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April 28, 2015

### MEMORANDUM

**TO: Council Members**

**FROM: Patty O'Toole**

**SUBJECT: Update on BPA annual project progress reports with research, monitoring and evaluation components**

### BACKGROUND:

**Presenter:** Ben Zelinsky, Katie McDonald

**Summary** Bonneville will provide an update on their research, monitoring and evaluation (RM&E) annual reporting reform efforts.

**Relevance** The Council's 2014 Fish and Wildlife Program emphasizes the need to have certain information reported by project sponsors. Consistent with the Council's program, Bonneville has worked to develop a template for annual project progress reports that will address many of these information requirements. This template is the initial results of efforts by Bonneville to improve annual project progress reporting for RM&E work. Recently completed reports have been provided to the ISAB/ISRP to inform their review of program critical uncertainties and provide recommendations to the Council for the Research Plan update.

**Work plan:** 2015 Work plan: 2.B. Prioritize and implement new Program actions: Update Research Plan (Review new data with partners).

**Background:** Bonneville has implemented a new template for RM&E annual project progress reporting. The objective of this template is to improve the quality of the reports. Bonneville has also adjusted the annual due dates so that

all RM&E reports are due at the same time to facilitate review of this work. At the May Fish and Wildlife Committee meeting, Bonneville will provide an update on the latest version of the Annual Project Progress Reports.

Program areas that address reporting include:

- Research section which states that research projects will address hypotheses relevant to management decisions; and,
- Reporting section which states that Bonneville should continue working with the Council to implement a concise, useful template for annual reports for research and monitoring projects that can replace other more cumbersome, more costly, and less useful reports for individual projects. The Council will continue to work with Bonneville and the ISRP to identify and assemble the information needed to produce an annual summary of results for Council review.

The 2014 Program's Reporting Appendix L also provides guidance as to the information that Bonneville should ensure is provided by project sponsors on an annual basis, specifically (excerpt from the Program):

- Annual project progress reports: These reports will be produced by project sponsors and submitted electronically to Bonneville in a format and with content requested by Bonneville consistent with the following guidelines:
  - o 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.
  - o Reports for monitoring and research activities will include as a minimum: clear objectives and hypothesis, linkage to program priorities, description of any treatments applied, scientific methods including designs and protocols, statistical analyses, statistical results, conclusions, summary of accomplishments to-date, and implications for fish, wildlife, and their habitat.
  - o At a minimum, all projects must have implementation monitoring that must be reported to Bonneville within six months of completion of the project or annually in the case of multi-year projects.
  - o Bonneville, in its contracting process, should ensure that each project adheres to the relevant protocols and methods and satisfies the reporting and data-management criteria described in this program or as adopted by the Council.
  - o An annual project progress report will be a stand-alone, complete document that does not rely on other documents, such as past annual project progress reports, to provide information needed to assess what has been done.
- The Council expects that the organization and content of these reports will evolve over time to make them more comprehensive and accessible for the purpose of addressing information needs of Bonneville, the Council, and the ISRP including, for example, the ISRP's project reviews and program retrospective reports.



# Research, Monitoring, and Evaluation Project Annual Reporting Initiative

NPCC Fish and Wildlife  
Committee Update

May 5, 2015



# Agenda

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Roll Out and Current Status	Slides 7-8
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# Background

- Significant commentary on prior approach to RME Project Annual Reporting
  - PMs/COTRS
  - Sponsors
  - NPCC
- Low compliance
  - 20% for CY2013 reports
- Re-evaluate
  - Solution
  - Implementation
  - Communication



# Objectives for RME Annual Reporting

1. **Demonstrate application** of RME results to management actions
2. **Timely** reporting of RME results
3. **Efficient** reporting – utilize existing information and don't ask for info you don't need
4. **Increase transparency** to support oversight, and compliance
5. **Scientific credibility** – are the results credible, do they represent best available science?
6. **Accessibility** – can users quickly find the content they are looking for?



# Analysis Approach

Who uses RME annual reports  
and what do they use them for?





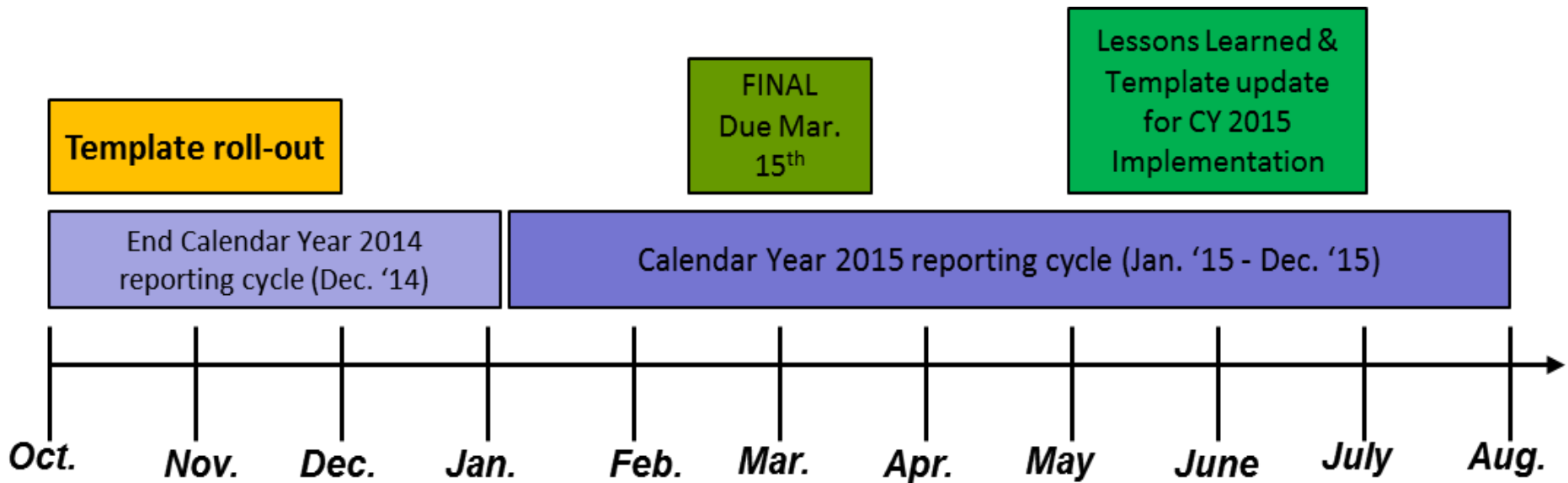
# Results/Solution

- Use traditional scientific journal format
  - *New template modified from Transactions of the American Fisheries Society*
  - Explicitly call out adaptive management, policy implications, and lessons learned
- Reports should not be too long (10-20) pages – producers vs consumers
- Data and technical details should be in appendices
- Need to hold sponsors accountable for submitting quality reports on time
- Need to clearly define how the information we collect will be used





# Roll Out





# Current Status

- Compliance for CY2014 RME reports up by more than 4x
  - Approximately 100 reports submitted by March 31<sup>st</sup>
- Reports submitted this year used both the previous tool and the new template
  - Transition year, reflecting BPA contracting processes
- Lessons learned
  - Need to address hybrid projects
    - e.g. part RME part habitat restoration
  - The lessons learned and adaptive management recommendation section included findings at multiple levels
  - Report length generally still exceeded recommended 10-20 pages
  - Integrated project reports are useful



# Next Steps on RME Annual Reporting

- Improve compliance and quality in 2016
  - All RME reports submitted in Mar 2016 will use new template
- Get feedback from RME producers about how the new template worked
  - Update template for CY 2015 RME reporting
- Get feedback from RME consumers about how reports are being used