

Methodology and Process for Mountain Columbia Province Project Review

Kalispell Meeting 2/26/06

The local review team met in Kalispell at the MFWP office on Feb. 28 from 9:00 to 3:30 to review and prioritize fish and wildlife proposals for the Mountain Columbia Province, in particular projects from the Flathead and Kootenai subbasins. In attendance were:

Kerry Berg	NPCC
John Ogan	NPCC
Brian Marotz	MFWP, Member Oversight Group*
Sue Ireland	KTOI, Member Oversight Group
Barry Hansen	CSKT
Lynn DuCharme	CSKT, Member Oversight Group
Virgil Dupuis	Salish Kootenai College
Peter Rice	University of Montana
Joe DeHerrera	BPA
Mark Shaw	BPA
Mark Reller	BPA
Vaughn Paragamian	IDFG, Member Oversight Group
Joann Hunt	NPCC
Wade Fredenberg	USFWS, Member Oversight Group
David Rockwell	Consultant

** The Oversight Group consists of entities that the NWPC has statutory responsibility toward. This group is responsible for making funding recommendations to the NWPC. It includes Tribes, States, and the USFWS.*

Kerry Berg and John Ogan kicked off the meeting by discussing the relevant documents that the Council has posted on its website to help with the local review of fish and wildlife proposals. Links to those are as follows:

1. General Guidance: <http://www.nwcouncil.org/fw/budget/2007/guide.htm>
2. Review Guidance: http://www.nwcouncil.org/fw/budget/2007/guide_review.htm
3. BPA Letter: <http://www.nwcouncil.org/fw/budget/2007/bpa.pdf>
4. Schedule: <http://www.nwcouncil.org/fw/budget/2007/guide.htm#schedule>
5. Province Prioritization Worksheet and Proposals by Province:
<http://www.nwcouncil.org/fw/budget/2007/province/Default.htm>

In the Council's "Review Guidance" document, they ask local groups to review the fish and wildlife proposals that have been submitted against the adopted subbasin plans they relate to and provide the Council a proposed three-year suite of projects that represent the highest priorities of the subbasin plan for the next three years.

Kerry Berg and David Rockwell led the Oversight Group (OG) through a proposed strategy for local review of the project proposals. The strategy, which includes the

following three steps, is based on criteria set forth in the Flathead and Kootenai Subbasin plans and reflects changes recommended by the team at the meeting.

Step 1

Step 1 includes a set of criteria for evaluating each of the projects. These **Tier One Criteria** are designed to ensure that all proposed projects and measures address BPA's responsibilities under the Northwest Power Act. (See page 88 of the Flathead Subbasin Management Plan and page 125 of the Kootenai Subbasin Management Plan). Theoretically, any projects that do not meet these criteria would drop out because the projects would not be the responsibility of BPA.

Step 2

Step 2 says that after applying Tier 1 criteria, projects will be compared against the objectives in the appropriate subbasin plan. The highest priority projects will be ongoing projects that address urgent and high priority objectives. In both plans we prioritized objectives as urgent (U), highly recommended (H), and recommended (R). (See table 10.3 on page 87 in the Flathead Management Plan and table 10.5 on page 124 in the Kootenai plan.)

This will work fine for projects proposed for the Flathead and Kootenai Subbasins, but not for the projects proposed for the Bitterroot, Blackfoot, or Clark Fork because they do not have subbasin plans yet, and so they lack objectives. (This is discussed below.)

Step 3

Step 3 includes another set of criteria (**Tier Two Criteria**) to further prioritize projects. (See page 89 of the Flathead Management Plan and page 126 of the Kootenai plan.)

Assigning Points

For these criteria to be useful, they have to have some sort of point system assigned to them. So as a starting point, we have assigned points to:

- (1) the objective rankings in Step 2,
- (2) the Tier Two criteria in Step 3, and
- (3) the single question in Step 4. Points are not needed for Step One criteria.

Keep in mind that this point system is tentative and open to discussion and revision by the full group. At this point it is just laid out for discussion purposes. It is as follows:

For Step 2, the points are as follows:

Urgent	= 3 points
Highly Recommended	= 2 points

Recommended = 1 point

For Step 3, the points are as follows:

1. Projects that provide long-term protection will be given a higher priority (**1 point**) than projects that provide shorter-term protection, all other factors being equal.
2. Terrestrial projects that also provide benefit for aquatic focal species (and vice versa) will be considered a higher priority (**1 point**) than strategies that only benefit terrestrial or aquatic species or habitats separately.
3. Projects that increase the survival and reproductive success of fish and wildlife species native to the project area will be given a higher priority (**1 points**). Special consideration will be given to projects that benefit fish and wildlife species in depleted or special conservation status, including ESA (**2 points**). (Note: A project receives either 1 point or 2 points—it cannot receive 3.)
4. Projects that increase the area of productive habitat accessible or utilized by native fish and wildlife species present in the project area will be given a higher priority (**2 points**) as will projects that provide benefits to multiple species or that have other beneficial watershed productivity implications (**1 point**).
5. Projects that are measures identified in specific fish management, conservation, or recovery plan will be given a higher priority (**1 point**).
6. Proposed projects with techniques and methodologies that have a high degree of likelihood of achieving proposed results under the full range of normally experienced operating conditions will be given a higher priority (**1 point**). Projects that demonstrate cost effectiveness in achieving project purposes compared to similar projects and alternative means of achieving the same proposed result (**1 point**). This latter criterion is triggered only when comparing competing proposals.
7. Projects that provide additional opportunities for biological/ecosystem benefits will be given a higher priority (**1 point**).
8. Projects that make maximum effective use of program funds by involving all funding sources in the proposed project and funding from all sources in related restoration activities will be given a higher priority (**1 point**). Project proposals that demonstrate thorough project coordination with appropriate federal, tribal, state, local, and private entities including local landowners will receive priority. (**1 point**)
9. Projects that can be completed and yield proposed benefits in a timely (this funding cycle) manner will be given a higher priority (**1 point**).

To facilitate our review, we have created a spreadsheet, which is attached (Project Prioritization.xls). Within this spreadsheet, the worksheet entitled **Criteria** provides a way of recording the scores for each proposed project based on the three steps above. The

other two worksheets, entitled **Koot Obj Prioritization** and **Flathead Obj Prioritization**, respectively, provide a bookkeeping method for each project's consistency with subbasin plan objectives. The tallies from these last two worksheets feed into the **Criteria** worksheet.

Issues

CBFWA Resident Fish Committee Review?

It was mentioned at the meeting that the CBWWA RFC was considering reviewing/ranking resident fish projects submitted during the solicitation. The general consensus from our province seemed to be this was unnecessary, and the group was not sure how such a review could work.

Research/RME in General

It was suggested that the group make a list of RME in our area and discuss with the Council why it does not fit neatly into the current movement that seems to be focused on anadromous fish. We have very project specific RME in the Mountain Columbia.

The issue also arose of the conflict between the movement by Bonneville to a 70/25/5 breakdown in the program (70 % on the ground, 25% RME, 5% coordination), thus limiting RME spending, and the consistent recommendations from the ISRP for more RME. This is an issue that confuses project sponsors.

Projects From Areas With No Subbasin Plans

The Council received proposals for five projects from areas without subbasin plans in the Mountain Columbia Province. Three of these projects (one in the Bitterroot and two in the Clark Fork) are requests for funding for habitat work. The other two are proposals to develop a subbasin plan in the Blackfoot and Bitterroot.

Because the local review groups were asked to prioritize projects against subbasin plans, and because there are policy issues involved beyond the responsibilities of the local review group, the OG decided that the Council should make a policy call on these projects. The OG went ahead and prioritized the projects and developed budgets for the Flathead and the Kootenai (where subbasin plans exist) using the budget allocation that the Council recommended for the Mountain Columbia. If the Council recommends that Bonneville fund any of the five projects proposed for areas without subbasin plans, the OG asks that the Council and staff consult with it to best determine how this funding might be accomplished within the budgets that the group recommended.

BPA Information

The Group looks forward to seeing some of the information from BPA, in particular the projects BPA believes fit into the “capital” category, to help the province in finalizing its recommendations.

Kootenai and Flathead Group meetings

The Kootenai Group met on April 13 in Kalispell to prioritize Kootenai Subbasin proposals using the spreadsheet tool. Sue Ireland, Brian Marotz, Scott Soultz, David Rockwell, and Vaughn Paragamian were present. Carolyn Stamy from Kootenai River Network (KRN) called in for that portion of the meeting dealing with the KRN proposal. Over the course of the meeting, the group made two revisions to the spreadsheet.

The first was to change Step Two so that points were not awarded for meeting individual subbasin plan objectives. This was done because the original point system was not yielding fair scores. The revised spreadsheet simply records which subbasin plan objectives a given project is designed to meet. The team then reviews those objectives and assesses, based on professional knowledge, the project's overall importance to the protection, mitigation, and/or enhancement of native fish and wildlife species. Based on this assessment, the team awards a “professional judgment” score of between 1 and 5. This professional judgment score replaces the objective score in the original spreadsheet (see the revised spreadsheet).

The other change was made because three of the Phase Two Criteria in the spreadsheet were not applicable to the Watershed Coordination projects. So for the evaluation of the two Watershed Coordination projects, four new criteria were developed to replace the three original criteria considered not applicable (see the revised spreadsheet).

All the Kootenai projects were prioritized during the meeting.

The Flathead Group met on May 25 and used the revised spreadsheet to prioritize all the Flathead Projects. Project sponsors present included Barry Hansen, Virgil Dupuis, Lynn DuCharme, Brian Marotz, Don Edsall, and Eileen Ryce. David Rockwell facilitated the meeting.

Bonnors Ferry Meeting 5/31/06

We met in Bonners Ferry at the Tribal Headquarters on May 31 from 10:00 to 4:00 to review the project prioritization and discuss how we could meet the target budget. The following were in attendance:

Kerry Berg	NPCC
Brian Marotz	MFWP, Member Oversight Group
Sue Ireland	KTOI, Member Oversight Group
Barry Hansen	CSKT (by phone)
Lynn DuCharme	CSKT (by phone) , Member Oversight Group
Jason Flory	USFWS, Member Oversight Group
Virgil Dupuis	Salish Kootenai College (by phone)
Carolyn Stamy	Kootenai River Network

Rox Rodgers	USFWS
Jody Walters	IDFG
Mark Maskill	USFWS
David Rockwell	Consultant

Kerry Berg started the meeting by explaining the history of the proposal review process in the Mountain Columbia Province and the role of the Oversight Group (composed of the state, tribal, and federal agencies which the NWPCC has statutory responsibilities to) versus the individual project sponsors. The Oversight Group will be making final recommendations on funding to the Council. Kerry explained that if project sponsors are unhappy with the outcome of the local process, they can appeal to the NWPCC and then to BPA.

The team made one minor adjustment to the spreadsheet by changing the language of the first “Coordination” criterion and making the possible points for that criterion two instead of one. The additional point was added so that the total points possible from the substitution criteria equal the points possible from the criteria they replace. The new criterion reads:

Support locally recognized stakeholder groups that improve coordination and implementation of local, state and federal programs.
(1 pt or 2 pts)

The team then scored the few remaining cells of the spreadsheet that for various reasons had not yet been scored.

In a review of the final scores the team noted that the spreadsheet has a significant bias toward projects that are broad in scope. For example, the Kootenai River Native Fish Restoration and Conservation Aquaculture project, which is a hatchery project focused specifically on white sturgeon and which is crucial to the survival of the species, scored lower than other projects of much less importance. The bias results in large part because projects that are broad in scope tend to score on more criteria. Also in this example, another spreadsheet bias — the fact that the criteria tend to favor habitat restoration as opposed to hatcheries — comes into play. The professional judgment score can compensate somewhat for these biases, but can not eliminate them. Another problem with the spreadsheet tool is that Coordination projects are compared against habitat projects, which are very different.

The team discussed the comment portion of the spreadsheet and wanted the source of the comments noted: the Kootenai subgroup wrote the comments on the Kootenai projects when those projects were being prioritized. The Kootenai Subgroup consists of Kootenai project sponsors. Similarly, Flathead project sponsors wrote the comments for the Flathead projects.

The team then reviewed the budget and determined that to meet Fiscal Year 08 and 09 targets, significant cuts in project budgets will need to be made.

Virgil Dupuis submitted an approximate 30% reduction to his budget for his Flathead Subbasin Flowering Rush and Yellowflag Iris Project. The reduction was in response to a request made by the Flathead Subgroup at its May 25 meeting.

After a thorough discussion, all the project sponsors agreed to review their proposed budgets and submit revisions to David Rockwell via email by June 7. A follow-up conference call of the policy working group will be held shortly thereafter to determine final budget recommendations.

Conference Call Meeting 6/8/06

We met via conference call at 1:00 on June 8 to finalize funding decision and adjust budgets. The following were in attendance:

Kerry Berg	NPCC
Brian Marotz	MFWP, Member Oversight Group
Sue Ireland	KTOI, Member Oversight Group
Lynn DuCharme	CSKT, Member Oversight Group
Jason Flory	USFWS, Region 1 Member Oversight Group
Carolyn Stamy	Kootenai River Network
Rox Rodgers	USFWS
Vaughn Paragamian	IDFG, Member Oversight Group
Mark Maskill	USFWS
David Rockwell	Consultant
Wade Fredenberg	USFWS Region 6, Member Oversight Group
Mark Reller	BPA
Scott Soultz	KTOI

The purpose of the meeting was for the Oversight Group to work toward the finalization of its funding recommendations to the Council. The group decided which projects should receive a “fundable” recommendation and then worked through the budget to determine budget reductions for each fundable project. As mentioned above, the OG decided not to prioritize or make any recommendations on projects for which there was not a subbasin plan.

The OG was able to achieve a balanced budget with several contingencies or recommendations, which are noted in the comment section of the document entitled “Spreadsheet Compilation”. Along with this memo, that document represents the final report of the OG to the Council. It includes the OG Score for all the projects, the proposed budgets, the OG’s recommended budgets, a column noting whether a project is on BPA’s list of projects that meet the Sturgeon BIOP RPA’s, whether a project or a portion of a project can be capitalized, and comments. As previously noted, the comments section includes important recommendations and other information that should be taken into consideration by the Council as it develops its recommendations. This spreadsheet also includes (in column D) a filter with a drop-down menu that allows projects to be grouped into three categories:

1. Projects broad in scope that generally focus on habitat restoration
2. Hatchery projects and projects that are very narrow in scope
3. Coordination projects

Grouping the projects in this way allowed the OG to evaluate individual projects against other similar projects, thereby reducing or eliminating some of the built-in bias of the spreadsheet discussed earlier.

Attachments: **Project Prioritization.xls** (the spreadsheet tool used to score the projects)
Spreadsheet Compilation.xls (the Oversight Group's final funding recommendations)