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April 29, 2010

MEMORANDUM

TO: Council Members

FROM: Staff

SUBJECT: Update on RM&E/Artificial Production Category Review

Staff will give an update on progress toward launching the RM&E/Artificial Production Category Review in June. We will cover next steps for project proponent notifications, workshops, project categories, plans to incorporate recently reviewed projects, the review schedule, and the proposal form.

Attached is a subset of the proposal form questions consisting of instructions for all projects as well as tailored questions for particular project types (Attachment 1). These questions have been abstracted from the Taurus proposal form currently under development, and 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 data queries in the proposal form that contribute to Bonneville's understand of how these projects meet particular FCRPS BiOp requirements. The attached subset of questions, with the exception of the tailored questions, represents the general questions developed by and used for the ISRP's past project reviews. Nancy Leonard will be able to discuss how the information asked in this subset of questions address components of the MERR.

Proposal Form Narrative Instructions & Tailored Questions
April 26, 2010

Project Abstract:

Provide a summary of your project proposal that includes the following information: Primary goal of your work; why the work is important (including anticipated results/benefits; please be as quantitative as possible); 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. For proposals based on existing projects, this field is initialized with the Project Summary entered in Pisces.

Explanation of Financial Performance

Discuss your project's financial history – if its fiscal year expenditures are significantly above or below its fiscal year contracted amount, please explain. Keep in mind that it can be tough to compare expenditures to contracted amounts since contracts often span fiscal year and the amount above simply is based on the fiscal year in which the contract started, whereas the expenditures are the sum of invoices paid against the project for the fiscal year.

Major Accomplishments

In addition to summarizing the Deliverables you checked above, in order to help ISRP and Council assess project performance, please address the following: List important activities and milestones; report results and evaluate those results in terms of the project's ultimate goals; whenever possible, describe these 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 data tables of key metrics showing trends; and 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. Do not get into the future deliverables of your project – you will provide these later.

Adaptive Management

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.

Explain your project's significance to Regional Programs

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).

Problem Statement

In this section describe the specific problem or need your proposal addresses. Describe the background, history, and location of the problem. For research related projects or research components of a project (e.g., action effectiveness), include a short scientific literature review covering the most significant previous work related to the project, including 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. All references should be concisely summarized and cited.

Project Objectives

What are the ultimate ecological objectives of your project? For example, the project intends to monitor the status and trend of the spawner abundance of a salmonid population; increase harvest; restore or protect a certain population; or maintain species diversity. Objectives provide a biological and/or physical habitat benchmark against which to develop a monitoring and evaluation program to gauge project success. Objectives should be stated in terms of desired outcomes, rather than as statements of methods and work elements (tasks). In addition, provide objectives that are measurable in biological and/or physical terms. Later, you will be asked to link these Objectives to Deliverables and Work Elements.

Project Relationships

a. Is your project part of a program or coordinated implementation strategy that may be larger than this individual proposal? Please explain how your proposed project relates to, complements, or includes collaborative efforts with other proposed or existing projects, specifically those in your watershed, subbasin, and province. 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. As another example, if your study supplies information for an Intensively Monitored Watershed program, explain the relationship. However, only cite projects that relate directly to the specific objectives of this project (i.e., do not list all projects in the basin). If the relationship with other proposals is unknown or is in conflict with another project, note this and explain why.

b. How is your project coordinated with other similar projects in the basin? Please explain how your proposed project relates to, complements, or includes collaborative efforts with other projects similar to yours. For example, how is your (lamprey, hatchery, tagging) project coordinated with other similar projects and or research in the basin?

Existing Project Relationships

Below are your project's existing relationships that cbfish.org already knows about. Please describe additional relationships in the text box below. Explain how your project is related to other projects not listed above.

Facilities & Equipment

All major facilities and equipment to be used in the project should be described in sufficient detail to demonstrate adequacy. For example, the proposal should 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. Any special equipment, i.e., new technology, to be purchased with project funds should be identified and justified. Please limit this section to only a few paragraphs.

Project References or Citations

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 stand alone document, so all critical information needs to be provided and summarized in the proposal. Citations should be clearly linked to your narrative text references.

Key Personnel

Provide a summary of the personnel required to implement the proposed activities. Include names, titles, job descriptions, hours/Full Time Equivalent (FTE) personnel will commit to the project. For key personnel (e.g., principal investigators, project managers, key subcontractors) provide one-page resumes and describe their duties on the project.

Resumes should 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.

Tailored Questions

Artificial Production:

1. Summarize the HSRG recommendations for this production program.
2. 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.
3. Indicate the pHOS on spawning grounds within the project's area and the pNOB for the hatchery.
4. Is the facility operated as an integrated or segregated production program?
5. Describe the current status of referenced HGMPs.

Research, Monitoring and Evaluation:

1. Type of RM&E will you be doing?

- | | |
|---|--|
| <input type="checkbox"/> Project Implementation/Compliance Monitoring | <input type="checkbox"/> Status and Trend Monitoring |
| <input type="checkbox"/> Action Effectiveness Research | <input type="checkbox"/> Uncertainties Research |

2. Describe if any emerging limiting factors such as climate change, non-native species, predation increases, or toxics might impact your project's focal species and their habitat or reduce your project's success? If so, please describe how you are taking into account these emerging factors to ensure the continued success of your project. **This should apply to all projects.*

Tagging:

(from the joint ISAB/ISRP Tagging report 2009-1)

- 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.
- Describe any of the innovative approaches that your projects proposes that are in direct support of the ISAB'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.
- 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.
- 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).

- Explain how your tagging and tag recovery rates ensure a statistically valid result for your project.

Habitat Projects:

Describe the process to solicit for, review and select projects; and include the criteria by which projects are rated and selected.

Regional Coordination:

Explain how your proposed work will address the focal activities described in the Council's Program for Program Coordination projects:

- 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)

Include as part of Narrative:

Metrics of impact: (e.g., how effective is the project: what is its added value of the coordination project)

When describing objectives for your coordination project consider and discuss value added by your proposed project in terms of:

- changes in behavior
- value to members
- user evaluation of product utility
- lack of redundancy
- member assessment of effectiveness and impact
- benefits to fish and wildlife of enhanced coordination activities.
 - o Specific projects or resources benefited by the project
 - o Specific effect of coordination on conservation and management

Include as part of Past Accomplishments:

- Meetings you've attended
- Workgroups that you have participated in
- Deliverables that you have helped to develop in a regional forum
- Regional policies that you have helped to develop
- Reporting
- Information exchange
- degree of representation among coordinated parties