State of Sound Outline
August 26, 2009

This handout includes:

- Definition of project
- Outline of State of Sound Report
- Outline of Technical memos
- Schedule to produce State of the Sound report and memos
- List of staff leads for each product

PRODUCT DEFINITION

- Report from the Leadership Council to the Legislature on statutory requirements for ecosystem status and trends and action progress, including setting quantifiable goals
- Approximately 50 pages paper summary report, also available on web
- Appended (electronically) technical memos on non-statutorily required products
- Primary audience: State legislature, Governor, "informed stakeholders" (state, tribal, federal, local government, NGO, business community), media
- Secondary audience: General public

STATE OF THE SOUND REPORT OUTLINE

I. **Summary Overview (~4-6 pages)**

This section is the Partnership's statement about ecosystem status and action alignment/tracking.

a. Introduction (why this is new and different): addresses both ecosystem status and trends and implementation and funding. Provides the most accurate accounting to date of state funding dedicated to Puget Sound; shows alignment of funding with strategies, actions, and ecosystem threats; provides a strategic framework to link actions to threats and goals; provides a concrete adaptive management process; and provides measurable benchmarks of progress.

b. Short overview of performance management system

c. Summary pages (~2-pages each) of key ecosystem indicators and performance data.

d. Partnership conclusion/statement about State of the Sound based on the results of the Ecosystem Status and Trends Report Chapter and performance report chapter

e. Next steps
    i. Legislative agenda
    ii. Others TBD

II. **Ecosystem Status and Trends Report (~15-20 pages)**

Focused on one or a few indicators grouped by goals. Will include science-perspective reporting on indicators selected by the Leadership Council (Sept 2 or 3) including Science Panel interpretations of status and trends. Report should be viewed as a "beta" version for the future status reports to come. Outline will be refined.

a. Introduction, Methods
b. Status and Trends (2 paper pages for each PSP goal) (*Indicator categories, but not the specific 2009 reporting indicators) are shown in the outline*
    - What's addressed on this page? How is this important to the goal of____?
    - What is the recent/current status of ____? (narrative plus map/chart graphics)
    - What are recent trends in _____? (narrative plus graphics such as time series charts)
    - What do these findings mean for the Puget Sound ecosystem? (include standardized interpretation of status & recent trending)
    - What do we still need to know about ____? What are our plans for future reports?
        i. Human Health
            1. Safety of seafood
            2. Safety of water for drinking and swimming
        ii. Human Well-being
            1. Working resource lands and industries
            2. Nature based recreation
        iii. Species and food web
            1. Species of greatest conservation concern
            2. Flagship and umbrella species
            3. Food webs
        iv. Habitat
            1. Extent of ecological systems
            2. Condition of ecological systems
        v. Freshwater flows
            1. Streamflow
            2. Hydrologic regime
        vi. Water Quality
            1. Toxic hemical contamination
            2. Water quality index for marine and fresh waters

c. Other?

III. **Action Tracking (~20 pages)**

This work will be primarily forward-looking and set the stage for future analysis of performance and accountability.

a. Introduction (statutory requirements) and Methods
b. Discussion of Performance Management (Accountability) system and use of Open Standards.
    i. Presentation of Strategic Framework
    ii. Overview of adaptive management process for revising the Action Agenda based upon new science and performance information.
c. Identification and presentation of 3-5 priority intermediate outcomes, desired future conditions, and results chains
d. Progress by state and nonstate entities in implementing the action agenda
    i. Accomplishments in the use of state funds for implementation (required). This would focus on 2007-09 accomplishments.
    ii. Discussion of 2009-11 Action Agenda, including the answer to the following questions
        1. Alignment of NTA to strategies, threats, and goals.
        2. Analysis of funding by strategies, threats and goals
        3. Discussion of anticipated general outputs from 2009-11 state funding
        4. Identification of all funds provided to the Partnership and state agencies to implement the Action Agenda for the 2009-11 Biennium including alignment with strategies, threats and goals.
        5. Identification of funding gaps between what was identified in the Action Agenda, and what was funded by the Governor and the Legislature.
    iii. Accomplishments by non-state entities. This would consist of a small number of narrative highlights by sector (feds, tribes, locals, ngo, private) as related to the objectives in Section III. Maybe activities that involves several interests working together (e.g., Nisqually, others).
    iv. Consistency of Actions with Action Agenda
        1. Discussion of concept of consistency
        2. Identification of actions that are not consistent with the Action Agenda
e. Recommendations for process on how future expenditures could better align and match the Action Agenda priorities.
    i. State agencies
        1. Remedy for actions that are not consistent
    ii. Non State Entities (Feds, local governments, others)
f. Review of citizen concerns and responses
    i. Overview and methods

ii. Summary from 2009 Action Agenda Comment-Response Summary
iii. Very high level thematic summary of other comments received

IV. **Comments by the Science Panel on progress related to Action Agenda implementation (~4 pages)**

This is a statutory requirement. Specific topics for comment are under discussion by the Science Panel and will include comments on status and trends, as well as technical memos (see below). The comment letter/memo will be included in the document. The comments on specific topics will also appear in the appropriate sections of the report.

TECHNICAL MEMOS TO BE POSTED ELECTRONICALLY

The technical memos will present the current products of work by staff from the Partnership and additional entities to implement Action Agenda activities addressing the development of the Partnership's Performance Management system.

As with the State of the Sound report, the audience for these memos includes the leadership of the Partnership, implementers of Action Agenda actions, decision-makers and funders tracking progress in implementing the Action Agenda, and members of the scientific community whose work addresses the Puget Sound ecosystem or elements of it. Outcomes we hope to achieve with these memos include:

- Broader ownership of the formative steps toward accountability for and adaptive management of the Action Agenda.
- Maintained or increased levels of advocacy for the system as a tool for helping ensure our investments are strategic and effective.
- Awareness of technical/policy/programmatic assumptions that are driving the Action Agenda, and the needs and opportunities to address inaccurate assumptions.
- Early recognition of what will be used as indicators and benchmarks to measure progress toward 2020 goals, and the implications for strategies, actions, and the 2011-2013 biennium.

The Partnership will use the technical memo format as a means to solicit feedback on the initial steps toward assembling the Performance Management system. To date these steps have been guided by the application of the framework provided by the Open Standards for the Practice of Conservation. The technical memos present the work products that have emerged from these steps. These memos are an important step toward having the performance management system assembled and informing strategic decisions by mid-2010.

The technical memos will be distributed with a set of questions from the Partnership that will serve as guide for reviewers in focusing their review. While reviewer feedback on the entirety of the tech memo content, feedback that addresses the guidance questions will be the most useful and relevant in helping form the performance management system.

Technical Memo A: Vision and Scope for Partnership Performance Management System (~10 pages)

This memo will be a solid discussion draft that describes the Partnership's systematic approach to accountability for actions and outcomes and adaptive management. It will include how the Partnership is operationalizing the Open Standards framework for the Action Agenda, as well as timing and adaptation cycles related to scientific input into the Action Agenda and legislative and budget cycles. Timing and use of the

results of the IEA, Phase 2 indicators project and other new scientific information will be covered. The memo outline is being refined and will address the following topics:

- Key components of a Performance Management System
- How science will inform the Action Agenda and updates
- How the system will help the region set shared, measureable goals
- How the system foster collaboration or "horizontal management?" (aware of and engaged with other organizations working on the same goal – part of the same results chain)
- How the system will support setting priorities for action and funding?
- How the system will support developing an integrated ecosystem monitoring plan
- How the system inform adaptations/changes of the Action Agenda to reflect lessons learned
- How the will system support setting accountability standards and performance measures for implementers

Process diagrams, management timelines, a glossary, and next steps will be included.

Technical Memo B: Open Standards Work Products

These outlines are being developed.

1. **Overview of Open Standards Products**: status of work, next steps including review and revision (*note that each of the following memos would have a brief summary of the overview to provide context*).

2. **Threats identification and rating**
    a. Explain how this work advances our understanding of threats and how to address them
    b. Identification of Threats - Recap of Action Agenda on Threats; Open standards threat categories; present threats used in rating and their definitions; could use a table format for presenting this information
        i. Review Questions: Are the threats appropriate?, Are there additional threats?, Are the threat definitions accurate?, Are the threats appropriately discrete or should they be grouped differently?, Is there new info (i.e., not included in the Action Agenda threats chapter) on threats that we should be using?
    c. Presentation of Components for which threats are rated: Concise identification and description of the components, with any descriptive info that needs to go with it; the process for identifying components will be presented in the components/ viability tech memo, and comments on that info should be solicited there
        i. Review questions: Questions on components should be directed to the components/viability memo)
    d. Threats Rating Process – Purpose, definitions, criteria, steps – Including the concept that some threats that have potential for

serious impacts can be rated low due to existing effective management actions that need to continue to keep the threat at low impact

    i. Review question: Are there aspects of the process that need to be changed/adapted to support credible application to Puget Sound?

e. Regional Threat Rating: presentation and interpretation of results of initial threat rating exercise

    i. Review questions: Where do the results of this exercise conflict with existing technical information regarding the scope, severity or irreversibility of the rated threats? What is the source of that information?

f. Anticipated Next Steps on Threat Identification and Rating: Via 2010 Science Update as the venue; need to address food web and additional terrestrial components; Action Area level rating needed?

3. **Identification of Ecosystem Components and Their Indicators and Targets**

    a. Explain steps on "Viability analysis" as needed, and how this advances our understanding of how we will measures progress toward the 2020 goals

    b. Identification of Components: role of components and how they help us prioritize or focus recovery work; explain how they relate to the full breadth of goals; Recap of work done to arrive at these components and the rationale behind starting with this set in our work

        i. Review question: Do these components adequately represent the ecosystem we are trying to recover?

    c. Identification of Indicators

        i. Review questions: Do these indicators adequately portray the condition of the ecosystem components?; Are there indicators, as additions or substitutes, which should be included to present a better portrayal?

    d. Evaluation of Current Status of Indicators

        i. Review questions: Does the existing data support this assessment of current status?; Are there new or additional data that should be included in the assessment of current status?

    e. Identification of Targets and Benchmarks for Components or Indicators: present in detail, threats memo relies on this piece –

    f. Anticipated next steps on Components, Indicators, Status and Targets: need to augment on the terrestrial side (and feed that into threats rating); components/indicators on the human side need more work; relationship to 2010 Science Update work plan; relationship to monitoring plan; etc

        i. Review question: Do the steps presented ensure that we have a set of components, indicators and targets that provide the best possible starting point for accountability and adaptation of strategies and actions?

4. **Results Chains (including those fully developed for the State of the Sound report and other results chains as time permits)**
    a. Explain steps on results chains in detail as needed, and how this advances our understanding of how strategies and actions move us toward benchmarks and targets
    b. Presentation of Rationale and Process - Recap of work done to develop these results chains and the rationale behind starting with this set in our initial work; address the issue of threats identification in light detail, deferring to the Threats memo;
    c. Present individual results chains (currently: growth/development, stormwater/non-point source pollution, wastewater, invasive species, habitat/river restoration, marine nearshore shoreline armoring, freshwater withdrawal and diversion)
        i. Review Questions: Does this results chain accurately encompass the strategies and actions on this topic from the Action Agenda?; Are there performance measures currently in use in the region that address this topic that should be added to this results chain?; TBD based on specific results chains
    d. Anticipated Next Steps on Building or Revising Results Chains: Role of 2010 Science Update as the venue; need to address food web and additional terrestrial components; Action Area level rating needed?
        i. Review Question: Do the steps presented ensure that we have a set of results chains that provide the best possible starting point for accountability and adaptation of strategies and actions?

Other Technical Memos

1. Technical memo on ecosystem status & trends as delivered to PS Partnership (*this is the background technical work for the status and trends report as presented in the State of the Sound Report)*
2. Others TBD if needed

PROPOSED SCHEDULE FOR THE STATE OF THE SOUND REPORT

July 30-31
- ECB meets and helps identifies key results chains to develop first

August 2-29
- Analytic work for action tracking reporting
- Analytic work for Ecosystem Status and Trends reporting. Work completed by Aug 29 and transmitted to Science Panel
- Key results chains developed with subject experts and reviewed Cross-PSP Performance Work Group

September 1-14
- Cross PSP Performance Work Group develops recommendations related to Intermediate Outcomes and desired future conditions

September 9-10:
- Science Panel review of ecosystem status and trends results
- Discuss comment topics

September 25: Joint meeting of LC, ECB, SP
- Review SOS product outline and timeline
- Review and discuss recommended intermediate outcomes and desired future conditions
- Review and give input performance management system concepts and specifics

September 25:
- Analytic work completed for action tracking chapter
- Open Standards analytic work "pencils down"
- Technical memo on performance system "pencils down"

October 1
- Materials transmitted to LC for meeting
- Staff final preparation and edit of materials begin

October 8: Leadership Council Meeting
- Review and discuss results from action tracking analysis
- Preview ecosystem status and trends findings
- Discuss Science Panel findings
- Discuss Leadership Council conclusions about findings

October 14: ECB Meeting
- Preview SOS content, including relevant technical memos, next steps

October 16: Staff edit work stops for final layout
October 19-23: Final Production and initial printing
October 28: Working date for transmittal to Governor and Legislature

TENTATIVE PARTNERSHIP MEETING TOPICS

Leadership Council

September 2-3
State of the Sound
1. Briefing: Review outline, steps and schedule
2. Briefing: PSP Performance System concepts, contents
3. Approval: 2009 ecosystem status and trends reporting indicators

September 21 week (proposed joint meeting with ECB – see below)

October 8
State of the Sound report:
1. Review ecosystem status and trends conclusions
2. Discuss SP comments on progress
3. Follow up from proposed joint LC/ECB meeting re setting intermediate outcomes
4. Discuss action tracking results
5. Discussion high level messages for the report

Other performance mgt work
Discuss overall performance management system (tech memo)

Ecosystem Coordination Board

July 29-30
1. Review Open Standards methods
2. Input on key results chains to develop first (will help inform identification of intermediate outcomes)

September 21 week (proposed) – Joint meeting with LC and SP
1. Review State of the Sound outline
2. Review and discuss recommendations on intermediate outcomes and desired future conditions from Cross-PSP Performance Management Work Group
3. Discuss overall performance management system concepts under development

October 14
1. Preview and discuss conclusions about State of the Sound report, input to LC on next steps
2. Preview technical memos and next steps on performance system

Science Panel

September 9-10

1. Review draft Ecosystem Status and Trends results
2. Recommend comments to provide to LC

Cross-PSP Performance Work Group

August 13

1. Review group tasks, roles
2. Overview of State of the Sound products, schedule
3. Overview of Open Standards Performance management work
4. Discuss results chains in prep

August 21

1. Review key results chains
2. Begin discussion about intermediate outcomes, suites of ecosystem indicators for 2009 report, desired future conditions for some indicators of ecosystem status and trends
3. For 2009 ecosystem status and trends report, review list reporting indicators, rationale for selection, current status/availability of data and approach to 2009 reporting
4. Input on performance management system

September 1

1. Begin to develop intermediate outcome recommendations/options for further discussion with LC/ECB/SP
2. Begin discussion of desired future conditions
3. Input on performance management system

September 15

1. Finalize recommendation on intermediate outcomes, desired future conditions, and prepare for joint LC/ECB meeting discussion

September 29

1. Follow up from joint LC/ECB meeting

KEY STAFF ROLES

Overall Project Management:

- Martha Neuman and David St. John

Specific Assignments:

Tasks	**Lead**
Overall Schedule	Martha, DSJ jointly
Coordination with PSP Boards and management	Martha
Content package	DSJ, Martha jointly
SOS Document/web design, production	Jon Bridgman (Martha)
I. SOS Conclusion Statement	Paul Bergman (Martha)
II. SOS Ecosystem Status and Trends	Scott Redman (Martha, DSJ as needed in coordination with Open Stds work)
III. SOS Action Tracking Report	Jim Cahill (Martha) (DSJ on results chains and related work)
IV. Science Panel comments	Scott Redman/Joel Baker (Martha)
A. Technical memo on performance system	Mary Beth Brown (DSJ)
B. Open Standards Products including key results chains for SOS report	Jones and Jones, Foundations for Success, other PSP Staff as needed (DSJ)
C. Other technical memos	DSJ with others (Scott, others TBD)