

Final Report to the Pacific Salmon Commission and their Southern Fund Committee – February 13th, 2015

Name(s):

Michael W. Schmidt, Isobel Pearsall and Brian Riddell

Project Number and Title:

SF-2013-I-16A – Salish Sea Marine Survival Project – Research Program Development. Year 1

Narrative:

Funding was received from the Southern Fund Committee to work toward integrating the U.S.-Canada research approaches as a next step in program development for the Salish Sea Marine Survival Project. The was on: a) ensuring the core sampling program is suitably integrated: the bottom-up sampling effort that includes juvenile salmon, their prey (zooplankton) and the physical environment; b) establishing priority data needs and high-level trans-boundary approaches for trends analyses and modeling activities; and c) developing trans-boundary data sharing methods and protocols for the project, and data standardization for long-term data use after the project is complete. This work was achieved via retreats and conference calls, and the resulting product is the enclosed “Operations and Alignment Summary” document describing how the Project is being carried out, where and how efforts are being aligned between U.S. (Puget Sound) and Canada (Strait of Georgia) and where there will be separate tracts.

The initial approach included establishing workgroups to facilitate alignment. US-Canada ad-hoc workgroups have been established around two areas where alignment is a greater priority: Bottom-up Sampling and Trends Analyses and Modeling. Scientists participating in Top-Down research activities were also identified, and cross-border collaboration is occurring there as well. More formal task teams are working within this structure, based upon the three research categories (see Table 2. Participants and respective groupings, in the attached report). These workgroups have met periodically by conference call and annually at U.S.-Canada retreats, but have communicated more often independently, facilitated by workgroup contact lists identifying who is doing what and via a web-based project management utility. Active task teams have met often via facilitated conference calls. Although originally planned, a data management and sharing workgroup has not been established. Instead, Isobel Pearsall, Terry Currans, and Michael Schmidt have used the feedback from the scientists participating in the annual retreats and some independent meetings to hash out the strategy. The data management and sharing strategy is closely tied to the work of the Trend Analyses and Modeling group, where most of the Project data will ultimately run through.

The primary mechanism for completing the alignment work was via two, two-day U.S.-Canada Retreats (December 2013 and December 2014). The retreat summaries are provided as appendices in the attached report. Conference calls were held to establish a unified ecosystem indicators list as well. Although more conference calls were planned for the ad-hoc workgroups, ultimately, given the high intensity and offset pace of development on either side of the border (Puget Sound full implementation in 2014 vs. Strait of Georgia Cowichan pilot in 2014 and full implementation in 2015), it was easier to focus on getting the work done at the retreats where everyone was together.

Deliverables

The primary deliverable is the enclosed document, Salish Sea Marine Survival Project: US-Canada Operating and Alignment Summary. This document describes the foundation for the project, illustrates where and how efforts are being aligned between U.S. (Puget Sound) and Canada (Strait of Georgia) and where there will be separate tracts. It also describes how the project management, communications and data sharing activities will occur. Specific details regarding the research and the information supporting the research activities can be found in the basin-specific research plans and supporting documents on the resources page of www.marinesurvivalproject.com. Finally, the summary reports from the first two U.S.-Canada annual retreats are included as much of the discussions in these meetings serve as the basis for the operating and alignment approach.

Per our comments in the February 2014 progress report, details include but are not limited to:

- A section describing alignment in the bottom-up sampling program (juvenile salmon, zooplankton and ichthyoplankton, and physical environment and primary production), and in the trend analyses and modeling activities. This section includes a map of the existing and potential sampling sites, and tables at the end of the document detailing the sampling efforts so that the approaches on either side of the border can be readily compared.
- A section describing the primary data to be collected and whether it is going to be collected in US, Canada or both. This is described in the tables at the end of the document, including a consolidated list of hypotheses, the metrics associated with each sampling activity, and a comprehensive list of draft ecosystem indicators to be assessed.
- A section describing the coordination processes for the course of the project. This section includes research development, project management, communications and fundraising strategies.
- A section describing data management and sharing protocols for the project and the general approach for standardizing information to allow for long-term accessibility and utilization. This is more of a higher level strategy at this time. The data sharing approach will continue to evolve as the project progresses.

Financial Summary:

The financial summary includes two parts. Table 1. is the detailed statement of operations, summarizing expenses relative to the proposal budget. Table 2. provides a breakdown of all expenses, by date. Details regarding the variance in budget to actuals are provided below Table 1.

Table 1: Long Live the Kings Detailed Statement of Operations, Restricted Agreement PSC SF-2013-I-16A Final Report - August 15, 2013 – January 30, 2015

	<u>Ref</u>	<u>Actual</u>	<u>Total Budget</u>	<u>Variance</u>
Revenues		\$90,340.00	\$100,378.00	\$10,038.00
Expenses				
Wages & Salaries				
Michael Schmidt	1	\$33,715.15	\$31,178.00	\$2,537.15
Labour - Employer Costs				
Michael Schmidt	2	\$11,256.18	\$8,418.00	\$2,838.18
Subcontractors & Consultants				
Pacific Salmon Foundation	3	\$9,000.00	\$25,000.00	\$16,000.00
Site/Project Costs (travel & meetings)				
SSMSP Retreat (12/19-21/13)	4	\$11,092.51		
US/Canada Retreat (12/2-3/14)	5	\$14,896.05		
Other project travel	6	\$176.08		
		\$26,164.64	\$17,100.00	\$9,064.64
Office Supplies, phone, printing				
Office Supplies	7	\$867.98		
Phone	8	\$3,272.54		
Printing	9	\$789.51		
		\$4,930.03	\$3,370.00	\$1,560.03
Indirect/Overhead Costs	10	\$15,312.00	\$15,312.00	\$0.00
Total Expenses		\$100,378.00	\$100,378.00	

(Ref.#1): Salary Expense for Mike Schmidt (Project Coordinator) from August 2013 through January 2015.

(Ref.#2): Employer Labour Cost for Mike Schmidt (Project coordinator) from August 2013 through January 2015. This includes Social Security, Medicare, Unemployment Insurance, Workers Comp insurance, as well as Medical, Dental, Life, Disability insurance. Also included is retirement plan costs, health plan administrative costs, and employee transportation costs.

(Ref.#3): Coordinate US-Canada retreats in December 2013 and December 2014. Co-develop US-Canada operating and alignment approach. Help complete operating and alignment plan for US and Canada, Salish Sea Marine Survival Project. Date range of work is November 1 2013-January 30, 2015

(Ref.#4): The SSMSP Retreat was held on December 19-21, 2013 in Richmond, BC. Expenses include \$10,755 to the Hilton Hotel (site of the conference) plus additional conference food and travel expenses for conference participants.

(Ref.#5): The US/Canada Retreat was held on December 2-3, 2014 in Bellingham, WA. Expenses include \$14,074 to the Best Western Hotel (site of the conference) plus additional conference food and travel expenses for conference participants.

(Ref.#6): Other project travel includes project presentation expense for Mike Schmidt

(Ref.#7): Office Supplies include supplies used for meetings and retreats

(Ref.#8): phone expense includes \$1,350 in conference call expense

(Ref.#9): Printing expense includes a portion of the printer/copier lease that is applicable to the printing of materials used for the project.

(Ref.#10): Indirect/Overhead costs include: support staff salary expense, a pro-rated portion of office rent, auditing expense, website maintenance, computer and tech support, and other general expense.

Regarding the statement of operations:

A majority of the variance in the budget is explained by the transfer of funds from our initial allotment to the Pacific Salmon Foundation for co-leading the Program Development, US-Canada alignment work to developing and implementing a second U.S.-Canada Retreat, held in December of 2014 (The original budget only included a retreat in 2013). Additional time and the retreat was needed to complete the alignment work, and we were able to reduce the Pacific Salmon Foundation expense through a cost share from them and through LLTK taking on the larger portion of the work writing the workshop summaries and the overall operating and alignment document. Because it was significant, the transfer of funds among budget items was approved by the Pacific Salmon Commission before it occurred.

Table 2 (A and B): Long Live the Kings Detailed Revenue & Expenses
Agreement PSC SF-2013-I-16A Final Report - August 15, 2013 – January 30, 2015

Revenue:

8/29/2013	1st Advance	\$50,200.00
4/3/2014	2nd Advance	\$40,140.00
	<i>final installment due</i>	<i>\$10,038.00</i>

\$100,378.00

Detailed expenses are on next page

Expenses:

<u>Date</u>	<u>Description</u>	<u>Ref.#</u>	<u>Cost</u>
8/13 to 12/13	Mike Schmidt - Salary	1	\$6,748.59
1/14 to 3/14	Mike Schmidt - Salary	1	\$9,051.14
4/14 to 6/14	Mike Schmidt - Salary	1	\$1,663.95
7/14 to 9/14	Mike Schmidt - Salary	1	\$589.13
10/14 to 12/14	Mike Schmidt - Salary	1	\$9,730.44
1/1-30/15	Mike Schmidt - Salary	1	\$5,931.90
8/13 to 12/13	Mike Schmidt - Employer Labour Expense	2	\$2,414.33
1/14 to 3/14	Mike Schmidt - Employer Labour Expense	2	\$3,096.75
4/14 to 6/14	Mike Schmidt - Employer Labour Expense	2	\$623.55
7/14 to 9/14	Mike Schmidt - Employer Labour Expense	2	\$363.00
10/14 to 12/14	Mike Schmidt - Employer Labour Expense	2	\$3,144.23
1/30/15	Mike Schmidt - Employer Labour Expense	2	\$1,614.32
1/30/15	Pacific Salmon Foundation	3	\$9,000.00
12/19/2013	Hilton Hotel	4	\$10,754.80
12/21/2013	iris Kemp - travel reimbursement	4	\$22.99
12/14/2013	Mike Schmidt - parking reimbursement (retreat (set-up)	4	\$45.63
12/11/2013	Kaffeklatsch - refreshments for retreat	4	\$10.41
12/11/2013	Cactus Club - food for retreat	4	\$125.29
12/12/2013	Hilton-Vancouver - food for retreat	4	\$81.27
12/12/2013	Ceilis Irish Pub - food for workshop	4	\$37.74
12/13/2013	76 - refreshments for retreat	4	\$4.40
12/16/2013	Batdorf & Bronson - refreshments for retreat	4	\$9.98
12/2/2014	Best Western - US/Canada Retreat	5	\$14,074.08
11/27/2014	Mike Schmidt - parking - retreat planning	5	\$22.00
12/3/2014	Ian Perry - retreat travel & food	5	\$168.74
12/3/2014	Robie Macdonald - retreat travel & food	5	\$61.30
12/3/2014	Marc Trudel - retreat travel & food	5	\$327.50
12/1/2014	Skagit Co-op - refreshments for retreat	5	\$6.29
12/1/2014	Boundary Bay - refreshments for retreat	5	\$17.36
12/2/2014	Sq-Delicious - refreshments for retreat	5	\$18.11
12/3/2014	Jim Irvine - retreat travel & food	5	\$200.67
12/5/2013	Mike Schmidt - parking - project presentation	6	\$6.00
12/5/2013	Boundary Bay - food - M. Schmidt - project pres.	6	\$17.36
12/16/2013	Mike Schmidt - parking - workgroup meeting	6	\$6.00
1/26/2014	Mike Schmidt - travel - Alignment meeting	6	\$146.72
8/13/13 to 1/30/15	Office supplies	7	\$867.98
8/13/13 to 1/30/15	CenturyLink - phone service	8	\$1,922.50
8/13/13 to 1/30/15	CenturyLink - conference calls	8	\$1,350.04
8/13/13 to 1/30/15	Pacific Office Automation - copier expense	9	\$789.51
8/13/13 to 1/30/15	Indirect	10	\$15,312.00
			\$100,378.00