

Subbasin Plan Presentation Guide

For Subbasin Planners to Inform the Independent Scientific Review of Subbasin Plans

May 2004

Overview. As part of the independent scientific review of subbasin plans in summer 2004, subbasin planners will have the opportunity to present the process and methods that they used to develop their subbasin plans. This document provides guidance on developing presentations to reviewers from the Independent Scientific Review Panel and its Peer Review Group members, and the Independent Scientific Advisory Board (ISRP/ISAB/PRG).

In general, presenters should describe:

- a clear logic path that drove their planning process, starting with the public and technical input used to generate the plans;
- the analytical tools or other methods used, specifying how they customized the tools and methods for the unique conditions and species in their subbasins; and
- a few key examples that show their logic path, demonstrating the use of an assessment to identify limiting factors, to create working hypotheses, to develop objectives, and to select strategies.

Presenters should emphasize the logical linkages between the assessment, limiting factors, working hypotheses, objectives, and strategies. That is, they should make clear how they have used information and analysis to decide on the projects, techniques, and areas that their plan identifies as priorities for actions such as restoration, protection, and research. This is important because presenters will not have time to present all the conclusions from the assessment or describe all the strategies for all the focal species. The focus of the presentation should be on the analytical and decision-making process, illustrated by key examples pertaining to priority focal species with ecosystem implications. The presentation of the Flathead and Kootenai team followed this approach and provided a good model for other presentations this summer. The presentation is available on the Council's subbasin planning website page at: www.subbasins.org/science/flathead.htm.

The remainder of this document provides specific guidance on presentation content and format.

ISRP/ISAB/PRG Review Process. Subbasin plan presentations are an important part of the independent scientific review. They give planners a chance to highlight and provide context on their planning effort. By the time presentations occur, at least three reviewers should have reviewed and commented on each subbasin plan using the ISRP/ISAB/PRG review comment template and checklist described below. Thus, planners should be prepared to answer questions on areas where reviewers may need further elaboration and clarification. Presentations should lay out the basic framework and conclusions of the planning effort to spur more detailed discussion as dictated by the reviewers. For some of the earlier presentations scheduled for the Yakima and Upper Columbia (Columbia Cascade Province), reviewers will likely not be finished with an initial review of the subbasin plans, so those presentations may need to step reviewers through the plans in more detail than presentations that are scheduled later in the year.

Following the public presentations, the reviewers will meet in private to reach consensus on checklist evaluations and begin to synthesize review comments. Although three reviewers will review each subbasin plan in depth, a larger review group will attend the presentations, review the plans at a higher level (e.g. the management plan), and participate in review discussions. Thus, the presentation and subsequent review discussions provide an important function in educating the entire review group so that a consistent level of scrutiny is applied across the entire Columbia River Basin.

The ISRP/ISAB/PRG will submit final reports to the Council by August 12, 2004. The final reports will be made publicly available on the Council's website by August 15.

Review Criteria. In developing presentations, planners should consider the ISRP/ISAB/PRG review questions and criteria, which are described in the *Subbasin Plan Review Guide for ISRP, ISAB, and PRG Reviewers* (www.nwcouncil.org/library/isrp/SubbasinPlanReviewGuide.doc). The guide includes a detailed review checklist that is directly derived from the *Subbasin Planning Technical Guide* (www.nwcouncil.org/library/2001/2001-20.htm) and incorporates the subbasin plan review questions from the 2000 Fish and Wildlife Program and the Council's August 2002 Notice of Request for Recommendations for subbasin plans.

Broadly, reviewers must evaluate: 1) whether the subbasin plans are complete and internally consistent, following a transparent and defensible logic path; and 2) whether the subbasin plans are externally consistent with the vision, principles, objectives, and strategies contained in the Council's 2000 Fish and Wildlife Program and Mainstem Amendments. Specifically, the checklist asks reviewers to evaluate whether the plan satisfactorily provides the assessment, inventory, and management elements requested by the Council and, as necessary, to recommend the level of need to further treat a specific element of the subbasin plan before it meets the criteria of completeness, scientific soundness, and transparency.

The ISRP/ISAB/PRG report outline is provided below. It follows the Technical Guide's outline for the assessment, inventory, and management plan, and should provide a good starting point for a presentation outline. Presenters should also refer to the ISRP's figure describing the subbasin plan logic path provided at the end of this document.

Strengths and Limitations of the Plan. The ISRP/ISAB/PRG reviewers are aware of the time, budget, and data constraints associated with the subbasin planning effort. However, the Subbasin Planning Technical Guide, and consequently the ISRP/ISAB/PRG review checklist, request an ambitious amount of information, analysis, and decision-making. The ISRP/ISAB/PRG review evaluation scale contemplates this and includes language such as, "the plan's approach to this issue was scientifically sound given the time, data, and analytical/decision support tools available." Planners should describe their unique circumstances that shaped their planning effort (e.g., lack of data, poor fit of existing analytical tools, etc.) but should highlight their approach for moving forward rather than dwell unnecessarily on limitations of the effort to date.

Analytical Tools. ISRP, ISAB, and many PRG members are familiar with the primary analytical tools used by subbasin planners. They have received briefings on EDT, QHA, IBIS, and Ecovista's analytical tool, and are also familiar with NOAA's TRT effort. Presentations should identify which tool or other methods were used, the unique inputs for the individual subbasin, and what was learned. Presentations should describe why certain tools and methods were selected for use over others and how they may have been modified or adapted to fit the available data or specific assessment needs in a particular subbasin. For example, the Flathead/Kootenai planners indicated that they used QHA rather than EDT because QHA provided a more efficient mechanism to evaluate habitat protection and restoration potential for resident fish.

Presentations on Multiple Subbasin Plans. For planners who present multiple subbasin plans, it might be useful to highlight important differences between the subbasins, especially where one represents a good situation and the other a poor situation for a particular species (leading to recommended solutions based on the contrast). Presenters are in the best position to decide whether this presentation approach will serve a useful purpose.

Presentation Methods and Format

- **Presentation Format** - Power Point is the preferred presentation format. A computer projector and laptop will be provided. It is also preferred that presenters email their Power Point presentation to Erik Merrill at the Northwest Power and Conservation Council the Friday before their presentation week. However, presenters can also bring their presentations to the meeting on CD or USB flash “thumb” drive. Presenters are advised to bring their own projector and laptop if it is not possible to send the Power Point presentation to Erik Merrill in advance or if other computer software is used (e.g., Corel Presentations).

Slides and transparencies are permitted but presenters will need to contact Erik Merrill at least a week in advance of their presentation to confirm that the necessary audio-visual equipment is available.

- **Use only good quality graphics** - Avoid slides with huge amounts of text or poor contrast between background and text. Use large font and be sure the image projects well from the back of a large room. Use text to outline or highlight the point you plan to discuss rather than reading through detailed text.
- **Make your presentation interesting** - Assume that most reviewers have read your subbasin plan. Use maps and photos to orient reviewers to your subbasin and use most of your time to emphasize the logic path and methods that drove your planning process.
- **Select the person that is most capable of making an effective presentation** - Additional technical staff can and should be present in the audience to help answer questions.
- **Practice your presentation** - It is essential that you remain within the time limits. Facilitators will ensure that all presenters adhere to the time allotted for their subbasin.

See the Council subbasin plan website for up-to-date meeting agendas and logistics.

For any questions, contact: **Erik Merrill**
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Outline for ISRP/ISAB Subbasin Plan Review Reports

- I. Executive Summary
- II. Introduction
- III. Summary Comments
 - A. Strengths of the Plan
 - B. Weaknesses of the Plan
 - C. Consistency with the Fish and Wildlife Program and its Scientific Foundation
- III. Specific Comments on the Assessment, Inventory, and Management Plan
 - A. The Subbasin Assessment (*generally pages 4-6, 9-10 and specifically 18-24 of the Technical Guide*)
 - 1. General and Summary Comments on the Assessment
 - 2. Review Checklist and Comments on Sections of the Assessment
 - a. Subbasin Overview
 - b. Focal Species Characterization and Status (*Presenters: How were focal species selected?*)
 - c. Environmental Conditions
 - d. Ecological Relationships
 - e. Interpretation and Synthesis / Limiting Factors and ConditionsAlso for consideration: Socio-economic Themes
 - B. The Inventory (*pages 11-12 of the Technical Guide*)
 - 1. General and Summary Comments on the Inventory
 - 2. Review Checklist and Comments on Sections of the Inventory
 - a. Existing Protections
 - b. Existing Plans
 - c. Current Management Activities / Restoration and Conservation projects

Note to Presenters: The reviewers are especially interested in how you reported and analyzed the results of past programs.
 - C. The Management Plan (*pages 12-16 of the Technical Guide*)
 - 1. General and Summary Comments on the Management Plan
 - 2. Review Checklist and Comments on Sections of the Management Plan
 - a. The Vision for the Subbasin
 - b. Biological Objectives
 - c. Strategies (Prioritization and Consideration of Alternative Management Responses)
 - d. Research, Monitoring and Evaluation (Adaptive Management)

ISRP Flowchart: Subbasin Plan Logic Path

