criteria for potential bog turtle habitat. These areas may occur within the emergent, scrub-shrub or forested parts of the wetland.

2. Ambient air temperature at the surface in the shade should be $\geq 55^{\circ}$ F.
3. Surveys should be done during the day, at least one hour after sunrise and no later than one hour before sunset.
4. Surveys may be done when it is sunny or cloudy. In addition, surveys may be conducted during and after light rain, provided air temperatures are $\geq 65^{\circ}$ F.
5. At least one surveyor must be a recognized qualified bog turtle surveyor⁴, and the others should have some previous experience successfully conducting bog turtle surveys or herpetological surveys in wetlands. To maintain survey effort consistency and increase the probability of encountering turtles, the same surveyors should be used for each wetland.
6. A minimum of four (4) surveys per wetland site are needed to adequately assess the site for presence of bog turtles. At least two of these surveys must be performed in May. From April 15 to April 30, surveys should be separated by six or more days. From May 1 to June 15, surveys should be separated by three or more days. The shorter period between surveys during May and June is needed to ensure that surveys are carried out during the optimum window of time (*i.e.*, before wetland vegetation becomes too thick).

Note that bog turtles are more likely to be encountered by spreading the surveys out over a longer period. For example, erroneous survey results could be obtained if surveys were conducted on four successive days in late April due to possible late spring emergence, or during periods of extreme weather because turtles may be buried in mud and difficult to find.

Because this is solely a presence/absence survey, survey efforts at a particular wetland may cease once a bog turtle has been found.

7. Survey time should be at least four (4) to six (6) person-hours per acre of designated survey area per visit. Additional survey time may be warranted in wetlands that are difficult to survey or that have high quality potential habitat. The designated survey area includes all areas of the wetland where soft, mucky-like soils are present, regardless of vegetative cover type. This includes emergent, scrub-shrub, and forested areas of the wetland.

If the cover is too thick to effectively survey using Phase 2 survey techniques alone (*e.g.*, dominated by multiflora rose, reed canary grass, *Phragmites*), contact the Service and State wildlife agency for guidance on Phase 3 survey techniques (trapping) to supplement the Phase 2 effort. In addition, Phase 3 (trapping) surveys may also be warranted if the site is in the Lake Plain-Prairie Peninsula Recovery Unit. Check with the Service or State wildlife agency for further guidance.

⁴ Searching for bog turtles and recognizing their habitat is a skill that can take many months or years of field work to develop. This level of expertise is necessary when conducting searches in order to ensure that surveys are effective and turtles are not harmed during the survey (*e.g.*, by stepping on nests). Many individuals that have been recognized as qualified to conduct bog turtle surveys obtained their experience through graduate degree research or employment by a state wildlife agency. Others have spent many years actively surveying for bog turtles as amateur herpetologists or consultants.

8. Walk quietly through the wetland. Bog turtles will bask on herbaceous vegetation and bare ground, or be half-buried in shallow water or rivulets. Walking noisily through the wetland will often cause the turtles to submerge before they can be observed. Be sure to search areas where turtles may not be visible, including under mats of dead vegetation, shallow pools, underground springs, open mud areas, vole runways and under tussocks. Do not step on the tops of tussocks or hummocks because turtle nests, eggs and nesting microhabitat may be destroyed. Both random opportunistic searching and transect surveys should be used at each wetland.

The following survey sequence is recommended to optimize detection of bog turtles:

- Semi-rapid walk through the designated survey area using visual encounter techniques.
 - If no bog turtles are found during visual survey, while walking through site identify highest quality habitat patches. Within these highest quality patches, begin looking under live and dead vegetation using muddling and probing techniques.
 - If still no bog turtles are found, the rest of the designated survey area should be surveyed using visual encounter surveys, muddling and probing techniques.
9. Photo-documentation of each bog turtle located will be required; a macro lens is highly recommended. The photos should be in color and of sufficient detail and clarity to identify the bog turtle to species and individual. Therefore, photographs of the carapace, plastron, and face/neck markings should be taken of each individual turtle. Do not harass the turtle in an attempt to get photos of the face/neck markings; if gently placed on the ground, most turtles will slowly extend their necks if not harassed. If shell notching is conducted, do the photo-documentation after the notching is done.
 10. The following information should be collected for each bog turtle: sex, carapace length-straight line and maximum length, carapace width, weight, and details about scars/injuries. Maximum plastron length information should also be collected to differentiate juveniles from adults as well as to obtain additional information on recruitment, growth, and demography.
 11. Each bog turtle should be marked (*e.g.*, notched, PIT tagged) in a manner consistent with the requirements of the appropriate State agency and/or Service. Contact the appropriate State wildlife agency prior to conducting the survey to determine what type of marking system, if any, should be used.
 12. All bog turtles must be returned to the point of capture as soon as possible on the same day as capture. They should only be held long enough to identify, measure, weigh, and photograph them, during which time their exposure to high temperatures must be avoided. No bog turtles may be removed from the wetland without permission from the Service and appropriate State agency.
 13. The Fish and Wildlife Service and appropriate State agency should be sent a copy of survey results for review and concurrence, including the following: dates of site visits; time spent

per designated survey area per wetland per visit; names of surveyors; a site map including wetlands and delineations of designated survey areas; a table indicating the size of each wetland, the designated survey area within each wetland, and the survey effort per visit; a description of the wetlands within the project area (*e.g.*, acreage, vegetation, soils, hydrology); an explanation of which wetlands or portions of wetlands were or were not surveyed, and why; survey methodology; weather per visit at beginning and end of survey (air temperature, wind, and precipitation); presence or absence of bog turtles, including number of turtles found and date, and information and measurements specified in item 10 above; and other reptile and amphibian species found and date.

ADDITIONAL SURVEYS / STUDIES

Proper implementation of the Phase 2 survey protocol is usually adequate to determine species presence or probable absence, especially in small wetlands lacking invasive plant species.

Additional surveys, however, may be necessary to determine whether or not bog turtles are using a particular wetland, especially if the Phase 2 survey results are negative but the quality and quantity of habitat are good and in a watershed of known occurrence. In this case, additional surveys (Phase 2 and/or Phase 3 (trapping) surveys), possibly extending into the following field season, may be recommended by the Service or appropriate State agency.

If bog turtles are documented to occur at a site, additional surveys/studies may be necessary to characterize the population (*e.g.*, number, density, population structure, recruitment), identify nesting and hibernating areas, and/or identify and assess adverse impacts to the species and its habitat, particularly if project activities are proposed to occur in, or within 300 feet of, wetlands occupied by the species.

CONTACT AGENCIES - BY STATE*(April 2006)*

STATE	FISH AND WILDLIFE SERVICE	STATE AGENCY
Connecticut	U.S. Fish and Wildlife Service New England Field Office 22 Bridge Street, Unit #1 Concord, NH 03301	Department of Environmental Protection Env. & Geographic Information Center 79 Elm Street, Store Floor, Hartford, CT 06106 <i>(info about presence of bog turtles in or near a project area)</i> Department of Environmental Protection Wildlife Division, Sixth Floor 79 Elm Street, Store Floor, Hartford, CT 06106 <i>(to get a Scientific Collectors Permit or determine what type of marking system to use)</i>
Delaware	U.S. Fish and Wildlife Service Chesapeake Bay Field Office 177 Admiral Cochrane Drive Annapolis, MD 21401	Nongame & Endangered Species Program Delaware Division of Fish and Wildlife 4876 Hay Point Landing Road Smyrna, DE 19977
Maryland	U.S. Fish and Wildlife Service Chesapeake Bay Field Office 177 Admiral Cochrane Drive Annapolis, MD 21401	Maryland Department of Natural Resources Wildlife & Heritage Division PO Box 68, Main Street Wye Mills, MD 21679
Massachusetts	U.S. Fish and Wildlife Service New England Field Office 22 Bridge Street, Unit #1 Concord, NH 03301	Division of Fisheries and Wildlife Dept. Fisheries, Wildlife and Env Law Enforcement Rt. 135 Westboro, MA 01581
New Jersey	U.S. Fish and Wildlife Service New Jersey Field Office 927 North Main Street, Bldg. D-1 Pleasantville, NJ 08232	New Jersey Division of Fish and Wildlife Endangered and Nongame Species Program 143 Van Syckels Road Hampton, NJ 08827
New York	U.S. Fish and Wildlife Service 3817 Luker Road Cortland, NY 13045	New York Natural Heritage Program Department of Environmental Conservation 700 Troy-Schenectady Road Latham, NY 12110-2400 <i>(info about presence of bog turtles in or near a project area)</i> NY Department of Environmental Conservation Special Licenses Unit 50 Wolf Road, Albany, NY 12233 <i>(for endangered species permit applications)</i>
Pennsylvania	U.S. Fish and Wildlife Service Pennsylvania Field Office 315 South Allen Street, Suite 322 State College, PA 16801	Natural Diversity Section Pennsylvania Fish and Boat Commission 450 Robinson Lane Bellefonte, PA 16823

BOG TURTLE COUNTIES OF OCCURRENCE OR LIKELY OCCURRENCE¹
(April 2006)

STATE	COUNTY	
Connecticut	Fairfield	Litchfield
Delaware	New Castle	
Maryland	Baltimore Carroll	Cecil Harford
Massachusetts	Berkshire	
New Jersey	Burlington Gloucester Hunterdon Middlesex Monmouth Morris	Ocean Salem Somerset Sussex Union Warren
New York	Albany Columbia Dutchess Genesee Orange Oswego Putnam	Seneca Sullivan Ulster Wayne Westchester
Pennsylvania	Adams Berks Bucks Chester Cumberland Delaware Franklin	Lancaster Lebanon Lehigh Monroe Montgomery Northampton Schuylkill York

¹ *This list is valid for one year from the date indicated. It may, however, be revised more frequently if new counties of occurrence are documented. Updates to this list are available from the Service upon request.*