

## REPORTING RM&E RESULTS

Research, monitoring and evaluation (RM&E) projects often are complicated beasts that produce copious results far beyond what Pisces<sup>1</sup> reporting can presently accommodate. Monitoring activities also are hidden within other types of projects, and they, too, require special consideration for progress reporting.

Some general definitions of RM&E projects and distinctions regarding reporting:

**Research:** These projects are designed to answer one or more questions, and they should have a finite duration. Nevertheless, it may take many years before the data collection and analyses are sufficiently complete to report final results. A completion report at the end of the project is the most important report. Progress reports along the way may track annual accomplishments, summarize some data, and report some interim findings, but they would not be expected to provide many analyses or results.

**Monitoring & Evaluation:** These projects typically collect data on status and trends of population or habitat parameters, then evaluate the results. Except for a few high-profile projects whose results are very important each year, these projects are amenable to Periodic Reporting (see below), which does not require full analysis and reporting each year.

**Monitoring:** These projects collect data, but don't really analyze it within the scope of the project. The data are for others to use, perhaps for unknown purposes. These projects must ensure that their data are publicly accessible. When the data are readily available, a progress report probably would not be required unless something exceptional occurred when collecting data that year. There are few of these projects.

### No Report...is rarely an option

Aside from the data itself, reports are often the principle deliverable of RM&E-related projects. Fish and Wildlife Program stakeholders frequently ask for more monitoring and better reporting from these projects. Yet standards for reporting RM&E results are hard to prescribe, in part because the Program funds such a variety of those activities. For example, a habitat project may simply monitor the survival of riparian vegetation planted the previous year or the presence/absence of a focal species above a former passage barrier. At the other end of the spectrum, a broad-scale RM&E project may include a cornucopia of intensive monitoring, methods development, modeling, and stand-alone research projects that are inter-related to various degrees. However diverse, virtually all of our RM&E activities have one thing in common: they produce results that Pisces status reporting presently can not accommodate. Therefore, some type of additional report will be needed from virtually all contracts that include even small amounts of RM&E.

BPA Project Managers will work with their contractors to determining the appropriate format, frequency, and content for reporting RM&E results, based on the specific circumstances of the contract and/or project.

<sup>1</sup> [Pisces](#) is BPA's project management software tool for fish and wildlife projects.

## Report Type and Format

Most progress reports for research- and M&E-focused contracts will be published technical reports in a scientific format. See the “[Content and Formatting Guidelines for Publications and Reports](#)” for detailed guidance. Exceptions should be well considered.

## A Comprehensive Report with Full Analyses Is NOT Necessary Each Year

A less-than full-blown progress report may be very adequate in some years, depending on where the project is in its lifecycle and the feasibility of a periodic reporting strategy. Writing full technical reports each year can consume a lot of a contractor’s time unnecessarily. We recommend limiting and focusing that reporting time to the information that is most relevant, that has the greatest value to the public. The following guidelines may be useful.

### Lifecycle

Progress reporting abilities, needs, and emphases will vary depending on whether coverage is for the first years, middle, or end of an RM&E project. Progress reports for projects will generally pass through phases, the lengths of which depend on the nature of the work and how quickly it develops:

- *Planning:* Theoretically, much of the planning would have been completed before the proposal was submitted, although often that is not the case. The focus here would be on refining objectives (what exactly are we trying to do and which aspects are most important) and on the details of sampling and analytical design, including temporal and spatial replication. The bigger, longer, and more complicated the project, the more important it will be to attend to up-front planning in the inaugural year. A RM&E plan makes a wonderful part of – or companion to – the first year’s progress report. BPA may request/specify that a RM&E plan be completed or updated as part of the first year’s Statement of Work (SOW).
- *Implementation:* The reporting focus will be on how well the infrastructure has been developed, like permits/permissions, equipment deployment and operability, staffing and training, data management systems, etc. At this point, an SOW-based progress report format may be better than a scientific format, because there will be little or no data results to report.
- *Initial data collection:* Emphasis is on data quality. Are methods (including QA/QC) providing data that are as accurate and precise as desired? Have alternative methods been tested, and with what results? Which data will be most important to report regularly? After the first or second year of “serious” data collection, a progress report’s emphasis will be on the best way to summarize and present the data. Begin to evaluate the accuracy of assumptions on which the RM&E plan was based (e.g., sampling design, data variability).
- *Ongoing data collection:* Avoid the temptation is to jump prematurely into analysis. Periodic reporting (below) works well here. Don’t forget data archival, or the true focus/purpose of the project (it’s usually more than just collecting data).
- *Analyses:* The frequency of thorough analyses will depend on the nature and schedule of the project. For example, a short-term, 3-year research project might include in-depth analyses only in the final progress report. Likewise, a longer-term (or phased) research project or an in-perpetuity monitoring and evaluation

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project might plan for thorough analyses and reporting on longer periods than annually.

## Periodic Reporting

A cycle of variable progress reporting can be very efficient. It involves a thorough analysis and report (Comprehensive Progress Report) only every 2 to 4 years, with more cursory progress reports during interim years (Interim Progress Reports). The results from many projects change little from one year to the next, and management decisions (e.g., for the project and for the natural resources it involves) rarely depend on new results each year. In these cases, a substantial investment in full analyses and reporting each year probably is not worthwhile.

- *Comprehensive Progress Reports* can be timed to provide critical information when it is most useful for making management decisions. For some monitoring projects whose results are critical for making year-to-year decisions, full analyses and reporting will be necessary each year. However, for most monitoring projects and for some long-term research projects, comprehensive analyses and reports might be needed only every few years.

Longer periods between comprehensive analyses and reports may be advisable when working with conditions that change slowly, such as:

- Characteristics of fish populations (e.g., genetics), given that one generation can last several years.
- Habitat conditions, some of which change over a scale of decades.
- Effects of hatchery production on natural populations.

[Also, as an aside, slow-changing conditions like these often do not require that the same data be collected each year.]

It would be prudent to schedule the comprehensive analyses and reports to be complete just prior to project solicitations, so that proposal reviewers may get a good view of the project's results. Look ahead for other important milestones that may make a project's cumulative results very useful in a particular year. Years when comprehensive analyses and reporting would occur probably will require adjustments in the contract's SOW and/or line-item budget (but not the budget total).

If a contract/project includes several major lines of investigation that are relatively independent, then each line of investigation could be scheduled for comprehensive reporting on a rotating schedule to help even-out workload.

- *Interim Progress Reports* keep information flowing between Comprehensive Reports. They would focus on:
  - SOW reporting.
  - Any changes in methods.
  - Succinct summaries of the most pertinent data, typically in data tables that are expanded each year. These would be the data that are most closely associated with the project's primary objectives and/or are of greatest importance each year to resource managers.
  - Any very exceptional results that shouldn't wait until the next Comprehensive Report.