Bruce A. Measure
Chair
Montana

Rhonda Whiting
Montana

W. Bill Booth
Idaho

James A. Yost
Idaho

Northwest Power and Conservation Council

Joan M. Dukes
Vice-Chair
Oregon

Bill Bradbury
Oregon

Tom Karier
Washington

Phil Rockefeller
Washington

July 28, 2011

MEMORANDUM

TO: Committee Members

FROM: Lynn Palensky

SUBJECT: Update of upcoming reviews for Resident Fish/blocked areas, Data Management, and Program Coordination

Staff will give an update on progress toward launching the category reviews for Resident Fish, Data Management and Program Coordination on September 1. We ask that the Council members confirm the process and schedule and provide feedback on any components; particularly on the guidance material and proposal form questions.

The review structure is modeled generally after the recently completed Wildlife and RM&E/AP reviews, but of course tailored specifically for the upcoming review categories. Therefore most of this will look familiar, but for the guidance and tailored questions that are being developed for the September 1 launch. Attached are several documents for your review for this process most of which are in draft form and will continue to be developed based on review and comments:

A. Early notice to sponsors - final and sent 7/8/11
B. Draft Sponsor Information Packet *(including guidelines for each category)*
C. Proposal Form Text Field Instructions *(to be refined for this review)*
D. Draft Tailored Questions for each category *(to be included on the proposal form)*

The Proposal Form Text Field Instructions and the tailored questions do not appear in the same context as they will in the proposals form, nor do they represent all of the information that we are asking sponsors to provide. For example, in addition to the attached list of questions, there are structured data queries in the proposal form that ask sponsors to fill in information on things like budget, objectives, protocols, etc. To really get a feel for the information we ask of sponsors in the proposal forms, check out a current RM&E proposal from the "Proposals" tab from the top menu bar on the homepage and click on the first project: http://www.cbfish.org/Project.mvc/Display/1991-029-00.

w:\lp\packet materials\2011\august\categoryreviewdiscussion - committee.docx

Resident Fish and Blocked Areas
Project Category Review
For Fiscal Year 2013 and Beyond

Dear Project Proponents:

The Northwest Power and Conservation Council (Council) will soon be embarking on a science review of projects in the Resident Fish/Blocked Areas, Regional Coordination (Program Coordination) and Data Management categories under the Council's Fish and Wildlife Program (Program). You are receiving this letter because you are listed as a project lead on one or more projects included in this review.

The portfolio for the resident fish and blocked areas review includes habitat restoration, RM&E, and artificial production projects intended to benefit resident fish with a majority of the projects located in areas that are inaccessible by anadromous fish.

The list of all projects included in this review is available at http://www.cbfish.org/Portfolio.mvc/Display/989. The list encompasses all projects relevant to the category topics including related projects that have undergone recent ISRP review since the 2007-09 review processes. Recently reviewed projects are included to provide context for the other projects that have not been reviewed recently. If your project is included for contextual purposes, the ISRP will use the most recent review as reference. However, if your project is not already in Taurus, you may need to update project information in Taurus with the assistance of your COTR. Projects included for contextual purposes will be listed two places: in the main portfolio (above); and at http://www.cbfish.org/Portfolio.mvc/Display/1033 which lists contextual projects separately.

While new projects identified under Biological Opinions and the Accords are included, and the Council may be asking for specific project adjustments to meet Program needs, this process is not an open solicitation for *new* projects.

Look for a complete and detailed Project Review Information Packet to arrive via e-mail on September 1st. This packet will contain the information you and your staff will need to complete the project proposal(s), as well as other guidance, tips, important dates and contact information. Proponents will have three months to complete their proposals beginning September 1st. Proposals will be due by midnight on Tuesday, November 22.

Web-based and in person workshops will be scheduled to assist project proponents in completing the proposal form for the new Taurus system.

What you can do before September 1:
1. Verify your projects are included in this review from the portfolio in Taurus. No log-in is necessary to view the list.
2. Verify your contact information in Pisces so that the right person receives the September 1, e-mail communication.
3. Consider options for attending a workshop or scheduling technical assistance (see next page) Contact Lynn Palensky at lpalensky@nwcouncil.org, 503-222-5161 with any questions.

4. Consider whether you would like to participate in a project presentation and/or site visit as part of this review process. Site visits may need to precede completion of proposal forms to avoid winter weather conditions. Attached is a calendar of possible dates for site visits, beginning in July and going through October. We encourage proponents to coordinate dates and possible itineraries for ISRP visits in their local geographic areas to the extent possible. We are polling the ISRP members on the proposed dates, so final date selection will need to be confirmed with all involved. Council staff will contact project proponents over the next month to develop a schedule for Council/ISRP site visits between now and the end of October, weather permitting. Contact Lynn Palensky with any questions.

5. Please indicate in any of your correspondence regarding this review, your project number(s) so we know which project you are working for and referring to.

Technical assistance workshops

The Council and Bonneville will offer opportunities to assist project proponents in completing the proposal form in Taurus. The workshops will also provide information about the review process and programmatic level guidance for each category of projects. All project proponents are welcome to attend any of the workshops. Please bring a laptop to work on if you are able.

September - Spokane	**Web-based tutorial**
Specific date and location to be determined	To be announced
On-site technical assistance by request	**Items to cover:**
Your group can also request a special training session at the location that provides reliable wireless, projector and Infocus, and space for others outside of your group/organization to attend.	- Overview of schedule and process - Overview Programmatic level Guidance - Overview of cbfish.org - Overview of proposal form - User testing on proposal form

Category Review Schedule for
Resident Fish/Blocked Area and
Data Management/Regional Coordination Projects

July 7, 2011
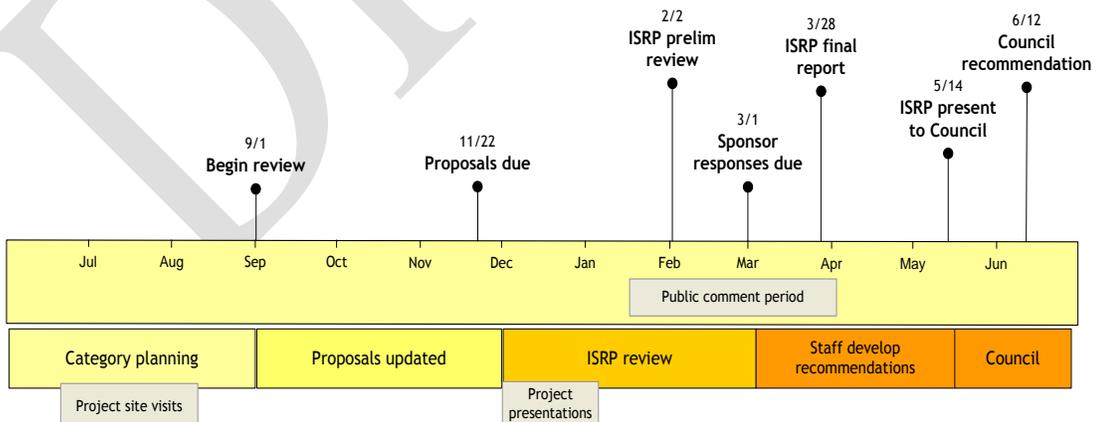
Possible Dates for Site Visits with ISRP

Consider whether you would like to participate in a project presentation and/or site visit as part of this review process. Site visits may need to precede completion of proposal forms to avoid winter weather conditions. Attached is a calendar of possible dates for site visits, beginning in July and going through October. We encourage proponents to coordinate dates and possible itineraries for ISRP visits in their local geographic areas to the extent possible.   We are polling the ISRP members on the proposed dates, so final date selection will need to be confirmed with all involved. Council staff will contact project proponents over the next month to develop a schedule for Council/ISRP site visits between now and the end of October, weather permitting. Contact Lynn Palensky at lpalensky@nwcouncil.org with any questions.

Please indicate in any of your correspondence regarding this review, your project number(s) so we know which project you are working for and referring to.

Since we have ISRP members traveling from outside of the region, ideally we would group particular areas in one trip like we've done in the past (e.g. Intermountain, Upper Snake, Kootenai, etc). We will likely fly/drive to a central location and pick up a large van or two for local transport.

July 25-28 (4 day window)

August 2-3 (2 day window)

August 29- Sept 1 (4 day window)

September 19-22 (4 day window)

October 17-20 (4 day window)

October 24-27 (4 day window)

_____

Program Coordination and Data Management
Category Review
For Fiscal Year 2013 and Beyond

Dear Project Proponents:

The Northwest Power and Conservation Council (Council) will soon be embarking on a science review of projects in the Resident Fish/Blocked Areas, Regional Coordination (Program Coordination) and Data Management categories under the Council's Fish and Wildlife Program (Program). You are receiving this letter because you are listed as a project lead on one or more projects included in this review.

The portfolio for the program coordination and data management review includes: projects that, in the past, have been referred to as "regional coordination"; and data management projects that address data collection, storage, analysis and dissemination needs at a basin-wide scale.

The list of all projects included in this review is available at http://www.cbfish.org/Portfolio.mvc/Display/989.   The list encompasses all projects relevant to the category topics including related projects that have undergone recent ISRP review since the 2007-09 review processes. Recently reviewed projects are included to provide context for the other projects that have not been reviewed recently. If your project is included for contextual purposes, the ISRP will use the most recent review as reference. However, if your project is not already in Taurus, you may need to update project information in Taurus with the assistance of your COTR. Projects included for contextual purposes will be listed two places: in the main portfolio (above); and at http://www.cbfish.org/Portfolio.mvc/Display/1033 which lists contextual projects separately.

While new projects identified under Biological Opinions and the Accords are included, and the Council may be asking for specific project adjustments to meet Program needs, this process is not an open solicitation for *new* projects.

Look for a complete and detailed Project Review Information Packet to arrive via e-mail on September 1st. This packet will contain the information you and your staff will need to complete the project proposal(s), as well as other guidance, tips, important dates and contact information. Proponents will have three months to complete their proposals beginning September 1st. Proposals will be due by midnight on Tuesday, November 22.

Web-based and in person workshops will be scheduled to assist project proponents in completing the proposal form for the new Taurus system.

What you can do before September 1:
1. Verify your projects are included in this review from the portfolio in Taurus. No log-in is necessary to view the list.
2. Verify your contact information in Pisces so that the right person receives the September 1, e-mail communication.
3. Consider options for attending a workshop or scheduling technical assistance (see next page) Contact Lynn Palensky at lpalensky@nwcouncil.org, 503-222-5161 with any questions.

4. Consider whether you would like to participate in a project presentation as part of this review process. Council staff will contact project proponents in early fall to begin developing a schedule for ISRP presentations for late fall and winter 2011, weather permitting. Contact Lynn Palensky with any questions.
5. Please indicate in any of your correspondence regarding this review, your project number(s) so we know which project you are working for and referring to.

Technical assistance workshops
The Council and Bonneville will offer opportunities to assist project proponents in completing the proposal form in Taurus. The workshops will also provide information about the review process and programmatic level guidance for each category of projects. All project proponents are welcome to attend any of the workshops. Please bring a laptop to work on if you are able.

<u>September - Spokane</u> Specific date and location to be determined	<u>Web-based tutorial</u> To be announced
On-site technical assistance by request *If the workshop in Spokane or the web-based tutorial won't work for your group, you can request a special training session. We ask that the requesting party set up the venue with reliable wireless, projector and Infocus, and space for other outside of your group/organization to attend.*	**Items to cover:** • Overview of schedule and process • Overview Programmatic level Guidance • Overview of cbfish.org • Overview of proposal form • User testing on proposal form

Category Review Schedule for
Resident Fish/Blocked Area and
Data Management/Regional Coordination Projects

July 7, 2011
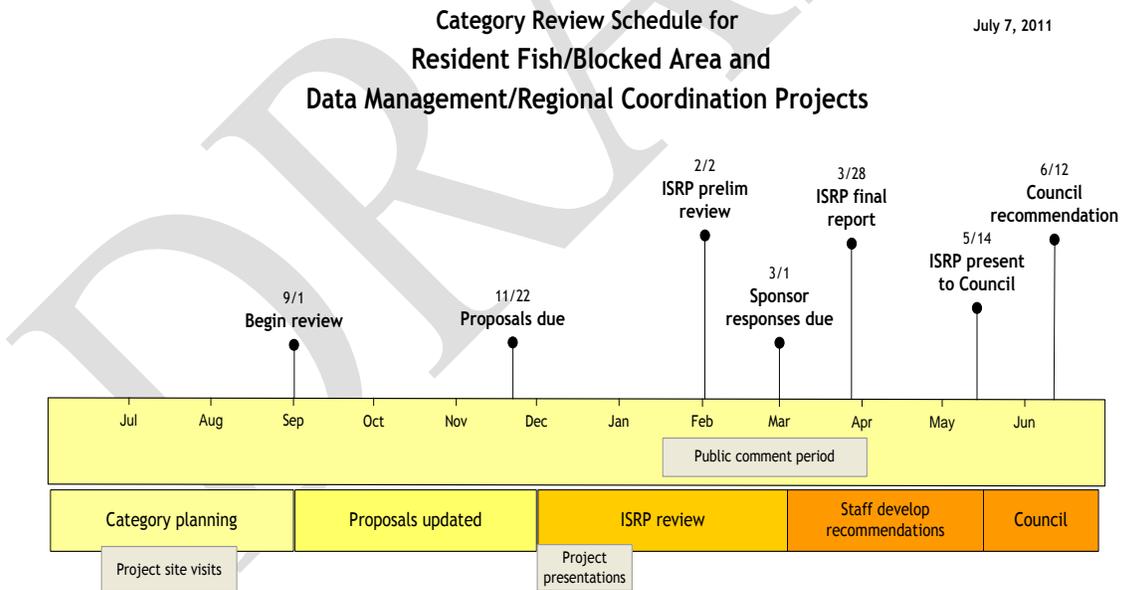
July 28, 2011
Review of Resident Fish, Data Management and Program Coordination
Projects for Fiscal Years 2013-2017

Dear Project Proponents:

The Northwest Power and Conservation Council (Council) and Bonneville Power Administration (Bonneville) will begin the category review of all projects in Resident Fish, Data Management and Program Coordination in the Council's Fish and Wildlife Program (Program) on September 1, 2011.

This information packet contains the information you and your staff will need to complete the project proposal(s) forms, as well as other guidance, tips, important dates and contact information. All information contained in this packet can also be found on the Council's website at: http://www.nwcouncil.org/fw/budget/2013. **Proposals are due by midnight on November 22nd.**

The first step in the process is to collect information on the work you propose to accomplish as well as information documenting any past project accomplishments. The Council will use this information and the independent science review process to make project implementation recommendations to Bonneville. The Council's implementation recommendations will span up to five years (FY13 -17).

I. Background and Guidance

The Council and Bonneville are using this review to ensure that projects implemented meet the needs and commitments of the Fish and Wildlife Program, the 2006 U.S. Fish and Wildlife Service, *Biological Opinion regarding the effects of Libby Dam operations on the Kootenai River White Sturgeon, Bull Trout and Kootenai Sturgeon Critical Habitat, and the* 2008 Federal Columbia River Power System (FCRPS) Biological Opinion (BiOp).

This category review includes most of the projects referred to in the past as resident fish, data management and regional coordination projects. The review will consider cross-cutting issues unique to these three categories as well as project–specific issues.

Projects included in this review are listed at http://www.cbfish.org/Portfolio.mvc/Display/989. The list encompasses all category-appropriate projects including those that have undergone

Council and ISRP review since the FY 2007-2009 review process. Recently reviewed projects are included to provide context for the projects that have not been reviewed recently
The current list of contextual projects identified for review may be found at
http://www.cbfish.org/Portfolio.mvc/Display/484. All projects in the upcoming categorical review fall under one of the following three groups. Each group has its own instructions for submission of project information as outlined below:
 (see page 3 for more details).

(1) Existing projects *not* reviewed since the FY 2007-2009 Project Review process

Proponents of these projects will complete the proposal form for their project under its currently assigned project number. Previous proposal information will be pre-loaded into Taurus to the greatest extent possible. Proponents will need to update and augment the current project information in Taurus to reflect accomplishments, reporting of results, whether expected results are being achieved, and whether the project's proposed objectives, actions, and methods reflect new information gained from those results and future needs.

(2) Projects recently reviewed by the Independent Science Review Panel (ISRP) and which received a subsequent Council funding recommendation

This group of projects includes Accord, Step Review and BiOp projects that have recently been reviewed by the ISRP *and* have received a funding recommendation by the Council. These projects will not undergo another proposal review by the ISRP and Council. However, the Council and Bonneville have committed to make these projects available to the ISRP for purposes of contextual review. The ISRP and Council will use the information from the most recent ISRP/Council review along with additional information provided by sponsors to gain a better understanding of how similar projects can work together in the basin to address key Program strategies or topics. For a list of projects to be reviewed for context only, see
http://www.cbfish.org/Portfolio.mvc/Display/1033.

If these projects have not been entered into Taurus, Bonneville staff will transfer current information contained in proposals into Taurus.

Bonneville will ask the project proponents to validate information entered by Bonneville staff and existing project information imported from Pisces within the Taurus proposals. Bonneville will also ask project proponents to augment the proposals with information on indicators, methods, designs associated with data collection and analysis and the databases supporting BiOp requirements.

(3) New Accord projects
This category includes new Accord projects.

All projects in this review group have been identified and assigned a project number in Taurus, but have not yet completed a proposal form or have not yet received a final review from the ISRP. Generally, these projects will be classified as "development" in the Status column of the portfolio.

Proponents of Accord projects that have not been reviewed by the ISRP will need to provide information about the new project by completing the proposal form in Taurus using the assigned project number. The project will be reviewed in this review category.

II. Schedule and General Information

Process Steps and Schedule

This letter marks the start of the "sponsor report" phase in which project proponents update and complete their project proposals in Taurus. **Final proposals are due on Tuesday, November 22nd, by midnight**. The Council will make all proposals available to the ISRP for review on November 23rd. The complete review schedule is set forth in the timeline on page 7.

ISRP Review

The ISRP will review all new proposals and existing proposals not evaluated since FY 2007-09 using criteria from the 1996 Amendment to the Northwest Power Act. The amendment states that the ISRP's project recommendations be based on a determination that projects are based on sound science principles; benefit fish and wildlife; have clearly defined objectives and outcomes; have provisions for monitoring and evaluation of results; and are consistent with the Council's Fish and Wildlife Program. The ISRP will also consider specific tailored questions or requests for scientific information regarding the proposals from the Council, such as the relationship of the proposal to the MERR framework.

For existing projects, the ISRP review will focus primarily on project performance — accomplishments, reporting of results, whether expected results are being achieved, and whether the project's proposed objectives, actions, and methods reflect new information gained from those results. The ISRP will also evaluate the results reported in this Category Review in its "retrospective" review of the results of prior year Program expenditures (see ISRP 2006 Retrospective Report).

The ISRP will complete **a Preliminary Review of proposals from November 23rd, 2011 through February 2nd, 2012.** To produce the preliminary review, at least three reviewers will independently evaluate each proposal and provide comments. The ISRP will not make publicly available individual reviewer comments or specifically name reviewers of a particular project. The review team will include past reviewers of a project and scientists with expertise in a project's primary area of emphasis.

During the preliminary review, project presentations and site visits (for resident fish projects) will be organized to share information about projects, add context to the proposals, and provide an opportunity for dialogue between the ISRP and project proponents (see below for details on scheduling).

The ISRP's preliminary report will provide written recommendations and comments reflecting the consensus of the ISRP on each proposal that is amenable to scientific review. If the proposal does not contain sufficient information or issues need to be clarified, **the ISRP will request a response from the project proponent, due by March 1, 2012**.

The ISRP will review these responses and complete a **final report by March 28th, 2012**. This report will include final recommendations on all proposals and findings on programmatic issues related to these proposals, such as identification of gaps, opportunities for coordination, and potential areas of redundancy.

Proposal form
The Council and Bonneville have shifted from the old proposal form to the Taurus system available on www.cbfish.org. The new proposal form reflects the same basic narrative questions as the old proposal form, but includes additional questions tailored to particular project types. For guidance and useful resources on each of the three categories see XXX

Project Presentations
Consider whether you would like to participate in a project presentation to the ISRP as part of this review process. Council staff will be developing a schedule for Council/ISRP presentations prior to December 15th. There will likely be 4 days of presentations in at least two locations. Contact Lynn Palensky at lpalensky@nwcouncil.org with any questions or scheduling requests.

Site Visits - Resident Fish
For resident fish projects, consider whether you would like to participate in a site visit as part of this review process. Council staff will be contacting project proponents to develop a schedule for Council/ ISRP potential site visits between September and December. Contact Lynn Palensky at lpalensky@nwcouncil.org with any questions or scheduling requests.

Workshops
The Council and Bonneville will hold at least one training session on how to complete proposals in Taurus. The meeting will be held in Spokane at the XXXXX. The workshops will also cover details about the review process. Any project proponent is welcome to attend any of the workshops. Bonneville will also develop a web-based tutorial for Taurus proposals….

III. Getting Started
Follow these steps to begin working on your proposal:

1. Go to www.cbfish.org.
2. Log in (upper right corner) using your Pisces username and password. If you don't have a username and password, click on the "Request Support" link (upper right corner) to request one.
3. Click on "Proposals" from the top navigation bar.
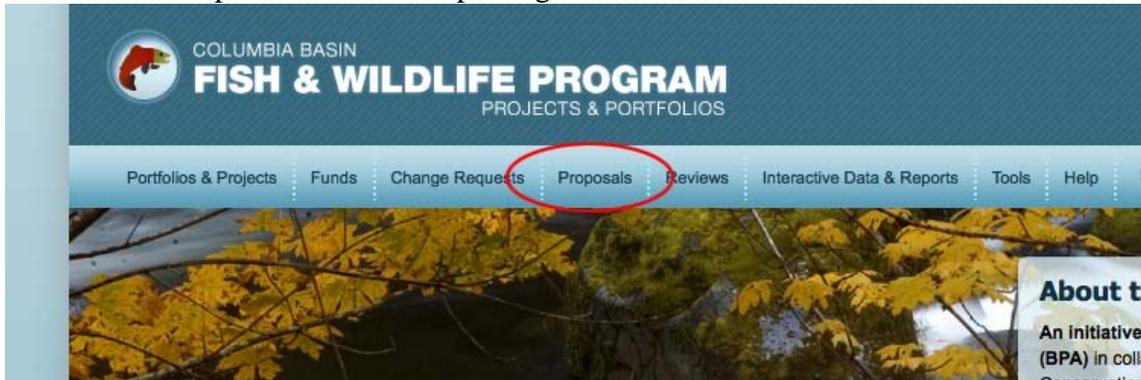
4. Go to the "Propose" section of the page (on the right).
5. Find your project by entering all or part of the project number or title in the project search box.
6. Finally, click on the "Renew Existing Project" button and your proposal form will load.

Important Guidance Documents (links)
Useful reference documents for proposal development are listed below.
    1. Council's Website for general information: http://www.nwcouncil.org/fw

2. ISRP and ISAB Reports: http://www.nwcouncil.org/fw/science.htm
3. Council's 2009 Fish and Wildlife Program: http://www.nwcouncil.org/library/2009/2009-09
4. Subbasin Plans: http://www.nwcouncil.org/fw/subbasinplanning
5. Non-native Species Impacts on Native Salmonids in the Columbia River Basin ISAB http://www.nwcouncil.org/library/isab/isab2008-4.htm
6. The USFWS revised 2005 critical habitat designation for bull trout (threatened) in the range of Montana, Idaho, Oregon, Washington, and Nevada.
7. Bull Trout" critical habitat, recovery plans and listing information for two regions: See http://www.fws.gov/pacific/bulltrout/Recovery.html
8. U.S. Fish and Wildlife Service, *Biological Opinion regarding the effects of Libby Dam operations on the Kootenai River White Sturgeon, Bull Trout and Kootenai Sturgeon Critical Habitat* (February 2006)
9. High Level Indicators: http://www.nwcouncil.org/fw/program/hli
10. Draft Monitoring, Evaluation, Research and Reporting (MERR): http://www.nwcouncil.org/library/2010/2010-04.htm
11. Recommendations for Implementing Research, Monitoring and Evaluation for the 2008 NOAA Fisheries FCRPS BiOp (AA/NOAA/NPCC RM&E Workgroups, May 2010). This document provides recommendations on RM&E that are needed to meet FCRPS BiOp RM&E Strategies and RPAs. http://www.salmonrecovery.gov/ResearchReportsPublications.aspx
12. NOAA Fisheries Draft "Guidance for Monitoring Recovery of Salmon and Steelhead: Listed Under the Federal Endangered Species Act (Idaho, Oregon, and Washington)". Bruce Crawford and Scott Rumsey 2009. http://www.nwr.noaa.gov/Salmon-Recovery-Planning/upload/Draft-RME-Guidance.pdf

Contact Us

Lynn Palensky, Council	503.222.5161 lpalensky@nwcouncil.org	General process and review
Bryan Mercier, Bonneville	503.230.3991 bkmercier@bpa.gov	Taurus and proposal form
Erik Merrill, ISRP Coordinator.	503.222.5161 emerrill@nwcouncil.org	ISRP review and proposal form
Nancy Leonard	503.222.5161 nleonard@nwcouncil.org	Monitoring and data management
Russell Scranton, Bonneville	503.230.4412 rwscranton@bpa.gov	Proposal form RM&E Metrics and Methods
Jim Geiselman, Bonneville	503.230.5732 jrgeiselman@bpa.gov	BiOp Strategies/RPAs, Habitat Action Effectiveness and Data Management Guidelines
Dal Marsters, Taurus	503.780.5079 dal@sitkatech.com	Taurus and *cbfish.org* technical

Category Review Schedule for
Resident Fish/Blocked Area and
Data Management and Program Coordination Projects

July 7, 2011

Feb
ISRP prelim
review

Mar
ISRP final
report

Jun
Council
recommendation

Mar
Sponsor
responses due

May
ISRP present
to Council

Sep
Begin review

Nov
Proposals due

| Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun |

Public comment period

| Category planning | Proposals updated | ISRP review | Staff develop recommendations | Council |

Project site visits

Project presentations
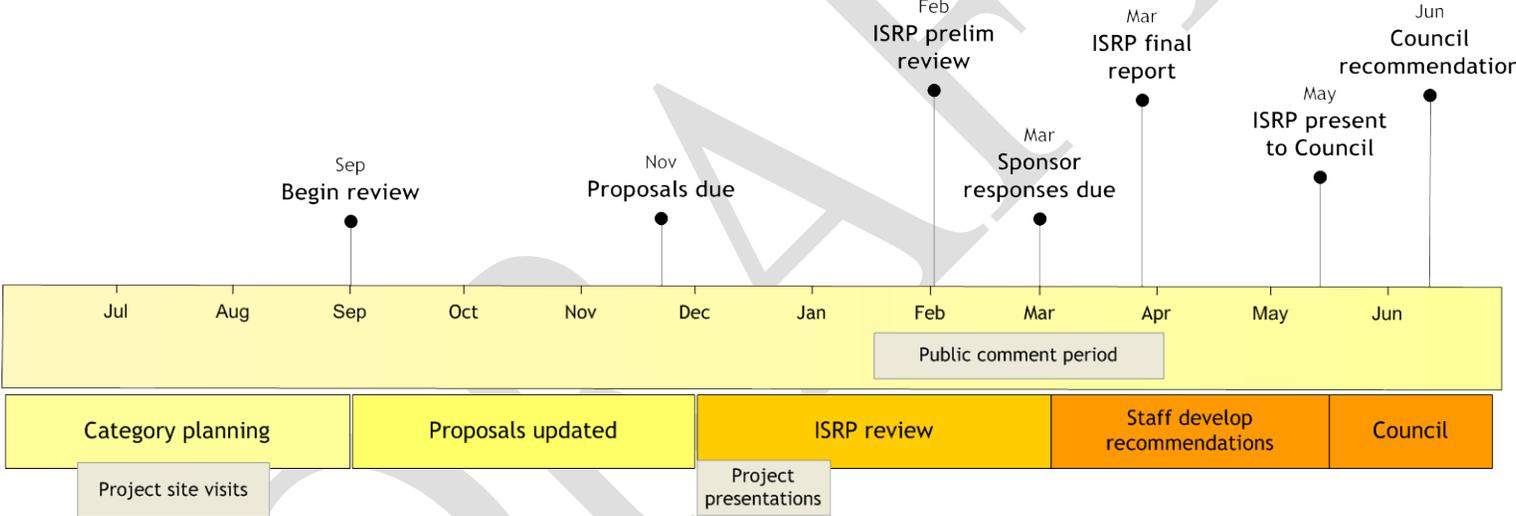
Guidance for project reviews

The focus of the Program is on performance and adaptive management. The 2009 Program focuses the emphasis on periodic scientific review of new and ongoing actions; increases requirements for reporting of results and accountability; emphasizes adaptive management as a way to solve continuing uncertainties; renews the push to develop a better set of quantitative objectives for the Program; commits to a periodic and systematic exchange of science and policy information; and expands the monitoring and evaluation framework with a commitment to use the information to make better decisions and report frequently on progress. More specific guidance is outlined below for:
- Resident Fish
- Data Management, and
- Program Coordination

A. Resident Fish

Review Objectives
To confirm continued and proposed work in this area of the Fish and Wildlife Program and identify gaps for resident fish work for: addressing limiting factors affecting fish; RM&E, species propagation and mitigation requirements included in the 2006 U.S. Fish and Wildlife Service, *Biological Opinion regarding the effects of Libby Dam operations on the Kootenai River White Sturgeon, Bull Trout and Kootenai Sturgeon Critical Habitat*

Program Areas: Requirements & Considerations *(see program for specific language)*
- Relationship to subbasin plans
- Risk assessment for resident fish substitution
- Mainstem habitat and,
- Loss assessments
- Mitigation using non-native species
- Settlement Agreements

B. Data Management

Review Objectives: To improve the interconnectivity, usability, accessibility and value of the raw and derived data that is collected, maintained, analyzed and disseminated under the Program.

The Program describes specific programmatic needs that can be applied to our current portfolio of projects engaged in data management analysis and dissemination. The program calls for the Council to:

- Develop Council-approved guidelines for consistent methods to collect or identify data appropriate for tracking focal fish species and ecosystem variables.
- All monitoring and evaluation data and information (including raw data and reports) funded under the Program are considered in the public domain and must be made readily available to all interested parties in an agreed-upon electronic format.
    - Make available to the public all key monitoring data that is used to evaluation and adaptively manage the program in an agreed-upon electronic format.
    - Include data that is collected on anadromous and resident fish, wildlife and habitat to help inform the Council's decisions.
    - The Council will collaborate with interested parties to establish an integrated internet-based system for disseminating data relevant to this Fish and Wildlife Program
    - Data sites must be adaptively managed to stay current with the evolving needs of users in the Columbia River Basin.
    - Data and metadata must be compiled, analyzed, and reported annually and within six months of project completion.
    - Identify priority data gaps and make efforts to eliminate redundant monitoring and evaluation.
- Develop a common data base for tracking, assigning and recording habitat units for wildlife. And, including establishing baseline for evaluating habitat qualities.
- Coordinate with organizations that track and monitor data on non-native species distribution, climate and human population change at the Northwest regional scale. Manage stock composition and stock-specific abundance, escapement, catch, and age distribution data so that it can be easily integrated and readily available in real time.
- Provide timely dissemination of harvest-related information in a publicly accessible manner.

Specific Data and Metadata Standards and Guidelines
The 2009 Fish and Wildlife Program and the FCRPS BiOp both stipulate that data and metadata (data documentation) need to be readily available in an agreed-upon electronic format for RM&E and data management projects. This stipulation supports programmatic performance assessments and reporting, and the successful application and integration of RM&E into planning and adaptive management.

To comply with the requirements and objectives of the Program and the BiOp, all data and metadata collected from research and monitoring must follow *regionally accepted standards and guidelines*. Therefore, beginning with FY 2011 contracts and proposed work submitted for the category review process, all RM&E work *should use data and metadata standards and* guidelines that have regional suppotr and these should be clearly identified by the proponent.. *If other standards and guidelines are used* instead, *these need to be described and a rationale provided* for *why these were used versus regionally accepted standards and guidelines.* PNAMP is working on developing regional guidelines and recommendations through ongoing regional collaboration processes which are shaping programmatic level data management strategy. In the

interim, the following documents posted on the PNAMP web site (www.pnamp.org) should be used to guide the management of data and metadata associated with RM&E projects:

- Considerations for Regional Data Collection, Sharing and Exchange (Schmidt, B., ed., 2009)
- Regional Guidance on Metadata for Environmental Data (Rentmeester, S., ed., 2010)
- PNAMP's Methods and Metrics Catalogue (http://www.monitoringmethods.org/)
- Best Practices for Reporting Location and Time Related Data (NED, 2007)
- Best Practices for Data Dictionary Definitions and Usage (NED, 2006)
- Check List for Organizing Field Collection and Management of Data (NED, 2006)

For questions regarding data and metadata standards and guidelines please contact Russell Scranton at Bonneville at 503-230-4412 or rwscranton@bpa.gov.

C. Program Coordination

The Council benefits from the coordinated efforts of many groups, committees and organizations in implementing the Council's Program on an ongoing basis. Continued coordination of various Program elements is expected, supported, and in some cases financed by Bonneville. The elements below represent the key areas in which the Council seeks continued coordinated efforts from fish and wildlife managers and interested parties throughout the region. Coordination funding should be focused on the following activities that support Program implementation:

☐ *Data management (storage, management, and reporting)*

☐ *Monitoring and evaluation (framework and approach)*

☐ *Developing and tracking biological objectives*

☐ *Review of technical documents and processes*

☐ *Project proposal review*

☐ *Coordination of projects, programs and funding sources within subbasins*

☐ *Facilitating and participating in focus workgroups on Program issues*

☐ *Information dissemination (technical, policy, and outreach)*

Any entity or organization receiving funding for coordination of Program activities must develop a work plan detailing the coordination elements, objectives, deliverables, and budget. All coordination work will be reviewed as part of the Council's project review process and as necessary, scientific and administrative review. The Council will recommend to Bonneville the level and type of coordination required to implement the Program.

Primary Objective of this review: Support activities and tasks (under the above categories) that directly support Fish and Wildlife Program implementation, reporting, and policy development at a provincial or basin-wide scale.

In attempt to distinguish program coordination activities from individual project implementation coordination, we include guidance to help make that distinction. Either way, there should be a stronger nexus between the coordination activities and the program.

Strong Nexus <--→Weak Nexus

A strong nexus would: contribute to or inform Program policy development; lead to broad-scale Program implementation; and is reportable back to the council. A weaker nexus (or no nexus) would be an activity that would: still be performed absent the program; was internal to the funded organization; or, related to individual project coordination.

Appropriate activities for program coordination include but are not limited to:

General:

- Facilitation services for Council-requested workgroups and forums
- Participation at Program -related workgroups, forums and meetings that serve to inform Program priorities as requested
- Participation in a regularly scheduled council convened process to coordinate information and issues with all coordinating entities within the Council's Fish and Wildlife Program.
- Participation on Science to policy forums
- Support for collecting, maintaining, dissemination raw and derived data (redds, pop est) from the Basin to inform broader reporting needs, e.g., subbasin. Provincial or ESU/DPS, basinwide, and program level.
- Assist the Council in organizing and facilitating science reviews for the Council and ISRP; including site visits, project presentations and special meetings
- Support and participation in subbasin plan, provincial or program progress reporting

Specific:

- New and continued synthesis/management plans/RM&E development on ISRP/Council topics of interest: lamprey, sturgeon, tagging, estuary ocean, etc
- Participation in ongoing development of Program's M&E framework and approach
  - MERR Plan and development of its sub components such as related RME
  - (Implementation strategy:ASMS/CHaMP/VSP, coordinated assessments)
  - Support for synthesis/analysis of data
    - for HLIs, objectives, etc
- Wildlife: wildlife forum, NHI data, HEP, land management issues (e.g. weed control)

Instructions from proposal text field questions

This document is provided for reference and is intended for use when viewing the Proposal Summary page. Several questions in the proposal form required explanations and longer form text responses from proponents instead of selections from structured data controls like checkboxes and drop-down list boxes. To help provide context for the responses submitted by proponents, the instructions for these questions are included below.

Edit Basics

Proposal Short Description (*500 chars*)**:** Provide a brief summary of your proposed project that includes its primary goal and why the work is important.

Proposal Executive Summary (*10,000 chars*)**:** Provide a summary of your project proposal. For project renewals, this field is initialized with the Project Summary entered in Pisces. This Executive Summary should include the following: Primary goal of your work; Why the work is important (including anticipated quantitative results/benefits); How the work will be accomplished; Where in general the work will be done, for how long, and by whom; and How the effectiveness of your work will be monitored. This establishes the logic path for the project.

Summarize History

Explanation of Recent Financial Performance (*3000 chars*)**:** Discuss your project's recent financial performance shown above. Please explain any significant differences between your Working Budget, Contracted Amount and Expenditures. If Confirmed Cost Share Contributions are significantly different than Proposed cost share contributions, please explain.

Explanation of Financial History (*3000 chars*)**:** Discuss your project's historical financial performance, going back to its inception. Include a brief recap of your project's expenditures by fiscal year. If appropriate discuss this in the context of your project's various phases. The F&W Division developed a new approach to financial management in FY 2004. Records prior 2004 are not compatible with this approach and as a result are not incorporated into our current systems.

Explanation of Performance (*5000 chars*)**:** Discuss your project's contracted deliverable history (from Pisces). If it has a high number of Red deliverables, please explain. Most projects will not have 100% completion of deliverables since most have at least one active ("Issued") or Pending contract. Also discuss your project's history in terms of providing timely Annual Progress Reports (aka Scientific/Technical reports) and Pisces Status Reports. If you think your contracted deliverable performance has been stellar, you can say that too.

Major Accomplishments (*chars not limited*)**:** Besides summarizing the Deliverables you checked above, please do the following to help the ISRP and Council assess project performance:

 * List important activities and then report results.
 * Evaluate those results in terms of the Project Objectives.

Whenever possible, describe results in terms of the quantifiable biological and physical habitat objectives of the Fish and Wildlife Program, i.e., benefit to fish and wildlife or to the ecosystems that sustain them. Include summary tables and graphs of key metrics showing trends. Summarize and cite (with links when available) annual reports, peer reviewed papers, and other technical documents. The ISRP will also use this information in its Retrospective Review of prior year results. If your proposal is for continuation of work, your proposal should focus on updating this section. If your project is doing Regional Coordination, click here for additional instructions.

Do not get into the future deliverables of your project – you will provide these later.

Response to past ISRP and Council comments and recommendations (*20,000 chars*)**:** Explain how your project has responded to the above ISRP and Council qualifications, conditions, or recommendations. This is especially important if your project received a "Qualified" rating from ISRP in your most recent assessment. Even if your project received favorable ratings from both ISRP and Council, please respond to any issues they may have raised.

Adaptive Management (*10,000 chars*)**:** Please describe any management changes planned or made because of biological responses or information gained from project actions. This would include management decisions at the subbasin, state, or regional level influenced by project results and project modifications based on information from recent research and literature.

Edit Purpose

Explain your project's significance to Regional Programs (*20,000 chars*)**:** As applicable, expand on the information above and describe how your work relates to or implements other regional documents including: the Council's Draft Monitoring Evaluation Research and Reporting Plan, Subbasin Plan objectives, Council's 2006 Research Plan, Biological Opinions, or regional plans such as species-specific plans (e.g., Lamprey Restoration Plan). If your project is doing Regional Coordination, click here for additional instructions.

Edit Objectives

Problem Statement / Technical Background (*chars not limited*)**:** In this section describe the specific problem or need your proposal addresses. Describe the background, history, and location of the problem. For projects doing research or monitoring, identify the management questions the work intends to address and include a short scientific literature review covering the most significant previous work related to the project. Also include the work of key project personnel on any past or current work similar to the proposal. The purpose of the literature review is to place the proposed research or restoration activity in the larger context by describing work that has been done, what is known, and what remains to be known. Cite references here but fully describe them on the Edit References page.

Project Objectives: What are the ultimate ecological objectives of your project? Examples include: Monitoring the status and trend of the spawner abundance of a salmonid population; Increasing harvest; Restoring or protecting a certain population; or Maintaining species diversity. A Project Objective should provide a biological and/or physical habitat benchmark by which results can be evaluated. Objectives should be stated in terms of desired outcomes, rather than as statements of methods and work elements (tasks). In addition, define the success criteria by which you will determine if you have met your objectives. If your project is doing Regional Coordination, click here for additional instructions. Later, you will be asked to link these Objectives to Deliverables and Work Elements.

Objective Description (*1000 chars*)**:** Objectives should be stated in terms of desired outcomes, rather than as statements of methods or work elements (tasks). Later, you will tie Project Deliverables, which have timelines, to each Objective.

Edit Relationships (*10,000 chars*)

a) Geographic Region
Is your project part of or related to a larger province, watershed or subbasin effort? Focus your answer on the part your project plays in orchestrated efforts situated in your geographic region and only cite other projects or proposals that relate directly to the specific objectives of your project. If the relationship with other proposals is unknown or is in conflict with another project, note this and explain why. If monitoring and evaluation is conducted by another project or program, identify it by program and project number (if BPA-funded). Include a description of the entity, how your project is coordinating efforts with that entity, what data and analyses generated by the other entity will be reported by your project, and how your project will use that data to inform actions such as prioritizing actions or adapting methods. For example, if this project is the production component of a hatchery program, please list and explain the relationship with the monitoring and evaluation; operations and maintenance; and other components of the program.

The kinds of project relationships intended by this question include, but are not limited to, large "umbrella" type projects, like hatchery programs, where several related projects are associated with the larger one. Similarly, studies supplying information to an Intensively Monitored Watershed program should explain that relationship here.

b) Similar Work
Relate your project to other projects anywhere in the basin doing similar work. Focus your answer on the coordinated, complementary, or collaborative efforts you are engaged in with those projects.

Examples of this kind of coordination may include, but are not limited to, work involving lamprey, hatcheries, tagging, etc.

Edit Focal Species

Other Focal Species (*1000 chars*)**:** Since you selected an "Other" species option above, please provide details on the Focal Species your project aims to benefit.

Emerging Limiting Factors (*5000 chars*)**:** Are your project's focal species and their habitat vulnerable to potential impacts arising from emerging limiting factors and threats such as climate change, non-native species, predation increases, or toxics? If so, please describe how you are taking these emerging factors into account to ensure the continued success of your project.

Edit Work Type Details

Add Hatchery Program
- Program Name: A simple way to identify this program in this proposal. Example: Fall Chinook

- Program Type: Is the facility operated as an integrated or segregated production program?

- Fish Species: These are the Focal Species you entered earlier. Please select the fish species involved in your program.

- HSRG Recommendations: Summarize the Hatchery Scientific Research Group (HSRG) recommendations for this production program.

- Does the production program take into account the recommendations of the HSRG? If yes, please explain how you plan to implement the recommendations. If not, please explain why you are not implementing the HSRG recommendations.

- Hatchery-Natural Composition: For integrated hatchery programs, use the table to provide your target and realized annual hatchery-natural composition of broodstock and natural spawners. Use 2009 or the most recent year for which a PNI value is available.

- Please provide links to your Hatchery Genetic Management Plan (HGMP) documents. Include the Title and the fully qualified web URL (e.g. http://www.xyz.com/myproject.pdf).

Research, Monitoring and Evaluation (RM&E)

- Where will you post or publish the data your project generates? Identify at least one data repository where you will make available the raw or summarized data that your project will produce. Our list is a work in progress and contains both primary and secondary data repositories. It only contains repositories that are accessible via the Internet, and mostly those that are publicly available. We have included a final option, "NOT ELECTRONICALLY AVAILABLE" for projects that currently do not share their data via the Internet. You may also provide links to repositories not in our list.

Tagging

- Please explain why the tagging technology used in this project was selected. Include a discussion of how the cost and applicability of the selected tagging technology influenced your selection. Enter "NA" if not applicable to your project.

- Describe any of the innovative approaches that your project proposes that are in direct support of the ISAB/ISRP's recommendations to improve techniques for surgical insertion of internal tags, or external attachment of acoustic, radio, or data storage tags that reduce handling time, fish injury and stress. Enter "NA" if not applicable to your project.

- For specific tagging technologies, please address the tagging report's recommendations for genetic markers, otolith thermal marking, PIT tags, acoustic tags and radio tags for improving technologies in any way applicable. Enter "NA" if not applicable to your project.

- If your project involves ocean port sampling and lower river sampling for coded wire tag (CWT) recovery, address the tagging and tag recovery issues (statistical validity of tagging rates, tag recovery rates, and fishery sampling rates) presented in the Pacific Salmon Commission's Action Plan to Address the CWT Expert Panel (PSC Tech. Rep. No. 25, March 2008). Enter "NA" if not applicable to your project.

- Explain how your tagging and tag recovery rates ensure a statistically valid result for your project. Enter "NA" if not applicable to your project.

Edit Deliverables / Budget

Deliverable Description (*5000 chars*)**:** Describe the work required to produce this deliverable. Describe the methods for implementation, in particular any novel methods you propose to use, including an assessment of factors that may limit success. Do not go into great detail on RM&E Metrics, Indicators, and Methods if you are collecting or analyzing data – later in this proposal you'll be asked for this.

Fiscal Year Budgets: Based on the Fiscal Year durations and estimated budgets of your project's deliverables (entered above), the Fiscal Year budgets for your project have been automatically estimated in the grid below. Because these estimates may not match how much money you will actually need in a given Fiscal year, enter the appropriate values into the Actual Request column. In the Explanation column, enter a brief rationale for significant differences between estimated and actual request values (optional). The total of the Actual Requests must equal the total of the Estimated Need.

The Council anticipates providing a 5 year (FY12 - 16) recommendation for artificial production projects and a 3 year recommendation (FY12 - 14) for all other projects. BPA will also use this information to make adjustments to some BiOp RM & E projects in FY11. If you have estimates for additional outyear budgets, this information will be used for planning purposes.

Facilities/Equipment (*2000 chars*)**:** Describe all major facilities and equipment to be used in the project in sufficient detail to demonstrate adequacy. For example, indicate whether there are suitable (based on contemporary standards) field equipment; vehicles; laboratory and office space and equipment; life support systems for organisms; and computers. Identify and justify any special equipment, i.e., new technology, to be purchased with project funds. Please limit this section to only a few paragraphs.

Edit RME Metrics / Methods

Describe your Study Design (*chars not limited*)**:** Discuss the hypothesis of your design, how your sites were selected, sample size, and the duration of your study. Indicate if you have used a Power Analysis to support your design and number of years of your study. If you selected "Other Design" for any of the design components above, please explain. Also include which Method or Methods you will use in each Design.

Your study design description should answer these questions:

* Does the study include spatial or temporal controls and/or reference areas?
* Does it include true Replicates?

* Are treatments and controls/references independent of each other?
    * Were sites selected without bias?
    * For Action Effectiveness Research, are the measured parameters directly associated with the treatment?
    * Is there a Quality Assurance/Quality Control procedure?

Edit References

Project References or Citations (*30,000 chars*) Include full citations to any key technical documents specifically related to your project that are cited and summarized in this narrative proposal form. These documents can include cited scientific literature, appendices, data tables, maps, and project reports that are critical to the project. If a cited document is available online, please provide the web address and/or hyperlink. Referenced documents may include subbasin plans, project management plans, monitoring and evaluation plans, watershed assessments, and peer-reviewed articles, especially those articles generated from the project. Please note that the evaluation of your proposal will be based on the proposal as a standalone document, so all critical information needs to be provided and summarized in the proposal. Make sure the various parts of your proposal (such as its Problem Statement or Objective and Deliverable Descriptions) cite these references.

Enter "NA" if this is not applicable to your project.

Edit Key Personnel

Key Personnel (*chars not limited*)**:** Provide a summary of the key personnel (e.g., principal investigators, project managers, key subcontractors) required to implement the proposed activities. Describe key personnel duties on the project, including the hours they will commit to the project, and one-page resumes that include name, degrees earned (with school and date), certification status, current employer, current responsibilities, list of recent previous employment, a paragraph describing expertise, and up to five recent or especially relevant publications or job completions. Emphasize qualifications for the proposed work.

DRAFT Tailored Questions by Subcategory
28 July 2011

What the list represents:
Additional questions for subcategories that aren't *already* covered by our universal proposal questions that we want to ask - tailored to that project type.

A. Resident fish
1. Please describe which opportunities have been explored to restore or reintroduce resident native fish and their habitats?
2. Has a loss assessment been completed for your particular subbasin/or province? Please provide a link to the assessment or upload the document. Describe how the project addresses the loss assessment. If a loss assessment is in progress or being proposed, describe the status and scope of that work.
3. If you are using non-native fish species to achieve mitigation, have you completed an environmental risk assessment of potential negative impacts to native resident fish? If so, what are the findings of that assessment? Non-native fishes include species endemic to areas outside the Columbia River basin plus species that occur within the basin but are not endemic to the watershed selected for introduction.
4. If a risk assessment has not been completed, please describe: for the production of non-native fish, what are the potential impacts on native fish populations, including predation, competition, genetic impacts, and food web implications?
5. Does your proposed work support or implement a production goal identified in a USFWS Bull Trout Recovery Plan? If so, please explain.

B. Program Coordination
1. Proposed Work:
Describe the activities that will be performed to support the Program within the activity areas described below. Include: an estimate of the percentage time that is anticipated to be spent in each of these areas; a brief description of your primary objectives/deliverable is for each; and a description of geographic scale for each (e.g., regional, provincial or subbasin scale implications and benefits. Please note if any activity is specific to an ongoing BPA-funded mitigation project?

- Data management (storage, management, and reporting)
- Monitoring and evaluation (framework and approach)
- Developing and tracking biological objectives
- Review of technical documents and processes - *[Example: 20% - Participating in developing the Comprehensive Lamprey Plan, and participation on the CWT forum]*
- Project proposal review
- Coordination of projects, programs and funding sources within subbasins
- Facilitating and participating in focus workgroups on Program issues
- Information dissemination (technical, policy, and outreach)

2. Past Accomplishments

a. Describe the Work

For previously-funded program coordination works, please list and describe the work you have accomplished to support the Program toward completing work plan deliverables since the previous review cycle. Include:

- Workgroups or forums that you have participated in (e.g. PNAMP, Adhoc SWG, RIOG, CBFWA or CRITFC workgroups, UCUT, USRT, RTT, WA Monitoring Forum, Yakima, NPT, Species-specific workgroups, EOS) and a description of your participation. Is your participation ongoing or was this a one-time effort?
- Deliverables that you have helped to develop in a regional forum
- Regional policies that you have helped to develop
- Information exchange (for example, presentations, newsletters, brochures, publications, social media)
- List of represented parties and degree of representation

b. Describe the value-added for the Program and region

For past accomplishments, described the effectiveness or value-added for this coordination work in terms of:

i. Benefits to fish and wildlife of enhanced coordination activities

- Specific projects or resources benefited by the project
- Specific effect of coordination on conservation and management

ii. Value to region/users/and or members

- changes in management/policies/behavior
- user evaluation of product utility (based on any products developed)
- reducing duplication/redundancy

Has there been user/member assessment of effectiveness and impact of the work accomplished? If so, describe the outcome and how the results have modified previous and proposed activities over time to increase value of this work.

D. Data Management *(WEs 157, 162, 160, 159)*

1. What tools (e.g., guidance material, technologies, decision support models) are you creating and using that support data management and sharing?

2. Describe the process used to facilitate *receiving and sharing* of data, such as standardizing data entry format through a template or data steward, including data exchange templates that describe the data collection methods, and the provision of an interface that makes data electronically accessible.

3. What type of data are you collecting and how are you documenting supporting metadata?

- Are the metadata kept with the data, in a different location, or not retained?
- If you are documenting metadata, which standards are you following, regional standards available from PNAMP or other?

4. Please describe the sources from which you are compiling data, as well as what proportion of data is from the primary source versus secondary or other sources?

5. Describe the accessibility of the data and what the requirements are to access them? Specifically address:
- How access to your data aligns (or not) with the 2009 Program guidance (pages 24-26
- Contributes to the FCRPS BiOp (RPA 72) goal of establishing a coordinated and standardized RME information system,
- If access level differs among users, explain what level of access is given to the diverse data-users including the general public, other managers, and regional databases (e.g., all raw data, subset of derived data).

E. Describe how you are taking into account potential effects of factors such as climate change, non-native species, predation increases, and toxics that may impact the project's focal species and their habitat, potentially reducing the success of the project. For example: Does modeling exist that predicts regional climate change impacts to your particular geographic area? If so, please summarize the results of any predictive modeling for your area and describe if/how you take that into consideration for the proposed work.