

**From:** [Freifeld, Holly](#)  
**To:** [Lief Wiechman](#); [Kathy Hollar](#)  
**Subject:** Re: Draft Process cycle and Report Format Direction for Justin  
**Date:** Monday, January 26, 2015 2:21:06 PM  
**Attachments:** [DRAFT formats for one touch button reports v 2.0.xlsx](#)  
[CED Query Report Process Cycle v 2.0.pptx](#)

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Based on our conversation just now, here's v 2.0 of these docs - whatcha think? If you're good with these, I will send Excel file to Justin (and plan to chew over with him Wednesday).

Thanks -  
H

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Holly Freifeld, Ph.D.  
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911 NE 11th Ave., 4th Floor, Portland, OR 97232  
ph: 503.231.2198  
[holly\\_freifeld@fws.gov](mailto:holly_freifeld@fws.gov)

On Mon, Jan 26, 2015 at 11:53 AM, Hollar, Kathy <[kathy\\_hollar@fws.gov](mailto:kathy_hollar@fws.gov)> wrote:  
*Great comments.- Thanks!*

*Can we have a quick call to discuss, and ensure a common understanding before asking Justin to make changes.*

*Kathy Hollar  
503-231-6156 office  
503-961-3993 cell*



On Mon, Jan 26, 2015 at 10:41 AM, Freifeld, Holly <[holly\\_freifeld@fws.gov](mailto:holly_freifeld@fws.gov)> wrote:  
Def. agree re: terminology - if "certify" raises red flags, let's use something else. I like "evaluate" or "review." Let's pick a word and stick to it.  
H

On Mon, Jan 26, 2015 at 10:32 AM, Wiechman, Lief <[lief\\_wiechman@fws.gov](mailto:lief_wiechman@fws.gov)> wrote:  
Attached.

I piggy-backed my edits on Holly's versions. I made my changes on the .ppt in blue. Just not sure we should use the term 'certification' in a process where it might be deferred. It's incredibly picky of me, but I'm nervous about some in the FOs being confused and mixing terminology. Using terms in a similar way seems to be an issue

on several of our status review fronts, I'm realizing.

The only other thing, and I'm not sure if we need to specify is that it'd be nice to have all metrics summed up for the FOs. Any time a query is run (canned or otherwise) it'd be nice to have a line that reads something like "...37 projects totaling 379,421 acres..."

LW

*Lief Wiechman*

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[lief\\_wiechman@fws.gov](mailto:lief_wiechman@fws.gov)

On Mon, Jan 26, 2015 at 9:40 AM, Freifeld, Holly <[holly\\_freifeld@fws.gov](mailto:holly_freifeld@fws.gov)> wrote:  
Hi Kathy,

Thanks for getting all this down! I zoomed through both docs, and some quick thoughts are attached -- see what you think.

H

On Fri, Jan 23, 2015 at 6:43 PM, Hollar, Kathy <[kathy\\_hollar@fws.gov](mailto:kathy_hollar@fws.gov)> wrote:

Hi Holly and Lief, here's my efforts to capture our call yesterday on what we want reports to look like and the process for getting info certified by the ES field offices, uploaded in the CED, used in MZ reports, and then updated over time.

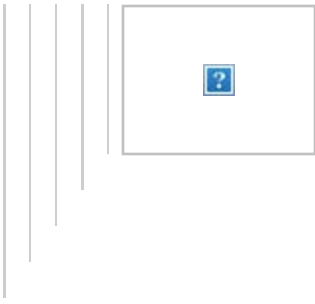
Note I have two tabs in the excel file - one for the rapid assessment certification process, and one for the refined reports.

I look forward to hearing your thoughts on improving this, making sure we're all on the same page, and then getting Justin started on it.

Happy editing and commenting!

*Kathy Hollar*

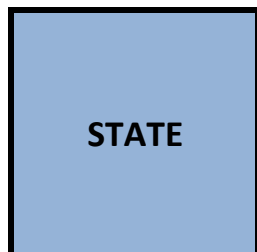
503-231-6156 office  
503-961-3993 cell



## One-touch Query Report Formats

### Rapid Assessment Querys (only primary threats by MZ)

Select  
Button:



**NOTE:** Lief will provide the primary threats for each management zone, and only those

**NOTE:** First set of reports would likely be for all projects approved, subsequent report

**This will generate a report name consisting of: Rapid Assessment Report for State**

#### Report will capture:

Only Completed

Only Projects

Only approved by partner

Only Effective (not High Likely to be Effective given enough time)

Only records approved during date range specified

#### Report will display the following fields:

| Effort ID | Effort Name | Effort Link | Population | Activity |
|-----------|-------------|-------------|------------|----------|
|-----------|-------------|-------------|------------|----------|

**NOTE:** Activity or subactivity specific info would also need to be included, such as:

conifer removal: acres of Phase 1, 2, 3, mixed

easements: length of agreement, early termination penalty, % protected from threat x

protection: % protected from threat x

infrastructure: miles marked, modified, removed; # of structures modified, removed; etc.

#### Report will display the following blank columns for Service to complete:

| Does the Service agree with the self-reported effectiveness assessment? | DROP DOWN OPTIONS                                                                                      |                                                                                              | Optional Text Box to document Service assessment | name of certifier |
|-------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|--------------------------------------------------|-------------------|
|                                                                         | option 1. Yes - supported by documentation provided by partner and/or BPJ of reviewing bio (certified) | option 2. No - not supported by documentation and/or BPJ of reviewing bio (deferred for now) |                                                  |                   |

**Displaying the following notes on bottom of report page:**

All field names/responses in the query

Effectiveness Considerations include: if protocol or methodolog is known to be effective, action is well su

Others?

MZ

Date  
Approved in  
CED  
(Range to include  
in Report)

ie threats will be available for the selected management zone

ts would be for updated/new projects and rely on date approved by partner

**: X, in Management Zone X, for Primary Threat X, self-reported as Effective and Comp**

| Subactivity | Metric | Matric Value | Objectives | Start Date | Finish Date |
|-------------|--------|--------------|------------|------------|-------------|
|-------------|--------|--------------|------------|------------|-------------|

supported in the peer-reviewed , gray literature, or personal communications,

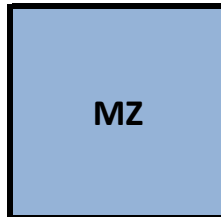
delete

| Explain Activity Effectiveness | Doc 1 Name | Doc 1 File Type | Doc 1 Description | Doc 1 Link |
|--------------------------------|------------|-----------------|-------------------|------------|
|--------------------------------|------------|-----------------|-------------------|------------|

## One-touch Query Report Formats

### Refined Query and Reports (only primary threats by MZ and only FWS certified)

Select  
Button:



**NOTE:** Lief will provide the primary threats for each management zone, and only those threats

**NOTE:** First set of reports would likely be for all projects approved, subsequent reports would

**This will generate a report name consisting of: Refined CED Report for Management Zone**

#### Report will capture:

Only Completed

Only Projects

Only approved by partner

Only Certified as Effective by FWS

Only records approved during date range specified

#### Report will display the following fields:

| Effort ID | Effort Name | Effort Link | Population | Activity | Subactivity |
|-----------|-------------|-------------|------------|----------|-------------|
|-----------|-------------|-------------|------------|----------|-------------|

**NOTE:** Activity or subactivity specific info would also need to be included, such as:

conifer removal: acres of Phase 1, 2, 3, mixed

easements: length of agreement, early termination penalty, % protected from threat x

protection: % protected from threat x

infrastructure: miles marked, modified, removed; # of structures modified, removed; etc.

tified effectiveness )

seats will be available for the selected management zone  
ould be for updated/new projects and rely on date approved by partner  
**t Zone X, for Primary Threat X, Service certified as Effective**

| Metric | Matric Value | Objectives |
|--------|--------------|------------|
|--------|--------------|------------|





# CED Query/Report Process

