

**Willamette Action Team for Ecosystem Restoration (WATER)
Research, Monitoring and Evaluation (RM&E)**

June 27, 2019

http://www.nwd-wc.usace.army.mil/tmt/documents/FPOM/2010/Willamette_Coordination/Willamette%20RME/RME.html

[Corps provided edits]

FINAL Facilitator's Summary

ACTION	BY WHOM?	BY WHEN?
Review and provide edits to 5/23/19 meeting summary	RM&E Team	7/11/19
Send Doodle poll for Middle Fork Workshop	Rich	ASAP
Draft a 1-pager for the Steering Team regarding unfunded concepts for consideration	DS Consulting	Completed 7/1/19]
Determine whether genetic pedigree work effort is already included in the FY19 funding package	Rich	ASAP
Review FMWQ 18-02 (additional juvenile sampling objective) and provide a revised concept if the nature of the project has changed.	Rich	ASAP
Follow-up with Fenton regarding potential concept papers identified in the 5-23-19 RM&E Meeting Actions.	Rich	ASAP
Provide team members with any additional concept papers by the week of July 8, 2019.	Fenton	ASAP
Provide written comments to concept paper authors.	RM&E Team	7/19/19
Incorporate team member comments and circulate a final concept to RM&E Team members.	Anne/Fenton	Before Joint RM&E/Steering Team meeting
DS Consulting will schedule the Joint RM&E/Steering Team meeting for late July/August, 2019	DS Consulting	ASAP

****Note:** *The Document Tracking table is attached to the end of this summary as attachment 2.*

Participants in the Room: Leslie Bach (NPCC), Diana Dishman (NMFS), Mike Hudson (USFWS), Christine Peterson (BPA), Rich Piaskowski (USACE), **Participants on the Phone:** Dave Jepsen (ODFW), Jim Myers (NMFS), Lawrence Schwabe (CTGR);

Facilitation Team: Emily Stranz and Nancy Pionk (DS Consulting).

Welcome, Housekeeping, and Updates

Emily welcomed the group and conducted a round of introductions. The team deferred approval of the 5/23/19 RM&E meeting summary to allow team members additional time for review.

→ **Action:** RM&E Team will review the 5/23/19 RM&E meeting summary and provide edits to Nancy by 7/11/19.

Water Team Member Updates: Diana shared that she was assuming her new position at NMFS and this meeting was her last as a NMFS representative on the RM&E Team; Anne Mullan will be representing NMFS on the RM&E team in the future.

2019 Studies/Projects Updates

- **Update on Middle Fork workshop series:** The Corps is in the process of contracting and will then award funds to the contractor. The first workshop is expected to take place during July/August.
- **Action:** Rich will send RM&E Team members with a Doodle poll to get a sense of availability for the workshop.
- **Copepods in UWR Reservoirs (JPL-19-03-SYS):** The funding for this study is currently in process.
 - **High Head Bypass (JPL-18-03-HHB):** The RM&E and Steering Teams have reviewed this study and supported moving forward with it; a draft proposal has been requested. The Corps is exploring adding an additional objective to investigate a future study of a bypass system that meets NMFS passage criteria. Rich explained that the study process will include partial dewatering of the holding tanks to simulate a stressor to the fish associated with the trap and conveyance test scenarios.

Steering Team Request: Revisit FY19 Concepts

Emily recapped the Steering Team's request for the RM&E team to discuss FY19 concepts that were ranked high, potentially feasible to fund, and not yet funded in FY19. The RM&E team developed a list of studies for further discussion by the Steering Team. Emily note that at the 5/23/19 RM&E Team meeting, the Corps indicated that it was reviewing FY19 projects and considering additional objectives to fund with remaining FY19 funds and was going to provide a list of potential projects that it proposed to fund.

To meet this request, the RM&E Team reviewed a spreadsheet displaying the FY19 Concept Rankings by agency and the current funding status for each project (See a separate document entitled *FY19 WATER RME Concept Ranking Spreadsheet_7-26-18_StatusUpdate062519*). Rich noted that is very difficult to get funding for a study as the end of the fiscal year approaches. Whether a study is executable with FY19 funds depends on the type of study and the field work components, the researcher's capability to do the study and the funding mechanism for funding the particular study. The Corps has a range of funding mechanisms (academic, state, etc.) which begin to close as the end of the fiscal year approaches.

The team identified 4 FY19 concepts to bring forward to the Steering Team for funding consideration at their 6/4/19 meeting:

1. **FMWQ 18-02** *Determination of habitat use patterns for rearing and emigrating juvenile spring Chinook salmon and winter steelhead below Willamette Project dams:* **Additional Juvenile Sampling.** Team members requested that the objectives for additional sampling be reviewed for consistency with the original ranked concept and a revised concept be brought to the team if the nature of the project has changed.
2. **JPL-19-02-LOP** *Evaluation of delaying refill and spring surface spill operation at Lookout Point Dam for improving juvenile spring Chinook Salmon dam passage:* **Paper exercise to do pre-feasibility/implementation plan** (ex. Consider the hydraulic probability to conduct study and identify risks and trade-offs).
3. **FMWQ 18-01** *Evaluation of habitat benefits associated with USACE revetment modification, including potential cold-water refuge enhancement:* **Paper exercise to evaluate habitat uplift with revetment modification.**
4. **Genetic pedigree sampling** of Chinook; analysis of Fall Creek and North Santiam samples. This work was not ranked; however, it is needed in order to implement multiple studies. **Note:** The Corps is checking to determine whether this work effort is already included in the FY19 funding package.

These concepts were noted as having high average ranking (above 3.0) and potentially feasible to fund in FY19. The list was developed as a team; however, it does not reflect consensus recommendation to pursue funding; instead team members signaled their continued support for each concept (See attachment 1).

RM&E Team members also reviewed the annual planning and prioritization process. The Corps noted that, after the RM&E team develops the concepts and they are ranked by the Steering Team, the Corps must still make the decision of whether the study is capable of being funded and executed. Team members agreed that it would be helpful to track funding status throughout the year to be able to identify additional opportunities as they arise. The team identified the following process improvements to implement in the FY20 study cycle:

- The RM&E Team will add a “funding status” column to the WATER Concept Ranking & Prioritization Spreadsheet to allow them to track funding status and opportunities throughout the year.
- The RM&E Team will implement quarterly check-ins aimed at reviewing the FY study priorities, identifying opportunities to fund or tee-up studies.
- Continue utilizing, and encourage the Steering Team to utilize, the annual RM&E Concept Planning spreadsheet.

[Note: In edits following the meeting, the Corps also suggested that the Steering Team be encouraged to continue to utilize the WATER Concept Ranking & Prioritization Spreadsheet as well

Team members agreed that a 1-pager should be prepared for the Steering Team that lists the 4 FY19 concepts, and indicates which agencies signaled continued support (or non-support) for the concept as well as the FY19 ranking by each agency, and the process improvements.

Team members explored whether there might be other ways to expand the ability to fund studies later in the year. It was suggested that the Corps consider whether it can expand the list of researchers ready to contract. Additionally, while the Corps generally does not request proposals on concepts it does not anticipate funding, it was suggested that the Corps consider using a pre-proposal template with researchers for concepts with medium to high collaborative support. The template could let researchers know that, while a full proposal is not being sought and the concept is not being funded, a completed pre-proposal would allow the RM&E team to fast-track the proposal, if funding becomes available.

NMFS requested that DSC flag for Steering Team awareness and Federal Family conversation, the language of RPA 9.1 which states that:

The Action Agencies will seek NMFS’ review of draft study proposals and draft reports. Comments submitted by NMFS on draft evaluation proposals must be reconciled by the Action Agencies in writing to NMFS’ satisfaction prior to initiating any research-related activities anticipated in this RPA.

Rich requested to Diana/NMFS that a conversation occur first between the Corps and NMFS prior to having a Steering Team discussion about what process is required under RPA 9.1 to “reconcile” comments. Additionally, it was suggested that how projects are selected and issues related to funding be considered on a policy level by the Steering Team

- **Action:** DSC Consulting will draft a 1-pager for the Steering Team that includes the list and process improvements. [Note: See Attachment 1 entitled: *FY19 RM&E Concepts for Funding Consideration*]
- **Action:** Rich will determine whether genetic pedigree work effort is already included in the FY19 funding package.
- **Action:** Rich will review FMWQ 18-02 and the objectives for additional juvenile sampling for consistency and provide a revised concept for the additional sampling if the nature of the project has changed. If it is line with the review concept, the Corp will request a proposal.

FY20 Concept Paper Review

The group reviewed the concept papers listed below and identified red flags, suggestions and questions. Comments on individual concepts will be provided directly to the concept authors.

1. **JPL-15-02-SYS**- Evaluate the feasibility of in-stream and head-of-reservoir juvenile fish trap and haul above Willamette Project (WP) Dam.
2. **JPL – 19-01-LOP** - Evaluation of a spring and summer spill operation at Lookout Point Dam for improving juvenile spring Chinook Salmon dam passage. **Note:** it was suggested that this concept incorporate objectives from JPL-19-02-LOP regarding reservoir evaluation to understand how fry distribution is affected by reservoir elevation and discharge.
3. **JPL-19-02-LOP** - Evaluation of delaying refill and spring surface spill operation at Lookout Point Dam for improving juvenile spring Chinook Salmon dam passage.
4. **APH-17-02-GRP** - Evaluate reintroduction and productivity of UWR Chinook salmon above Green Peter Dam. **Note:** This is an unresolved policy issue. NMFS' intends to send a letter to the Corps that articulates NMFS' determination that it is necessary for the Corps to outplant adult hatchery Chinook salmon above Green Peter for fish passage research as described in the 2008 NMFS Biological Opinion.
5. **FMWQ-18-04-SYS** - Assess Effects of Total Dissolved Gas Exposure on UWR Chinook Salmon and Steelhead Below Big Cliff Dam.
6. **FMWQ-18-02-SYS** - Determination of habitat use patterns for rearing and emigrating juvenile spring Chinook salmon and winter steelhead below Willamette Project dams.
7. **JPL-18-02- SYS** - Delayed Mortality.

The team discussed next steps for the concept papers. RM&E team members will send out any additional concept papers by the week of July 8, 2019. Team members agreed to provide written comments directly to concept paper authors by July 19, 2019. Concept paper authors will incorporate comments and circulate a final concept to RM&E Team members, at least two weeks prior to the Joint RM&E/Steering Team meeting where they will be ranked. DS Consulting will work to schedule a Joint RM&E/Steering Team meeting to rank the concepts during late July/August. Once the concepts are ranked, proposals will be requested for the concepts that are moving forward, and the proposals will be reviewed at the September RM&E meeting.

→ **Actions:**

1. Rich will follow-up with Fenton regarding potential concept papers identified in the 5-23-19 RM&E Meeting Summary Actions.
2. Fenton will provide team members with any additional concept papers by the week of July 8, 2019.
3. Team members will provide written comments to concept paper authors by July 19, 2019.
4. Authors will incorporate comments and circulate a final concept to RM&E Team members, at least two weeks prior to the Joint RM&E/Steering Team meeting where they will be ranked.
5. DS Consulting will schedule the Joint RM&E/Steering Team meeting for late July/August, 2019

Next Steps and Closing

The next RM&E Team meeting is scheduled for July 25, 2019. Topics will include a review of FY20 concepts, review of O&M funding prioritization and a presentation by Jim Myers and NMFS staff regarding the 5-Year Status Review and updates to NMFS life-cycle modeling approach.

With that, Emily thanked the group and concluded the meeting.

The next RM&E Team meeting is scheduled for July 25, 2019 from 9:00- 1:00 PM

This summary is provided by DS Consulting. Suggested edits are welcome and can be provided to Nancy Pionk (nancy@dsconsult.co).

Attachment 1

FY 19 RM&E Concepts for Funding Consideration
 Provided by the RM&E Team

The following concepts were discussed by the RM&E Team at their 6/27/19 meeting; these concepts were noted as having high average ranking (above 3.0) and potentially feasible to fund in FY19 (depending on Corps internal funding and researcher’s schedules, contracting, and field work components). The list was developed as a team, however, does not reflect consensus recommendation to pursue funding (see “signaled continued support” column below).

FY 19 Concept				Signaled continued support during 6/27 RM&E Meeting		
FMWQ 18-02 <i>Determination of habitat use patterns for rearing and emigrating juvenile spring Chinook salmon and winter steelhead below Willamette Project dams</i> Additional Juvenile Sampling				COE, CTGR, FWS, ODFW, NMFS, NPCC		
Ave. FY19 Ranking: 3.3	BPA: 2	COE: 2	CTGR: 4	FWS: 5	ODFW/ODEQ: 3/3	NMFS: 4

JPL-19-02-LOP <i>Evaluation of delaying refill and spring surface spill operation at Lookout Point Dam for improving juvenile spring Chinook Salmon dam passage</i> Paper exercise to do pre-feasibility/implementation plan.				BPA, COE, CTGR, FWS, ODFW, NMFS, NPCC		
Ave. FY19 Ranking: 3.8	BPA: 2	COE: 4	CTGR: 4	FWS: 4	ODFW: 4	NMFS: 5

FMWQ 18-01 <i>Evaluation of habitat benefits associated with USACE revetment modification, including potential cold-water refuge enhancement</i> Paper exercise to evaluate habitat uplift with revetments modification.				BPA, ODFW, NMFS COE feels that past work and ongoing studies (e.g. SWIFT efforts) inform these questions and does not see need for additional work.		
Ave. FY19 Ranking: 3.4	BPA: 4	COE: 4	CTGR: 2	FWS: 5	ODFW/ODEQ: 3/3	NMFS: 3

Genetic pedigree sampling of Chinook; analysis of Fall Creek and North Santiam samples				COE, CTGR, FWS, ODFW, NMFS, NPCC		
Not Ranked. This is work needed in order to implement multiple studies. Note: COE is checking to determine whether this work effort is already included in the FY19 funding package.						

In addition, the RM&E Team identified process improvements to implement in the FY20 study cycle:

- The RM&E Team will add a “funding status” column to the WATER Concept Ranking & Prioritization Spreadsheet to allow them to track funding status and opportunities throughout the year.
- The RM&E Team will implement quarterly check-ins aimed at reviewing the FY study priorities, identifying opportunities to fund or tee-up studies.
- Continue utilizing, and encourage the Steering Team to utilize, the annual RM&E Concept Planning spreadsheet.

** For Steering Team awareness, and Federal Family conversation, RPA 9.1 states: The Action Agencies will seek NMFS’ review of draft study proposals and draft reports. Comments submitted by NMFS on draft evaluation proposals must be reconciled by the Action Agencies in writing to NMFS’ satisfaction prior to initiating any research-related activities anticipated in this RPA.**

Attachment 2

Document Review Tracking (Click here for [Master “tracking” Spreadsheet](#))

Document Name	Document Type	Comments Due By	Comments received / forthcoming from
FY19 Concepts			
Investigation of spring Chinook salmon fish passage alternatives for the Middle Fork (APH 19-01 MF)	Status: Request for proposal has been sent out.		
Evaluation of Foster Adult Fish Trap Performance, 2019 (APH-15-05-FOS)	Pre-Proposal	November 2	CTGR, ODFW and NMFS provided comments
	Status: On hold; PDT presented on design fixes at 3/5/19 WFFDWG meeting.		
Evaluation of Foster Adult Holding and Transport (APH -19-01-FOS)	Draft Proposal	July 2	NMFS provided comments
	Status: Revised Concept (synthesis approach) ranked by Steering Team on 6-4-19; Further discussion on funding anticipated at 7-2-19 Steering Team meeting. Draft Proposal sent to team members for comments.		
Evaluation of a spring and summer spill at LOP (JPL-19-01-LOP)	FY 19 Concept Paper	TBD	COE provided comments
	Status: RM&E and Steering Team will discuss management purpose and information needs during concept prioritization meeting.		
High Head Bypass (JPL-18-03-HHB)	Draft Proposal	July 2	NMFS provided comments
	Status: 6/4//19: RM&E and Steering Teams supported moving forward with study. Draft Proposal sent to team members for comments		
FY20 Concept Papers			
Evaluation of Foster Dam Juvenile Passage (JPL-11-04-FOS)	FY 20 Concept Paper	7/19/19	
Willamette Project Dam Passage Delayed Mortality (JPL 18-02-SYS)	FY20 Concept Paper	7/19/19	
Evaluate the feasibility of in-stream and head-of-reservoir juvenile fish trap and haul above Willamette Project (WP) Dam (JPL-15-02-SYS)	FY20 Concept Paper	7/19/19	
Evaluation of a spring and summer spill operation at Lookout Point Dam for improving juvenile spring Chinook Salmon dam passage (JPL – 19-01-LOP)	FY20 Concept Paper	7/19/19	
Evaluation of delaying refill and spring surface spill operation at Lookout Point Dam for improving juvenile spring Chinook Salmon dam passage (JPL-19-02-LOP)	FY20 Concept Paper	7/19/19	

Evaluate reintroduction and productivity of UWR Chinook salmon above Green Peter Dam. (APH-17-02-GRP)	FY20 Concept Paper	7/19/19	
Assess Effects of Total Dissolved Gas Exposure on UWR Chinook Salmon and Steelhead Below Big Cliff Dam. (FMWQ-18-04-SYS)	FY20 Concept Paper	7/19/19	
Determination of habitat use patterns for rearing and emigrating juvenile spring Chinook salmon and winter steelhead below Willamette Project dams. (FMWQ-18-02-SYS)	FY20 Concept Paper	7/19/19	
Draft and Final Reports			
Evaluation of Chinook Salmon (<i>Oncorhynchus tshawytscha</i>) Fry Survival in Lookout Reservoir, Western Oregon, 2018. (USGS)	Draft Report	7/3/19	