

RESOLVE

Results Through Consensus

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MEMORANDUM

TO: NMFS Willamette/Lower Columbia River TRT Members
FROM: Paul De Morgan, RESOLVE and Paul McElhany, NOAA Fisheries
SUBJECT: Action Items from the February 24, 2004 TRT Meeting

Thanks to everyone for your participation in the TRT meeting last week. This memo includes a brief summary of the conversations and the action items discussed during the meeting. Note that there are some fairly tight deadlines for completion of the actions. Also, we have highlighted items all TRT members need to complete in light gray. Please feel free to contact either of us with any questions, concerns, or additional action items.

Upcoming Meeting Dates	Where	Agenda Focus
<ul style="list-style-type: none">TBD (Please respond to JJ's email ASAP)	<ul style="list-style-type: none">TBD	<ul style="list-style-type: none">ISRP subbasin Review Process; TRT Chain of Logic; Timelines/Milestones; Oregon Goals

During the meeting the date of the next meeting was discussed and a number of TRT members indicated the March 30 meeting date does not work well, therefore, **all TRT members were asked to send their schedule availability to JJ Westfall. An email was sent out February 26 and it should be returned to JJ as soon as possible.** Please note, the meeting will likely be held in the Olympia/Lacey area.

A brief discussion of preliminary objectives for the next meeting resulted in: reviewing the overall timeline/milestones for reviewing recovery plans and subbasins; obtaining a better understanding of what the ISRP subbasin review will include (they suggested Paul consider asking someone from the ISRP or the NWPC to attend the meeting to assist with this objective); discussing and agreeing on TRT 'chain of logic' and its implications for review of recovery plans; and, as appropriate and time permits, reviewing and discussing where Oregon's planning efforts stand. In addition, it was noted that there may be a need to use some time to discuss the population evaluation memo.

I. EVALUATING RECOVERY PLANS AND SUBBASIN PLANS

The group began their deliberations by addressing a number of questions related to evaluating recovery plans. These questions included:

- How might we evaluate the certainty that the actions in a proposed recovery plan are adequate to achieve the goals?
- What level of quantification is appropriate for predicting fish response to proposed actions? (What changes in fish production would be expected?); (Are the actions directly targeting the threats? Is there evidence from elsewhere that these action can achieve what the plan intends?)
- How do we add up the cumulative effect of all actions?
- Who could do what in the evaluation? (roles and responsibilities)
 - TRT? – NOAA? – Local Recovery Planning Groups?
- What guidance on analysis is expected and/or reasonable?
- What is the confidence level that the action would result in the intended outcome?

The highlights of this conversation are captured in the flipcharts (Appendix A below). At the end of the deliberations, the TRT confirmed the ongoing need to clarify their role in the review of the LCFRB Recovery Plan and the Oregon Subbasin Plans. An important part of making decisions about the role will be to better understand what is expected from the ISRP review. To this end, the group agreed to review existing materials and when available, other materials from the Council and/or ISRP. Here are links to a number of pages related to subbasin planning, and more specifically, the ISRP review process:

- Subbasin Planning Page: <http://www.nwcouncil.org/fw/subbasinplanning/Default.htm>
- Subbasin Technical Guidance: <http://www.nwcouncil.org/library/2001/2001-20.htm>
- Clearwater Plan: <http://www.nwcouncil.org/fw/subbasinplanning/clearwater/plan/Default.htm>
- Review of Clearwater plan: <http://www.nwcouncil.org/library/isrp/isrp2004-4.htm>

II. RESPONDING TO THE LCFRB QUESTIONS

During the course of the meeting, the group did not get to specifically revisit the questions raised by LCFRB in mid-January (and discussed at the January TRT meeting). Paul McElhany indicated he was drafting the last two ‘preliminary’ answers, and that then it would be complete and distributed to the TRT for review and comment prior to finalization and distribution to the LCFRB.

However, during the deliberations, the TRT did address one of the major questions raised by the LCFRB: how will sufficiency be determined? TRT members indicated there are numerous proposed pathways to achieving sufficiency, and that the TRT will not be making an absolute decision on the ability of the proposed plan to achieve sufficiency. Rather than guaranteeing the plan will succeed, the TRT will be indicating confidence in the logic behind the analysis and confidence in the direction the plan is heading. One member suggested that when dealing with sufficiency as a concept there is a need to determine what replaces certainty (since it is impossible to achieve). Specifically, he suggested the following items be assessed when reviewing the plan: stated assessments; logic; intentions; performance measures; monitoring and evaluation; adaptive management. Another member added: use of multiple models; and specific identification of ‘robust’ measures.

III. COMPLETING THE POPULATION EVALUATION REPORT

Paul McElhany indicated he would be distributing the ‘discussion’ section in the next week or so and asked people to review it (along with Appendix A) and send comments to him. He will work to finalize the report and distribute it to NOAA, LCFRB, ODFW, and others as appropriate. If there

are outstanding issues raised during the comment period these will be addressed either over email or by scheduling a conference call.

IV. ACTION ITEMS

The action items described below relate to the following topics: population evaluations; LCFRB questions; TRT review efforts in the future; and ISRP review efforts in the future.

Action Items – Population Evaluations	Who	Completed by
1. Develop ‘Discussion’ section of the report and distribute for review.	Paul McElhany	Tuesday, March 2
2. Review ‘Discussion’ section and send comments to Paul McElhany.	All TRT members	Tuesday, March 9
3. Review Appendix A of draft Report and send comments to Jim Myers	All TRT members	Tuesday, March 9
4. Finalize report for distribution.	Paul McElhany	Tuesday, March 16

Action Items – LCFRB Questions	Who	Completed by
5. Finalize preliminary in-depth answers and distribute for review.	Paul McElhany	SENT OUT 2/25/2004
6. Review preliminary in-depth answers and send comments to full TRT.	All TRT members	Wednesday, March 3
7. Finalize answers and send to Paul McElhany.	Primary authors as Assigned at Meeting	Friday, March 5
8. Send final answers to NOAA and LCFRB.	Paul McElhany	Wednesday, March 10

Action Items – TRT Review Efforts in the Future	Who	Completed by
9. Develop and distribute ‘review’ timeline and milestones.	Patty Dornbusch and Phil Trask	Tuesday, March 9
10. Develop example (e.g., methods, flowchart) from Recovery Plan	Ray Beamesderfer	Tuesday, March 9

11. Develop and distribute ‘chain of logic’ scenarios (e.g., analysis paths that work; and those that don’t).	Ashley Steel	Wednesday, March 17
12. Review documents to help understand TRT review process.	All TRT members	Prior to the next TRT meeting
13. Convey NOAA deliberations (e.g., with ISRP, among TRTs, etc.)	Paul McElhany	Ongoing
Action Items – ISRP Review	Who	Completed by
14. Distribute ISRP information.	Paul De Morgan	INCLUDED in cover email with this memo
15. Obtain, if possible, and review ISRP Review Framework	Elizabeth Gaar	As soon as possible
16. Review ISRP information (i.e., Clearwater Report, Technical Guide, Review Framework)	All TRT members	Prior to the next TRT meeting

Action Items – Miscellaneous	Who	Completed by
17. Schedule next TRT meeting.	Paul McElhany (with assistance from JJ Westfall)	ASAP

Documents Distributed at the Meeting

1. Agenda (Draft – February 20, 2004)
2. Memo on Proposed Approach to Review of LCFRB Recovery Plan from Paul McElhany to Patty Dornbusch (Draft – February 23, 2004)
3. NOAA Fisheries’ Draft Checklist for Reviewing Subbasin Plans (Draft Internal Guidance Document – January 28, 2004)
4. WLC ESA Ex Com Questions Regarding Sufficiency Guidelines for Recovery Plans (Discussion Draft – February 28, 2003)

TRT Members in Attendance:

- Steve Kolmes
- Paul McElhany
- Jim Myers
- Dan Rawding
- Ashley Steel
- Tim Whitesel
- Chuck Willis

Others in Attendance:

- Elizabeth Babcock, NOAA Fisheries (by phone in the morning)
- Ray Beamesderfer, S.P. Cramer & Associates, Inc.
- Jeff Breckel, LCFRB
- Paul De Morgan, RESOLVE
- Patty Dornbusch, NOAA Fisheries
- Elizabeth Gaar, NOAA Fisheries
- Mary Ruckelshaus, NOAA Fisheries (by phone in the morning)
- Phil Trask, LCFRB

APPENDIX A, FLIP CHART NOTES
NOAA WLC-TRT MEETING FEBRUARY 24, 2004

EVALUATING RECOVERY PLANS

- Two Aspects:
 - Population Scenarios
 - Suite of actions
- Summing up actions in each attribute – how?
- Implications?
- Do you think (best judgment) that the actions will achieve recovery?
- Use ‘scores’ or....
- Do actions target threats in a way that will provide results?
- What is sufficient habitat?
- What gets you a “3” in X,Y,Z attribute? (pop-based?)
=> Guidance needed?
- Evaluating attributes (now) different than evaluating ESU delist (future)
- 1st step (of plan) is to describe goals as thoroughly as possible.
- Are there actions proposed for sufficient populations that, given uncertainty and adaptive management, will move us to delist?
- Attributes:
 - Which are limiting and which are feasible to address?
 - What are the threats for that specific attribute?
 - Actions?
 - Confidence in those? (over time & space & populations)
- Do you have to address all threats (YES) /solve all of them? (Probably NO: scale may determine the relevant extent)
- Prioritizing populations
- Viability criteria AND threats criteria
- Threats all different: some stable; some ↓ (directionally deteriorating); some uncertain.
=>Address each differently
- M&E plan → v. important, especially in light of adaptive management.
- Evaluating certainty? – can’t be certain, rather:
 - “confidence”
 - “robust
- Time scale very important
 - What will actions do? When?
- Stakeholders want certainty.
- LCFRB – wants sense of the approach over time to moving forward (long-term).
 - Now: assumptions, actions, etc.
 - M&E
 - Pot. Δ’s (adaptive management).
- Certainty:
 - 1) Goals (attribute-specific)
 - 2) M&E process
- By assessing status by viability – sets expectation for recovery to be same
- Chub example in Willamette River
 - Bar is viability and that is correct

- Have to define attributes more specifically
- Attribute analysis:
 - Suite of options for evaluation by panel
 - Specificity
- Recognition: this is the best we can do at this point in time.
- Metrics for assessing populations
 - For individual populations – assume SS of $x = 3.0$
- Tidal gates (e.g.) not a threat...entrapment/habitat loss is a threat.
- (Q) Level of specificity in the LCFRB plan?
- (A) Reach-level actions priority H2O sheds, subsheds, reaches, reach attributes, perf. standards that allow for local governments to meet best way.
- Review:
 - Did it id limiting factors and how to address?
 - Is it likely to meet goals it has laid out?
 - Will it meet goals within proposed timeframe?
 - Add: time-scale & future adaptation expectations.
- Infinite number of ways to ‘recover’
 - What does the subbasin want to do?
 - TRT – general –
 - Yep. as good as possible given what we know
 - No, won’t cut it.
- Action → who has to do it; what do they have to do; what is the desired/likely outcome? Is there evidence it will happen? M&E plans.
- Need specificity in terms of action; threats, M&E
- Puget Sound:
 - What goals are we trying to achieve?
 - Goals – time (5-10 year increments)
- Define timeline for review/input
 - WA: LCFRB RP
 - OR: Subbasin Plans
- LCFRB: Goal is to revise aspects of subbasin plans by 12/31/04 (council timeline); and take longer if necessary on RP
- Review Processes: NWPC; state, TRT, NOAA
- Concern: Redundancy of reviews
 - =>What is the most effective use of TRT time/effort in future?
 - ISRP – specific tech. guide driven review (subbasin level)
 - TRT – ESV-level analysis; all-h integration analysis
 - ?’s need to be focused on ↑
- ISRP – just freshwater (look at Clearwater Review)
 - ISRP Review Framework
- “Not raising the bar?” → What does this mean? For TRT?
- Clarity on TRT Review Role
- Annotated outline
- Specific Actions
- How FRB intends to evaluate /analyze actions?
- Review of Subbasin – Habitat Focus
- Review of Recovery Plan – all-4 Focus; ESU

- OR Subbasin Review
 - Who does review?
 - What will they review? (ISRP)
 - Who does the roll-up?
- Question: How will the TRT determine sufficiency?
 - Are you going to use scoring to determine sufficiency?
- Answer: Scoring – original intent: picture of today, picture of where you want to be (not intended to be used to determine sufficiency)
- Suggestion: include – “This is what I envision a 3.0 looks like” – (population specific) ... in terms of tangible measurable things
- LOGIC review versus ACTION review?
- Who wants certainty?
- What does the TRT say at the end of the review?
 - Certification
 - Direction
 - Grade

Populations/ESU
Historic

Assurance of Plan
certified actions

Broad sense

“sufficient”

Delist

“reasonable” actions and M&E

Now

all criteria for viability

Dead

plan “sucks”