

## **Integration Panel Summary of Recommended 1997 Category III Funding Package**

The CALFED Bay-Delta Program convened a panel of 20 technical experts, called the Integration Panel (Attachment A), to provide advice on near-term ecosystem restoration efforts related to the Bay- Delta System. Specifically, the Integration Panel was given three tasks:

- Select proposals for the 1997 Category III RFP (up to \$60 million)
- Identify other high priority proposals (up to \$40 million)
- Review and comment on the CVPIA FY 98 Annual Work Plans

This report provides a general summary (not project- specific) of the Integration Panel's recommendations for the 1997 Category III proposals. Due to legal requirements of confidentiality, proposal specific information is not available until the final selection is made.

The Panel was given a limit of \$60 million by CALFED staff for the 1997 Category III proposals. The limit was set at the \$60 million level rather than the \$70 million identified in the RFP because of the need to reserve funding for administration, contingencies and possibly for gaps identified by the Integration Panel. The second task given to the Integration Panel was to identify other high priority proposals that would be selected if additional funding were provided. The Integration Panel identified approximately \$30 million in additional high priority proposals or additional high priority actions that need to be funded to address gaps. The Panel will meet again in November to refine and possibly add to the \$30 million package. Funding for the other high priority proposals and actions would most likely be provided by federal funds. The last task, related to the CVPIA, provided a basis for coordinating the ecosystem restoration actions between the Category III and CVPIA programs. A memo describing the Panel CVPIA recommendations and comments will be provided to the USFWS, USBR, Ecosystem Roundtable and Restoration Fund Roundtable.

### **1. Summary of Category III Evaluation and Selection Process**

The CALFED Bay-Delta Program established a two step process to evaluate and select the 1997 Category III proposals. Thirteen technical review panels, organized by subject, scored and evaluated each of the 332 proposals over a three week period. The Technical Review Panel evaluation sheets were passed onto the Integration Panel for proposals with a score of 40 or higher. The role of the Integration Panel was to select the highest priority proposals based on the benefits to the RFP priority species and habitats.

## 2. Integration Panel Process

Prior to reviewing the proposals, and to guide the selection of proposals, the Integration Panel developed Guiding Principles (Attachment B) which emphasized restoration of ecosystem processes, multiple benefits to species and habitats and other general principles, consistent with the RFP. In addition, the Panel further refined the priorities for the species and project types identified in the RFP (Attachment C). The Panel included the CVPIA anadromous fish species in their list of species priorities to help them review and comment on the CVPIA Annual Work plans. To identify the level of benefit that would be provided by addressing the stressors, the Integration Panel also ranked each of the stressor groups for each of the species (Attachment D). The RFP definitions for each stressor are provided in Attachment E. In general, based on those guiding principles, the species, stressor and project-type priorities, and the technical review panel information, proposals with a passing technical score were selected and gaps identified.

The Integration Panel met for four days to review and select proposals. The Panel was facilitated by a CALFED consultant and notes taken by CALFED staff. The Panel was observed by a staff person from the Attorney General's Office for one of the mornings at the request of the Ecosystem Roundtable to help monitor the process. Throughout the four days the panel focused on the technical and biological merits of each proposal and all members had an equal voice in the decisions. If a member was closely associated with a proposal, that panel member did not participate in the voting on that proposal.

## 3. Summary of Category III Recommended Package

The Integration Panel recommends funding for 51 proposals at a cost of \$60,653,499. A total of 332 proposals were reviewed by the Technical Review Panels and approximately 150 proposals were forwarded to the Integration Panel with a passing score of 40 or more as directed by the RFP.

Many good proposals were received in response to the Category III RFP. There are a variety of reasons that proposals were not forwarded on to the Integration Panel by the Technical Panels, or not recommended for funding by the Integration Panel. Generally, the reasons proposals were not recommended include:

- The limitation of available funding;
- The primary benefits were not significantly related to the priority species in the RFP;
- The proposal did not address conflicts that are manifest in the Bay-Delta problem area;
- The proposal needed to be revised to better address the Category III and CALFED priorities.

As the Technical Review Panels and the Integration Panel reviewed and selected the proposals, the panels identified gaps that need to be addressed in future funding cycles. Those gaps are described in more detail in the next section as the topic is discussed. However, in general the primary gaps identified by the Integration Panel were:

- Water quality guidance document needed to identify and coordinate priority actions to maximize ecosystem benefits
- Landscape level monitoring, reporting, and assessment proposals for the CALFED near-term ecosystem restoration efforts;
- Research to better understand the life history of green sturgeon and steelhead
- Projects on the Feather, Yuba, American and Merced Rivers

#### 4. Recommended Proposals Summary

The following sections provide a general summary of the Integration Panel's recommended proposals, with breakdowns by stressor, project type, applicant type, habitat type, species group, and geographic area.

##### A. Stressor Groups

The Integration Panel used the following stressor groups identified in the RFP to evaluate and recommend proposals (Table A). Attachment D provides information in the Integration Panel ranking for each stressor.

**Table A. Summary of Proposals Recommended for Funding**

<b>Stressor Groups</b>	<b>Dollar Amount</b>	<b>%</b>
Hydrograph Alterations	\$0	0%
Entrainment	\$6,376,766	11%
Barriers and Straying	\$705,201	1%
Floodplain/Marshplain changes	\$21,859,605	36%
Channel Form Changes	\$24,839,783	41%
Water Quality	\$5,081,260	8%
Water Temperature	\$53,113	0%
Undesirable Species Interactions	\$1,155,900	2%
Adverse Harvest Impacts	\$0	0%
Population Management/Artificial Propagation	\$581,873	1%
Land Use	\$0	0%
Human Disturbance	\$0	0%
Wildfire	\$0	0%
<b>Totals by stressor group</b>	<b>\$60,653,499</b>	<b>100%</b>

Hydrograph Alterations. The Integration Panel considered flow changes to be a high priority stressor for most species. However, because Category III funds are not available for water acquisition projects, and because there were few proposals that dealt specifically with other