

PROJECT MANAGEMENT PLAN

Evaluation of potential habitat breaks (PHBs) for use in delineating the upstream extent of fish habitat in forested landscapes in Washington State *June 23, 2026*

PROJECT MANAGEMENT PLAN OVERVIEW

The Project Management Plan breaks down project work into logical steps to help provide a framework to efficiently allocate resources, reliably estimate project costs, and help guide schedule, budget development and project scope. Previously in the CMER Protocols and Standards manual (PSM), this document was titled an implementation plan. The Project Management Plan documents and tracks the progress of a CMER project through its various stages. The contents of the Project Management Plan will vary depending on the type and complexity of the project. The Project Team is the primary audience for the Project Management Plan; however, SAG/CMER members are encouraged to provide feedback on the plan.

OVERSIGHT COMMITTEE

Instream Scientific Advisory Group (ISAG)

BACKGROUND

In 2001, the Washington State Forest Practices Board (Board) approved a comprehensive set of new forest practice rules based on the Forest and Fish Report (FFR). One of the goals of these rules is to protect water quality, including aquatic life, in streams on non-federal forest lands in Washington State. In concurrence with the approval of the FFR, the Board adopted a Forest Practices Adaptive Management Program (AMP). The purpose of the Forest Practices AMP is to “provide science-based recommendations and technical information to assist the Board in determining if and when it is necessary or advisable to adjust rules and guidance for aquatic resources to achieve resource goals and objectives”. To provide the science needed to support adaptive management, the Board established the Cooperative Monitoring, Evaluation and Research (CMER) Committee which has been tasked with performing research in support of the AMP.

In 2018, a Science Panel convened by the Board developed a study design to validate PHBs. The purpose of that study was to develop criteria for accurately identifying PHBs through the evaluation of PHB criteria selected by the Board for use in the fish habitat assessment methodology (FHAM) as part of a water typing rule.

The previous study design (Roni et al. 2019) was reviewed and approved by ISPR, however there were varying levels of comments and criticisms from all caucuses participating in the AMP to particular aspects of the study design and the review process. In 2019, the Board remanded the project to the Department of Natural Resources’ adaptive management science program. The CMER committee was tasked with revising the study design following CMER’s protocols and standards, referenced in AMP board manual (Section 22). CMER then tasked the Instream

Science Advisory Group (ISAG) with revising the study design. ISAG developed a study design, revised from the 2019 study design. This study design received ISPR and CMER approval in May 2023. The CMER Prospective Answers to 6 Questions document was approved by CMER in October 2023 and delivered to the Timber/Fish/Wildlife (TFW) Policy Committee in November 2023. A contractor was selected in November 2024 and field implementation began in spring 2025.

On September 10, 2025, the Board adopted permanent rules for the water typing system, which became effective March 1, 2026. Ultimately, the rule must be implementable, repeatable, and enforceable by practitioners and regulators involved in the water typing system. The new rules include the use of a fish habitat assessment method (FHAM) that incorporates known fish use with PHBs to identify fish habitat. The Board included specific PHB metrics only in Board Manual 23, not in the rule. The Board recommended that PHBs be based on permanent physical channel characteristics such as gradient, stream size, and/or the presence of natural non-deformable vertical and non-vertical obstacles as potential barriers to upstream fish movement. The results of this study will inform the AMP participants regarding the performance of the Board-selected PHBs as well as potential alternatives that might perform better.

PROJECT MILESTONES AND TASKS

		Estimated Dates of Completion							
Project Milestones	Responsible Party	FY23	FY24	FY25	FY26	FY27	FY28	FY29	FY30
Study Development									
Charter – updated	Project Team		Sep-23*						
Study design – ISAG approved	Project Team	Sep-22*							
Study design – CMER approved	Project Team	Sep-22*							
Study design – ISPR approved	Project Team	May-23*							
Field Implementation									
RFQQ for field implementation	Project Manager			Sep-24*					
Site Selection and Field Reconnaissance	Project Team/ Contractor			Mar-26*					
Data Collection	Contractor			Dec-27					
QA/QC	Contractor			Jan-28					
Data Analysis and Reporting									
Data analysis	PI/Contractor			Apr-28					
Final Report – ISAG approved	PI/Contractor							Jan-29	
Final Report – CMER approved	PI/Contractor							Jan-29	

Final Report – ISPR approved	PI/Contractor							Jun-29	
6 Questions Document	PI/Project Team								Sep-29
Board delivery	AMPA								Nov-29
Publication to DNR and CMER Websites	Project Manager								Nov-29
Written and verbal updates to the Board and CMER	PI/Project Manager	As needed							

*Actual dates

PROJECT DELIVERABLES

Deliverable	Responsible Team Member	Completion Date (Actual* or Estimated)
Final Approved Study Design	PT	May 2023*
Update Charter	PM	July 2023*
Prospective 6 Questions	PT	October 2023*
Update Project Management Plan	PM	June 2026
Site Selection and Field Reconnaissance	PM, CMER Scientist, PI	March 2026*
Field Data Collection	PI	March 2025-December 2027
Field Protocol Manual and Quality Assurance Plan	PI	April 2025* Updated: April 2026* Updated annually, as needed
Acquire Sampling Permits	PI	Acquired annually prior to spring sampling
Annual Summary Report	PI	March 2025* Annually in February
Annual PHB Analysis	PI	Annually in April
Draft Final Report to Project Team	PI	May 2028
Incorporate PT Edits and Provide Final Report for CMER/ISAG Review	PI	October 2028
Incorporate CMER/ISAG Edits and Provide Final Report for ISPR	PI	January 2029
Incorporate ISPR Edits and Provide Final Report for Final CMER Approval	PI	June 2029
Final 6 Questions	PI	September 2029

*Actual dates

PROJECT TEAM MEMBERS

Name, Title, Affiliation, Contact Info	Roles and Responsibilities
Project Manager: • Anna Toledo anna.toledo@dnr.wa.gov	• Monitors project activities and the performance of the Project Team. • Communicates progress, problems, and problem resolution to the Adaptive Management Program Supervisory Project Manager and Administrator (AMPA), and CMER. • Works with ISAG/CMER, and Project Team to help develop Project Charters and Project Management Plans, and keep them updated as needed over time. • Works with ISAG, CMER, and Project Team (including PI, contractors, and other Team members) to resolve problems and build consensus. • Works with PI and Project Team members to develop interim and final reports. • Ensures communication between all team members is clear, concise, and consistent. • Maintains contact and processes access agreements, once site access is granted. • Ensures coordination between ISAG/CMER, Project Team and landowners. • Coordinates all technical reviews and responses in a timely fashion. • Facilitates archiving of all data and documents. • Works with PI to manage documents on SharePoint Online. • Works with the AMPA, ISAG/CMER, and Project Team to develop and review proposals, RFPs or RFQQs, review contractor proposals, monitor contract performance, and provide input on budgeting, schedule, scope changes, and contract amendments. • Sees that contract provisions are followed. • Provides direction and support to the Project Team to achieve clear and specific scopes of work, schedules, and budgets within approved contracts. • Communicates and/or authorizes communication with all project-related contractors. • Maintains sole responsibility for all aspects of project management even if other individuals are completing or helping complete parts of the project.
Principal Investigator(s): Phil Roni, Cramer Fish Sciences phil.roni@fishsciences.net	• Oversees the technical aspects of the project including protocol development and refinement, site selection, data collection, analysis, and reporting. • Works with PM and field manager in overseeing data collection by field crew. • Oversees and conducts data analysis and QA/QC of data provided by field staff.

	• Leads in developing, writing, and preparation of the final report. • Serves as lead author of findings report. • Responds to comments by reviewers of reports. • Prepares quarterly summary and progress reports of project status, as needed. • Presents technical findings to ISAG, CMER, TFW Policy, and the Board as necessary. • Participates as a member of the project team. • Communicates concerns or issues that arise with PM. • Attends ISAG and Project Team Meetings.
Project Team members: Douglas Martin doug@martinenv.com • Christopher Mendoza cmendoza2@comcast.net • John Heimburg John.Heimburg@dfw.wa.gov • Jenelle Black jblack@nwifc.org • Jason Walter Jason.Walter@weyerhaeuser.com • Emma Greenwood emma.greenwood@spokanetribe.com • Mark Meleason consultmeleason@outlook.com	• Develop project documents, including study designs and site selection and data collection document. • Provide expertise as necessary for successful completion of project. • Assist PI for addressing technical and scientific questions/issues. • Assist PI with communications, data analyses, and reporting, as needed. • Provide timely review and constructive feedback on project documents and the final report. • Participate in completing site selection. • May assist contractor and PI with training of field crews. • Help implement QA/QC protocol. • Work with PI and PM to develop contract work scopes and review/select contract bidders. • Attend Project Team and ISAG meetings.
Contracted Field Manager: Jason Shaffer, Cramer Fish Sciences Jason.Shaffer@fishsciences.net	• Works with PI to coordinate field activities. • Provides primary oversight of field crew schedules, logistics, and needs. • Works with PI to provide training to field crews. • Communicates implementation status, changes, and needs to PI and PM. • Provides expertise as necessary for successful completion of project. • Provides timely review and constructive feedback on project documents and the final report. • Participates in Project Team meetings, as needed.
Contracted Field Crews: Cramer Fish Sciences	• Collect and QA/QC field data. • Maintain responsibility for field gear and equipment. • Transmit data to Field Manager and PI according to designated schedule.
Contracted Technical Lead Staff: Cramer Fish Sciences	• In coordination with the PI, oversees and conducts QA/QC of data provided by field staff. • Conducts project data summaries and analyses. • Assists PI with reporting. Helps prepare interim and final reports. • Responds to comments by reviewers of reports.

	• Creates spatial and tabular databases for all project data. • Participates in project meetings and conference calls, as needed.
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PROJECT CONSTRAINTS AND ASSUMPTIONS

Schedule constraints:

- The PHB project timeline may be influenced by scheduling and deliverable milestones of other ISAG/AMP projects.
- The PM will revisit the project timeline with the Project Team at least one time per month. Changes to the timeline will be made in consensus. The PM will communicate any changes to the timeline to AMP within one week.
- Equipment procurement and replacement must occur in a timely manner to prevent any delays in field work. Equipment should be available for crew field training.
- There are inter- and intra-annual constraints on site visits. Sampling must occur at a frequency and timing as described in the final study design.

Budget constraints:

- The current project budget (below) is based in part on the assumptions from the Science Panel version of the study design and pilot study, and reflects the budget from the SOW determined through contract negotiations with the contractor selected for implementation.
- Project expenditures will be constrained to the final legislature-approved budget.
 - Expenditures above the project budget will require a request of additional funds.

Human resource constraints:

- The Project Team will support implementation of the study design and other deliverables (primarily) using resources within AMP. Roles are defined in the Project Team table above.
 - Changes to the Project Team may impact project development, execution, and reporting.
- A contractor was selected in 2024 for field implementation and reporting. Contract staff include a PI, lead field staff, field technicians, as well as technical staff to assist with oversight, data analysis and reporting.
 - The PI, lead field staff, and technical leads, will provide oversight for field crew training and data collection effort, ensuring QA/QC protocols are followed.
- The PM will facilitate successful execution of contracts.

Resource constraints:

Technical, study site, and equipment/supply constraints will be most applicable to the implementation phase of the PHB study.

- Field crews will require rigorous training in field protocols and equipment, including e-fishing, data entry on tablets, and stream measurements.
- Equipment and supplies will need to be procured within budget constraints. Replacement of lost or damaged equipment must occur in a timely manner to avoid project delays.

- Sites will be screened according to criteria from the study design. Availability of these sites may be constrained by land ownership, landowner willingness, and accessibility by road, accessibility by season, and/or any changes in accessibility.

Project assumptions:

Project assumptions largely reflect schedule, budget, human resource, and resource constraints.

Assumption	Risk	Mitigation
The Water Typing Strategy serves as a proxy for a scoping document.	1. Changes to scope without oversight committee approval violate PSM guidelines. 2. Changes to scope without adequate planning can adversely affect project outcomes.	1. Project Team will regularly revisit core objectives, timelines, and budgets to avoid “scope creep”. 2. Necessary changes to scope will be identified as soon as possible. 3. Changes to scope will be brought to CMER and the Board for approval.
Milestones and deliverables will follow the project timeline.	1. Deviations may affect timelines and budgets of other AMP projects. 2. Data quality (collection and management) might suffer in a rush to complete field work.	1. PM, in coordination with the Project Team, monitors timeline on a weekly basis and promptly communicate changes to SAG, CMER, and AMP. 2. Assess if additional crews would be necessary to achieve sample size goals. 3. Request CFS consider refilling CFS Program Manager position. 4. Last resort: Consider a supplemental contract and funding to hire additional field teams.
Project Team members will reach consensus on deliverables.	Non-consensus will delay study implementation or lead to termination of project within the SAG.	Project Team members will identify source of non-consensus and bring the issue to the SAG.
Project Team members will stay consistent throughout the project.	Project Team member turnover may result in inefficiencies to work flow. Loss of Project Team members increases workload for remaining members and may lead to delays.	1. Ensure Project Team time commitment is clear to all members. 2. Anticipate and communicate changes to Project Team in a timely manner.
The project will be developed with the full extent of expertise needed to complete all deliverables.	Knowledge gaps may produce deficiencies in the study implementation and reporting.	1. Identify necessary expertise. 2. Project Team may consult with someone within or outside of AMP who has appropriate expertise to bridge any knowledge gaps. 3. Report any assumptions and/or knowledge gaps in deliverables.

Assumption	Risk	Mitigation
Expenses for field implementation will remain at or below the project budget.	Project may be delayed or compromised if budget gap cannot be filled.	1. Be proactive. See <i>Budget Constraints</i>. 2. Make additional funding requests in a timely manner.
There will be a sufficient number of sites available to meet minimum sample size requirements as defined in the study design.	If the minimum number of sites cannot be secured, the statistical power to detect an effect will be reduced.	1. Oversample during the site screening process. 2. If needed, revise and/or re-scope the project to accommodate a smaller sample size, if alignment with original questions and objectives is possible. 3. Have a 3rd-party statistician (e.g., WEST) review any suggested changes to sample size and other aspects of project.
Access to sites will not change throughout the study.	Loss of access reduces amount of data collected for analysis.	1. Oversample during the site screening process. 2. Be prepared to use backup sites.
Field technicians will have sufficient skill to ensure consistent data collection among crews and years.	Inconsistent data collection will produce poor-quality data and compromise project.	1. Ensure crews are consistently and centrally-trained. 2. Produce well-defined data collection protocols, forms, and checklists. 3. Ensure robust QA/QC procedures. Identify and rectify inconsistencies in field crews quickly. 4. Implement field audits or shadowing to verify adherence to protocols. 5. Use calibration exercises at regular intervals (not just initial training). 6. Incorporate digital data validation tools (e.g., real-time error checks). 7. Track individual and crew-level performance metrics to identify training needs.

A separate Risk Management Plan will not be developed unless one of these constraints or assumptions occurs or if one is deemed necessary. The process for developing a detailed Risk Management Plan is outlined in section 7.11 of the PSM. A Risk Management Plan identifies potential actions to avoid, reduce, and/or mitigate impacts to a project.

DECISION-MAKING AUTHORITY

The Forest Practices Board (Board) has approval authority over proposed CMER projects, annual work plans, and expenditures. The Board manages the Timber, Fish and Wildlife Policy Committee (Policy), the Cooperative Monitoring, Evaluation, and Research (CMER) Committee,

and the Adaptive Management Program Administrator (AMPA) to assist with the Board's directives. Policy assists the Board by providing guidance to CMER and recommendations on adaptive management issues. CMER is responsible for understanding available scientific information that is applicable to the questions at hand, selecting the best and most relevant information and synthesizing it into reports for Policy and the Board. The AMPA coordinates the flow of information between Policy and CMER according to the Board's directives. Decision-making authority described in this section needs to be consistent with CMER process and ground rules per the Board Manual section 22.

Decisions related to science and/or technical items are the responsibility of the PIs and the Project Team. If needed, decisions for scientific and/or technical items could be expanded to include the SAG and CMER. Final documents will be prepared by the project team and then reviewed and approved by the SAG, CMER, Independent Scientific Peer Review (ISPR), and the Board. Although the PM will assist in the facilitation of the discussion and decision making process, the PM will not be directly involved in decisions related to science and/or technical items.

Decisions related to contractual (scope of work, RFQQ, contract process, contractor interaction, etc.) and budgetary items are the responsibility of the PM along with input from the Project Team. Requests for additional funding will be approved by the PM and Project Team and sent to the SAG and CMER for formal approval. Minor budgetary or contractual items will be handled directly by the PM with notification provided to the Project Team. Major budgetary or contractual items will be decided between the PM, Project Team, and AMPA. If needed, decision making for budgetary items may require CMER and/or Policy input and/or approval.

PROJECT RESOURCE NEEDS

This list of project resources is from the PHB and DPC Study Field Manual and Quality Assurance Plan, Appendix C. Quantities listed below are for each crew. Implementation includes 6 crews.

Equipment Needs for Electrofishing Surveys:

Project Resource	Quantity
Apex or LR-24 Electrofisher	1
Batteries for electrofisher	2
iPad (with data collection platform)	1
Charger for electrofisher batteries (in vehicle)	1
Bad Elf Flex GPS unit	1
SPOT (or other beacon)	1
Field Notebook	1
Car charger for iPad (includes cables)	2
Reflective vests	2
Helmets	2
Machetes	2
Gloves (canvas or other work gloves)	2
Flagging rolls	2
One-two gallons of water (in vehicle)	1

Fire extinguisher (in vehicle)	1
Shovel (in vehicle)	1
Headlamps	2
Spare headlamp batteries (set)	2
Maps	
Site packets	
Duct tape	
Leatherman or other multitool	
Sharpies	
Pencils	

Equipment Needs for Longitudinal Habitat Surveys:

Project Resource	Quantity
Laser/Sonic Rangefinder	2
iPad (with data collection platform)	1
Bad Elf Flex GPS unit	1
SPOT (or other beacon)	1
Data sheets (backup)	5
Monopod for gunner	1
Bracket and yolk for Laser Rangefinder and monopod attachment	2
Target (Sonic or Laser)	2
Small backpack	2
Graduated stadia rod (meters)	1
Calibrated depth rod (meters)	1
First aid kit (bring in field) - Containing: Antihistamines, Epipens	1
Hip chains/tapes	2
Rebar (x2 per site)	3
Sledgehammer (4lb)	1
Reflective vests	2
Helmets	2
Machetes	2
Gloves (canvas or other work gloves)	2
Flagging rolls	2
Field Notebook	1
One-two gallons of water (in vehicle)	1
Fire extinguisher (in vehicle)	1
Shovel (in vehicle)	1
Spare Rangefinder batteries	2
Car charger for iPad (includes cables)	2
Hi-vis spraypaint for rebar benchmarks	1
Spare headlamp batteries (set)	2
Maps	
Site packets	
Duct tape	
Leatherman or other multitool	
Sharpies	
Pencils	

PROJECT BUDGET

This reflects a combined budget for the PHB and DPC studies, as they share a combined site selection and field effort. Numbers listed from FY17-FY25 are actual expenditures. Budget numbers from FY26-FY30 are projected estimates based on the current contract with Cramer Fish Sciences for implementation.

Budget/Cost Items	Expenditures FY17 – FY19 (Initial Study Design and Pilot Study)	Expenditures FY21-24 (Study Design Revision and Site Selection)	Expenditures FY25	FY26	FY27	FY28	FY29	FY30	Project Total
Cramer Fish Sciences (Service Contract)	\$0	\$0	\$805,045	\$1,246,000	\$1,228,000	\$419,300	\$59,500	\$10,000	\$3,767,845
Field implementation – Project Management, Field Manual, Site Selection, Permitting, and Reconnaissance	\$0	\$0	\$60,980	\$182,000	\$20,000	\$12,500	\$12,500	\$2,000	\$289,980
Field implementation -training, data coll. and mgmt.	\$0	\$0	\$744,065	\$1,026,000	\$1,170,000	\$314,000	\$0	\$0	\$3,254,065
Reporting	\$0	\$0	\$0	\$38,000	\$38,000	\$92,800	\$47,000	\$8,000	\$223,800
Service Contracts (PSCs)	\$319,076	\$132,872	\$45,258	\$0	\$0	\$0	\$0	\$0	\$497,206
Wild Fish Conservancy	\$3,950	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$3,950
Cramer Fish Sciences (Pilot Study)	\$124,497	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$124,497
Cramer Fish Sciences (Study Design)	\$190,629	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$190,629
WEST (Statistician for Study Design)		\$113,989	\$2,633						\$116,622
NWIFC tech (Site Selection)		\$18,883	\$42,625						\$61,508
Expert Panel 2017-2019	\$76,293	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$76,293
Pete Bisson	\$3,680	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Jeff Kershner	\$36,377	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Patrick Trotter	\$36,236	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Supply and Expense (On-going)	\$0	\$0	\$36	\$300	\$0	\$0	\$0	\$0	\$336
Science Technician Supplies (Small Supplies, Tools)	\$0	\$0	\$36	\$300	\$0	\$0	\$0	\$0	\$336
FY Total	\$395,369	\$132,872	\$850,339	\$1,246,300	\$1,228,000	\$419,300	\$59,500	\$10,000	\$4,341,680

Project Total: \$4,341,680

PROJECT SITES

The site selection process, including the sampling frame, site identification, and site rejection criteria, are described in the PHB Study Design. Site selection was initiated in FY24. Sites are located throughout Washington State and require contract support for field reconnaissance and data collection. The data for both the PHB and DPC studies are being gathered simultaneously at shared sites.

COMPANION CMER DOCUMENTS

Some companion documents were produced by the Board Designated Science Panel, outside of the CMER process. Therefore, documents are not necessarily CMER-approved and may not include all project documents otherwise typically required by the PSM. The previous and current effort share many elements, and the documents are listed here to provide continuity.

Document	Completion Date (Actual* or Estimated)
Science Panel Project Charter	4/5/2019*
Science Panel Final Study Design	3/20/2019*
Science Panel Field Manual (Site Selection and Data Collection Plan)	5/22/2019*
Science Panel Pilot Study Manuscript	7/8/2019*
Water Typing Strategy	4/28/2020*
Project Charter	Version 1: 2/24/2021* Version 2: 9/7/2023*
Study Design	5/23/2023*
Prospective 6 Questions Document	10/24/2023*
Project Management Plan	Version 1: 2/23/2021* Version 2: 6/2026
Field Manual	4/28/2025*
Final Report	6/2029
Final 6 Questions Document	9/2029

*Actual dates

PROJECT COMMUNICATION OVERVIEW

Transparent and accurate communication between the different adaptive management parties (Project Team/SAG/CMER/AMPA/TFW Policy/Board¹) is critical for the AMP to guide and oversee the work of the Project Team. This section provides a framework to manage and coordinate the communications needed for all phases of a project. If a separate Communication Plan is needed for a project, see section 7.6 of the PSM for detailed guidelines.

Two primary pathways exist for project communication to occur when working on CMER projects - 1) between the Project Team and project oversight committees (i.e. SAGs/CMER/TFW Policy/Board¹), and 2) communication within the Project Team.

¹ Indicates change from CMER Protocol and Standards Manual language with the addition of “Board.”

PROJECT OVERSIGHT COMMITTEE COMMUNICATION

This section covers communication between the Project Team and the project oversight committees (i.e. SAGs/CMER/TFW Policy/Board¹). Project oversight communication includes three categories of documents/communication: 1) Project management documents that enable oversight committees to understand how projects will be managed, 2) Project tracking and communication to enable the oversight committee(s) to track project progress and provide guidance and approvals to move projects forward, and 3) communication with contractors.

1. Project management documents

The PM is the lead author for the Project Charter, Project Management Plan, and other project management documents. If the Principal Investigator (PI) has been identified at the time of project launch, the PM will work with the PI to draft the Project Charter and Project Management Plan, in consultation with the oversight committee.

Project Management Documents*	Primary Author	Collaborators	Final Approval	Primary Audience
Project Charter – 2021 version	PM	PI and Project Team	CMER and the Board ²	Project Team, SAG, CMER, and Board
Project Charter – 2023 version	PM	PI and Project Team	CMER and TFW Policy.	Project Team, SAG, CMER, and TFW Policy
Project Management Plan (including communication and risk sections)	PM	PI and Project Team (if identified)	CMER	Project Team, SAG, and CMER

*For details regarding these documents, see PSM Section 7.6

2. Project tracking and guidance documents

The PM is responsible for ensuring that all reporting tasks are complete and provided on schedule. When preparing progress reports, the PI is responsible for providing detailed and comprehensive costs, schedule, and project updates, in writing, to the PM consistent with prior written agreement. The PM, in turn, is responsible for summarizing project update information into progress reports, and presenting these progress reports to the overseeing SAG and to CMER per the project schedule or as requested by the SAG or by CMER. The PM may delegate preparation or presentation of progress reports to the PI or other Project Team members, with their consent.

Project Tracking/Guidance Documents*	Primary Author	Collaborators	Final Approval	Primary Audience
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² The 2021 Project Charter did not go through an approval process at TFW Policy because the project was under supervision of the Forest Practices Board at that time.

Project updates	PM	PI	N/A	Project Team, SAG, CMER, TFW Policy, and Board ¹
CMER quarterly and annual project progress reports	PM	PI	N/A	SAG and CMER
CMER Requests	PM	Project Team	CMER	CMER
TFW Policy Requests/Check-ins	AMPA	Project Team	CMER	TFW Policy
Public Presentations	PI/PM	Project Team	N/A	Public

*For details regarding these documents, see PSM Section 7.6

3. Contractor Communications

In all cases, the PM is primarily responsible for facilitating open and transparent communication between contractor(s) and project oversight committee(s) members. Committee members should generally not directly communicate with the contractor(s) about substantive project elements outside of formally organized meetings, conference calls, or PM-facilitated group e-mail discussions, unless specifically authorized in pre-established contract terms, or approved in advance to do so by the PM. The PM may verbally grant authorization, and the rest of the Project Team and oversight committee members should be informed when this occurs. The PM is responsible for informing the contractor(s) of this policy as well.

INTRA-PROJECT TEAM COMMUNICATION

The PM provides assistance to Project Team members by coordinating communication (e.g. one-on-one and group meetings, conference calls, etc.) when needed as well as maintaining the e-mail distribution list for the Project Team. The PM also ensures that any communication resulting in a formal decision about the project occurs in a transparent and inclusive way.

The PI is responsible for preparing and writing technical reports for CMER. How the PI communicates and works with other Project Team members to produce these documents will vary based on the nature of the project and dynamics of the Project Team. The PI works together with the PM to coordinate communication with other team members as needed.

Communication by individual team members includes participation at meetings and conference calls, providing feedback on draft documents, researching specific topics/issues, taking the lead on writing report sections, and/or acting as co-author(s) of CMER documents. The expectation is that Project Team members, including PMs and PIs, who communicate outside of normal project meetings, conference calls, and other venues will share substantive, project-related conversations they have with the rest of the Project Team. For additional details regarding project team communication see PSM section 7.7.15 and 7.7.16.

Communication structure

