

## Brian Lipscomb

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**From:** Delwiche, Gregory K - KE-4 [gkdelwiche@bpa.gov]  
**Sent:** Monday, April 20, 2009 3:57 PM  
**To:** Brian Lipscomb; Grover, Tony; Maslen, Bill - KEW-4  
**Subject:** RE: M&E workshop

Brian, in reponse to your questions; I probably could have been a bit cleaner with my language/terms, but the general issue, whether we're talking status and trend monitoring or VSP parameters, is that there's particular information we need for Biop purposes and that information is a subset of broader information that either NOAA needs for recovery planning, or that the co-managers need for broader fishery mgt, and where our obligation responsibilities end and where others need to step up isn't always crystal clear. And yet, in item below, I meant 1-4, not 1-3.

Also, I thought I'd paste, immediately below, the RM&E principles that I flagged at a February RM&E categorical review meeting you were at, and that I had sent out to attendees following the meeting, as I think we should keep these principles in front of us as well, in terms of the workshop planning.

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**From:** Delwiche, Gregory K - KE-4

**Sent:** Monday, February 23, 2009 2:17 PM

**To:** 'Grover, Tony'; 'blipscomb@cbfwa.org'; Fritsch, Mark; 'O'Toole, Patty'; 'Palensky, Lynn'; Leonard, Nancy; 'Tom Iverson'; 'jayh@nezperce.org'; ROGP@critfc.org; Horton, Stacy

**Cc:** Maslen, Bill - KEW-4; Geiselman, Jim - KEWR-4; L'Heureux, Andre L - KEWR-4; Hilliard Creecy, Jamae - KEWR-4

**Subject:** RM&E Review Principles

In Friday's meeting on the RM&E categorical review, I described five principles and/or desired outcomes for the review - the principles came out of a meeting the previous week between Power Council and BPA staff. Jay Hesse asked me to share those principles with participants in Friday's meeting. They are as follows:

1. A desired outcome of the review is to convert F&W Pgm-funded RM&E to a "standardized" RM&E framework

(We consider this framework to be the structure and requirements reflected in the Action Agencies' Proposed Action for RM&E identifying Management Questions, Performance Requirements, and Actions by several key RM&E Strategic Categories. This framework is reflected within the structure and requirements of the BiOp RPAs and augmented with the F&W Program non-BiOp objectives - primary elements of the parts of the framework for which the F&W Pgm is a major funder include status and trend monitoring, tributary habitat monitoring, hatchery M&E, and project implementation and compliance monitoring.)

2. The review should allow new FCRPS Biop-required RM&E to be put in place ASAP

*(implicit in this principle, and critically important, is that NOAA concurs that their RM&E expectations of BPA vis a vis the new FCRPS Biop are satisfied, as an outcome to the categorical review)*

3. The AA/NOAA/NPCC RM&E review process and the Council-led RM&E categorical review should be synched up to the maximum extent possible.
4. It is important that the fish and wildlife co-managers be engaged in the review.

(It should be mentioned that the opportunity for co-manager involvement for fish population monitoring and data collection/management standards is envisioned to occur in the NWEIS Task 2 process and the PNAMP Workgroups and associated projects. Outreach to specific agency staff expertise will occur as this review proceeds, and coordination meetings or requests for input are planned prior to finalization of Workgroup review products (though input will need to occur within the established timeframes).

5. The outcome of the review should be an RM&E project portfolio, in totality, that represents an aggregate funding level that is no more than, and preferably less than the sum total of a) the current RM&E portfolio, including existing Biop and/or Accord RM&E projects, b) the new RM&E projects in the Fish Accords, and c) the currently-unsubscribed placeholder budget for new RM&E required by the new FCRPS Biop.

(If savings are identified, it is anticipated that the savings would be dedicated to funding additional on-the-ground activities)

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**From:** Brian Lipscomb [mailto:Brian.Lipscomb@cbfwa.org]  
**Sent:** Monday, April 20, 2009 2:25 PM  
**To:** Delwiche, Gregory K - KE-4; Grover, Tony; Maslen, Bill - KEW-4  
**Subject:** RE: M&E workshop

Greg, thanks for the feedback, I agree not show stoppers but definitely point to being diligent about design and execution. I'll be getting some feedback from the MAG tomorrow and will bring up your thoughts. A comment and a couple questions for clarification:

1. I agree with your thought on building in an iterative check-in this will also help to create efficiencies in monitoring design.

2. In the first sentence you describe number 1) as "fish population status and trend monitoring" and not VSP parameters, was this relative to your concern in item 3)? Also in this item in the last sentence you suggest focusing on items 1-3 in the workshop if the co-mgrs agree, did you mean 1-4?

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**From:** Delwiche, Gregory K - KE-4 [mailto:gkdelwiche@bpa.gov]  
**Sent:** Monday, April 20, 2009 8:40 AM  
**To:** Grover, Tony; Brian Lipscomb; Maslen, Bill - KEW-4  
**Subject:** RE: M&E workshop

Brian, Tony and Bill -

I, too, have received a generally positive response in terms of testing this with several folks, caveated by the need to be very deliberate about planning the workshop and developing the scope of it. We also agree that facilitation will be important. Here are some of the caveats:

1. Some of the folks we talked with that were actually outside the agency expressed doubt that we could do a meaningful prioritization if money was directly involved, because at some point, self-interest would begin to affect judgement (again, this perspective did NOT come from folks we talked with internally, it actually came from folks outside the agency, whose judgement I have a lot of respect for, and whose employers are on the receiving end of some of this funding). But having said that, if there isn't a budget, a potential outcome could be a large unfundable wish-list, which creates all sorts of its own challenges/problems, even including litigation risk. Focusing on identification of needs (with clear criteria) and priority ranking of projects and gaps as a technical exercise followed by a more policy oriented drawing of the budget line may be more productive.

As a result, I think we would need to design a set of interactive check-in or feedback loops with managerial types; where guidance could be that "there's too much important stuff on the bottom half of the priority list, so the scope of some of the actions on the top half of the list needs to be reduced in magnitude". Implicit in this is that the workshop attendees would be more technically oriented, and the interactive loop would occur with mgt/policy types, but they wouldn't be in the workshop on an elbow to elbow basis.

2. We believe that this exercise is most critical in the areas of 1) fish population status and trend monitoring, and 2) related tributary habitat monitoring, 3) including action effectiveness monitoring, and 4) hatchery M&E; and less critical in the areas of a) hydro effectiveness monitoring (given that so much hydro effectiveness monitoring is coordinated/funded via AFEP), b) estuary/ocean monitoring (the Corps is the AA lead and much of this work is coordinated in other processes), and also c) data mgt. These latter categories also involve a different set of players, so having them be within the scope of the workshop increases required attendance and makes the scope more complicated. We acknowledge, however, that it is important that the co-managers buy into the scope of the workshop, so limiting the scope to items 1-3, and not having it cover a-c, only works if the co-managers agree.

3. Another moderate concern is how to reconcile and/or prioritize BPA's Biop needs/obligations, which are most critical in the areas where we have productivity gaps to close and where we are funding habitat restoration as a gap closure strategy; against some of the M&E desires and needs relating to broader fishery management activities and VSP recovery-related monitoring, within which the nexus to our FCRPS mitigation obligation is a bit more blurry, as well as recovery planning, which FCRPS actions will contribute but for which we are not solely responsible.

These issues aren't show stoppers, but they do point to the need to be very deliberate in terms of the upfront planning of this workshop to clearly establish both scope and expectations.

Greg

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**From:** Grover, Tony [mailto:tgrover@nwcouncil.org]  
**Sent:** Friday, April 17, 2009 2:55 PM  
**To:** Brian Lipscomb; Delwiche, Gregory K - KE-4; Maslen, Bill - KEW-4  
**Subject:** RE: M&E workshop

Brian, Greg, Bill,

I just spoke to Rhonda -- she is very supportive of this initiative.

Have a great weekend.

Tony Grover  
 NPCC

4/21/2009

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**From:** Brian Lipscomb [mailto:Brian.Lipscomb@cbfwa.org]  
**Sent:** Friday, April 17, 2009 10:00 AM  
**To:** Grover, Tony; Delwiche, Gregory K - KE-4; Maslen, Bill - KEW-4  
**Subject:** RE: M&E workshop

Tony, I will know after talking with Barry on Wednesday who will be our management counterpart from NOAA. I did tell Scott that we would need to be relying a lot on his input to design the workshop but I did not get into a lot of detail regarding the upfront direction and periodic check-in. I'll make sure I get feedback on that specifically from NOAA on Wednesday.

Regarding facilitation, I did mention that we would be considering facilitation as we designed the workshop. After reviewing the screening tool and the attached document describing the selection of a "neutral" that I got off the institutes website I agree that if we were careful about the selection it could lead us to a helpful person.

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**From:** Grover, Tony [mailto:tgrover@nwcouncil.org]  
**Sent:** Friday, April 17, 2009 9:33 AM  
**To:** Brian Lipscomb; Delwiche, Gregory K - KE-4; Maslen, Bill - KEW-4  
**Subject:** RE: M&E workshop

Brian,

I am still working on talking with Council members, but have received a positive reaction from the Council chair and from staff. They are attracted by the idea of putting M&E experts in the room, with only occasional drop-ins by we managerial types to get updates and to offer guidance. Will Rob be our management counterpart at NOAA or will Barry Thom want to be involved as the managerial team representative? Did the issue of a facilitator come up in your discussions with members?

Here is the link to the US institute for environmental conflict resolution. If we carefully screen their recommendations, we could may be able to agree on a helpful person. Let me know what you think after looking at their website.

<http://www.ecr.gov/>

Tony Grover  
NPCC

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**From:** Brian Lipscomb [mailto:Brian.Lipscomb@cbfwa.org]  
**Sent:** Friday, April 17, 2009 9:24 AM  
**To:** Delwiche, Gregory K - KE-4; Grover, Tony; Maslen, Bill - KEW-4  
**Subject:** M&E workshop

Hi all, my conversation with the members regarding a two week workshop for M&E in June was well received. I

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articulated that the tentative expectation would be for an agreed to strategy for anadromous fish VSP parameters and habitat, hatchery, and hydro effectiveness monitoring for an amount not to exceed the current anadromous fish monitoring (as identified by the NPCC list) less 10% plus an additional \$18M for BiOp M&E. We would achieve this by confirming and communicating the assessments of current monitoring efforts, develop a common vision, complete a gap analysis, and develop a common strategy for VSP parameters for anadromous fish then move to action effectiveness for hatchery, habitat, and hydro. The members directed me to work with you to develop the expectations and parameters for the workshop including participation and workshop design.

I have discussed this directly with Rob Walton and Scott Rumsey and scheduled a meeting with Barry Thom on next Wednesday to discuss further.

Have you all received in feedback from your ends?

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