
WORKGROUP REPORT ON EXTENDED MONITORING

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From: Extended Monitoring Workgroup:
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I. Background and Purpose

When research and monitoring projects are designed within the Adaptive Management Program (AMP), the study duration is an important component of the study plan. Given the number of CMER projects the Board funds biennially, and the limitations of human and financial resources, it's important that all funded projects are carried out in a manner which provides meaningful, defensible scientific results. Once project scoping and study design passes the various review steps (Independent Science Panel Review, CMER and TFW Policy) and has been implemented, preliminary results may suggest longer duration monitoring is needed to further reduce uncertainty, strengthen confidence in results, and better inform TFW Policy and the WA Forest Practices Board's (Board) decision making process.

Despite the potential benefits, extending monitoring beyond the original scope of a project will require expanded costs and staff demands, and could potentially delay consideration of results by Policy and the Forest Practices Board beyond important deadlines (e.g. meeting Ecology Clean Water Act milestones). The existing AMP project approval process is geared toward the initiation, implementation and completion of new projects but lacks a defined process for assessing such extensions. At their August 2018 meeting, the Board requested input on how extension proposals should be evaluated.

A work group was assembled of the CMER and Policy members listed above. This report explains their assessment of the issue and resulting recommendations.

II. Workgroup Efforts

Considerations and Discussion

Because work group members have extensive experience in the AMP, efforts utilized their personal knowledge to consider the following:

- Discussion of Extended Monitoring scenarios in past and future

- Circumstances beyond scope of Extended Monitoring Framework (i.e. major changes requiring a new design or minor changes that could be addressed by a memo of decision by PI or SAG to CMER).
- Review of existing procedural tools and timelines and applicability to extended monitoring.
- Considerations for developing new process: improvements vs additional effort required
- Need for involvement and approval by CMER, Policy, AMP Administrator, Forest Practices Board (FPB)
- How to evaluate consequences to AMP budget, staff, committee work loads
- Information needed to evaluate EM proposals

III. Recommendations

The Workgroup determined most of the documentation needs for extended monitoring are like those presently being used for development of new projects. For this reason, several of the document types CMER has developed are applicable to consideration of extended monitoring. The advantages of using existing documents include avoiding additional development effort and minimal learning curve effort for users over the long run.

The Workgroup anticipates some adaptations may be needed to accommodate differing circumstances. Once this approach has been implemented and refined, it may be incorporated into the Protocols and Standards Manual and/or Board Manual Section 23.

The Workgroup anticipates several scenarios when extended monitoring could be formally considered. They include:

1. **At project initiation** during project scoping, best available science review, preferred alternatives development and approval by TFW Policy. The decision to provide additional monitoring outside the scope of the initial study design doesn't necessarily need to occur at this time but needs to be discussed. If no decision about extended monitoring is made at this time, it may be revisited later in project implementation as needed (see below);
2. **Mid-stream of a Project** due to unforeseen circumstances that directly impact the ability of the project to be carried out as originally designed (delays in site selection, loss of treatment/reference sites, harvest timing out of sync with applied treatments, etc.);
3. **Near the end of the field component of a project** extended monitoring may be considered prior to last year of post-treatment field data collection, but ideally, before any field equipment is removed. Extending monitoring may be of interest due to the

magnitude of impacts, unexpected findings, and/or to learn more about long-term impacts from treatments (e.g., stream temperature, shade, wind throw, etc.) relative to the original project scope. This is the scenario the workgroup spent most of its time considering.

Some members of the Workgroup believe consideration of extended monitoring should be a standard requirement at a certain optimal stage of all relevant AMP projects. The group did not determine whether such a prescribed trigger would eliminate or coexist with the circumstance-driven scenarios described above. This question may benefit from further discussion during CMER and Policy review.

Extended Monitoring Decision Framework

Extended monitoring consideration generally consists of four steps and can be initiated by any AMP participant (PI, CMER, Policy, FPB).

1. PI and project team (SAG) develops brief extended monitoring proposal by updating the prospective findings report (rationale, benefits, link to AM, costs, etc.).
2. Extended monitoring proposal and updated prospective findings report are presented to CMER for review and approval.
3. Once approved by CMER, Policy considers extended monitoring proposal within the context of biennial MPS consideration.
4. If Policy approves extended monitoring, PI and project team (SAG) updates project charter which is reviewed and approved by CMER and Policy.

Note - Since extending monitoring beyond the scope of initial project study designs can affect AMP budget/priorities, the steps above need to occur well in advance of the annual budget process, which typically concludes at the May FPB meeting. Step 1 above should begin around the end of each calendar year in order to give CMER and TFW Policy adequate time to prepare and consider the information prior to the May FPB meeting (of the following year).

Attachments

Summary Form

Example prospective findings report