

From: [Wiechman, Lief](#)
To: [Freifeld, Holly](#)
Cc: [Hollar, Kathy](#)
Subject: Re: Draft Process cycle and Report Format Direction for Justin
Date: Monday, January 26, 2015 11:32:57 AM
Attachments: [DRAFT formats for one touch button reports \(HF and LW edits\).xlsx](#)
[CED Query Report Process Cycle hf LW.pptx](#)

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

Sage-grouse Ecologist
U.S. Fish & Wildlife Service
Mountain-Prairie Region
Cell: 307.214.8426
Office: 307.772.2374 x236
lief_wiechman@fws.gov

On Mon, Jan 26, 2015 at 9:40 AM, Freifeld, Holly <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> 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:

MZ

Primary
Threat

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

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

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

Report will capture:

Only Completed

Only Projects

Only approved by partner

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

Only for date range specified

Report will display the following fields:

Effort ID	Effort Name	Effort Link	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.

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 certifying bio	option 2. No - not supported by documentation and/or BPJ of certifying bio		

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 we
Others?

State

Date
Range

Those threats will be available for the selected management zone
ports would be for updated/new projects and rely on date approved by partner
ate X, in Management Zone X, for Primary Threat X, self-reported as Effective and Co

Metric	Matric Value	Objectives	Start Date	Finish Date	Explain Activity Effectiveness
--------	--------------	------------	------------	-------------	--------------------------------

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

mplete

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:

MZ

Primary
Threat

Date Range

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

Report will capture:

Only Completed

Only Projects

Only approved by partner

Only Certified as Effective by FWS

Only for date range specified

Report will display the following fields:

Effort ID	Effort Name	Effort Link	Activity	Subactivity	Metric
-----------	-------------	-------------	----------	-------------	--------

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

Matric Value	Objectives
-----------------	------------





CED Query/Report Process

