

ATTACHMENT 3 - REVIEW PANEL OVERVIEWS OF REGIONAL PROCESSES

Region: **Puget Sound**

Regional Organization/Lead Entity: **Hood Canal Coordinating Council**

I. Internal funding allocations

Description of process and criteria (e.g., SRFB technical and community issues categories) used to develop allocations across watersheds with the region.

Comments:

The lead entity is the regional organization focusing on listed summer chum, and also providing the middle Hood Canal contribution for Puget Sound Chinook being addressed by the Puget Sound Shared Strategy. Work on Skokomish Chinook and Bull Trout recovery plans is ongoing.

The current process mirrors previous rounds but is shifting toward limiting projects to highest priorities within ESA-listed stock habitats.

All listed stocks compete for funds equally based on benefit, certainty and community involvement, and lead to one project list (not separate lists for summer chum and Chinook).

In sum, a prioritization scheme is applied, not an allocation approach.

II. Local technical review process

The SRFB envisions regional technical project review processes that address, at a minimum, the fit of lead entity project lists to regional recovery plans.

- a. Explanation of regional technical review envisioned by the SRFB, and how was it related to the technical review work of lead entities.
- b. Documentation of the technical review process and results (including summary of comments of the reviewers and how they were reflected in the project list).
- c. Identification of the review team(s) used, when, and why (include names, expertise, and affiliations of members).
- d. Documentation of the technical and citizen review process, and in summarized form, comments from technical and citizen/policy reviews.
- e. Explanation of how and when the SRFB Review Panel (e.g., early in the process, throughout, or late), was used in the process.

Comments:

- a. *The lead entity intended to develop a technical review process with involvement from the Puget Sound TRT and local TAG, with SRFB review panel participation. This was unable to be accomplished (e.g., lack of NOAA TRT participation). All accepted projects are documented in the plan as high priority.*

The review process took into account timeliness and critical nature of relationships with landowners on proposed projects and resulted in the re-ranking of projects to reflect the current and future ability of the lead entity to accomplish their long-term goals.

The lead entity worked with the review panel on POCs, and addressed identified concerns. Review panel was invited to participate in review meetings, though schedule conflicts hampered attendance.

- b. *Only about ten of sixteen TAG members reviewed projects. Attachment B contained the Process guide, appendix B contains technical evaluation criteria, and attachment C for TAG meeting summary – afford a generally transparent process but individual reviewer comments or individual scoring sheets were not provided for the review panel.*

Meeting summaries for the TAG and the project list committee were included in attachments C and D respectively. This identified member's present, and clarified results of the review process. Individual reviewer comments were not provided.

- c. *A list of review teams is found in appendix F attachment B - Draft Process Guide – Names and affiliations are included but expertise was not.*

- d. *The meeting summary in Attachment D shows process and results and how the project list committee adjusted the list with rationale included. The NOAA Puget Sound TRT did not participate due to scheduling issues.*

- e. *There was minimal early participation of SRFB review panel due to schedule conflicts, and the review panel did not participate in field visits. The review panel was not invited to attend meetings of the citizens committee.*

III. Evaluation process and project lists

- a. Explanation of (with appropriate supportive documentation) what was done to ensure consistency of project lists with the regional recovery plan and with local priorities. The issues to address include:
 - i. Explanation of the project evaluation and ranking process, criteria, and results within and across watersheds.
 - ii. Explanation of how the priorities established by lead entities and the rankings of citizen committees were considered.
 - iii. Explanation of how comments of technical and citizen/policy reviews were addressed in finalizing the project list.
 - iv. Documentation that clarifies agreement between lead entities and the regional process on project lists (including statements from the regional organization and lead entities regarding the fit of lists to regional plans, clearly documenting the basis for these determinations).
 - v. Explanation of the dispute resolution process used to resolve any disagreements.
- b. Explanation of how the allocation of funds to non-listed species was addressed.

Comments:

The process to develop the project list was based on TAG reviews and consensus with the Citizens committee; no disputes were identified that needed to be dealt with; no projects targeting unlisted species were proposed nor will they be considered if proposed.

Region: **Puget Sound**

Regional Organization: **Shared Strategy for Puget Sound**

Lead Entities: **Island County, King County WRIA 8, King County WRIA 9, Kitsap (East), Mason Conservation District, Nisqually, North Olympic Peninsula, Pierce County, San Juan County, Skagit Watershed Council, Snohomish County, Stillaguamish, Thurston Conservation District, WRIA 1 – Nooksack**

I. Internal funding allocations

Description of process and criteria (e.g., SRFB technical and community issues categories) used to develop allocations across watersheds with the region.

Comments:

The Puget Sound Salmon Recovery Council agreed to development of a strategic approach to prioritization or allocation based on technical and policy considerations but this work is not expected to be completed until 2008.

This year allocations were based on the SRFB's previous allocation to watersheds (lead entities) across Puget Sound.

II. Local technical review process

The SRFB envisions regional technical project review processes that address, at a minimum, the fit of lead entity project lists to regional recovery plans.

- a. Explanation of regional technical review envisioned by the SRFB, and how was it related to the technical review work of lead entities.
- b. Documentation of the technical review process and results (including summary of comments of the reviewers and how they were reflected in the project list).
- c. Identification of the review team(s) used, when, and why (include names, expertise, and affiliations of members).
- d. Documentation of the technical and citizen review process, and in summarized form, comments from technical and citizen/policy reviews.
- e. Explanation of how and when the SRFB Review Panel (e.g., early in the process, throughout, or late), was used in the process.

Comments:

The process outlined in materials submitted appears to be logical and should provide strong regional guidance to local processes. The NOAA Puget Sound TRT (PSTRT) was not always able to participate fully at the local level (e.g., Hood Canal stated that PSTRT participation was low based on schedule problems).

PSTRT reviews of the lead entities' three-year implementation plans are well documented, which point out both strengths (mostly) and weaknesses in planned projects. The web link provided leads to significant detail on plans and PSTRT comments for each watershed. The PSTRT noted that in a number of cases that the contributions of some projects to recovery depended on future actions. Examples of PSTRT concerns included: South Sound and Hood Canal were "mostly consistent" with concerns related to project selection and potential benefits to Chinook, and the Hood Canal Hamma Hamma estuary restoration project was not consistent with the three-year plan.

In one case, the review panel appeared to have reached an erroneous conclusion by accepting a PSTRT comment in information submitted to the Panel that contained an error. These errors appeared to be due to a misunderstanding by the PSTRT. The PSTRT error was brought to the attention of the review panel by the lead entity (e.g., the PSTRT had indicated that the WRIA 2 project matrix showed some carry-forward projects that did not appear to be consistent with plan priorities, where restoration projects exist in the matrix but are lower priorities in the plan). It was helpful to the review panel that the lead entity was able to identify this situation. To the extent that the review panel must rely heavily on TRT documentation as submitted in the application process, it would be helpful in the future to have early documentation from TRTs acknowledging misunderstandings identified by watershed/lead entities to the extent that such are germane to review needs of the SRFB Review Panel.

Names and affiliation of PSTRT members were provided, but their areas of expertise were not. Detailed records of PSTRT participation were provided. Details on membership of some watershed TAGs were not provided.

Documentation of process and comments were provided with some exceptions, including: Skagit review comments were not provided, WRIA 13 review comments were too brief to be very useful, and WRIA 14 review comments were not provided.

The SRFB review panel was invited on project site visits by lead entities and participated in meetings with some exceptions, which included: project review consisted of review of documents and discussions with no field site visits in Skagit, Island, and Hood Canal. The review panel was not invited to attend any regional coordination or citizens committee meetings to observe the project list development process.

III. Evaluation process and project lists

- a. Explanation of (with appropriate supportive documentation) what was done to ensure consistency of project lists with the regional recovery plan and with local priorities. The issues to address include:
 - i. Explanation of the project evaluation and ranking process, criteria, and results within and across watersheds.
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 - iv. Documentation that clarifies agreement between lead entities and the regional process on project lists (including statements from the regional organization and lead entities regarding the fit of lists to regional plans, clearly documenting the basis for these determinations).
 - v. Explanation of the dispute resolution process used to resolve any disagreements.
- b. Explanation of how the allocation of funds to non-listed species was addressed.

Comments:

Each lead entity/watershed used PSTRT reviewed and approved 3-year work plans. PSTRT members commented on the individual work plans for consistency with the recovery plan, but did not review specific details for individual projects.

The project lists approved and submitted by individual lead entities/watersheds were not modified by the regional organization. Adjustments were considered and made after local review by the PSTRT and SRFB review panel. Each lead entity/watershed utilized their local process for technical and policy reviews.

In some cases the PSTRT commented that projects may not be consistent with the work plan, but it is not clear what the formal process in the region was to address such inconsistencies. Some lead entities addressed these comments via their local TAG or CAG groups. Specifically, Hood Canal provided an explanation for how the Hamma Hamma is consistent with their strategy and recovery plan and why they chose to promote this project this year ahead of schedule. In this case a previously reluctant, but instrumental landowner became interested in restoration options for the Hamma Hamma Estuary this year after showing little interest in the past. The lead entity felt it was highly strategic to engage the landowner in an initial assessment/restoration project in order to get movement on future restoration within the Hamma Hamma.

Although a dispute resolution process was discussed, there was no mention of its use or results if it was used.

Some of the work programs, including those submitted by lead entities in south Puget Sound, Island County and NOBLE (Elwha/Dungeness), are multi-species in nature or have significant suites of actions aimed at non-listed species. Recovery plans that have been developed at the local level and reviewed by the PSTRT and local groups note the benefits to multiple of some of the actions that are directed to Chinook or summer chum.

The allocation of funding across the region, as described in Section I, was developed with the intent that lead entities/watersheds would use available funds for their highest priority projects. Some of these projects are expected to have multi-species benefits or a non-listed species focus dependent upon local recovery plan priorities.

In summary, at the lead entity/watershed level, project review processes generally followed those developed for past SRFB rounds. Most included a step to check for consistency with the 3-year work plans developed for the Shared Strategy Chinook recovery plan. Generally this consistency check was an internal process by staff and not a part of the actual review and ranking. At this time, review criteria have not been added to reflect additional recovery plan criteria. In most cases the 3-year work plans were developed from lead entity habitat strategy documents or background documents upon which the strategies were originally based.

Region: **Lower Columbia**

Regional Organization/Lead Entity: **Lower Columbia Fish Recovery Board**

I. Internal funding allocations

Description of process and criteria (e.g., SRFB technical and community issues categories) used to develop allocations across watersheds with the region.

Comments:

Clear discussions were found in the "Lead entity Supplement Application Binder."

The regional organization and lead entity are the same, and cover most of the Lower Columbia region. The White Salmon subbasin and watersheds in WRIA 29 east thereof are outside the geographic area of the regional organization. Although no projects were proposed there in this round, funding allocation issues within that area will need to be addressed if projects are proposed there in the future.

All projects across the region are rated under the same ranking system. The complex ranking system is based on rating each river reach within the entire region. Reach ratings are based on the number of populations using each reach, the recovery priority of the populations and the importance of the reaches to the populations. Projects are then rated based on the benefit to salmon and certainty of success. Project benefits are based on rank of the reach, importance of habitat attributes addressed, and extent to which the project address the issues related to the attributes. Certainty of success is judged by rating each project's objectives and scope, technical approach, coordination and sequencing with other work, uncertainties, community and landowner support, and stewardship. All projects are comparable across the region and one ranked list is developed.

In sum, a prioritization scheme is applied, not an allocation approach.

II. Local technical review process

The SRFB envisions regional technical project review processes that address, at a minimum, the fit of lead entity project lists to regional recovery plans.

- a. Explanation of regional technical review envisioned by the SRFB, and how was it related to the technical review work of lead entities.
- b. Documentation of the technical review process and results (including summary of comments of the reviewers and how they were reflected in the project list).
- c. Identification of the review team(s) used, when, and why (include names, expertise, and affiliations of members).
- d. Documentation of the technical and citizen review process, and in summarized form, comments from technical and citizen/policy reviews.
- e. Explanation of how and when the SRFB Review Panel (e.g., early in the process, throughout, or late), was used in the process.

Comments:

- a. *The LCFRB TAC serves as the regional technical group; the NOAA Lower Columbia/Willamette TRT was not involved in project list development or review (and has not been substantively involved with the LCFRB since the recovery plan was developed). The LCFRB process used a new pre-proposal review process this year.*
- b. *Materials reviewed by the review panel provide a highly detailed account of the review process with pre-proposal notes on each project and final results through the LCFRB.*
- c. *TAC members were identified along with affiliations and expertise.*
- d. *Documentation of events was very clear and detailed.*
- e. *Review panel participation was requested that involved pre-proposal discussions, project site visits, and attendance at a meeting of the LCFRB (which serves as the citizens committee), at which the project list was approved for submission to the SRFB.*

The new pre-proposal review process, plus early and ongoing involvement by the review panel, the SRFB target allocation, seemed to help reduce POCs and focus projects on appropriate actions.

III. Evaluation process and project lists

- a. Explanation of (with appropriate supportive documentation) what was done to ensure consistency of project lists with the regional recovery plan and with local priorities. The issues to address include:
 - i. Explanation of the project evaluation and ranking process, criteria, and results within and across watersheds.
 - ii. Explanation of how the priorities established by lead entities and the rankings of citizen committees were considered.
 - iii. Explanation of how comments of technical and citizen/policy reviews were addressed in finalizing the project list.
 - iv. Documentation that clarifies agreement between lead entities and the regional process on project lists (including statements from the regional organization and lead entities regarding the fit of lists to regional plans, clearly documenting the basis for these determinations).
 - v. Explanation of the dispute resolution process used to resolve any disagreements.
- b. Explanation of how the allocation of funds to non-listed species was addressed.

Comments:

The scoring process was reworked this year to better reflect stock priorities and limiting factors, but interpretation appears still somewhat confusing.

The six-year work plan document itself does not appear to provide clear strategic guidance for project sponsors on where to go first. It has little context and is not specific enough about watershed processes (e.g. sediment).

The project review process was clearly explained with links to the TAC and LCFRB/citizens groups (e.g., in lead entity Supplemental Application Binder narrative page 3- 11).

Overall, the process appears logical and effective except for the ranking issue raised above.

Region: **Snake**

Regional Organization/Lead Entity: **Snake River Salmon Recovery Board**

I. Internal funding allocations
Description of process and criteria (e.g., SRFB technical and community issues categories) used to develop allocations across watersheds with the region.
Comments: <i>Technical review criteria include VSP parameters of spatial structure, abundance, diversity, and productivity that are used to prioritize areas and actions across the region. Project proposals and their ratings drive the process. Ratings are based on five criteria: priority areas, priority actions, certainty, size, and benefit:cost ratios and/ or imminent threat.</i> <i>In sum, a prioritization scheme is applied, not an allocation approach.</i>
II. Local technical review process
The SRFB envisions regional technical project review processes that address, at a minimum, the fit of lead entity project lists to regional recovery plans. <ul style="list-style-type: none">a. Explanation of regional technical review envisioned by the SRFB, and how was it related to the technical review work of lead entities.b. Documentation of the technical review process and results (including summary of comments of the reviewers and how they were reflected in the project list).c. Identification of the review team(s) used, when, and why (include names, expertise, and affiliations of members).d. Documentation of the technical and citizen review process, and in summarized form, comments from technical and citizen/policy reviews.e. Explanation of how and when the SRFB Review Panel (e.g., early in the process, throughout, or late), was used in the process.

Comments:

- a. *The lead entity Citizens Technical Committee (CTC) reviews projects, and the Snake RTT has oversight and conducts a final review and scoring; some members of the CTC are also members of the RTT. The NOAA Interior Columbia TRT does not review projects.*
- b. *Technical review processes were well documented in the "information submission questionnaire."*
- c. *Review team members and their affiliations are shown in the "information submission questionnaire," but no information was provided on their expertise.*
- d. *Comments from the RTT and others were included in the "information submission questionnaire" and 7th round project comments for the SRFB review panel, including questions, responses, general comments and RTT comments for each project.*
- e. *The review panel was invited to the pre-application workshop, but was not invited to otherwise attend field site visits or meetings of the citizens committee.*

III. Evaluation process and project lists

- a. Explanation of (with appropriate supportive documentation) what was done to ensure consistency of project lists with the regional recovery plan and with local priorities. The issues to address include:
 - i. Explanation of the project evaluation and ranking process, criteria, and results within and across watersheds.
 - ii. Explanation of how the priorities established by lead entities and the rankings of citizen committees were considered.
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 - iv. Documentation that clarifies agreement between lead entities and the regional process on project lists (including statements from the regional organization and lead entities regarding the fit of lists to regional plans, clearly documenting the basis for these determinations).
 - v. Explanation of the dispute resolution process used to resolve any disagreements.
- b. Explanation of how the allocation of funds to non-listed species was addressed.

Comments:

RTT review was the primary mechanism for ensuring consistency of the priorities of the lead entity with the recovery plan.

A new pre-application workshop was used this year and helped to orient project sponsors to the most appropriate projects, in the context of the SRFB target allocation.

An improved definition of "imminent threat" was used this year and the project scoring criteria were updated in order to better evaluate across project types instead of just within project types. In the past, riparian, instream, assessment and upland projects all had different scoring sheets.

The lead entity and regional organization are one group.

Region: **Upper Columbia**

Regional Organization: **Upper Columbia Salmon Recovery Board**

Lead Entities: **Okanogan and Chelan Counties**

I. Internal funding allocations
Description of process and criteria (e.g., SRFB technical and community issues categories) used to develop allocations across watersheds with the region.
Comments: <i>For this round, the lead entities explored historic funding levels as a basis for allocation. However, prioritization of stocks by Msa and msa and then the subsequent project evaluations were the basis for the regional project list. An a priori allocation of funds was not used.</i> <i>Future rounds are to be guided by the Upper Columbia Salmon Recovery Plan Implementation Guide.</i>
II. Local technical review process
The SRFB envisions regional technical project review processes that address, at a minimum, the fit of lead entity project lists to regional recovery plans. a. Explanation of regional technical review envisioned by the SRFB, and how was it related to the technical review work of lead entities. b. Documentation of the technical review process and results (including summary of comments of the reviewers and how they were reflected in the project list). c. Identification of the review team(s) used, when, and why (include names, expertise, and affiliations of members). d. Documentation of the technical and citizen review process, and in summarized form, comments from technical and citizen/policy reviews. e. Explanation of how and when the SRFB Review Panel (e.g., early in the process, throughout, or late), was used in the process.

Comments:

- a. *A description of the local review process was included in "Upper Columbia ranked list." The Upper Columbia regional technical team (RTT) provided technical review of projects for the lead entities using common rating criteria. The NOAA Interior Columbia TRT does not review projects.*
- b. *The RTT provided three reviews in project development: a fix-it-loop, project tours, and formal technical review.*
- c. *Reviewer names and affiliations were identified but expertise was not.*
- d. *The review process was complete and well documented in attachments F-G.*
- e. *The SRFB review panel was invited to participate in project field tours, final technical reviews, and at the joint citizens advisory committee meeting at which the project list was approved for submission to the SRFB.*

The lead entities agreed to use the same evaluation criteria for the citizens review process, which was carried out separately within the lead entities. The ranked lists from the lead entities were then combined via a regional citizens committee made up of three representatives from each lead entity.

III. Evaluation process and project lists

- a. Explanation of (with appropriate supportive documentation) what was done to ensure consistency of project lists with the regional recovery plan and with local priorities. The issues to address include:
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 - v. Explanation of the dispute resolution process used to resolve any disagreements.
- b. Explanation of how the allocation of funds to non-listed species was addressed.

Comments:

- a. *Review criteria and processes were well documented in the materials reviewed. Common ranking criteria and a joint citizen review committee inherent to this recovery plan implementation process leads to a project list that is consistent with the recovery plan. Attachment H included descriptions of the citizen's committee ranking process, which is based on benefits to fish and linkage to the recovery plan, certainty of success, projects longevity, project size, community support, and economics.*

The rank order of the combined list could not subsume the rank of the individual list. The result is that projects with greater technical score from one lead entity are ranked lower than projects from the other lead entity because the rank of the projects could not be lower. This was considered a minor problem this year due to the fact that it occurred only at the bottom of the list. The regional organization and lead entities expect to continue working on this issue in the future.

Technical review was provided by the RTT as usual, but their evaluation process was updated this year to better reflect recovery goals. The one issue with this process is an inequality in the total scores possible between project types, acquisition, protection, and restoration. This issue needs to be addressed unless they specifically intend to de-prioritize restoration projects via the ranking.

A dispute resolution process was not mentioned.

- b. *All projects are directed toward spring Chinook and steelhead, both ESA-listed, and supported through the criteria. Indirect benefits may occur for bull trout, also listed, and summer Chinook and sockeye, which are unlisted species.*

Region: **Mid-Columbia**

Regional Organization/Lead Entity:

Yakima Basin Fish and Wildlife Recovery Board

I. Internal funding allocations

Description of process and criteria (e.g., SRFB technical and community issues categories) used to develop allocations across watersheds with the region.

Comments:

Discussions between the Yakima Basin Fish and Wildlife Recovery Board (YBFWRB) and the Klickitat County lead entity resulted in initial agreement to follow the SRFB 6th round allocations methods. This was intended to be the starting point for discussion, and various adjustments to the method were being considered. However, early on it became clear that the Klickitat lead entity would only have a few projects; therefore the funding allocation was a result of the financial needs of those proposed projects. Final agreement on a more robust allocation approach across the Mid-Columbia region remains to be addressed before the 2007 grant round.

The Klickitat lead entity is operating as separate entity for WRIA 30 in the region and WRIA 29, which is outside of the Mid-Columbia Region. WRIA 31 is not represented by a lead entity. The YBFWRB is coordinating activities in the remainder of the WRIs for this region. The Klickitat and Yakima organizations basically used the allocation process from Round 6 (e.g., based on stream miles) and then adjusted the percentage per area based on the expected projects coming in to the Klickitat Lead Entity. Since Klickitat was only expecting 2 or 3 projects the total amount of funding they needed was less than what would otherwise have been needed if the SRFB's Round 6 allocation had been used.

The YFWRB prioritized projects and made funding decisions based on their TAG and CAG scoring matrices within the expected allocation. They approached sponsors with projects lower on the list about modifying the scope and budget of the projects to more closely fit within the allocation and talked with sponsors about partial funding. They also included two projects in their Medium ranking category in case a project higher on the list were to be withdrawn prior to the funding decision.

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Comments:

- a. *The technical and citizens committee reviews followed the same process as in previous rounds with some refinements made to the scoring process.*

A weighting factor that balances extensive versus intensive treatments was applied to the technical scores to better reflect the habitat quality and quantity being treated.
- b. *A request for proposals was advertised; an application workshop was held; clear documentation was provided to the review panel in Appendix B: "2006 Yakima Basin SRFB Project Ratings and Evaluation Criteria."*
- c. *Team members, their affiliation and expertise were identified.*
- d. *Review processes were well described with score sheets at the TAG and CC levels, and TAG notes on individual projects were provided.*
- e. *The review panel attended two days of field visits to proposed projects with the regional organization early in the project review process, but scheduling difficulties precluded Review Panel attendance at TAG meetings. The review panel was not invited to attend meetings of the citizens committee.*

III. Evaluation process and project lists

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Comments:

The evaluation process, scoring matrices and comments reviewed were very transparent (e.g., specific pages from the recovery plan were cited), clear and concise. Discussion and decision points were clear and consistent with the technical and citizen priorities laid out in the strategy and recovery plan.

The lead entity strategy/scoring system does not appear to specifically reward bull trout/single species projects in headwater areas. A more strategic approach to addressing bull trout projects may be helpful in the future. It is not clear how much the YBFWRB is interested in modifying process, scoring and plans if they intend to better address bull trout recovery needs. Their 3-year work plan is being developed.

The overall process is working to help sponsors improve projects for submittal in the future and help direct sponsors to other funding options where appropriate. The reviewed process did not accept projects that failed to meet priorities in the recovery plan.

The materials stressed that non-listed species are benefited by all projects. The YBFWRB would like to maintain a multi-species focus that supports diverse cultural values as well as endangered species recovery.