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**Agenda Item: Item 6**  
**Meeting Date: May 19, 2008**

## **Indicators and Performance Measures Update**

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**Summary:** Science Program staff will provide an update on the progress to date for CALFED indicators and performance measures, and will also outline other related efforts underway in the system.

**Action:** Update is for information only with feedback regarding the potential role of ISB in these various efforts.

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### **Program Performance and Tracking Database**

CALFED's Program Performance and Tracking (PPT) unit is currently developing an online project tracking system. The objective of the system is to automate and streamline the collection and reporting of CALFED project data through use of web-based technologies. The system will house all CALFED project data and also provide point-and-click access to standard published reports as well as project funding, descriptive and performance information at various levels of aggregation or detail. The initial release of the system is targeted July, 2008.

The project has included capture of project data necessary for a fully-functional system. Supporting this initial release, the data collection effort to date has focused on collection of a subset of 70 'pilot' projects for demonstration purposes. Data collected for these 70 pilot projects include level 1 and 2 performance information and detailed project classification information. Expanded data collection for all active CALFED projects (over 500) is planned for over the upcoming fiscal year. Please direct additional questions to John Ryan, CALFED Program Performance and Tracking, at [jjryan@calwater.ca.gov](mailto:jjryan@calwater.ca.gov).

### **Agency Performance Measures Subgroups**

Progress on performance measures by implementing agency staff working with CALFED Science Program and PPT staff is proceeding slowly. For each of the four subgroups, we have identified an initial set of performance measures (these are usually Level III outcome performance measures or indicators, but sometimes a mix of these and output performance measures), and have produced Performance Measures Data Collection Profile Sheets (See Attachment A) for each of these 12 performance measures. The Data Collection Profiles identifies the sources of data, methods for analysis and next steps needed to implement each of the performance

measures. A draft procedural document has also been produced that describes the performance implementation process for each subgroup.

The next step is to locate these data, synthesize it and produce a report on each performance measure. This implementation step is proceeding, but given the current pace, we do not realistically expect results from subgroups until next fall. The Ecosystem Restoration Program (ERP) is expecting to hire 6-8 staff members in the next year to work on this effort. The Water Quality Subgroup has a significant amount of data collected and analyzed, but does not have staff dedicated to this effort and thus, will continue to make slow progress. Levees is in a similar situation as Water Quality, although their data need to be analyzed before it is reported. Water Supply is awaiting a new staff person from DWR to be appointed to their subgroup before they can make significant progress.

### **Monitoring and Assessment Proposal**

At the request of Mike Healey, a team led by Sam Luoma has submitted a proposal to the CALFED Science Program entitled: "Designing a Strategic Plan for Monitoring and Assessment, and a Performance Measure System for the CALFED Bay-Delta Program". The purpose of the project is to develop a strategic plan that will guide coordinated, comprehensive monitoring in the Bay-Delta system. Tasks include:

- Task 1. Obtain Feedback on Workplan
- Task 2. Refine Scope, Goals and Objectives
- Task 3. Build a Framework that Identifies Important Variables and Processes
- Task 4. Integrate Existing Distributed Programs and Plans
- Task 5. Identify Gaps and Deliver Plans to Fill Gaps
- Task 6. Pilot Monitoring Schemes Following the Framework
- Task 7. Produce and Present Results

ISB has commented on the draft proposal and it has been revised and is currently undergoing additional agency review.

### **Report Card Approach**

On April 17-18, Erica Fleishman from UC Santa Barbara, National Center for Ecological Analysis and Synthesis (NCEAS), Bill Dennison from University of Maryland, and Wim Kimmerer from San Francisco State convened a group of approximately 15 people, including Science Program staff, to explore the possibility of applying a "report card approach" to the Bay-Delta system. This approach has been successful in the Chesapeake Bay and Australia. In fact, a day after the 2007 Chesapeake Bay report card was released, the Maryland State Legislature voted to support a new \$75 million Chesapeake Bay Fund focusing on diffuse nutrient sources.

The meeting resulting in agreement that this type of approach would be worth piloting in the Bay-Delta system and the first pilot should focus on a key environmental issue such as the Pelagic Organism Decline (POD). The group developed three different types of indicators:

- 1) bay-wide assessments (parameters measured in particular places that reflect bay-wide processes such as salinity, pumping predation, contaminant loads);
- 2) estuary mapping (parameters measured throughout the estuary such as nutrients, chlorophyll, clarity, zooplankton); and
- 3) habitat or ecosystem mapping (focused on areas of particular ecosystem types such as area of *Egeria*, extent of *microcystis* bloom, area of *Corbula*, area of wetland condition).

Additional discussions between Sam Luoma, Mike Healey, and CALFED Science Program Staff and others have led to the following approach regarding furthering this concept in the Bay-Delta System:

- This would be a pilot effort focused on the POD aimed at determining if this type of Scorecard Approach is applicable and useful in the Bay-Delta context.
- This type of Interpretative Assessment Pilot is called for in Sam Luoma's monitoring proposal described above (Task 6).
- We envision that the effort would be implemented by a coordinated team of people, including:
  - Two, 2-year graduate student/post-docs –one focusing on the spatial components of the analysis and one on the ecological components.
  - Community/agency mentors, as well as academic mentors.
  - Assistance from Bill Dennison at University of Maryland as an expert advisor in the “scorecard” approach.
  - CALFED Science Program staff to coordinate the effort.
  - Need to coordinate with the NCEAS at UC Santa Barbara and with IEP regarding data collection, analysis and synthesis. Wim Kimmerer provides a key nexus as he routinely interfaces with IEP and is currently on the POD's NCEAS parent team.
  - It is envisioned that that ISB would play an on-going role in terms of reviewing and commenting on work products that emerged from such an effort.

### **Delta Vision**

The Delta Vision Blue Ribbon Task Force is now working on a Delta Strategic Plan that is scheduled to be finalized on October 31, 2008. Four work groups have been formed to support the Delta Vision Blue Ribbon Task Force Strategic Planning Process. These are:

- Estuarine Ecosystem
- Delta as Place
- Reliable Water Supply for California
- Governance and Strategic Finance

Each workgroup is charged with developing strategies to achieving the goals in the Delta Vision, and developing performance measures and criteria.

The Estuarine Ecosystem Work Group has made the most progress in the area of performance measures. The lead technical expert for this group is Stuart Siegel and Matt Nobriga has been participating in this work group from the Science Program. The work group has prepared a Draft Document that outlines ecosystem characteristics, their indicators and performance targets (Attachment B). Mike Healey and Jeff Mount prepared a discussion paper for the Task Force that addresses performance measures and goals and actions (Attachment C).

### **Bay-Delta Conservation Plan**

BDCP is drafting conservation measures aimed at achieving their stated objectives, and will use DRERIP conceptual models to help evaluate these measures. Performance measures will be developed in late 2008 as part of the "Chapter 3: Conservation Strategy" which will include conceptual models, and monitoring and adaptive management plans.

### **San Joaquin River Monitoring Partnership Project**

The U.S. Environmental Protection Agency (USEPA) initiated an effort in the San Joaquin River Basin to test a framework for water quality indicators. The purpose of the project was to go beyond indicators and indices of environmental conditions and trends, and test a framework of measuring conditions, linking potential causes to observed conditions, and tracking results of management practices designed to improve conditions. The work was implemented by the San Francisco Estuary Institute and The Bay Institute and focused on salinity and selenium. USEPA has requested that the ISB review the final report entitled: "San Joaquin Watershed Indicators Final Report". This correspondence was provided as a handout under Board Update.

### **ISB Considerations and Staff Recommendations**

- 1) Continued role of the ISB in relationship to CALFED Performance Measures Subgroups. CALFED Science Program and PPT recommend that the ISB liaisons continue to be involved with the Levee Subgroup and the Water Quality Subgroup, and provide input when these groups have made substantial progress, but that they not engage Water Supply and ERP until there is staff to move these efforts along. ERP is expected to hire 6 new people in the fall for their PM effort. It is not clear when DWR will appoint someone to the Water Supply performance measures effort.
- 2) Role of the ISB in relationship to Luoma-led Monitoring Framework and Report Card Approach. Science Program recommends that the ISB carefully track both of these projects from reviewing and commenting on the proposal (ISB has already done this for the Framework proposal) to reviewing and commenting on work products as they are produced.
- 3) Role of ISB and Delta Vision. Science Program recommends that the ISB track the performance measure recommendations developed by the Delta Vision Work Groups and Task Force.
- 4) Role of ISB and the San Joaquin River Monitoring Partnership Project. Science Program recommends that Bill Glaze as ISB liaison to the Performance

**Attachments:**

Attachment A: Performance Measures Data Collection Profile Sheets

Attachment B: Ecosystem Work Group Recommendations Strategic Plan for  
Restoring the Delta's Ecosystem, Developing Draft 5/13/2008

Attachment C: Performance Indicators for the Delta (Michael Healey)

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