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November 27, 2012

## MEMORANDUM

**TO:** Fish and Wildlife Committee

**FROM:** Nancy Leonard, Fish, Wildlife, Ecosystem Monitoring and Evaluation Manager  
John Harrison, Information Officer  
Tony Grover, Fish and Wildlife Division Director

**SUBJECT:** PERC Recommendation Follow-up – Technical Services Work Plan

During the October 2012 Council meeting, the Council approved a PERC recommendation for a Council and Bonneville staff steering committee (staff SC) to develop a one-year (2013) scope of work for technical services to support reporting needs (<http://www.nwcouncil.org/news/2012/10/6.pdf>).

In response to this recommendation, the staff SC assessed and determined that in the absence of the Status of the Resource (SOTR) report, which is being phased out, information gaps will occur for informing Council products such as fish and wildlife indicator, high-level indicators and subbasin dashboards. The draft work plan, which is attached for your review, focuses on addressing these information gaps.

## **Attachment: Technical Services Work Plan**

The Council recommendation from the Program Evaluation and Reporting Committee (PERC) process included that:

- *A Council and Bonneville staff steering committee (staff SC) should develop a one-year (2013) scope of work for technical services to support reporting needs. The scope of work will be based on identified gaps that must be filled resulting from the absence of the SOTR (work, products, technical services, or reports).*
- *No later than January 2013 Council meeting, the steering committee will recommend the most economic and efficient means to satisfy the scope of work.*

The Council/Bonneville staff steering committee (staff SC) describes in the below work plan the data needs and the associated evaluation and reporting efforts requiring technical services. For each item, the staff SC provides a list of tasks needed to ensure information is provided in the appropriate format. These efforts pertain to information gaps that will result with the termination of the status of the resource (SOTR). These gaps include, but are not limited to, resident fish data, non-ESA anadromous fish data, and data synthesis to match the Program's structure of subbasin, province and basin scales.

To ensure continuity, integrity, and the high quality of work produced thus far that have and continue to inform the below data needs, evaluation and reporting efforts, the staff SC recommend that the current providers of this support (Neil Ward and Binh Quan) continue providing this service to the Council and Bonneville. These providers have experience providing these services, established contact with data providers, an understanding of the Program's information needs and structure, as well as valuable institutional knowledge that make them most efficient and effective in gathering, managing, and synthesizing this type of information.

All tasks undertaken by these service providers will be completed per guidance provided by the staff SC. Implementation of these tasks will require that the technical service providers work closely with the staff SC to ensure the seamless transition and maintenance of information from the SOTR website and databases to these Council/Bonneville information needs.

## **Proposed 2013 to 2014 Work Plan**

### 1. Subbasin Dashboard

*Goal:* Subbasin Dashboard contains up-to-date fish and wildlife population information organized by subbasins for the time period April 2013 to April 2014.

*Objective 1:* Identify and migrate the pertinent content of the SOTR website and databases.

*Tasks:* Evaluate the SOTR website/databases to identify information to move to the Subbasin Dashboard. Revise figures and maps to align with standards/desires. Determine best locations to "house" the website and database. Install and/or configure server software as required. Restore database and files from backup website configuration. Configure URL address for public access.

*Objective 2:* Rebrand to merge seamlessly with Subbasin Dashboard.

*Tasks:* Remove CBFWA and SOTR references from website and database. Replace banners and headers with new images.

*Objective 3:* Integrate SOTR content with the Council's Subbasin Dashboard.

*Tasks:* Identify items to integrate. Create figures, tables, etc. that match existing format. Write code to transfer and load database information. Transfer items into Subbasin Dashboard.

*Objective 4:* Compile and update fish and wildlife information to ensure the Subbasin Dashboard is current and relevant.

*Tasks:* Perform monthly updates of biological information (e.g., population status, harvest, hatchery production, etc.). Continue to provide subbasin-level information and synthesized data. Work with fish and wildlife managers and other data providers to ensure data are being used and interpreted correctly. Maintain "backend" data administration site (this site allows non-technical personnel to load data). Continue to work with StreamNet to ensure relevant data is available in StreamNet. Engage in coordination to automate sharing of data as feasible.

*Objective 5:* Incorporate modifications/enhancements to Subbasin Dashboard.

*Tasks:* Identify/compile information not currently available. Incorporate new information into the Subbasin Dashboard to address reporting needs. Work with fish and wildlife managers and other data providers to ensure data are being used and interpreted correctly. Enhance database administration site (automation of loading information). Assist in the development of incorporated items.

## 2. High-level Indicators (HLI) and Fish and Wildlife Indicators (FWI)

*Goal:* HLI and FWI fully identified and represented with current data by April 2014.

*Objective 1:* Identify and migrate the pertinent SOTR information.

*Tasks:* Evaluate the SOTR website/database to identify relevant information. Revise figures and maps to align with agency standards/desires.

*Objective 2:* Integrate SOTR content with the Council's web-based HLI and FWI reports.

*Tasks:* Identify items to integrate. Create figures, tables, etc. that match existing format. Write code to transfer and load database information. Transfer items into the HLI and FWI web-based reports.

*Objective 3:* Compile HLI and FWI information, from April 2013 to April 2014, to ensure the HLI and FWI summaries are current and relevant.

*Tasks:* Perform monthly updates of biological information that support HLI and FWI. Work with fish and wildlife managers and other data providers to ensure data are being used and interpreted correctly. Maintain data administration site (this site allows non-technical personnel to load data). Continue to work with StreamNet to

ensure relevant data is available in StreamNet and work toward automation of sharing as feasible.

*Objective 4:* Continue HLI and FWI development.

*Tasks:* Work with Council staff to develop FWI that support Council's HLI, especially resident fish indicators. Assist Council/Bonneville staffs in uniting managers to work on development FWI and HLI. Include updating meeting websites with relevant documents, preparing required meeting materials, and providing synthesized information for the meeting.

*Objective 5:* Incorporate modifications/enhancements to HLI and FWI webpages.

*Tasks:* Identify/compile information not currently available. Incorporate new information into the HLI and FWI webpages to address reporting needs. Work with fish and wildlife managers and other data providers to ensure data are being used and interpreted correctly. Enhance database administration site (automation of loading information). Assist in the development of incorporated items.

### 3. Support Program Amendment

*Goal:* Support Program amendment process by providing requested highly synthesized web-based information and graphics.

*Objective 1:* Assist with the conversion of Program-related information into user-friendly digital media prior to and during the amendment process.

*Tasks:* Work with Council staff to identify information needs. Determine the types of illustrations that are user-friendly. Synthesize information and develop graphics. As needed, work with fish and wildlife managers and other data providers to ensure data are being used and interpreted correctly. Write code to transfer and load database information. Transfer items into appropriate locations. Maintain and update data and graphics as needed.

### 4. Potential Other Professional Services that Could be Provided

*Goal:* Provide professional technical services, as needed, to Council and Bonneville staffs

*Objective & task:* to be determined as needed. This may include work related to providing expertise with graphical (maps, graphs, charts, figures, flash, etc.), website, database development, Microsoft windows server, networking, PC support, project management and coordination.

### 5. Potentially Continue Providing Organization and Technical Services to Maintain the Fish Screen Oversight Committee (FSOC)

*Goal:* Continue implementing, through the ongoing technical services provided by Neil Ward and Binh Quan, the Fish Screening Oversight Committee (FSOC) meetings, workshops, training sessions, and web-based products per Council recommended maintenance of this service.

*Objective 1:* Provide fish biologists, fish screen and passage engineers, and fabricators an opportunity to discuss and address current fish screen and passage issues between April 2013 and April 2014.

*Tasks:* Convene quarterly teleconference meetings. Convene, as needed, subcommittee meetings. Convene an annual workshop/training session.

*Objective 2:* Provide FSOC participants a website to view pertinent committee information between April 2013 and April 2014.

*Tasks:* Work with Council/Bonneville to determine FSOC website location. Develop database-driven FSOC website that will allow an administrator to schedule meetings, upload meeting documents, and view information from previous meetings. Develop maintenance and backup plan for FSOC website. Train staff on administration site.

## 6. Provide technical services to regional HEP team

*Goal:* Continue having Binh Quan provide technical assistance (computer and server support, Excel worksheet management, Microsoft Office support, data logger and ArcView (GIS) support, remote administration, etc) to Paul Ashley and his HEP Team.

*Objective 1:* Continue to provide technical support and assistance to the HEP team.

*Task 1:* Work with the HEP team to development communication structure for technical assistance.

*Task 2:* Setup and install software to remotely administer HEP team computers and laptops.

## 7. Potential Development of HEP data repository

*Goal:* Pending the development of the plan for securely storing historic HEP reports, matrixes, models, and vegetation transect data, Binh Quan may be requested to assist given his experience working with the HEP team, his familiarity with the data infrastructure, and experience in developing databases and repository.

*Objective & task:* to be developed as needed.