



December 6, 2012

**2013 Geographic Project Review
Review of habitat projects in the anadromous areas of the Columbia Basin
for Fiscal Years 2014-2018**

Dear Project Sponsors:

The Northwest Power and Conservation Council (Council) and Bonneville Power Administration (Bonneville) announce the start of the review process for ongoing habitat projects in the anadromous areas of the Columbia Basin, under the Council's Fish and Wildlife Program.

This packet contains the information you and your project team will need to complete the project proposal forms, as well as important dates, and contact information. All information contained in this packet also can be found on the Council's website at www.nwcouncil.org/fw/budget/2014/ and will be updated periodically with new information.

Proposals are due by midnight February 28, 2013.

The reviews include five general steps. The first step in the process is for project sponsors to develop proposals on the work they intend to accomplish over the next five years and to report the results of their past work. Second, the Independent Scientific Review Panel (ISRP) reviews these proposals and results of the projects to date. The ISRP review includes site visits, presentations, and a response loop. Third, the public is invited to comment on the ISRP's review. Fourth, the Council staff will use the information from the proposals, science reviews, and public comment to draft recommendations for the Council. Fifth, the Council will make final recommendations to Bonneville for project implementation. The Council's recommendations will span from fiscal year 2014 through 2018.

Projects included in the review are listed at www.cbfish.org/Portfolio.mvc/Projects/1503. The portfolio encompasses all category-appropriate projects including those that may have undergone Council and ISRP review since the FY 2007-2009 review process.

I. Background and Purpose

Under Section 4(h) of the Northwest Power Act, the Council develops a program to “protect, mitigate and enhance” fish and wildlife affected by the hydroelectric facilities on the Columbia and its tributaries. Section 4(h)(10)(A) of the Power Act then calls on the Bonneville to use its funds and other authorities to protect, mitigate, and enhance these same fish and wildlife “in a manner consistent with” the Council’s fish and wildlife program.

Section 4(h)(10)(D) of the Northwest Power Act directs the Council to make recommendations on projects proposed for funding by Bonneville to implement the Council’s Fish and Wildlife Program. In developing recommendations, the Council fully considers the proposal reviews of the ISRP. The Council and Bonneville work together to develop the information necessary to make this review process successful. Beginning in 2009, the Council and Bonneville, with advice from the ISRP, decided to review projects in functional categories (i.e., wildlife, monitoring, evaluation and research, artificial production, resident fish in the areas impassible for anadromous fish) to be followed by a review of certain projects, especially habitat actions, organized by subbasin and province, commonly referred to as the Geographic Review.

2009 Fish and Wildlife Program Direction

The focus of the 2009 Fish and Wildlife Program is on performance and adaptive management. The 2009 Program emphasizes 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. In addition, it encompasses projects that support the Federal Columbia River Power System (FCRPS) Biological Opinion (BiOp) Reasonable and Prudent Alternatives (RPAs). The direction from the 2009 Program to focus on evaluation and to report on progress guides the focus of the Geographic Review.

Results

This review focuses on ongoing habitat projects, including some that have been the subject of numerous reviews in the past. An important function of these reviews is to evaluate project results and how well the projects have adapted proposed future work based on those results. The review will also evaluate how well the project sponsors have responded to the scientific and management issues identified in previous reviews.

Context

The central purpose of the geographic review is to assess how the project’s objectives address subbasin plan objectives, strategies, and limiting factors, as well as recovery plans or other local action/implementation plans. Through this review, the Council and Bonneville should better understand the relevance and priority of the work and how it fits into the context of other work and priorities (including artificial production) in the subbasin. In addition to individual project-specific reviews and recommendations, this review process allows the ISRP and Council to assess coordination and consistency of efforts to restore habitat, natural functions, and ultimately fish populations.

II. Schedule and General Information

Process Steps and Schedule

This packet marks the start of the proposal phase in which project sponsors update their project proposals in cbfish.org (akaTaurus). **Final proposals are due by midnight on Thursday, February 28th 2013.** The Council will make all proposals available to the ISRP for review on March 1, 2013. The complete review schedule is set forth in the timeline on page 6.

Electronic Proposal Form

Since the review of proposals for FY 2007-2009, the Council and Bonneville have shifted to an online proposal form supported by the Taurus system available on www.cbfish.org. The new proposal form reflects the same narrative questions as the old proposal form and includes additional questions tailored to particular project types.

Proposal Form Workshops

The Council and Bonneville will hold five training sessions on how to complete proposals in Taurus. The workshops will be held in Pendleton, Yakima, Boise, Lewiston and Portland. See details on the Council's website at www.nwcouncil.org/fw/budget/2014. The workshops will also cover details about the review process. Project sponsors can attend any of the workshops. A web-based tutorial will also be available to assist sponsors during the Portland meeting. Sponsors are invited to attend any of these workshops. *If you have not already done so, please send an email to Lynn Palensky indicating which workshop you will be attending and remember to bring a laptop.*

ISRP Review

The ISRP will review all proposals 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 and Council also will consider the relationship of the proposal to various regional documents. These include the subbasin plans as well as the Council's Draft Monitoring Evaluation Research, Reporting and Data Framework, Council's 2006 Research Plan, Biological Opinions, NOAA's Recovery Plans or regional plans (e.g., Columbia Estuary Ecosystem Restoration Program or Willamette River Habitat Protection and Restoration Program). See the list of helpful documents links and additional guidance starting on page 7.

For individual projects, the ISRP review will focus primarily on project performance. This consists of assessing: 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. Moreover, the ISRP is specifically charged with

reviewing “results of prior year expenditures” and therefore results reported through proposals and supporting documents will be critical to the ISRP’s evaluation.

The ISRP will complete a Preliminary Review Report of proposals on **June 6, 2013**. 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 will be organized to share information about projects, add context to the proposals, and provide an opportunity for dialogue between the ISRP and project sponsors (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 if issues need to be clarified, the ISRP will request a response from the project sponsor that will be due July 9, 2013.

The ISRP will review these responses and complete a Final Report by **August 15, 2013**. This report will include final recommendations on all proposals and findings on programmatic issues related to these proposals such as identification of information gaps, opportunities for coordination, and issues that cross-cut many projects (e.g. prioritization of projects and long-term maintenance issues).

Umbrella Proposals (aka “Programmatic” Proposals)

Larger habitat projects that identify, rank, select, and in some cases fund habitat projects and are considered “programmatic” in nature are included in this review and will be referred to as “umbrella projects.” This set of projects will be required to answer a specific set of questions related to the process of identifying and selecting projects for implementation by others or the sponsoring entity. These questions will pop up in the proposal form where appropriate. To see all the questions related to umbrella projects in one place, see page 10.

Umbrella Projects included in this review:

1. Project #1992-026-01: Grande Ronde Model Watershed
2. Project #2010-077-00: Tucannon River Programmatic Habitat
3. Project #2010-001-00: Upper Columbia Programmatic Habitat
4. Project #2003-011-00: Columbia River Estuary Habitat Restoration
5. Project #2008-104-00: Land & Water Acquisition (Colville Tribe)
6. Project #2009-012-00: Willamette Bi-Op Habitat Restoration
7. Project #2010-073-00: Columbia Land Trust Estuarine Restoration
8. Project #2010-004-00: CREST Estuary Habitat Restoration
9. Project #2010-070-00: WA Estuary MOA Project Scoping & Implementation

Project Presentations and Site Visits

Sponsors are encouraged to participate in project presentations, as part of this review process, which serves to inform the ISRP, other sponsors, and representatives from Council and Bonneville about their work. This exchange of information among project sponsors will help inform ISRP and Council recommendations. Presentations should focus on results, accomplishments, adaptive management implications, and proposed work. We anticipate holding the presentations in conjunction with the site visits between the middle of March and the end of May 2013 (see draft schedule below). Contact Lynn Palensky with any questions or early scheduling requests.

We will rely on the project sponsors to help coordinate workable itineraries that show a representative project or sites to showcase your work. Coordination on behalf of the sponsors should also consider other sponsors and project partners. For example, in a particular subbasin the state and tribes should work together to put together joint site visits that would not only showcase the project but also the relationships and collaboration on particular objectives.

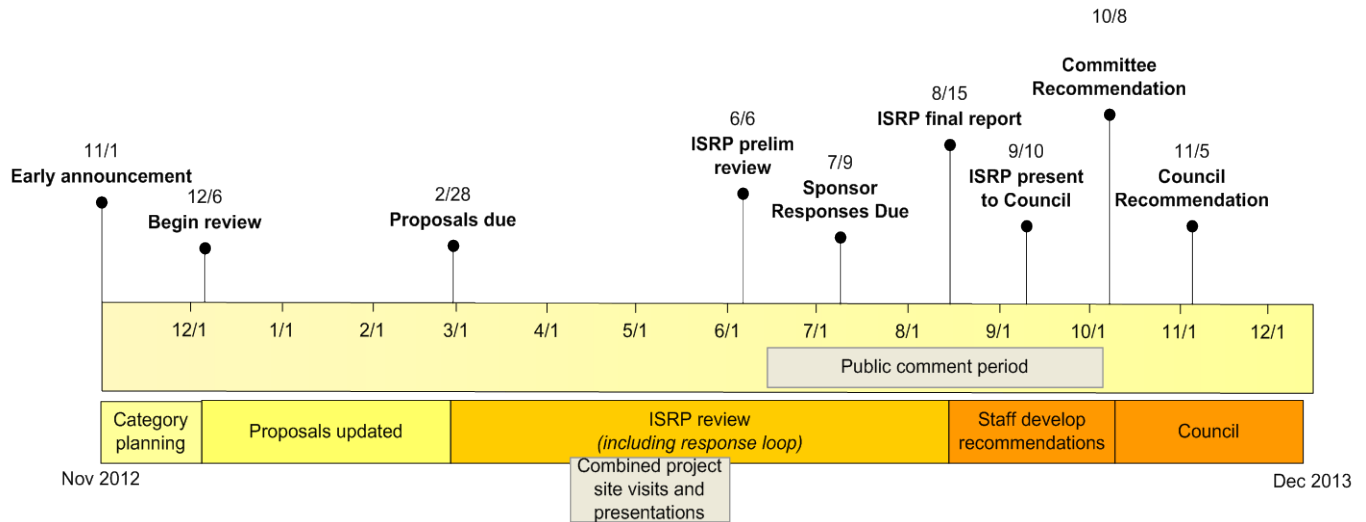
Contact Lynn Palensky at lpalensky@nwcouncil.org with any questions or scheduling requests.

Review and Site Visit Location	Tentative Dates	Meeting Location	Number of Projects
Estuary, Lower Columbia	Week of March 18	Portland	8
Gorge and Columbia Plateau - Wind, Klickitat, Hood, Fifteenmile	Week of April 15	The Dalles	6
Gorge and Columbia Plateau - Deschutes, John Day			13
Columbia Plateau - Umatilla, Walla Walla, Tucannon	Week of April 22	Pendleton or Walla Walla	14
Blue Mountain - Grande Ronde		La Grande or Pendleton	6
Mountain Snake - Clearwater; Blue Mountain - Asotin	Week of April 29	Lewiston	15
Columbia Cascade - Wenatchee, Entiat, Methow. Okanogan	Week of May 13	Wenatchee	7
Yakima			7
Mountain Snake - Salmon	Week of May 21	Boise	13
Total (Days)			89

Contacts

Lynn Palensky, Council	503.222.5161 lpalensky@nwcouncil.org	General process and review
Marcy Foster, Bonneville	503.230.3446 mmfoster@bpa.gov	Taurus and proposal form
Erik Merrill, ISRP Coordinator	503.222.5161 emerrill@nwcouncil.org	ISRP review and proposal form
Nancy Leonard, Council	503.222.5161 nleonard@nwcouncil.org	Monitoring and data management
Jim Geiselman, Bonneville	503.230.5732 jrgeiselman@bpa.gov or RMEsupport@bpa.gov	BiOp Strategies/RPAs, Habitat Action Effectiveness and Data Management Guidelines
Dal Marsters, Sitka Technology Group	503.808.1208 dal@sitkatech.com	Taurus and <i>cbfish.org</i> technical

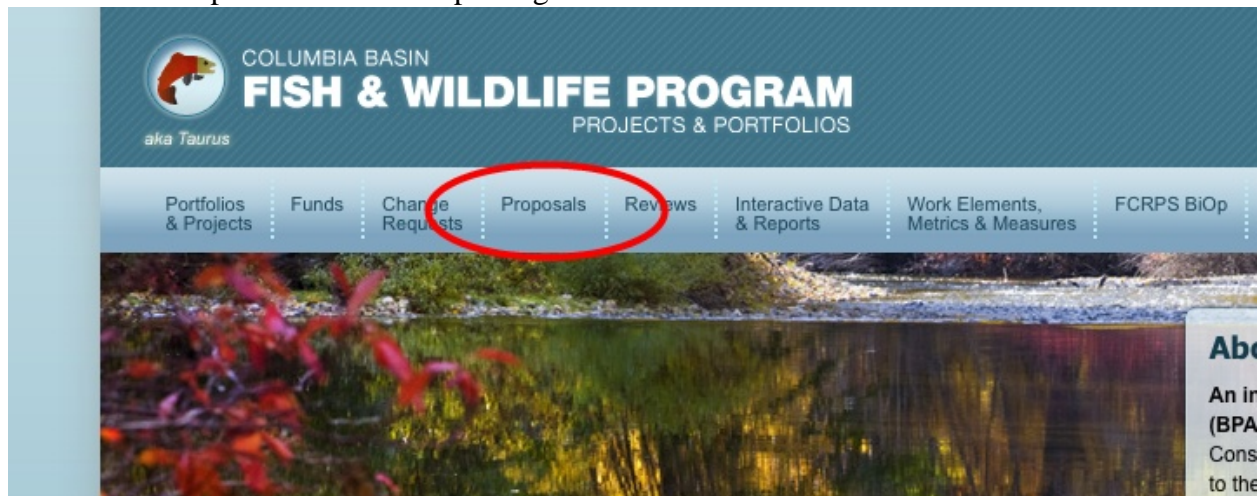
Geographic Review Schedule



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.

IV. Guidance for project reviews

a. Important Guidance Documents (web-links)

There are numerous documents that you may choose to consult to support your proposed work. One place to find many important document web links is the Council's new Subbasin Dashboard web page (www.nwcouncil.org/fw/dashboard). Key components of this site - and to your proposals - are the subbasin plans. The dashboards are interactive web pages that present excerpts of the subbasin plans and links to related information including other management plans, local maps, and contact information for key individuals. The Council plans to update information on the dashboards as necessary and hopes that these will evolve to serve as a one-stop-shop for information on planning activities in a subbasin. Additional information accessible on the Dashboard pages includes:

- ESA-related information (RPAs, Recovery plans, Expert Panels information, critical habitat documents and maps)
- Species- and state-specific management plans
- Tribal resources management plans
- Hatchery documentation (HGMPs, HSRG reviews, etc.)

- General links to local, tribal, state and federal organizations related to each subbasin specifically
- Basinwide monitoring and data storage locations
- Extracted key elements from the Subbasin Plans (objectives, limiting factors, focal species, status and trend information from the assessments, etc.)
- Project portfolios from Taurus specific to each subbasin

Other reference documents that may assist with your proposal development:

- Council's website for general information: www.nwcouncil.org/fw
- Council's 2009 Fish and Wildlife Program: www.nwcouncil.org/library/2009/2009-09 or www.cbfish.org/ProgramStrategy.mvc/ProgramStrategiesIndex
- Subbasin Plans: www.nwcouncil.org/fw/subbasinplanning
- High Level Indicators: www.nwcouncil.org/fw/program/hli
- MERR: Draft Monitoring, Evaluation, Research, Reporting, and Data Access Framework (draft MERR Framework) www.nwcouncil.org/fw/merr
- ISRP and ISAB Reports: www.nwcouncil.org/fw/science.htm
 - Using a Comprehensive Landscape Approach for More Effective Conservation and Restoration (ISAB 2011-4, www.nwcouncil.org/library/report.asp?d=640)
 - Columbia River Basin Food Webs: Developing a Broader Scientific Foundation for Fish and Wildlife Restoration (ISAB 2011-1, www.nwcouncil.org/library/isab/2011-1)
 - ISRP Retrospective Report 2011 (especially pages 65-72, ISRP 2011-25, www.nwcouncil.org/library/report.asp?d=647)
 - Non-native Species Impacts on Native Salmonids in the Columbia River Basin (ISAB 2008-4, www.nwcouncil.org/library/isab/isab2008-4.htm)
- Monitoring Advisor at www.monitoringresources.org includes guidance for documenting monitoring and research which includes links to www.monitoringmethods.org and the <https://salmonmonitoringadvisor.org>
- For annual reports from ISEMP or CHaMP, see www.champmonitoring.org
- For information on limiting factor updates, see the BOR website for Expert Panel Workshop results: <http://www.usbr.gov/pn/fcrps/habitat/panels/reference/index.html>

b. Expert Panel Areas

If you are in an expert panel area, the information developed during that process is incorporated into both the proposal form (by way of limiting factors) and into the subbasin dashboards (described above). The expert panel areas include the Salmon, Grande Ronde, Clearwater, Lower Snake (e.g., Asotin, Tucannon), and the Upper Columbia basins.

c. Limiting factor guidance for restoration and acquisition projects

The most recent limiting factor assessments results, either from the Expert Panel assessment or from the 2004 subbasin plan EDT and QHA assessments, have been incorporated into the proposal form in Taurus. These assessments are being used to illustrate the link between project actions and limiting factors. If actions are not associated to known limiting factors, an explanation of the action to limiting factors or degraded conditions will be requested as you fill

out the form. We recognize that some subbasin plans and other source documents may have been recently updated. If you refer to any updated source information not currently in Taurus, you will be asked to identify the source. Sponsors are requested to submit updated information on limiting factors to <http://www.cbfish.org/Help.mvc/Support> for incorporation into Taurus.

d. Project level action effectiveness monitoring approach for geographic review

The ISRP, as required by the 1996 Amendment to the Northwest Power Act, assess whether projects have provisions for monitoring and evaluation of results. In the past, monitoring has been conducted on a project by project basis with limited coordination or strategic direction toward comprehensive analysis of data and synthesis and reporting of results. BPA and the Council are now developing a project-level action effectiveness monitoring approach that is coordinated, informs comprehensive reporting of results, and will emphasize a programmatic approach to evaluate the effectiveness of restoration actions. As part of this evolution, some projects may no longer be required to monitor beyond implementation and compliance monitoring.¹

In this review, project sponsors should include a discussion of how restoration actions are monitored or how they are covered through other monitoring projects or programmatic approaches. We recognize that, currently, projects in the Geographic Review vary in how their projects may be monitored. Some projects are gathering and evaluating monitoring data for their specific project actions. Others are gathering monitoring data that contributes to a programmatic monitoring project, such as for IMW projects. Some projects may not be gathering any monitoring data and rely on other projects to conduct the monitoring and evaluation of their restoration actions. To align with the BPA and Council guidance to evolve toward a programmatic approach for monitoring and evaluation of effectiveness of restoration actions, project sponsors should include information that identifies how they:

- 1) Integrate their monitoring results into BPA's draft project level action effectiveness monitoring strategy, entitled "Effectiveness Monitoring of *Tributary Habitat Improvement: a programmatic approach for the BPA Fish and Wildlife Program.*"² If you would like to know more about how to integrate your project into BPA's *Programmatic Approach* contact RMEsupport@bpa.gov.
- 2) Rely on existing watershed-scale (IMWs) or programmatic monitoring and evaluation projects to inform the effectiveness of their restoration actions or the action category.³ If this is the case, sponsors should discuss this in the "*relationship to the other projects*" section of the proposal form.

¹ This may include projects that have completed project effectiveness monitoring per the original study design or projects that can reference monitoring assessments through other, similar types of projects or through a regional programmatic approach

² The draft programmatic approach will be submitted for ISRP review and public comment, and will be available for reference on the Council's website in January 2013.

³ Proposals that include work in IMW basins (Entiat, Methow, John Day, Wenatchee, South Fork Salmon, Lemhi, Clearwater [Potlatch], Asotin) should refer to the IMW project/process as the action effectiveness monitoring strategy which results will be incorporated.

e. Status and trends monitoring approach for geographic review

Project sponsors who currently rely on information produced by other projects that conduct habitat status monitoring to identify restoration opportunities should describe how these monitoring results are used. To contribute to efforts to move the Fish and Wildlife Program toward a programmatic approach to monitoring, Project Sponsors should consider utilizing monitoring results from watershed and programmatic status monitoring projects such as CHaMP. Project sponsors that are performing status and trend monitoring should consider employing the same monitoring methods used by watershed and programmatic status monitoring projects and contributing their data and results to these large scale projects. These projects should consider employing similar methods as used by CHaMP, “Scientific Protocol for Salmonid Habitat Surveys within the Columbia Habitat Monitoring Program (CHaMP) for 2011” that are viewable at www.monitoringmethods.org/Protocol/Details/416.

f. Questions for umbrella habitat projects (*programmatic projects*)

Umbrella Projects included in this review:

1. Project #1992-026-01: Grande Ronde Model Watershed
2. Project #2010-077-00: Tucannon River Programmatic Habitat
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Questions to be addressed by the sponsor(s) in the proposal process:

1. Describe the primary purpose of the program (objectives and priorities) and how they are linked to the actions (projects) implemented through subcontracts. Provide a history on program administration changes associated with this project, including any future changes that are anticipated to assist in facilitating the program more efficiently and effectively.
2. Describe all the steps in the program’s process to solicit, review, prioritize, and select habitat projects for implementation. Explain how the solicitation process incorporates or is consistent with other similar regional or state processes as appropriate. Also, please attach solicitation notices/documents, ranking and scoring criteria, and overall project action/implementation plans for your project. The following outlines the information to include:

Solicitation: Describe in detail the solicitation process and criteria. Include how the announcement is communicated and who is included in the communication, eligibility criteria for submitting proposals, types of projects funded, expressed priorities, and any other applicant requirements.

Review: Include and describe the review/scoring/prioritization criteria used to determine and select technically feasible projects. Discuss how you incorporate current scientific information and limiting factors to support the prioritization of projects. Describe feasibility factors that affect priority such as land ownership, permitting, cost, cost/benefit ratio, risk, etc. Also describe the review process, provide the resumes and qualifications of the review panel and explain how potential conflict of interest issues are avoided in regard to project prioritization.

Selection: Describe who makes funding recommendations and who makes final funding decisions. Describe all steps in this process including how potential conflicts of interest are avoided with regard to project funding.

3. Reporting

- a. Provide a list of project actions to date. Include background information on the recipients of funding, including organization name and mission, project cost, project title, location and short project summary, and implementation timeline.
- b. Describe how the restoration actions were selected for implementation, the process and criteria used, and their relative rank. Were these the highest priority actions? If not, please explain why?
- c. Describe the process to document progress toward meeting the program's objectives in the implementation of the suite of projects to date. Describe this in terms of landscape-level improvements in limiting factors and response of the focal species.
- d. Where are project results reported (e.g. Pisces, report repository, database)? Is progress toward program objectives tracked in a database, report, indicator, or other format? Can project data be incorporated into regional databases that may be of interest to other projects?
- e. Who is responsible for the final reporting and data management?
- f. Describe problems encountered, lessons learned, and any data collected, that will inform adaptive management or influence program priorities.

4. Provide a summary of your past annual budgets and include a breakdown of the program's administration and implementation costs (i.e., overhead costs, each subcontractor, etc.). Please include cost share summary information (e.g., for overall program funding and for individual projects - percent cost share, partners and how you coordinated cost share).