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January 8, 2013

MEMORANDUM

TO: Council Members

FROM: Nancy Leonard, Fish, Wildlife, Ecosystem Monitoring and Evaluation Manager

SUBJECT: Briefing on Bonneville Power Administration new Annual Project Reporting Template

Russell Scranton and Jason Sweet from the Bonneville Power Administration (Bonneville) will provide an update on the new, standardized, annual project reporting template (template). This new template is being implemented as a pilot in 2013 by requesting that all research, monitoring and evaluation (RM&E) project sponsors use this new template in producing their 2012 annual project report for Bonneville with RM&E work.

During its development in 2012, this template has received input from the three main user groups: a subset of project sponsors, Council staff, and the Independent Science Review Panel. Following this pilot application, Bonneville will further refine the template by again seeking input from these three user groups.

This template serves to address the [Council's June 2011 recommendations](#) number one and six from the RME+AP Project Review Category process as well as to meet ESA BiOp Reporting needs. In brief, this template responds to the recommendation that Bonneville should work with the Council to improve annual reporting by project sponsors by providing a concise, useful template, to be followed by research, monitoring and evaluation project sponsors in preparing their annual reports to Bonneville. The complete recommendation language is as follows:

1. Reporting and use of project and program results

Council recommendation: Each year the ISRP and then the Council will produce a report that in some way delivers a review snapshot of the implementation and biological results from a subset of the on-the-ground projects, the program's monitoring and evaluation and research elements, or both. The easiest way to do this will be for the ISRP to add a more distinct and visible retrospective/results component to all project reviews, and then mine the

reviews each year for information to organize into the retrospective review of results for that year. The ISRP and the Council will also look for frequent opportunities to have the sponsors and managers of the broader programs produce their own retrospective reviews of results over a body of time (such as the CSS review noted above or the synthesis reports in certain topic areas called for below), for subsequent review and report by the ISRP and then the Council, possibly including a workshop. The systematic annual review and reporting of results needs to focus on more than just the results from individual on-the-ground projects. Inherent in the Fish and Wildlife Program is a set of relationships or hypotheses that link the projects to expected changes in the relevant habitat conditions for key species and then in the population characteristics of those species. The on-the-ground projects that we hope or expect will, collectively, produce these changes are not, by and large, tasked with monitoring the status and trends of the targeted habitat and population characteristics. That is the province of distinct program monitoring and evaluation efforts and projects described throughout this document. These efforts need to be included in the revolving annual review and reporting of results by the ISRP and Council. The report on High-Level Indicators could be folded into the Council's part of this effort.

This decision document in this review is not the place to scope out this effort in detail. Those details will come in a separate proposal developed by the Council staff and ISRP together. It is likely the ISRP and staff will propose a test or pilot of this approach in 2011 focused on the results that have or will be gathered for ISRP review this year with regard to artificial production, mainstem monitoring, and the Lower Snake River Compensation Plan activities.

As part of this effort, Bonneville should require all research, monitoring and evaluation projects to report annually, providing an electronic summary of their results and interim findings as well as describing benefits to fish and wildlife. Bonneville should work with the Council to design a concise, useful template for annual reports that can replace other more cumbersome, more costly, and less useful reports for individual projects. The Council will work with Bonneville and the ISRP to identify and assemble the information needed to produce an annual summary of results for Council review, consistent with the principles above.

A separate programmatic issue below (#6) speaks distinctly to reporting requirements for research projects in particular.

6. Research projects in general

Council recommendation: The Council recommends that all research projects receive no more than three-year funding recommendations. Out-year funding will be dependent on ISRP and Council review of the reports of research results and a proposal for further work.

More generally, the Council recommends that Bonneville, working with the Council and other program participants, identify, organize and track all research projects as part of an overall research effort. When projects include both research and monitoring and evaluation elements, the research components should be tracked as part of these coordinated research efforts. All research projects should initially report basic information, followed by an annual status report that can be used to track the accomplishments of projects. Information to be reported by research projects should include the following:

Initially Report:

- *An accounting of past hypotheses tested, conclusions reached, and benefits for fish and wildlife;*
- *A clearly defined hypothesis to be tested that links to a critical uncertainty; description of scientific methods and statistical analyses; a timeline for producing results including milestones and end dates.*

Annually Report (including final report):

- *Electronic progress reports including any results, conclusions, benefits for fish and wildlife, and a link to any publications resulting from the work.*