State of Sound Outline
September 28, 2009

This handout includes:

- Definition of project
- Outline of State of Sound Report
- Outline of Technical memos

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 (~7 pages)**
   a. Introduction
      i. Assignment from legislature and governor
      ii. Why this is new and different, status of the work
   b. Short overview of performance management system
   c. Summary of ecosystem status and any highlights
   d. Summary statement of 2009 Action Performance and Accountability
   e. Next steps

II. **Introduction of Partnership Performance Management (Accountability) system and use of Open Standards (~4 pages)**
   a. Summary of performance management system vision
      i. System goals
      ii. System strategies
      iii. Desired results
   b. Overview of system design
      i. System components
      ii. System processes
   c. Roles and responsibilities in managing performance
   d. Next steps in system development

III. **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, limitations
b. Overall summary statement about status and trends
c. Status and Trends
    i. Human Health and Well-being
        1. Human Health
            a. Safety of seafood
            b. Safety of water for drinking and swimming
        2. Human Well-being
            a. Working resource lands and industries
            b. Nature based recreation
    ii. Species and their Habitats
        1. Species and food web
            a. Species of greatest conservation concern
            b. Flagship and umbrella species
            c. Food webs
        2. Habitat
            a. Extent of ecological systems
            b. Condition of ecological systems
    iii. Water
        1. Freshwater flows
            a. Streamflow in major rivers
            b. Hydrologic regime alteration from urbanization
        2. Water Quality
            a. Toxic chemical contamination
            b. Water quality index for marine and fresh waters

IV. **Action Performance and Accountability (~20 pages)**

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

a. Introduction (statutory requirements), approach to 2009 report, methods
b. Reducing Ecosystem Threats in PS
    i. Short introduction and overview page
    ii. Presentation of 3-5 important threats with results chains with actual or proposed threat reduction outcomes
c. Performance Analysis Summary for 2009
    1. Introduction, methods, limitations
    2. Implementation progress in reducing threats
        a. Accomplishment highlights of 2007-09 plan and other agencies in reducing important threats (base

on the what results chains are picked to show above and high ranked NTAs

b. Discussion of anticipated general outputs from 2009-11 state funding

3. Funding analysis summary
    a. Estimate 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
    b. Overall level of funding, by budget (operating, capital, transportation
    c. Funding by threat (Description and Tables)
    d. Funding by goals (Description and Tables)
    e. Identification of funding gaps between what was identified in the Action Agenda, and what was funded by the Legislature.
4. Consistency of Actions with Action Agenda
    a. Discussion of concept of consistency
    b. Identification of actions that are not consistent with the Action Agenda
    c. Remedy for actions that are not consistent
5. Constraints and Areas of Concern
6. Recommendations: for process on how future expenditures could better align and match the Action Agenda priorities (
    1. State agencies
    2. Non State Entities (Feds, local governments, others)

d. 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

V. **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 (~10-15 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. See separate outline.

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. Compendium of Near-Term Actions organized by Threat and with funding information (*Background information for Section IV).*
3. GMAP Table summary for 2007-09 Plan