



## Independent Scientific Review Panel

for the Northwest Power & Conservation Council  
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**Memorandum (ISRP 2012-14)**

**September 26, 2012**

**To:** Tony Grover, Director, Fish and Wildlife Division, Northwest Power and Conservation Council

**From:** Rich Alldredge, ISRP Chair

**Subject:** Review of the Willamette Wildlife Mitigation Program (#2011-003-00)

### **Background**

At the Northwest Power and Conservation Council's August 16, 2012 request, the ISRP reviewed a proposal for the Oregon Department of Fish and Wildlife's *Willamette Wildlife Mitigation Program* (#2011-003-00). This program was established by the *Willamette River Basin Memorandum of Agreement Regarding Wildlife Habitat Protection and Enhancement* between the State of Oregon and the Bonneville Power Administration in October 2010. The program has developed a new public process and criteria to be used for prioritizing projects that apply to receive acquisition funding from BPA. This program attempts to address the most critical and urgent needs for habitat protection on a landscape scale, which should benefit a multitude of species. The program's habitat protection and restoration focus is on protecting those habitat types that have been identified as most at risk in the Willamette basin.

### **Recommendation**

Response requested. The proposal sections that need to be clarified and expanded are identified below. At this stage, the ISRP focus is on the selection criteria proposed for acquiring lands. In the future, the ISRP should review the protocols for monitoring and evaluation of lands purchased.

### **Comments**

#### *1. Purpose, Significance to Regional Programs, Technical Background, and Objectives*

The Problem Statement provides a very good description of the history that resulted in the unique agreement of the 2010 settlement and Memorandum of Understanding. The proposal clearly presents valuable first steps toward connecting with other programs. These first steps should be strengthened by providing additional details as identified below. The ISRP compliments the proponents on establishing a framework for communication among the stakeholders.

Technical background responses: Table 1 is a reasonable beginning to presenting information and literature available that describes habitat associations of the focal species selected for this project. The information should be updated periodically and the authors also should develop a synthesis of the information in Table 1. An important step in this synthesis would be the construction of a geographical database that includes current and past distribution of these species in the Willamette Basin, data on population trends over time (e.g. breeding bird surveys, fish surveys, and herptile surveys) and the current and past distribution of focal habitats.

This database would allow the Collaboration Group and the Group to evaluate land purchases relative to focal species and focal habitats (i.e. those habitats identified in the “Habitat type and Current Condition” under selection criteria). The authors should also include data layers that mapped predicted “risk of development” to these habitats. An additional technical improvement requested by the ISRP is the presentation of a review of the past, present, and ongoing restoration activities in the Willamette Valley. ODFW’s *Upper Willamette River Conservation & Recovery Plan for Chinook Salmon & Steelhead* makes powerful use of current and desired distribution maps, and the GreenBelt Conservation Plan (<http://www.greenbeltlandtrust.org/about/goals.html>) uses data layers to clearly present the relationship between property types in the Valley. Sources of information for data layer construction could be PISCES and the Northwest Habitat Institute.

The current Section VI identifies groups involved in habitat restoration in the Willamette Valley. The ISRP requests that this table be complemented with a section that summarizes ecological and practical approaches to restoration activities in the Willamette Valley. A few documents that could be useful in constructing this summary are the BiOp and the Willamette Valley Conservation Plan. The summary may identify management activities that were successful, those that were unsuccessful, and activities proposed for future restorations. This summary should capture past and present approaches to restoring the Willamette Valley ecosystem. A good example of work that synthesized existing ecological knowledge and linked this knowledge to management activities is the NMFS Biological Opinion for the Willamette Project.

General comments about objectives are provided immediately below. More details are provided in other sections of the ISRP review.

- OBJ-1: Fulfill the objectives of the 2010 MOA

This objective is clearly presented and identified. The goal is to acquire 16,880 acres or more by the year 2025 to fulfill the mitigation requirements of the Willamette MOA. The April 2012 document states that two ODFW staff members were hired to work on this project and have been working on the project since October 2010 indicating a commitment to fulfill the objectives.

- OBJ-2: Long Term Account: Establish a Long Term Account to be used by ODFW after 2025 to maintain acquisition properties and sustain the Willamette Wildlife Mitigation Program

It is not clear if this is the purpose of “Long Term Stewardship Account” mentioned on page 48 of the proposal. The ISRP understands that this is the Stewardship Account referenced in the MOA (see page 73 of the Willamette Wildlife Mitigation Program document). The accounts in use by ODFW and BPA should be more clearly identified and their use better described in the document.

- OBJ-3: Establish a compliance monitoring program

The purpose of this monitoring program is to assure acquisition properties are being managed in accordance with their easements and restrictions and that the properties provide high quality wildlife habitat according to their individual management plans. More explanation of this monitoring is needed. The ISRP recognizes that program personnel were hired recently, but the history of project land management and subsequent monitoring suggests that this issue needs much immediate attention. The ISRP requests that a general monitoring plan be developed now to highlight approaches planned for use on project lands. The ISRP expects that future proposals will provide monitoring and evaluation details.

- OBJ-4: Project selection criteria: Establish Project selection criteria that have been reviewed by the ISRP

The general goals, group membership, and use of the Land Stewardship account were fairly well identified on page 47 in Attachment 2 of the Willamette Wildlife Mitigation Program, April 2012. At this stage of development, the criteria are described in general terms. In sections that follow, the ISRP requests more specific information about the selection criteria and how they will be used to make purchase decisions.

- OBJ-5: Form a Wildlife Advisory Committee: Form a Wildlife Advisory Committee composed of major stakeholders who will meet on an annual basis and review Willamette Wildlife acquisition using established project criteria in order to make suggestions on project recommendations to ODFW

The proposal identified 41 group members. Because of the large number in the group, the ISRP suggests that the authors outline protocols for participation in the review process. For example, the authors should specify criteria that identify what percentage of the group is to participate when the group makes decisions (i.e., simple majority, plurality, 75% of the group). Given the emphasis on quick decision-making and meeting acreage goals by 2025, the ISRP suggest an annual or semi-annual timeline for proposal review. The protocols could help guide the decision-making process and identify commitments expected from participants. The protocols should identify when, where and how (electronic?) proposals are to be submitted, and when the group plans to evaluate proposals and identify their selections. The timeline would allow groups submitting proposals to plan ahead and would also allow the Proposal Review Group to more clearly identify and plan its workload. The authors should also provide templates for use by parties submitting proposals with templates reflecting the current criteria used for project selection.

## *2. History: Accomplishments, Results, and Adaptive Management*

The history is brief because this project constitutes a new direction, with new staff, for the Program. Results are reported in terms of acres acquired in 2011 and expected in 2012, and the number of projects submitted for consideration in 2013. The total anticipated acquired acreage is on track to reach the goal of at least 16880 acres by 2025.

The nature of adaptive management appears to be one of modifying strategies in response to challenges as they arise. This flexibility in modifying the program is beneficial as long as the changes and rationale for the changes are clearly communicated with all interested parties and continuing evaluation takes

place. An example of the use of adaptive management in the Willamette Valley could serve others well and ought to be included in the document.

### *3. Project Relationships, Emerging Limiting Factors, and Tailored Questions for Type of Work (Hatchery, RME, Tagging)*

The description of project relationships is adequate. Emerging limiting factors should include a discussion of the impact of contaminants as well as more discussion of the effect of climate change on program strategies.

### *4. Deliverables, Work Elements, Metrics, and Methods*

The active involvement of major stakeholders in the basin provided a positive approach for development of the proposal. Although involvement of such a large number of participants is time consuming, it is likely a very effective way of providing a broad base of support and involvement for the multi-year program. There appears to be good representation of major interests. One exception to this is the apparent lack of any representation by agricultural interests. They are likely a key player in this effort and representation would be beneficial.

A number of work elements, likely critical to the success of this program, are identified in the proposal, but there is a general lack of specific plans or timelines for their completion. For a program that is already underway and intending to increase activities in the next few years, plans and timelines for work element would help ensure timely completion and incorporation into the program. The lack of fully developed tools that are ready and available for Program application is likely to adversely affect program performance and efficiency. Necessary information includes:

- 1) Discussion of the format and content of management plans that are to be developed for each parcel acquired since signing of the MOA, and if possible for parcels acquired before the MOA. As noted on page 30 of the proposal, these plans will play a key role in driving future monitoring and evaluation and will include a required monitoring section. Information on the time frame for completion of management plans should be specified. A discussion is needed concerning whether updates and revisions to the management plans will be required based on new information or changing conditions. Additional guidance for completion of management plans is critical and will help to facilitate adaptive management of the parcels.
- 2) Details concerning implementation, effectiveness monitoring and evaluation: It appears that this component of the Program is still in the "idea" stage with no established, quantitative monitoring questions, protocols or operational testing. This is a major concern for an aggressive, ongoing project. This will be a complex effort, which is acknowledged by the authors. The proposal identifies a team for development of the monitoring plan. This seems a good idea but will likely require a good deal of time and effort to organize and implement. A specific development plan, with an associated timeline for key activities, is needed to ensure timely completion. One approach would be to identify and develop near-term, "must do" monitoring elements and protocols. This direction could be used for the next 1 to 3 years while the longer-term, full-scale monitoring and evaluation program could be developed and tested. Having a well-designed and operationally tested monitoring program for implementation and effectiveness is necessary for program success and needs to be developed.

As mentioned above, geographic data base, mapping, and data management need to be developed. This is a critical element for success of the program. The proposal provides several examples of needs including real property inventory plus general characteristics of each parcel and protection requirements; baseline condition inventory; annual qualitative assessment; monitoring of habitat quality and fish and wildlife response to protected lands; standardized compliance monitoring and presence-absence surveys of ESA and Strategy species. The data management system will need to be used by variety of data collectors, managers, and the public. There is a critical need to identify or develop such a system for use. Existing mapping, data base, and data management systems already in use in the Columbia River Basin should be evaluated for applicability.

#### *5. Specific Comments on the Acquisition Prioritization Criteria*

The section on Selection Criteria reflects substantial effort to engage a range of stakeholders and to address a wide range of important considerations for selecting parcels for the Program. The ISRP has identified a number of issues that need to be addressed or clarified including:

- 1) The current selection approach is heavily weighted towards operational/administrative considerations and does not incorporate a number of important ecological considerations, many of which are noted in the proposal or in the Oregon Conservation Strategy. In its current form, only 1 of the 9 model criteria (Habitat Type and Condition) addresses ecological considerations. This represents only 6 of the possible 18 total points assigned by the model.

A number of important ecological considerations are addressed in the section “Program Objectives and Mandatory Requirements.” These include: parcel scope and scale to support species at the population scale; parcel size relative to location in a developed landscape; presence of unique or rare habitats or species assemblages; and maintenance or enhancement of protected habitat connectivity. Also, whether a parcel adds to the effective area of an existing conservation area, protected habitat should be considered. One approach to better incorporate these considerations into the model would be to break the criteria model into two components, one addressing ecological considerations and the other addressing operational and administrative considerations. Scores from each could be combined for a total parcel score and used for parcel prioritization. This would allow more careful consideration and ranking of important ecological aspects of each parcel while also addressing important operational and administrative aspects important for long term parcel management.

- 2) The relation between the section on “Program Objectives and Mandatory Requirements” and “Project Selection Criteria” is unclear. Rather than being mandatory requirements, it is stated that “projects should emphasize” a list of 9 items. The items are a mix of important ecological attributes that likely could be included in the Selection Criteria model (Items 1a, b and c and 2f). Omission of these important ecological attributes in the selection model appears to be an oversight. The proposal states that the Oregon Conservation Strategy forms the basis for the program. Most of the ecological attributes found in the Objectives and Mandatory Requirements section are addressed in these chapters and it is unclear why they were only partially included in the model used to rank parcels. In its current form,

these attributes are not given any selection points and presumably do not influence the overall ranking or priority of individual parcels.

- 3) Under “Habitat Type and Condition” there is a strong emphasis for parcels that are intact and fully functioning. These parcels presumably need little or no restoration. However, there are two additional criteria that provide points for restoration of a parcel, namely “Restoration Capability” and “Restoration Project Manager/Conservation Landowner Capability,” each with a maximum score of 3 points. It appears that a parcel needing minimal or no restoration could lose up to 6 points for restoration and receive a lower total score which does not appear to make sense.
- 4) Also within the “Habitat type and Condition” criteria a more complete definition of “high resilience level” and a better description of “properly functioning habitat” are needed. The ISRP suggests identifying multiple components and or characteristics that would be expected in habitats that indicate resilience and proper functioning. These may be best provided with examples from the literature or sites in the Willamette Valley that do and do not meet these criteria. As a start, the authors could use NOAA’s Properly Functioning Conditions for salmonid habitat as a way to elucidate these habitat features. The ISRP suggests that authors target a minimum size parcel and acknowledge that some species are sensitive to area.
- 5) Currently, the authors make general statements regarding criteria for connectivity among lands as a component of habitat location. Are there priority areas that would help connectivity or is this general statement about connectivity? Are the authors referencing connectivity as it is related to land ownership? Is it related to cover type? The authors should more fully define the idea of providing connectivity among habitats with the planned acquisitions. An example that highlights gaps in connectivity could be a useful in explaining connectivity as a criterion. Some measure of connectivity that would be provided by the purchase should be used as selection criteria.
- 6) The presentation and use of the Acquisition Cost criteria is not clear. It is stated that “The acquisition cost of each parcel will be used along with all of the non-acquisition cost criteria to rank projects each year.” The score is in numerical order and is a ratio of non-cost scores to cost per acre for each project. An explanation of what non-cost scores include is needed. Presumably this is the total points for all other criteria /acquisition cost per acre. A summary listing or clarification of these elements is needed. It is also appears that very small differences in scores among projects, could influence numeric rankings in the same manner as relatively large differences. Given the qualitative nature of many of the individual criteria rankings, further discussion is warranted.
- 7) Cultural values as a selection criterion need to be better defined and described in the current document. The tribes will be instrumental in these determinations and should be included in this effort.
- 8) The 10% dual benefits standard as agreed upon in the MOA should be more fully developed, so that this is clear to all parties. If 10% of the funds are to have dual benefits some formula for evaluation of this standard should be clearly presented.

- 9) In the “Criteria for Long Term Operations and Maintenance” there are considerations given for planning to secure maintenance funds and landowner capability for maintenance. These aspects for a proposed parcel would be difficult to address unless a Management Plan is also proposed. Such a Plan would likely spell out the scope and scale of operation and maintenance needs for a parcel. The same holds true for criteria addressing Restoration Capability (includes consideration of desired restoration at a site) and Public Access (details for access are to be determined in the Management Plan for a parcel). Further consideration should be given to including management plans as part of the proposal.
- 10) Documentation for the logic and rationale used for model development should be described. Documentation as to how criteria were selected, as noted in earlier comments on ecological attributes, or weighted for scoring is needed. It is not clear if testing of the model was done to determine sensitivity or power to identify priority differences between parcels or if there are differences in scoring among groups of raters. Testing of the model on a sample group of parcels, perhaps using past acquisitions could provide insights into the model. Given the key role in parcel rankings generated by the model, further efforts to refine and test the model are important.
- 11) It is stated that each project will be assigned a ranking using all of the adopted criteria and that the numerical scores will be used to prioritize the full proposals. However, there seems to be important information that should influence project priorities, contained in the section Program Objectives and Mandatory Requirements, items 1a through c and 2f. Additionally, it seems that when total scores are the same or close to each other, general discussion of unranked factors including cost sharing, partnerships, role in connecting or adding to other protected habitats would be useful in development of final rankings. The statement that “in making recommendations to BPA, ODFW will address each project as a whole and will review and prioritize each project in its entirety.” What this means and how it relates to the ranking of projects using the selection criteria is unclear. Clarification of this statement would be useful.