

Tom Karier
Chair
Washington

Frank L. Cassidy Jr.
"Larry"
Washington

Jim Kempton
Idaho

Judi Danielson
Idaho



Joan M. Dukes
Vice-Chair
Oregon

Melinda S. Eden
Oregon

Bruce A. Measure
Montana

Rhonda Whiting
Montana

March 7, 2006

MEMORANDUM

TO: Council members

FROM: Patty O'Toole, Program Implementation Manager

SUBJECT: Update on Pisces Program Reporting

At the March Council meeting, Bonneville staff will provide an update on Pisces Program reporting. Attached is a PowerPoint slide presentation and two report examples.

w:\po\ww\2007\pisces committee update 030706.doc



BPA Fish and Wildlife Division

Update on Pisces Program Reporting

Mar 2006 Council Meeting

Portland, OR



Today's Presentation

- Update on progress towards providing program reporting that will support decision-making
 - Introduce and walk-through two example reports
 - Briefly discuss the various applications of how the Pisces data can help us look at program information
 - Leave you with examples to stir further thinking and input going forward



Program Report Examples

1. F&W Program Work Classification Report

- Summarizes Work Element Data in Pisces today
- Next Evolution of this report (refreshed since Sept '05)
- Still has some important caveats

2. Prototype of a Project Status report

- Currently designing this internal report to improve project management
- We think its content could be useful in other contexts



F&W Program's Work Classification Report

Data Set

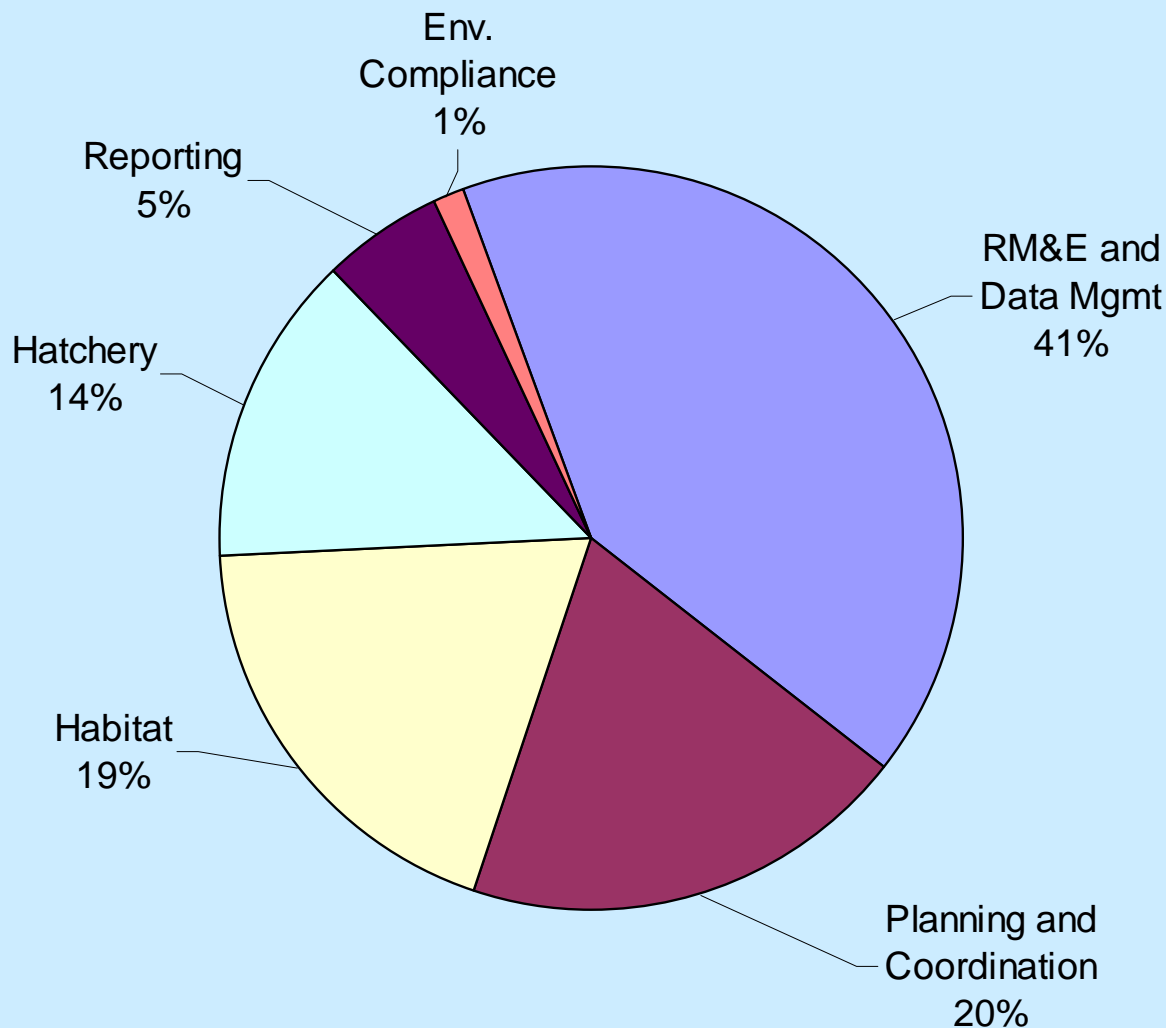
- ✓ **"Snapshot" taken Feb 24, 2006**
- ✓ **Rolls up 8241 work elements describing over 600 contracts**
- ✓ **Covers 400+ projects**

Limitations of the current report

- ✓ Data set does not contain a full fiscal year's worth of work data, but rather ~ 60% of FY05 and 80% of FY06.
- ✓ Pisces' current definitions of some work categories vary from other's. For example, "Planning & Coordination" includes work, such as landowner coordination and permitting, that is necessary to start "on-the-ground" work.
- ✓ Total project costs, such as land purchases (capital), PIT tags, and environmental compliance, are not yet captured in Pisces.
- ✓ Due to initial focus of simply converting old SOWs to work element format, nearly 15% of work elements have budgets of \$0. While some \$0 budgets are valid (e.g. cost share), most are not.



BPA Fish & Wildlife Program - \$193,898,739
Work Classification by Work Element Estimated Budgets
as of 2/24/2006 *(Data set spans FY05-06)*





Prototype of a Project Status Report

Objective of this report

- ✓ To provide a 2-3 page, objective status of a project's performance as measured by timeliness of deliverables and accomplishments (metrics).
- ✓ For project management and Program-level oversight.

Audience

- ✓ BPA Management
- ✓ BPA Project Managers
- ✓ Sponsors and Contractors

Caveats

- ✓ Based on data still being entered into the system
- ✓ Doesn't fully meet needs of project review for selection purposes



Prototype of a Project Status report

See Handout

F&W Program's Work Classification and Estimated Work Budgets (as of 2/24/2006)

The report attempts to answer the question, "What types of work does BPA's Fish & Wildlife program fund?"

The work element data set analyzed in this report was exported from Pisces on **2/24/2006** and includes **8241 work elements** belonging to SOWs attached to **614 active contracts** (which roll up into **288 projects**). This report does not aggregate SOWs associated with pending contracts. While the work elements span various fiscal years, the vast majority of them fall between the start of FY2005 and about midway through FY2007 (10/1/2005-2/28/2007).

Pages 1-3 of this report summarize **work classification** and **work category** data independent of fiscal year, page 4 provides a breakdown by FY, while pages 5 and 6 list individual work element details.

Notes:

- The work element total budgets will not sum to the program's fiscal year budget (~\$ 139 million) because we don't yet have a complete set of SOWs in work element format for any given fiscal year for the following reasons:
 - Not all work conducted in FY2005 was described in work element format (we converted contracts starting in FY2005, but not those that started in earlier FYs but that were still active in FY2005).
 - Since FY2006 is only about halfway through, about 25% of "FY 2006 SOWs" are not yet in the system.
- Another reason for not summing to the program's fiscal year budget is that **14.7%** of work elements (1209 of 8241) **have estimated budgets of \$0**. Some \$0 budgets are perfectly valid (e.g. Env. Compliance work that was completed in previous contract, but it's still necessary to track in the current contract), but others are clearly a problem of under-reporting. While initial efforts (training, reminding people, SOW Validation report) to address this issue appear to have helped (when we ran this report in June 24.8% of work elements had \$0 budgets) and should continue to help SOW Validation report issues an alert when a work element has a \$0 budget), further improvements are on the way (next generation of work element budgeting functionality in the Indigo release).
- Data population lumps both Capital and Expense projects together. Currently, there are a few legacy projects that are both Capital & Expense which is causing some problems with the rollup.
- The "Planning and Coordination" work classification in this report is broader than "Coordination" recently discussed with Council. Roughly \$7.3 million, or 20% of this classification's budget, is largely due to coordination necessary to get on-the-ground work done, such as landowner coordination. The next version of this report will aim to allocate landowner coordination to a more appropriate work classification. (For example, if \$6 million of this \$7.3 million is truly due to landowner coordination, the Planning and Coordination category would reduce to 17% and Habitat increase to 22%.)

Work Element Classification Data Table (Data Set spans FY05-06)

| Work Element Classification | # WEs | # WEs w/ \$0 budget | WE Classification Budget |
|-----------------------------|-------------|---------------------|--------------------------|
| RM&E and Data Mgmt | 2394 | 210 | \$ 79,475,600 |
| Planning and Coordination | 1966 | 248 | \$ 38,055,628 |
| Habitat | 1436 | 202 | \$ 36,788,595 |
| Hatchery | 391 | 48 | \$ 26,393,406 |
| Reporting | 1581 | 385 | \$ 10,345,963 |
| Env. Compliance | 473 | 116 | \$ 2,839,547 |
| TOTAL | 8241 | 1209 | \$ 193,898,739 |

Notes

Some of the "work classifications" in the table are roll-ups of Pisces work categories. Since the ensuing pages of this report display drill-down charts for each work category, the tables below show how those roll-ups were done.

"Habitat" includes categories: Habitat Improvement, Instream Passage Impr., Water Conservation, Water Transactions, Habitat/Passage O&M, Animal Mgmt, Land Acquisition & Conservation Easements.

"Hatchery" includes categories: Hatchery/Major Construction, Hatchery O&M

Work Category breakdown for "Habitat"

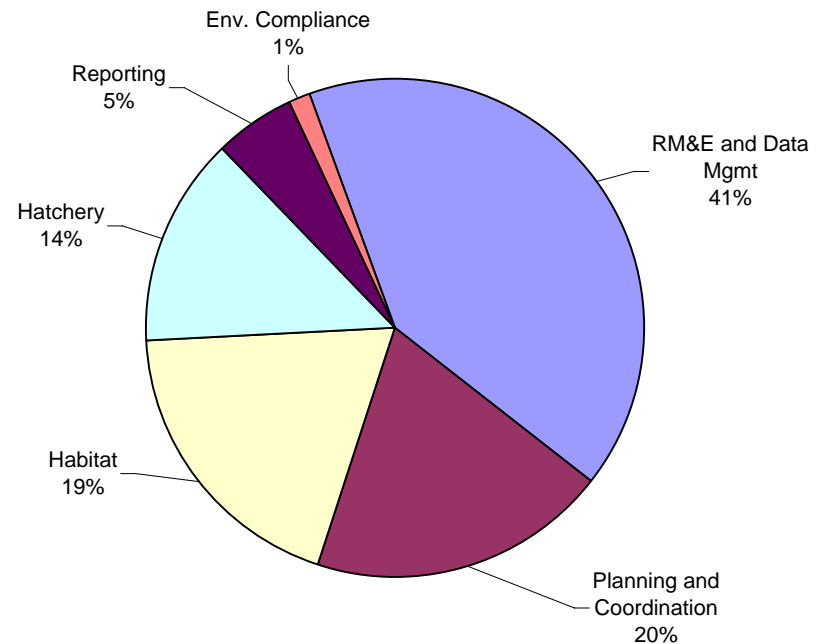
| Work Element Category | # WEs | # WEs w/ \$0 budget | WE Category Budget |
|--|-------------|---------------------|----------------------|
| Habitat Improvement | 617 | 63 | \$ 11,580,201 |
| Habitat/Passage O&M | 384 | 60 | \$ 6,559,173 |
| Instream Passage Improvement | 246 | 24 | \$ 6,311,886 |
| Water Transactions | 67 | 47 | \$ 5,176,607 |
| Animal Management | 19 | 1 | \$ 3,228,232 |
| Land Acquisitions / Conservation Easements | 72 | 6 | \$ 2,096,003 |
| Water Conservation | 31 | 1 | \$ 1,836,494 |
| TOTAL | 1436 | 202 | \$ 36,788,595 |

Work Category breakdown for "Hatchery"

| Work Element Category | # WEs | # WEs w/ \$0 budget | WE Category Budget |
|-------------------------------|------------|---------------------|----------------------|
| Hatchery O&M | 368 | 48 | \$ 25,168,445 |
| Hatchery / Major Construction | 23 | 0 | \$ 1,224,961 |
| TOTAL | 391 | 48 | \$ 26,393,406 |

BPA Fish & Wildlife Program - \$193,898,739 Work Classification by Work Element Budget Estimates

Data Set spans FY05-06





DRAFT Project Status Report as of 2/28/2006

This report aggregates information from all contracts with SOWs in work element format under a specific project.

Project 1990-044-00, Coeur D'Alene Reservation Habitat

Contractors: Coeur D'Alene Tribe

BPA Project Manager: Virgil Watts Iii

Project Timeline: 7/1/2002 - 5/31/2007

Contracts: 10885 - FISHERIES HABITAT EVALUATION IN TRIBUTARIES (7/2/2002-5/30/2006) [Issued]
CR-73766 - COEUR D' ALENE TRIBE FISHERIES HABITAT IMPROVEMEN (6/1/2006-5/31/2007) [Pending]

Province: Intermountain

Subbasin: Coeur D'Alene

Project Summary

[Free-form summary text - ideally limited to 2-4 sentences. This field does NOT exist in Pisces today, but will be added in the Indigo release]

Deliverables: 11 completed, 19 yet to be complete (3 of which are red)

● = will be completed by the end date
● = may not be completed by the end date
● = will not be completed by the end date

Deliverables Summary - Contract 10885 (Coeur D'Alene, 7/2/2002-5/30/2006)

This table summarizes contract deliverables, sorted by completion state and color rating. Because color ratings are always forward-looking, once the deliverable is completed, Pisces does not allow color ratings, hence the dash "-" character.

| Work Element | Budget | Deliverable | Due | Completed | Jul-Sep | Oct-Dec | Contractor Comments | PM Comments |
|--|-----------|--|------------|------------|---------|---------|---|-------------|
| A : Produce Environmental Compliance Documentation (165) - NEPA Analysis and Documentation | \$22,869 | Final NEPA Documentation | 10/14/2005 | 12/16/2005 | ● | - | | |
| E : Produce Design and/or Specifications (175) - Complete Bridge Design for North Fork Alder Creek (Rodeheffer) | \$18,709 | Bridge Design for N. Fork Alder Creek | 7/15/2005 | 9/27/2005 | ● | - | | |
| G : Realign, Connect, and/or Create Channel (30) - Benewah Creek Channel Construction (Johnson Site) | \$251,504 | Realigned Benewah Creek Channel | 10/30/2005 | 10/30/2005 | ● | - | Task completed on time | |
| H : Increase Instream Habitat Complexity (29) - Place Instream LWD in Evans Creek (Anderson) | \$65,310 | LWDs in Evans Creek | 10/28/2005 | 12/16/2005 | ● | - | | |
| L : Remove or Relocate Predaceous Animals (166) - Remove Brook Trout from Benewah Creek | \$21,454 | Brook Trout Removed from Benewah Creek | 10/2/2005 | 9/29/2005 | - | - | | |
| Q : PIT Tags (182) - Purchase Pit Tags for Adfluvial Westslope Cutthroat Trout Survival Study | \$8,667 | PIT Tags Purchased (for Westslope Cutthroat Trout Study) | 2/15/2006 | 1/31/2006 | ● | - | PIT tags received from PSMFC; Task completed on | |
| S : Collect/Generate/Validate Field and Lab Data (157) - Sample Salmonids in Target Watersheds for Population Estimation | \$32,946 | Salmonids Sampled in Target Watersheds | 9/30/2005 | 9/29/2005 | - | - | | |
| V : Analyze/Interpret Data (162) - Analyze Data Generated from Salmonid Sampling in Target Watersheds | \$11,636 | Salmonid Data Analyzed | 12/1/2005 | 12/1/2005 | ● | - | Task completed on time | |
| Y : Develop RM&E Methods and Designs (156) - Measure Summer and Winter Thermal Heterogeneity in Benewah Creek | \$14,122 | Thermal Heterogeneity Data from Benewah Creek | 2/28/2006 | 1/31/2006 | ● | - | Task completed on time | |
| Z : Create/Manage/Maintain Database (160) - Physical Data Management | \$11,948 | Managed Data | 5/31/2006 | 1/31/2006 | ● | - | Task completed on time | |
| AA : Analyze/Interpret Data (162) - Analyze Data from Physical Habitat Sampling, Discharge and Temperature Monitoring in Target Watershe | \$11,573 | Analyzed Data | 2/1/2006 | 1/31/2006 | ● | - | Task completed on time | |
| B : Coordination (118) - Coordinate Restoration Efforts with Stakeholders | \$52,008 | Coordinated Stakeholders | 5/30/2006 | | ● | ● | | |
| C : Outreach and Education (99) - Provide Education and Outreach Opportunities | \$58,261 | Outreach Accomplished | 5/31/2006 | | ● | ● | | |
| D : Identify and Select Projects (114) - Identify and Select New Restoration Projects | \$18,709 | Restoration Projects Selected | 5/31/2006 | | ● | ● | | |
| F : Produce Design and/or Specifications (175) - Produce Designs for New Restoration Projects | \$29,756 | Designs for Restoration Projects | 5/31/2006 | | ● | ● | | |
| J : Plant Vegetation (47) - Replant Disturbed Areas in Benewah Creek (Johnsor Site) | \$91,528 | Benewah Creek Replantings | 5/30/2006 | | ● | ● | | |



| | | | | | | |
|---|---|------------|---|---|--|---|
| K : Plant Vegetation (47) - Enhance Floodplain Plant Communities (Johnson Site) | \$60,581 Johnson Site Floodplain Plant Enhancements | 5/30/2006 | G | G | | |
| M : Analyze/Interpret Data (162) - Analyze Data from Brook Trout Removal from Benewah Creek | \$10,367 Brook Trout Removal Data Analyzed | 1/1/2006 | G | G | | |
| N : Install Fish Monitoring Equipment (70) - Install and Maintain Migration Traps Lake and Benewah Creeks | \$23,118 Migration Traps | 6/1/2006 | G | G | | |
| O : Collect/Generate/Validate Field and Lab Data (157) - Trap Juvenile and Adult Adfluvial Westslope Cutthroat Trout in Lake and Benewah Creeks | \$20,832 Trapped Westslope Cutthroat Trout (Juveniles and Adults) | 6/15/2006 | G | G | | |
| R : Collect/Generate/Validate Field and Lab Data (157) - PIT Tag Juvenile Adfluvial Westslope Cutthroat Trout in Lake Creek and Benewah Creek | \$29,848 PIT Tagged Westslope Cutthroat Trout | 6/15/2006 | G | G | | |
| T : Create/Manage/Maintain Database (160) - Biological Data Management | \$10,367 Managed Biological Data | 5/31/2006 | G | G | | |
| U : Analyze/Interpret Data (162) - Analyze Data Generated from Salmonid Trapping and PIT Tagging in Lake and Benewah Creeks | \$10,367 Salmonid Trapping and PIT Tagging Data Analyzed | | G | G | | |
| X : Collect/Generate/Validate Field and Lab Data (157) - Measure Water, Air Temperature, and Discharge in Target Watersheds | \$31,991 Data from Water, Air Temp, and Discharge measurements | 5/31/2006 | G | G | | |
| AB : Manage and Administer Projects (119) - Manage and Administer Project | \$102,118 Well-Managed Project | 5/31/2006 | G | G | | |
| AC : Produce Status Report (141) - Produce Quarterly Status Reports via Pisces | \$26,113 Quarterly Reports via Pisces | | G | G | | |
| AD : Produce Annual Report (132) - Produce Annual Report | \$26,113 FY05 Annual report | 5/30/2006 | G | G | | |
| I : Install Fish Passage Structure (184) - Construct Bridge on N. Fork Alder Creek(Rodeheffer) | \$66,031 Bridge on N. Fork Alder Creek | 5/30/2006 | R | R | Task rescheduled for 6/20/2006 due to permitting | To be completed June 06 |
| P : Install Fish Monitoring Equipment (70) - Install PIT tag antenna system in Benewah Creek | \$19,838 PIT Tag Antenna System Installed | 5/31/2006 | G | R | Additional system components need to be purchased under the next contract to complete | Work is being done to complete purchase |
| W : Collect/Generate/Validate Field and Lab Data (157) - Measure Physical Habitat in Reference and Treatment Reaches in Target Watersheds | \$39,179 Physical Habitat Measured (Ref. and Treatment Reaches) | 10/31/2005 | R | R | Lake Creek sites were not completed; surveying 15 sites is a more realistic target for | Less surveys within Lake Creek drainage |
| \$1,197,863 | | | | | | |

Most Recent Contractor Comments (10885)

<none>

Most Recent PM Comments (10885)

I have reviewed and accept this status report, and acknowledge 9 red designations

Metrics Summary - Contract 10885 (Coeur D'Alene, 7/2/2002-5/30/2006)

This table summarizes this contract's metrics. Note that not all work elements have metrics. When more than once instance of a work element exists on a SOW, this table will aggregate the metrics. Currently Pisces only supports Actual metrics.

| Work Element - Work Element Title | Metric | Planned | Actual | Contractor Comments | PM Comments |
|---|--|---------|--------|---------------------|-------------|
| C: Outreach and Education (99) - Provide Education and Outreach Opportunities | # of students reached | - | 1000 | | |
| | # of general public reached | - | 9000 | | |
| | # of teachers reached | - | 20 | | |
| G: Realign, Connect, and/or Create Channel (30) - Benewah Creek Channel Construction (Johnson Site) | # of stream miles after treatment | - | 0.3 | | |
| | # of stream miles before treatment | - | 0.2 | | |
| H: Increase Instream Habitat Complexity (29)- Place Instream LWD in Evans Creek (Anderson) | # of stream miles treated | - | 0.09 | | |
| | # of structures installed | - | 61 | | |
| I: Install Fish Passage Structure (184)- Construct Bridge on N. Fork Alder Creek (Rodeheffer) | If installing a ladder, does ladder meet NOAA specificat - | | | | |
| | Does the structure remove or replace a passage barrier - | | Yes | | |
| | Was barrier Full or Partial? | - | Full | | |
| | # of miles of habitat accessed to the next upstream bari - | | 1.5 | | |
| Summary of Plant Vegetation (47): | | | | | |
| J: Replant Disturbed Areas in Benewah Creek (Johnson Site) | # of riparian acres treated | - | 18.7 | | |
| | # of upland acres treated | - | 14.8 | | |



K: Enhance Floodplain Plant Communities (Johnson Site)

of wetland acres treated

-

3.9

of riparian miles treated

-

1.39

Summary of Research, Monitoring, & Evaluation Work

Work Element

M: 162. Analyze Data from Brook Trout Removal from Benewah Creek

O: 157. Trap Juvenile and Adult Adfluvial Westslope Cutthroat Trout in Lake and Benewah Creeks

R: 157. PIT Tag Juvenile Adfluvial Westslope Cutthroat Trout in Lake Creek and Benewah Creek

S: 157. Sample Salmonids in Target Watersheds for Population Estimation

U: 162. Analyze Data Generated from Salmonid Trapping and PIT Tagging in Lake and Benewah Creeks

V: 162. Analyze Data Generated from Salmonid Sampling in Target Watersheds

W: 157. Measure Physical Habitat in Reference and Treatment Reaches in Target Watersheds

X: 157. Measure Water, Air Temperature, and Discharge in Target Watersheds

AA: 162. Analyze Data from Physical Habitat Sampling, Discharge and Temperature Monitoring in Target Watersheds

| R, M, and E Focal Area | | | | | | | | Prim. R, M, E Type | | | | Sec. R, M, E Type | | | |
|------------------------|-------|---------|-------|---------|----------|------------|-----------------|-------------------------------|------------------------|----------------------|---------------------------|-------------------------------|------------------------|----------------------|---------------------------|
| Trib. | Hydro | Estuary | Ocean | Harvest | Hatchery | Systemwide | Emerging Issues | Research Action Effectiveness | Research Uncertainties | Monitor Status/Trend | Evaluate Impl./Compliance | Research Action Effectiveness | Research Uncertainties | Monitor Status/Trend | Evaluate Impl./Compliance |
| | | | | | | | ● | ● | | ● | | ● | | ● | |
| ● | | | | | | | | | | ● | | ● | | | |
| ● | | | | | | | | | | ● | | | ● | | |
| ● | | | | | | | | | | ● | | ● | | | |
| ● | | | | | | | | | | ● | | | ● | | |
| ● | | | | | | | | | | ● | | ● | | | |
| ● | | | | | | | | | | ● | | ● | | | |
| ● | | | | | | | | | | ● | | ● | | | |
| ● | | | | | | | | | | ● | | ● | | | |
| ● | | | | | | | | | | ● | | ● | | | |
| 89% | | | | | | | 11% | 11% | | 89% | | 67% | 22% | 11% | |

Status Report Summary

Since all the above data in this report is enabled via status reporting, this table summarizes the submittal and acceptance of status reports for each contract. "Accepted" means received, not necessarily verification of the deliverables marked complete in the status report.

| Contract | Status Period | Due | Submitted | Accepted |
|----------|---------------|------------|-----------|-----------|
| 10885 | Jul-Sep 2005 | 10/15/2005 | 9/30/2005 | 10/6/2005 |
| | Oct-Dec 2005 | 2/15/2006 | 1/31/2006 | 2/13/2006 |
| | Jan-Mar 2005 | 4/15/2006 | | |

Printed: 3/6/2006

Project Summary Report for 1994-044-00

This information has been made publicly available by BPA in Feb 2006 and does not contain BPA-approved Agency Financial Information.

page 3 of 3