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May 9, 2023

MEMORANDUM

TO: Fish and Wildlife Committee Members

FROM: Mark Fritsch and Maureen Hess

SUBJECT: Update on concepts for the next project review

BACKGROUND:

Presenter: Council Staff

Summary: Staff will propose initial draft concepts for an updated approach to the project review process and seek feedback from the Committee.

Relevance: For more than 25 years the Council has developed and conducted reviews of Bonneville direct-funded projects that are implemented to mitigate, protect and enhance fish and wildlife as directed under the Northwest Power Act. We propose to update the project review process to acknowledge that the projects implemented under the Fish and Wildlife Program have been reviewed numerous times, and the project's basic premises and scientific soundness have been accepted. We intend the next review process to acknowledge the maturity of these ongoing projects, while recognizing the complexity and current dynamics of how projects are implemented, and meeting science review requirements as directed by Section 4(h)(10)(D) of the Act.

Workplan: Fish and Wildlife Division work plan 2023; Program Implementation, Next Project Review.

Background: The Council has developed and conducted reviews for more than 25 years of Bonneville direct-funded projects that are implemented to mitigate, protect and enhance fish and wildlife as directed under the Northwest Power Act (the Act).

The Council's project reviews and recommendations (Council reviews) have yielded many benefits through the years. These rigorous reviews have resulted in clear documentation of each project's purpose, objectives, and results; project improvements through independent scientific review (science review) and feedback; facilitation of sharing project data and information; increased transparency and accountability and the identification of project contributions to the Program and to the region.

As the Council considers how to meet the review requirements of the Act in the coming decade, the Council believes it is important to continue maximizing the benefits of project review, while recognizing that there has been considerable growth and change over the last 40 years of project development and implementation. The projects implementing the Council's mitigation Program have grown in numbers and complexity through the years. In addition, they have been reviewed and recommended by the Council numerous times, and their continued implementation and scientific soundness has been accepted.

Due to the maturity of the Program's projects and that most have been reviewed numerous times, the information requested about the projects has also evolved over time. Early project reviews focused primarily on the proposed project details to ensure the projects were scientifically sound. Contemporary reviews have shifted to focus on project results and the adaptive management of ongoing work.

The Program has 317 projects¹, of which approximately 274 active and ongoing Council-recommended projects. These 274 projects are the focus of the project review process described here – ongoing protection and mitigation work and support activities. New projects that have no previous review and recommendation will be addressed separately for Council consideration and action.

Principles retained from previous project reviews

- Projects will continue to be grouped to maximize review efficiency. To some extent the review groupings will be categorical, but there are opportunities to further partition groupings into smaller sets of projects that are focused on similar objectives or purposes. In addition, there

¹ As of August 2022. These numbers are presented to demonstrate the concept associated with the proposed project review approach.

may be opportunities to group and review projects geographically, to be able to better understand the context in which various types of projects fit together in a geographic landscape.

- Reviews and recommendations will continue to be multi-year and are likely to be different for different types of projects depending on project grouping.

New concepts for the project reviews

- All of the ongoing projects have been through numerous project reviews. Each project's basic premise, scientific soundness, and reason for existence in the Program has generally been accepted. Projects reviewed many times may not need an extensive project review this time around, even if some sort of implementation check-in is warranted.
- The upcoming reviews will focus on targeted questions. While to some extent the Council will need to look at every project and possibly tailor specific review questions for each project, similar projects can also be grouped in a way to streamline the review questions to be asked, tailored to the status and type of ongoing project. And then the questions to be asked will help structure the review process for that project or group of projects. For example, project review questions may focus on:
 - A check-in on project outcomes, based on ongoing project reporting: Is a project contributing to or achieving its stated objectives?
 - If not, are there ways in which the project can or should be adapted to increase its chance of success in meeting its objectives?
 - Are there resources available that support adaptive management, such as new techniques, evolved best practices, and emerging scientific literature?
 - Specific information related to the project or a group of projects to provide information useful for evaluating overall performance of the Council's Fish and Wildlife Program.
- Streamlining and focusing the review effort and the questions for discrete sets of projects asked before the review process begins should improve the efficiency and effectiveness of the process and lessen the administrative demands on project sponsors, and the ISRP.

- The project review process will not address budgets except at only a high level, with the Council at most focusing on whether funding is sufficient to allow for implementation of the activities identified.

Objectives for review:

- Serve as an implementation check in on project actions:
 - Review the project's progress in achieving its stated objectives.
 - Use targeted questions or topics for the benefit of the Council and regional policy, management, and coordination efforts.
 - Provide an opportunity to confirm administrative changes (i.e., project title name changes, plans for merging contracts, etc.) and project work elements and objectives.
- Address any outstanding Council recommendations.

Staff are initiating the effort of gathering feedback with partners (i.e., Fish and Wildlife managers, Bonneville, and science panel) to further develop and refine the project review process. So far, these initial draft concepts were recently shared at the Regional Coordination Forum on April 10th, 2023. Staff are continuing to seek feedback broadly and appreciate the opportunity for feedback from the Committee on the approach to date.

More Info:

- [Information on past project reviews and recommendations](#)
- [Independent Scientific Review Panel background](#)
- [Project mapping memo, September 2021](#)



Concepts for the next project review

Fish and Wildlife Committee Meeting
May 16, 2023

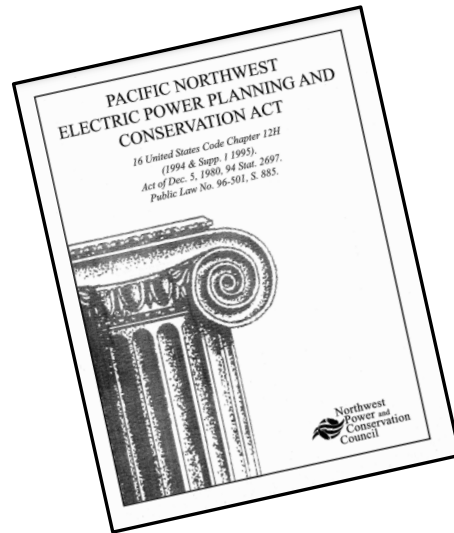


Presentation Overview

- I. Introduction and background
- II. Conceptual approach to the next project review
 - Objectives and general approach
 - Areas of flexibility
 - What projects to review
 - How to review projects

Project reviews

- Why review projects?
 - Northwest Power Act: Section 4h10D: Council role in review and ISRP review (1996 amendment to NPA)



- Benefits:
 - Clear documentation of each project's purpose, objectives and results
 - Scientific review
 - Transparency & Accountability
 - Identify contribution to the Program and region
 - Sharing of project data and information
 - Identification of policy issues to address

ISRP Review Criteria from 1996 Amendment to NW Power Act

Review projects for consistency with the Council's program and whether they:

- are based on sound science principles
- benefit fish and wildlife and
- have a clearly defined objective and outcome
- with provisions for monitoring and evaluation of results



Past reviews

- [2022 Anadromous Fish Habitat and Hatchery Review](#)
- [2020 Resident Fish and Sturgeon](#)
- [2019 Mainstem/Program Support](#)
- [2018 Research Projects: Progress Review](#)
- [2017 Wildlife Projects](#)
- 2015 - 2019 Solicitation Projects
 - [2019 Northern Pike](#)
 - [2018 Pacific Lamprey](#)
 - [2017 Sturgeon](#)
 - [2016 Habitat Assessment](#)
- [2014 Geographic Review](#)
 - [2017 Umbrella Projects follow-up](#)
- [2013 Resident Fish / Data Mgmt / Regional Coordination](#)
- [2011 RM&E/Artificial Production](#)
- [2011-2014 Lower Snake River Compensation Plan \(LSRCP\)](#)
- [2010 FastTrack](#)
- [2010 Wildlife](#)
- [Fish accord projects](#)
- [BiOp projects](#)
- [2007-2009](#)
- [2007 Innovative](#)
- [2006](#)
- [2005/2006](#)
- [2004/2005](#)
- [2002-04 Province](#)
- 2003 [Mainstem/Systemwide](#), [Request for Studies](#)
- 2002 [Innovative](#), [LSRCP](#)
- 2001 [Innovative](#), [Action Plan](#), [High Priority](#) and [Ongoing](#) reviews
- Proposals for: [2000](#), [1999](#), [1998](#), [1997](#)

Review History

- Numerous project reviews over last 25 years
- Transitioned from annual review of all projects (~300+) at once to focusing on portions of the Program in multi-year review cycles with resulting multi-year project recommendations
- Early project reviews focused primarily on proposed project details to ensure projects were scientifically sound.
- Contemporary reviews have shifted to focus on project results and adaptive management of ongoing work

A new project review process

Feedback from amendment process and regional coordination forum

- *Grouping of projects, review scale, timelines*
 - Acknowledge that different projects have different timelines and needs for review.
 - Consider a landscape approach.
- *Review process*
 - Create efficiencies to minimize additional work on project sponsors.
 - Ensure that reviewers recognize legal and policy sideboards when making recommendations – context to this and funding levels
 - Provide meaningful interaction with the ISRP (e.g., workshop, site visits), and value-added recommendations
- *Review team structure*
 - Provide specific direction and review guidance to ISRP members to ensure most useful outcomes. Structured questions and responses for ISRP.
 - Explore possibilities for project sponsors/managers to participate in regional reviews or review teams.

A new project review process – guiding principles for draft approach

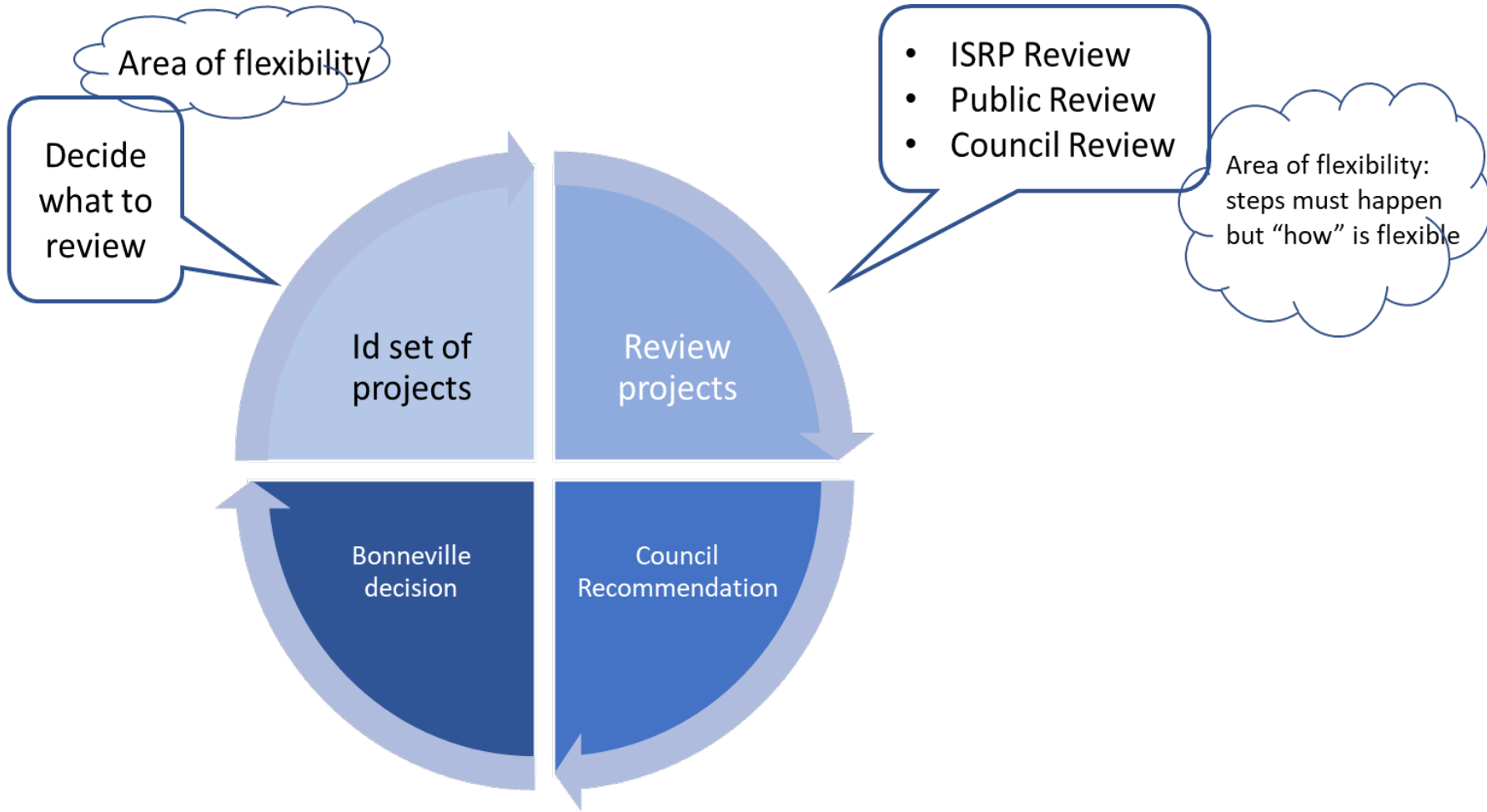
Principles retained from previous project reviews:

- Projects will continue to be grouped to maximize review efficiency.
- Reviews and recommendations will continue to be multi-year.

New concepts for the project reviews:

- Each project's basic premise, scientific soundness, and reason for existence in the Program has generally been accepted. Projects may not need an extensive project review, even if some sort of implementation check-in is warranted.
- Structure review process to address targeted questions.
- Streamline and focus the review effort and targeted questions for discrete sets of projects prior to initiating the review.
- Project budgets will only be addressed at a high level, with the Council at most focusing on whether funding is sufficient to allow for implementation of the activities identified.

Project review and areas of flexibility



Presentation Overview

- I. Introduction and background
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 - What projects to review
 - How to review projects

Objectives for review

1. Serve as an implementation check in on project actions:
 - Review the project's progress in achieving its stated objectives.
 - Use targeted questions or topics for the benefit of the Council and regional policy, management, and coordination efforts.
 - Provide an opportunity to confirm administrative changes (i.e., project title name changes, plans for merging contracts, etc.) and project work elements and objectives.

2. Address any outstanding Council conditions

General approach to review

Active ongoing Council recommended projects

- Submit review materials (addendum - brief summary/targeted questions), existing proposal)

Implementation check in on project actions
[Council review and recommendations on all projects]

Projects amenable to science review

ISRP Review

Projects with no outstanding Council conditions

- Comments or guidance intended to strengthen the project for continued implementation.

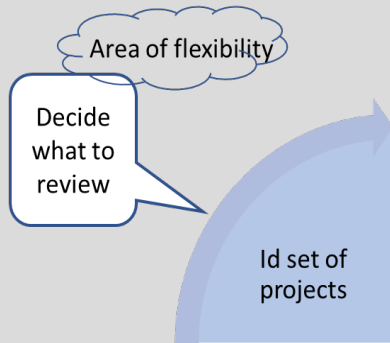
Projects with outstanding Council conditions

- Additional comments on evaluation of Council condition(s) and if they were addressed.

Projects not amenable to science review

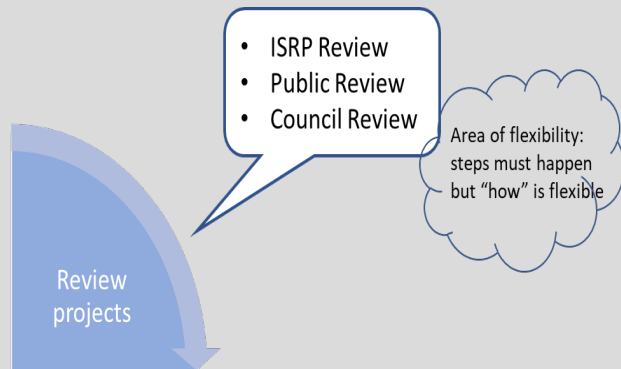
ISRP does not provide recommendations, but materials are available for information and context in relation to the other projects in the review.

Project Review – outline conceptual approach



➤ **Decide what to review:**

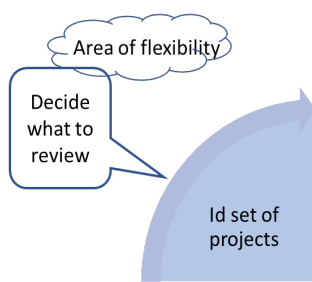
- What will be reviewed – All active ongoing Council recommended projects
- Why and how the projects to be reviewed will be categorized and grouped



➤ **Decide how to review**

- Organization and sequence of reviews
- What will happen before each review formally begins
- What will be asked of the project sponsors to begin the review
- Science review process

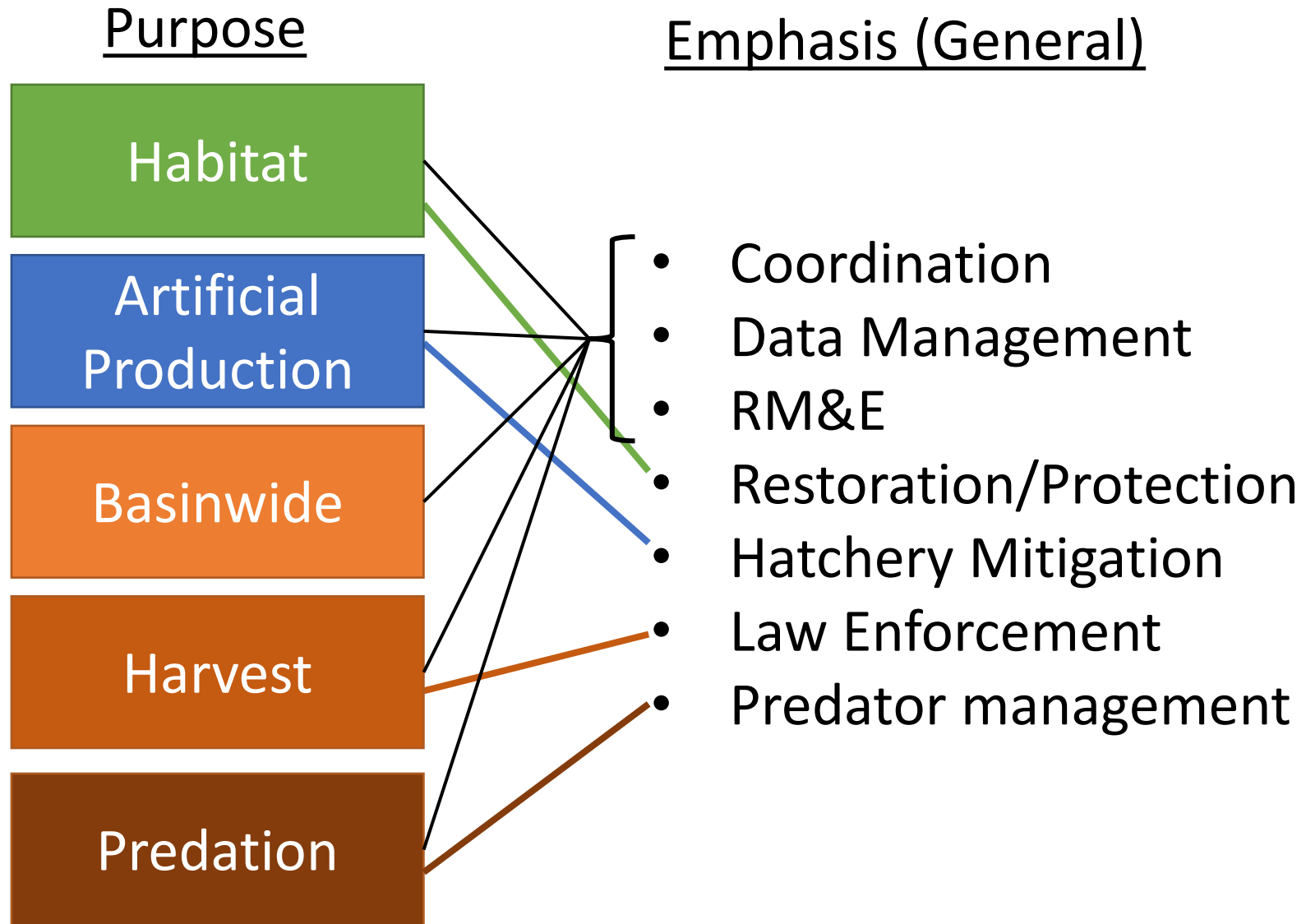
Why categorize and group projects?



- Facilitates focusing on projects that implement similar types of work
- Structure for developing targeted questions to address as part of the review for similar types of projects
- Allows ability to group projects into discrete sets and consideration of projects with different timelines and needs for review
- Ability to better define and clarify which projects are amenable to science review and which projects are not

How projects are categorized and grouped

Identify the type of work projects implement (project mapping)



Deciding **what** to review – categories and groups

Project Purpose	Project Emphasis (General)	Project Emphasis (Detailed)	# Projects	
Habitat	Coordination	Coordination - Local	5	
	Data Management	Data Management - Local	2	
	RM&E	RM&E	30	
	Restoration/Protection	Restoration/Protection	Restoration/Protection	57
		Restoration/Protection, RM&E	Restoration/Protection, RM&E	16
		Restoration/Protection Umbrella	Restoration/Protection Umbrella	7
		Restoration/Protection - Water	Restoration/Protection - Water	3
		Restoration/Protection - Screens, Passage, and/or Traps O&M	Restoration/Protection - Screens, Passage, and/or Traps O&M	5
		Restoration/Protection - Wildlife Lands O&M, RM&E	Restoration/Protection - Wildlife Lands O&M, RM&E	28
Restoration/Protection - Fish Lands Acquisition, O&M, RM&E	Restoration/Protection - Fish Lands Acquisition, O&M, RM&E	3		
Artificial Production	Coordination	Coordination - Local	2	
	RM&E	RM&E	12	
	Hatchery Mitigation	Fish Production - O&M	Fish Production - O&M	26
		Fish Production - RM&E	Fish Production - RM&E	17
		Fish Production - O&M, RM&E	Fish Production - O&M, RM&E	8
Hatchery planning and evaluation, and construction		Hatchery planning and evaluation, and construction	1	
Basinwide	Coordination	Coordination - Regional	20	
	Data Management	Data Management - Regional	6	
	Science Review and Advice	Science Review and Advice	2	
	RM&E	RM&E	14	
Harvest	Law Enforcement	Law Enforcement	3	
	RM&E	RM&E	2	
Predation	Predator Management	Predator Suppression, RM&E	5	

➤ 3 main groups
Many subgroups possible to further categorize

➤ Ability to develop targeted questions for similar types of projects

Deciding **what** to review – categories and groups

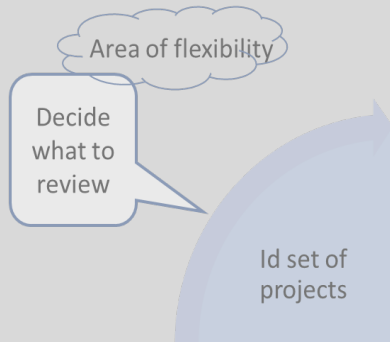
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Harvest	Law Enforcement	Law Enforcement	3	
	RM&E	RM&E	2	
Predation	Predator Management	Predator Suppression, RM&E	5	

➤ Ability to clarify which projects are amenable to science review and those that are not

- 72 projects not amenable to science review

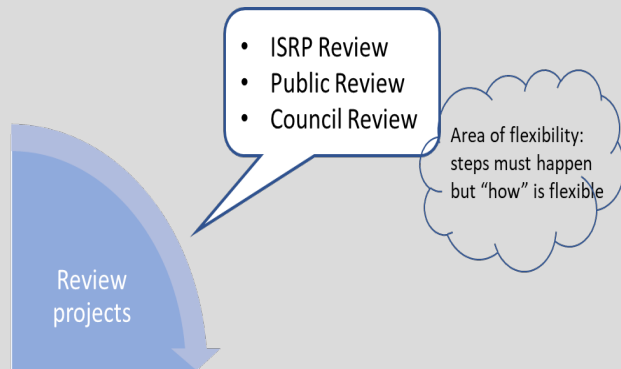
- 202 projects amenable to science review (*exception of O&M components for 39 projects)

Project Review – outline conceptual approach



➤ **Decide what to review:**

- What will be reviewed – 274 active ongoing Council recommended projects
- How and why the projects to be reviewed will be categorized and grouped



➤ **Decide how to review:**

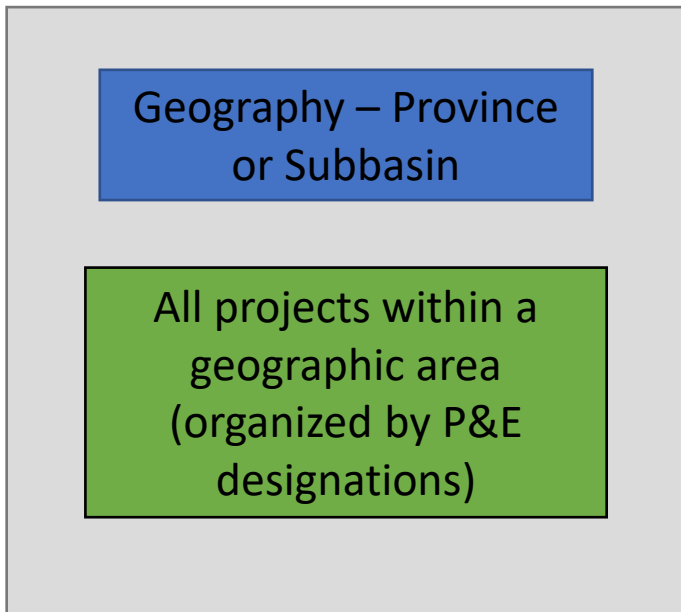
- Organization and sequence of reviews
- What will happen before each review formally begins
- What will be asked of the project sponsors to begin the review
- Science review process

Deciding **how** to review

Organization and sequence of reviews

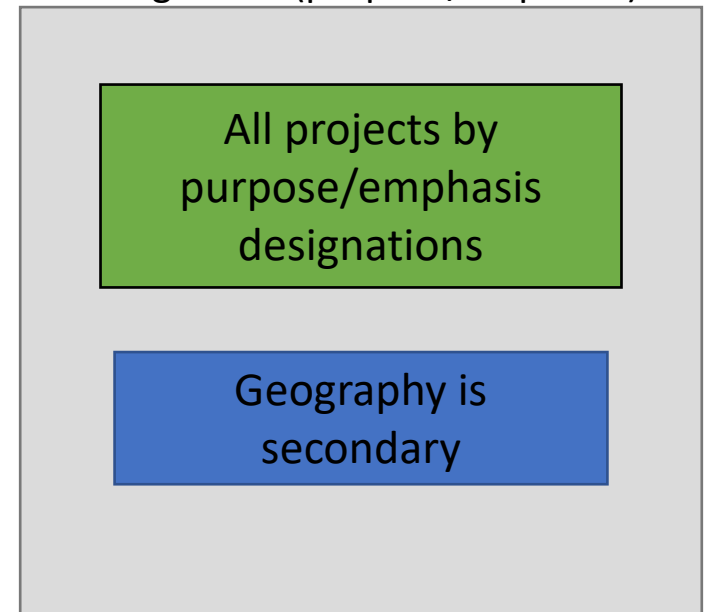
Two possible organizational approaches for consideration

1. Primary organization by geography



- Group projects within a geographic area
- Allows understanding how different projects/efforts may work together within a discrete geographic area

2. Primary organization by project designation (purpose/emphasis)



- Group projects by similarity/designations (i.e., detailed emphasis)
- Allows understanding how similar types of projects are implemented across a landscape



Deciding **how** to review

What will happen before each review formally begins

- i. Review and confirm the existing information about the projects to be reviewed (e.g., Program category, purpose, emphasis, and past Council recommendations)
- ii. Develop targeted questions for set of projects in review
 - Council staff will draft a set of targeted questions to ask of the project and/or sets of projects.
 - Examples may include:
 - Project plans for future implementation?
 - How a project addressed outstanding Council conditions?
 - Project information or data that may contribute to the Program Performance effort?
 - Are project results matching objectives?
 - What monitoring information is informing project results?
- iii. Project sponsor workshops
 - Council will host webinars to guide sponsors through review materials, instructions, and submission process

Deciding **how** to review

What will be asked of the project sponsors to begin the review

Sponsor to submit the following addendum to existing recommended project proposal:

- A brief project summary that describes project updates since the last review
- Documentation to address and answer targeted questions specific to the review
- Support materials that may assist ISRP and Council in understanding the projects (e.g., synthesis or annual reports, publications, etc.)

Review materials:

- Sponsor submission above (Addendum)
- Project's previously reviewed and recommended project proposal

Deciding how to review

Science Review Process

- ISRP reviews projects amenable to science review
- Targeted questions will provide the structure within which the ISRP will provide scientific recommendations.
 - Provide comments/guidance intended to strengthen all projects in the review
 - Additional emphasis/evaluation for projects identified as having outstanding Council recommendations

202 projects
amenable to
science review

↓
ISRP Review

projects with no
outstanding Council
conditions

- ↓
- Comments or guidance intended to strengthen the project for continued implementation.

projects with
outstanding Council
conditions

- ↓
- Additional comments on evaluation of Council conditions(s) and if they were addressed.

72 projects not
amenable to
science review

↓
ISRP does not provide
recommendations, but materials
are available for information and
context in relation to the other
202 projects in the review.

Summary

Outcome type	Outcomes	Concepts to address and work toward desired outcome - Applies to ongoing active projects
Legal	Comply with the NW Power Act and science review	<ul style="list-style-type: none"> Continue to review projects – updated approach as noted below
Transparency & Accountability	Identify and share project contributions to the Program	<ul style="list-style-type: none"> Because basic premises and scientific soundness have been accepted, shift focus of review to an <u>implementation check-in on project actions</u> Use targeted questions to guide the review
	Sharing of project information and data	
	Identification of policy issues to address	

Summary - continued

Outcome type	Outcomes	Concepts to address and work toward desired outcome - Applies to ongoing active projects
Process	Review efficiencies	<ul style="list-style-type: none">• Review materials = addendum and existing reviewed and recommended proposal• Council to clarify which projects are amenable to science review from those that are not (i.e., project mapping)• Focused review of discrete sets of projects at a time (i.e., project mapping)• Targeted questions provide structure for science review and Council recommendations• Meaningful value-added interaction with the ISRP:<ul style="list-style-type: none">• Comments/guidance to strengthen project for continued implementation• Additional evaluation for only a subset of projects with outstanding Council condition(s) from past reviews

Anticipated next steps

- Internal staff work to continue developing general concepts and options
 - Science review process details/steps (e.g., presentations and site visits, review team structure, feedback loop)
 - Pilot set(s) of projects and targeted questions
- Work to develop and refine process with partners (i.e., Fish and Wildlife managers, Bonneville, and science panel)
- Continue to update the Council on the next project review approach