# Delta RMP Joint Technical Advisory and Steering Committee Meeting

**October 24, 2017 9:30 am – 4:30 pm**

Delta Stewardship Council Building  
980 9th Street, 2nd Floor, Room A  
Sacramento, CA

Join the meeting: [https://join.me/sfei-conf-cw2](https://join.me/sfei-conf-cw2)  
To dial in by phone: +1.415.594.5500  
Conference ID: 238-626-034 #

## Agenda

<table>
<thead>
<tr>
<th></th>
<th>Introductions and Review Agenda</th>
<th>9:30</th>
<th>Brock Bernstein</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>Introduce TAC and SC members, establish quorum, and explain goals of the meeting</td>
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<th></th>
<th>Welcome to new Delta RMP participants. In the past year, several new organizations/agencies have joined the program as contributing members. The coordinating committee has suggested adding a seat to represent dredgers (currently Port of Stockton and the Port of West Sacramento). Desired outcome:</th>
<th>9:35</th>
<th>Patrick Morris</th>
</tr>
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<tbody>
<tr>
<td>2</td>
<td>- Approve addition of a new voting member and alternate to the Steering Committee representing dredgers.</td>
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<tr>
<td></td>
<td>Title</td>
<td>Details</td>
<td>Time</td>
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<tr>
<td>3</td>
<td>Decision: Approve Steering Committee Meeting Summary from July 28, 2017 and confirm/set next meeting dates</td>
<td>Desired outcomes: * Approve meeting summary  * Confirm upcoming meetings dates  * TAC: Dec 12, 2017, Regional San  * SC: Jan 23, 2018, CV Regional Board</td>
<td>Draft Summary of July 28, 2017 SC Meeting* 9:40  Brock Bernstein</td>
</tr>
<tr>
<td>5</td>
<td>Information: Delta Science Action Agenda and Delta Science Plan Update</td>
<td>Delta Science Program staff will provide a brief overview of the Delta Science Plan. The Delta RMP’s is invited to provide input into the plan’s update early next year and to participate in public meetings on the plan later this year.</td>
<td>Science Action Agenda Website: <a href="http://scienceactionagenda.deltacouncil.ca.gov/">http://scienceactionagenda.deltacouncil.ca.gov/</a> 10:00 – 10:10  Yumiko Henneberry  Lindsay Correa</td>
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<tr>
<td>6</td>
<td>Discussion: Funding for Contaminants of Emerging Concern (CEC) projects</td>
<td>Discussion: Funding for Contaminants of Emerging Concern (CEC) projects. Thomas Mumley, Assistant Executive Officer, San Francisco Bay Regional Water Quality Control Board, will discuss Region 2’s CEC Strategy, including the RMP’s Tiered Prioritization Framework. Desired Outcome: * Informed SC, to form basis for later decision on whether CECs are a funding priority for the Delta RMP.</td>
<td>Report: Contaminants of Emerging Concern in San Francisco Bay: A Strategy for Future Investigations <a href="http://tinyurl.com/SFBayCEC">http://tinyurl.com/SFBayCEC</a> 10:10 – 10:45  Thomas Mumley  Tom Grovhoug</td>
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<td></td>
<td>Break</td>
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<td>10:45 – 11:00</td>
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* Draft reports and meeting summaries distributed to Steering Committee and TAC members only.
### Discussion: Data Assessment Framework
Steering Committee members have proposed this framework as a means for determining the strengths and weaknesses of data collected by the program. The proposed framework is intended to help judge the validity, integrity, precision, reliability of data, and the extent to which data can be trusted as a basis for management decisions.

**Desired Outcomes:**
- Introduce the idea to SC and TAC members, as a basis for continued discussion and possible future adoption of a framework.

Proposed Delta RMP Data Assessment Framework and supporting charts and tables

11:00 – 12:00
Tom Grovhough

<table>
<thead>
<tr>
<th>Lunch</th>
<th>12:00</th>
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<tbody>
<tr>
<td>On your own</td>
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</table>

### Discussion: Draft Decision Grid applied to pesticides monitoring proposals
A working group has been developing a “decision grid” or scorecard for evaluating proposed monitoring projects. The group has trialed the grid to rank pesticides monitoring proposals from Spring 2017 and will report on its progress.

**Desired Outcome:**
- Suggest any changes to the Decision Grid framework
- SC to approve the use of the decision grid by the TAC and/or working groups.

Decision Grid and Responses

1:00 – 2:00
Brian Laurenson

<table>
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<tr>
<th>Discussion: Conflict of Interest Policy</th>
<th>2:00 – 2:20</th>
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<tbody>
<tr>
<td>The Delta RMP charter contains a section on how we deal with both real and perceived conflicts of interest.</td>
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</table>

**Desired outcome:**
- Shared understanding of how the program handles conflict of interest (COI).
- Reminder to participants about the duty to disclose any potential COIs, and recuse oneself from decisions where he/she has a COI.
- In necessary, form a volunteer Work Group to modify or clarify our policies and procedures.

Memo on Conflict of Interest
Delta RMP Charter Section 8 Conflict of Interest

2:00 – 2:20
Brock Bernstein
| 10 | **Decision: Revisions to the Delta RMP Charter**  
The finance subcommittee has proposed two modifications to the Charter, related to financial management and meeting preparation.  
**Desired outcome:**  
- SC approval vote on the charter amendments.  
- Note that SC members may propose additional modifications to the Charter at any time, to be discussed at a future SC meeting.  
<table>
<thead>
<tr>
<th>Proposed charter revisions</th>
<th>2:20 – 2:30</th>
<th>Matthew Heberger</th>
</tr>
</thead>
</table>
| 11 | **Information:** Presentation on Pesticides Data Visualization  
**Information:** Presentation on Pesticides Data Visualization  
**Break** | 2:30 – 2:45 | Greg Gearhart |
| 12 | **Discussion:** Roles of the Steering Committee, Technical Advisory Committee, and the Implementing Entity  
**Desired Outcome:**  
- Shared understanding of the roles of each distinct body in planning and implementing the regional monitoring program.  
| Delta RMP Charter excerpts | 3:00 – 3:30 | Adam Laputz & Linda Dorn |
| 13 | **Discussion: Monitoring Priorities for FY18/19 and onwards**  
In the fall of 2016, the SC set a planning budget of $250,000 for each of the three active areas of Delta RMP monitoring (pesticides, mercury, and nutrients). As we enter a new planning cycle for the upcoming fiscal year, it is appropriate to revisit this decision.  
**Desired Outcomes:**  
- SC to give direction on planning budgets for each of the Delta RMP focus areas  
| | 3:30 – 4:20 | Matthew Heberger |
| 14 | **Plan Agenda Items for Next SC Meeting**  
See “Parking Lot” of potential future agenda items below.  
| | 4:20 – 4:30 | Brock Bernstein |
| 15 | **Adjourn** | 4:30 |
Parking Lot of Future Agenda Items:

1. Process for setting fees, particularly for MS4 Phase 2 participants, to be led by Josie Tellers

2. Discuss adding additional representatives to the Steering Committee, i.e. representing Delta Science Program, dredgers, Army Corps of Engineers?

3. Presentation by SFEI authors of the 2016 report *A Delta Renewed*.

4. Presentation by USGS CWSC scientists on second proposal submitted to the nutrient sub-committee (shallow water mapping) that was not selected for funding in FY17/18. Approve as a possible SEP-funded project?

5. Other suggestions for presentations or items to discuss or decide?

6. Proposals for Supplemental Environmental Projects SEPs—presentation by USGS CWSC scientists on second proposal submitted to the nutrient sub-committee (shallow water mapping) that was not selected for funding in FY17/18. Approve as a possible SEP-funded project?
Meeting Materials for Item 7
Proposed Delta RMP Data Assessment Framework

Start
Perform Delta RMP Study

Characterize Methods
Use Chart A

Determine Linkage to Beneficial Use Attainment
Use Chart B

Determine Strength of Threshold Values
Use Chart C

Determine Level of Concern
Use Table 1

Tier 2?
Yes

No

Tier 3?
Yes

No

Tier 4?
Yes

No

Tier 1

Perform Monitoring and Management According to Framework Described in Table 1
Chart A
Conceptual Depiction - Different Stages of Method Development/Acceptance

1. Early Attempt at Analytical Method

2. Developing Method without Interlab Calibration

3. Developing Method Supported by Interlab Calibration

4. Well Developed and Tested Method, Not Yet Formally Sanctioned

5. Well Accepted and Documented Method, Formally Sanctioned (e.g. 40CFR 136)
Chart B
Conceptual Depiction - Focus of Analytical Method

Detection in the Environment → Molecular Effect → Cellular Effect → Organ Effect

Population Effect ← Community Effect ← Organism Mortality ← Organism Behavior

Are There Thresholds Linking Results to Beneficial Use Attainment?
Chart C
Conceptual Depiction - Strength of Threshold Values Linking Method Output to Beneficial Use Attainment

No Threshold Value

Threshold Values Presented in Peer-Reviewed Literature

Threshold Developed for Management/Regulation through Non-EPA Clean Water Act (CWA) Methodology

USEPA National Water Quality Criteria

Enforceable Water Quality Objective
### Table 1. The RMP Conceptual Tiered CEC Prioritization Framework for San Francisco Bay.

<table>
<thead>
<tr>
<th>TIER</th>
<th>DESCRIPTION</th>
<th>MONITORING STRATEGY</th>
<th>WATER QUALITY MANAGEMENT ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>IV HIGH CONCERN</td>
<td>Bay occurrence data suggest a high probability of a moderate or high level effect on Bay wildlife.</td>
<td>Studies to support TMDL or alternative management plan.</td>
<td>303(d) listing.* TMDL or alternative management plan.* Aggressive control/treatment actions for all controllable sources.</td>
</tr>
<tr>
<td>II LOW CONCERN</td>
<td>Bay occurrence data suggest a high probability of no effect on Bay wildlife.</td>
<td>Low-cost source identification and control. Low-level pollution prevention. Track product use and market trends.</td>
<td>Discontinue or conduct periodic screening level monitoring in water, sediment, or biota. Periodic screening level monitoring for chemical(s) detected in wastewater or stormwater to track trends.</td>
</tr>
<tr>
<td>I POSSIBLE CONCERN</td>
<td>Potential for concerns or uncertainty in measured Bay concentrations or toxicity thresholds suggest uncertainty in the level of effect on Bay wildlife.</td>
<td>Screening level monitoring to determine presence in water, sediment, or biota. Screening level monitoring for presence in wastewater or stormwater.</td>
<td>Maintain (ongoing/periodic) effort to identify and prioritize emerging contaminants of potential concern. Track international and national efforts to identify high priority CECs. Develop biological screening methods and identify available analytical methods.</td>
</tr>
</tbody>
</table>

*Subject to Regional Water Quality Control Board action with public review.

### 2.3 Identifying New CECs as Candidates for Initial Monitoring

The risk-based framework described above requires measured environmental concentrations to evaluate CECs and determine if there is a potential for concern in the Bay, yet many chemicals in commerce have never been the subject of local monitoring studies. To expand the suite of chemicals to screen for risk, the RMP has employed two additional approaches to identify potential CECs appropriate for Bay monitoring.

- **Literature reviews and results from other monitoring programs:** RMP scientists’ extensive and ongoing review of the scientific literature on CECs can uncover additional compounds with potential to impact the Bay ecosystem. In addition, the results of approaches adopted by other state or regional agencies to prioritize CEC monitoring and management actions for aquatic ecosystems may reveal additional candidates for the RMP to consider. Details on this approach are provided in Section 4.
Meeting Materials for Item 8
Delta RMP TAC-Steering Committee Decision Grid
Small Group Status Summary (October 13, 2017)

OVERVIEW AND STATUS UPDATE

• Decision Grid is intended as a discussion and communication tool. It will be used to first build consensus within the TAC and then provide a consistent and trusted communication tool to the Steering Committee.

• The Decision Grid document and modified evaluation criteria were used in a test-drive, and it is expected that additional edits to the criteria questions will be necessary as we continue to review the test-drive results, based on feedback from the small group, and as we work with the wider Steering Committee and TAC. We expect to have a working approach for the next proposal that the TAC receives or develops (no earlier than December 2017).

• The Decision Grid document is included in the agenda packet to provide background information on the decision-making process. The previous version of the evaluation criteria/decision matrix attachments are not provided as they are subject to revision and were not strictly used for the test drive.

• Results from the test drive for the Pesticide Option 2 “Pesticides Regional Assessment, Delta Tributaries” are provided; however, this is not intended for decision-making, but rather to inform the group about the usefulness of the approach.

• The Decision Grid process proposes to provide a “communication packet” to the Steering Committee that would include consensus recommendations, dissenting comments, summary evaluation results, and additional as-needed detailed technical assessments.

TEST DRIVE RESULTS

• Overall the group agreed that the survey effort was informative and led to more constructive and objective discussion of the proposed study plan.

• A number of issues need to be addressed including dealing with proposals with multiple technical tools, incorporation of additional questions and clarifications, addition of a “fund/no-fund/needs more” summary recommendation question, and the ability to comment on more of the specific questions.

• The group recommended that this test drive be “required” if a reviewer intends to provide comments and scoring. While anyone could participate in the TAC or SC discussion, the process should require up-front review if your score and comments were to be included. In this way responses would be encouraged and one TAC member could not slow down the process with unresponsiveness.

• The group acknowledge that evaluation criteria, scoring, and comments may change over the course of the discussion and those would be updated in the final communication packet, though the original scoring and comments would be documented.

Primary group participants included: Michael Johnson, Brian Laurenson, Melissa Turner, Cameron Irvine, Stephanie Fong, Patrick Morris, Selina Cole, Dave Tamayo, Tom Grovhoug, Matt Heberger, Karen Ashby, Samsor Safi, Stephen McCord, Vyomini Updahyay, and Tim Mussen
Delta Regional Monitoring Program Study Plan Proposal Review Process
(Revised Draft, October 4, 2017)

This Delta Regional Monitoring Program (RMP) Study Plan Proposal Review Process (Proposal Review Process) document outlines the process by which study plan proposals will be solicited, reviewed, and vetted and provides details on the coordination and communication expectations between the key participants. The Technical Advisory Committee (TAC) provides recommendations to the Steering Committee (SC) for future monitoring designs and/or studies. External stakeholders, the TAC, or the TAC subcommittees (e.g., nutrients, pesticides, mercury) can propose monitoring components and/or proposals for consideration by the SC in response to stated SC priorities. The TAC will evaluate proposals using the consistent process described in this document and then inform the SC on recommendations and their rationale so that the SC can make funding decisions and approve proposals. A standardized review process will allow the TAC to make recommendations based on consistent and agreed-upon criteria. Dissenting opinions will also be provided to the SC.

The evaluation criteria may change based on input from the SC, but they are intended to:

1. Support consistent, transparent, and technically defensible evaluations,
2. Provide a process for the TAC to follow, and
3. Enable clear communications and be responsive to the direction received from the SC.

The stepwise process is shown in Figure 1 and relies on guidance from the SC both in proposal solicitation and pre-proposal review and a technical review performed by the TAC.
1. **Proposal Solicitation.** Steering Committee sets priorities, budget, and other directives.

2. **Pre-Proposal Submittal.** Interested entity or collaborative submits proposal (go-to step no. 4) or pre-proposal submitted to Steering Committee.

3. **Pre-Proposal Review.** Steering Committee evaluates pre-proposal based on evaluation questions and provides recommendations for changes or full proposal development. Technical Advisory Committee representatives may support Steering Committee members.

4. **Proposal Submittal.** Interested entity or collaborative submits full proposal package based on Steering Committee submittal requirements and recommendations.

5. **Technical Review.** Technical Advisory Committee evaluates proposal. If it is necessary, the Detailed Decision Grid approach is first agreed on by TAC. The TAC prepares the Communication Packet for submittal to SC. It is expected that dissenting opinions and Detailed Technical Information Decision Grid will be developed by TAC members and only compiled by the Implementing Entity.

6. **Proposal Evaluation.** Steering Committee reviews Communication Packet and approves, rejects, or recommends additional modifications (return to step no. 4 for additional revisions and re-submittal or end review process).

<table>
<thead>
<tr>
<th>Action Entity Key:</th>
<th>Steering Committee Action</th>
<th>Technical Advisory Committee Action</th>
<th>Proposer (interested entity or collaborative) Action</th>
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**Figure 1. Proposal Review Process Steps**

1. **PROPOSAL SOLICITATION (STEERING COMMITTEE)**

The Charter does not distinguish types of study (i.e., special studies or status and trend studies) or provide specific priorities; these are instead set by the SC. The SC provides guidance for study priorities, budget considerations, key management questions that must be addressed and any other considerations that would narrow the focus of potential proposals. For instance, considerations may include whether the proposal should focus on longer term status and trends or shorter term special studies. Previously, the SC and TAC jointly and iteratively developed study priorities through the Monitoring Design Summary, which includes prioritized “Assessment Questions” that are intended to support the Charter “Management Questions”. However, there is no process or schedule for modifying the Monitoring Design Summary.

The SC may develop study-specific needs and case-specific evaluation criteria, constraints, budget limitations, etc., as necessary, but these should be clearly communicated to potential study plan developers (i.e., TAC or external parties). This will help guide the proposal.
development and also will allow the TAC to evaluate the proposals in an efficient and consistent manner.

2. PRE-PROPOSAL SUBMITTAL (PROPOSER)

The potential study proposer may submit a Pre-Proposal that describes the study sufficiently for the SC to provide feedback, but prior to a significant study planning effort. A recommended template and SC review questions for the pre-proposal submittal are provided as Attachment A. This format can be modified, but should provide clear responses to the evaluation criteria. It is intended to be a one to two page summary of the proposed study.

3. PRE-PROPOSAL REVIEW (STEERING COMMITTEE)

The optional pre-proposal SC review is intended to identify general concerns and focus the proposal on SC membership needs. SC members may consult with TAC representatives to interpret or evaluate technical issues in the pre-proposal.

4. PROPOSAL SUBMITTAL (PROPOSER)

The study proposer submits a study work plan based on SC submittal requirements and recommendations. While a standard format is not required, at a minimum, the study plan should include 1) management questions addressed, 2) background information, 3) hypotheses, 4) methods, 5) geographical boundaries and study locations, 6) study timing and frequency of sample collection, 7) budget requested, including timing and optional elements, and 8) data products, including expected analysis to test hypothesis or interpret data.

5. TECHNICAL REVIEW (TECHNICAL ADVISORY COMMITTEE)

Proposals will be reviewed by the TAC based on the Attachment B Evaluation Criteria as a starting point. The Summary Recommendations Decision Grid is a required TAC end product that is informed by the Detailed Assessment Grid (Attachment C). The TAC prepares a discussion of consensus recommendations, dissenting opinions, and any requests for clarification from the SC.

Decision Grids

The Summary Recommendations Decision Grid (see Attachment C template) is the primary communication tool that is intended to be more standard, though it may be modified by SC direction. The Summary Recommendations Decision Grid is a framework to ensure consistency among reviewers and assist with communication back to the SC. The Summary Recommendations Decision Grid will be prepared by the TAC as an executive summary of the TAC findings in the areas of evaluation.

The Detailed Assessment Grid (see Attachment D template) informs the conclusions in the Summary Decision Grid. It can also be customized through agreement by the TAC to provide more detail and consider 1) Specific Evaluation Criteria and 2) Scoring / Rating. Depending on the type of proposals, there may be a desire to use a straightforward scoring system, or it may be determined by the SC to use subjective rating terms such as “Meets Criteria”, or it may suffice to use (+) and (–) notations to indicate acceptability. Comments, including differing opinions, on how proposals meet each element of the evaluation can also be included in the decision grid. The
TAC will determine how the Detailed Assessment Grid will be populated prior to the initiation of the review.

It is expected that TAC members are responsible for preparing any dissenting opinion materials for the Implementing Entity to compile. TAC members are responsible for preparing technical elements of the Detailed Assessment Grid.

**Technical Advisory Committee Recommendations**

While the goal of the TAC is to provide consensus\(^1\) recommendations to the SC, this will not always be possible. For this reason, the following guidelines should be adhered to during the TAC evaluation:

- SC may be asked to clarify its priorities and policy issues identified during the program development or review process.
- When consensus cannot be reached by the TAC on what monitoring to recommend, discuss and document differing interpretations or opinions.
- TAC message points and dissenting opinions are vetted through the TAC prior to distribution to the SC.

Recommendations would be provided to the SC in a communication packet along with the specific recommendations from the TAC, references, any dissenting points of view, and additional narrative discussion, as necessary. The Communication Packet will include the following:

1. Summary of Consensus Recommendations, Dissenting Opinions, and Requests for Steering Committee Clarification [1-2 page compilation of key messages]
2. Summary Recommendation Decision Grid [required]
3. Detailed Assessment Grids [optional, format decided by TAC]

**6. PROPOSAL EVALUATION (STEERING COMMITTEE)**

The Steering Committee reviews the proposal with consideration to the technical recommendations and Communication Packet provided by the TAC. The Steering Committee membership may request that the TAC present their findings at a Steering Committee meeting or that the Proposer provide additional information. The Steering Committee can then take action on the proposal, including a request for additional information or revisions. Specific recommendations or comments should be documented and appropriately communicated.

\(^{1}\) The TAC will agree on a consensus or consensus-seeking process prior to the review of any proposal. This may require development of specific written protocols that are agreed-upon by the TAC and approved by the Steering Committee if added to the Delta RMP Charter.
Attachment A. Pre-Proposal Template

The Pre-Proposal submittal is intended to be a 1-2 page executive summary of proposed study concepts and applicability to Management and Assessment Questions. The Delta RMP Steering Committee will review the pre-proposal and provide feedback on level of interest and specific requested refinements. The Pre-Proposal submittal is expected to include the following information:

1. **Background** – provide relevant background material (previous related studies, regulatory drivers, interested parties, problem the study is addressing, relevant literature and reports, etc.) State how the study informs policies, regulations, or management decisions.
2. **Hypothesis** – provide a hypothesis statement(s) that the study proposes to address and whether the Delta RMP management and assessment questions are directly addressed.
3. **Methods** – provide a description of the proposed analytical and assessment tools that would be used and the resulting measurements provided to test the hypothesis and if there is any coordination (now or in the future) with other Delta studies or monitoring.
4. **Study Boundaries and Resolution** - provide a description of the geographic and temporal boundaries of the study, if known, and the approach to further refining the overall scope (i.e., phases of study, target conditions, screening, etc.)
5. **Budget range** – provide a description of how the study budget would be developed, key cost drivers, and potential collaboration opportunities.
6. **Pre-Proposal Development Team** – a list of contributors to the pre-proposal and their affiliation

The Steering Committee may consider the following questions in evaluating pre-proposals:

1. How does the study address Delta RMP management and assessment questions?
2. How does the study inform planned policies, regulations, or management decisions?
3. How does the monitoring coordinate with other Delta activities?
4. Can the study be developed to fit available Delta RMP and other available funding mechanisms? For example, could the study be phased or merged with other efforts?

Known comments to address (BL 10/13/17):
1. Pre-proposal process description is not clear especially as it relates what is “required” and who is obligated to review them
2. Proposal solicitation consideration - need some clarity on setting and communicating priorities - this has been an iterative process with the Monitoring Design Summary between the SC and TAC to develop and prioritize assessment questions. This iterative process is not well depicted in the process steps or discussion.
3. Proposal template text is just a placeholder - needs refinement and discussion
4. Pre-proposal template is new and should have a test drive - there were concerns that the proposed requirements were too extensive and would exceed the suggested 1-2 pages.
5. Weighting of scores has not been discussed and needed more clarity
6. The review criteria and questions need to be further discussed by the wider TAC group
Test Drive Results - Delta RMP Study Proposal Review
Option 2 - Pesticides Regional Assessment, Delta Tributaries
October 12, 2017

Who has responded?

Email
mjjohnson@mlj-llc.com
brianl@lwa.com
cirvine@ch2m.com
sfong@sfcwa.org

Name

Michael Johnson
Brian Laurenson
Cam
Stephanie Fong

A. Study Plan Responsiveness
1. Does the study proposal identify the management question addressed?

2. Are the Data Quality Objectives (DQOs; EPA 2006) clearly defined?

3. Does the study provide testable hypotheses (written as assessment questions or otherwise)?

4 responses
4. Does the proposal demonstrate how the results will be presented?

4 responses

5. Does the adequately demonstrate how the results will be interpreted?

4 responses
6. Does the proposal contribute to a larger body of data that can be used to answer Management Questions in the future?

4 responses

7. Does the proposed study plan include an estimated budget that is responsive to Steering Committee guidance?

8. Comments on overall study plan proposal responsiveness

2 responses

Data quality criteria could easily be incorporated, though not specifically included or referenced. More information may be necessary to perform site selection according to the provided criteria. Some incompleteness on how the “benchmark” comparison and toxicity findings will be presented and interpreted though the
simple approach is stated. The proposal does not provide sample data products and specific analytical approach for data interpretation (especially timing, event types, etc.), though the trend analysis information is adequately provided.

The proposal evaluated is a draft/incomplete and insufficient for the evaluation criteria; more appropriate for a pre-proposal evaluation using the evaluation criteria. DQOs are incomplete and scattered throughout the document.

Review of Survey Approach for Section A. Comments on survey format and questions

4 responses

Possible for comments on each question? No way to capture the dissenting opinions.

Because many studies will answer multiple assessment questions, it is necessary to evaluate the completeness of multiple research lines, which can only really be done in the current format with text comments. It can be difficult to separate "completeness" and technical evaluation.

1) Add comment field for each evaluation criteria - some responses require comment.
2) Evaluation criteria should list all MQs and AQs to indicate which are addressed by the proposal.

Seems ability to comment on everything would be nice. I did on my copy of the proposal, but that doesn't mean all reviewers will gave the whys to their responses. Maybe whys should be required for the group discussion when it's time to make the actual recommendation.

B. Technical Foundation

1. Geographic scope. Does the location selection support the study objectives?

4 responses

![Survey Results Chart]

1 (25%) 0 (0%) 1 (25%) 2 (50%) 0 (0%)
2. Geographic scope. Does the study adequately characterize an area relevant to the Delta RMP?

4 responses

![Bar chart showing responses]

3. Comment on geographic scope

4 responses

Multiple locations proposed with no rationale other than previous monitoring locations. No understanding of current monitoring effort at many of the sites.

The proposed Study Plan develops selection criteria, but does not provide information or recommendations on site selection. Additional information will be necessary to select two sites. The study does stay within the Delta Boundary, though and the selection criteria are reasonable.

Cannot answer these evaluation criteria clearly without knowing locations. Rationale for site selection is provided (good), and locations to be considered are relevant to the DRMP (good), but the spatial extent is very limited with only 2 sites (bad).

Didn't give #1 a 5 b/c it didn't cover what else was being monitored by other relevant efforts, but did give rationale for site selection. Gave a 4 on #2 b/c they did power analysis based on 2 sites and rationale for sites tells why they're important places in the Delta rather than just places of interest to them. Didn't dock them for lack of sites since that was a budget constraint and not a fault of the PI, but couldn't give them more because it's not much coverage geographically.

Review of Survey Approach for questions B.1. to B.3. Comment on geographic scope

4 responses

Adequate
The first two questions are slightly redundant and it is not clear how important location is the Delta is, though the study clearly stayed within the Delta boundary.

Survey incomplete. There are 4 evaluation criteria in the detailed matrix; only 2 here. E.g., Evaluation criteria should include external Peer Review comments (e.g., if the proposal aims to characterize fixed locations or the Delta - as a whole).

Seems like #1 is does it support the study and #2 is do we think the sites are important

4. Temporal resolution. Is the temporal scope and resolution of the study justified based on available data?

4 responses

5. Temporal resolution. Does the study clearly define the conditions of interest (e.g. high flows)?

4 responses
6. Temporal resolution. Can the results of the study be used to evaluate trends over the timescale of interest or target magnitude of change?

4 responses

7. Comment on temporal scope

4 responses

Power analysis is provided for an example station which provides some insight into appropriateness of sample size. Project is constrained by the overall budget.

The power analysis results are helpful, but presenting additional scenarios would be helpful to evaluate different approaches - more or less frequent, weighted to the beginning and end periods, etc. I'm not sure the 80% confidence assumed may not be sufficient confidence for regulatory programs, so it would be interesting to see how this could be improved and at what cost.

Temporal scope and resolution are limited by budget; not technical rationale.

It was lacking on how much historical data would come into play on their trend analyses

Review of Survey Approach for questions B.4. to B.7. Comment on temporal scope survey question and possible responses format/content

3 responses

Adequate
B.4 and B.6 are slightly redundant. Perhaps these could be reduced further.

1) Survey incomplete. There are 4 evaluation criteria in the detailed matrix; only 3 here. External peer review comment on the reliability and variability over long-term should be presented as an evaluation criteria, too.

2) Comments for each the evaluation criteria would help explain basis for response. need to reconsider the range of responses - how to score incomplete/not stated or where there are concerns with approach?

8. Sample collection. Does the proposed data collection method introduce biases or errors that are not adequately mitigated or measured?

4 responses

Comment on sample collection

Sample collection not addressed although grab samples from tributaries is assumed. No information provided on the passive sampling device; type, extraction, data evaluation, etc. The lack of information makes it difficult to determine if there are issues with data collection methods.

Sample collection methods are generally not detailed, and while this is a relatively straightforward "grab" approach, it is not specified if cross section composites or targeting of flow conditions would be performed. Details on the passive sampler deployments would also be helpful.

some elements are well defined/established (e.g., tox and standard chem) but others are not (e.g., passive samplers).

I didn't have issues with the data collection method, but there's a lack of information on collection. Even telling me that EPA test would be employed would tell me more about the collection, but they didn't specifically state that.
Review of Survey Approach for question B.8. Comment on sample collection survey question and possible responses format/content

4 responses

Adequate

It is generically stated, so it seems like a narrative comment will almost always be necessary. Because of the broad range of potential sample collection approaches, it may be difficult to include many more detailed questions. Perhaps breaking down potential issues would be helpful (collection timing, collection materials, collection logistics, introduction of bias, representativeness of sample collection approach).

Survey incomplete. There are 3 evaluation criteria in the detailed matrix; only 1 here. Comments for each the evaluation criteria would help explain basis for response. need to reconsider the range of responses - how to score incomplete/not stated or where there are concerns with approach?

I feel like my score of 3 means nothing. I made it neutral because I didn't have issue with what was stated, but there wasn't enough stated and there isn't any way to reflect that in the survey. It seems we need to refine this to reflect lack of info vs quality of info.

9. Monitoring tools. Where do the analytical tools fit on the ‘established methods’ spectrum?

4 responses

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</tbody>
</table>

0 (0%)
10. Monitoring tools. Are additional information/data outside of the proposed study required to interpret study data and outcomes?

4 responses

11. Comment on Monitoring Tools

4 responses

Toxicity testing and chemical analyses of water column samples are straightforward. The passive sampler is not commonly used in compliance monitoring and it is not clear how the data are to be used. If this was a real proposal, I would recommend that this part of the monitoring be dropped unless it is made explicit what data are to be collected (presence/absence?), how the data will be used, QA available, etc.

The analytical chemistry methods are reasonably inter-lab calibrated though not strictly 40CFR136 specified. The passive sampling approach is past the research phase, but still under development as a tool with known performance and interpretation measurements and may required more detailed flow data and careful deployment. Toxicity methods are generally acceptable, though there will be some SC membership that have concerns about Hyalella in water column, such that sediment testing might be higher benefit. In general, the study could better evaluate sediment effects for certain pesticides.

some elements are well defined/established (e.g., tox and standard chem) but others are not (e.g., passive samplers).

They lacked info in the tox test methods (e.g., specifically stating EPA methods) and passive sampler, but gave it for chem.

Review of Survey Approach for questions B.9. through B.11. Comment on monitoring tools survey question and possible responses format/content

4 responses
"Development status" is difficult to respond to without more detail.

Missing important evaluation criteria about the statistical design (which is based on an external Peer Review comment). Comments for each the evaluation criteria would help explain basis for response. need to reconsider the range of responses - how to score incomplete/not stated or where there are concerns with approach?

There isn't a way to say part of their tools are described well and/or robust for multiple tools. This had three tools with differing levels of information. Need a "not enough info to determine" option.

12. Interpretation. Are study condition controls adequately considered given the study timeframe, data collection frequency, and proposed interpretation to answer study hypotheses reliably? Consider whether the study approach sufficiently identifies and addresses sources of variability in the study.

4 responses

13. Interpretation. Is data power sufficient to answer study hypotheses reliably during the study timeframe? Consider whether the study has adequately evaluated expected data variability to meet study objectives.

4 responses
14. Interpretation. Is the basis for outcome assessments technically supported?

4 responses

15. Interpretation. How much additional new information does the proposed study require to evaluate beneficial use attainment?

4 responses
16. Interpretation. How much do proposed study assessment questions and outcomes address specified management questions?

4 responses

![Bar chart showing responses]

17. Comment on interpretation

4 responses

Toxicity testing and chemical analyses are well understood and the controls are incorporated as a part of the QA process. The power analysis for the Ulatis Creek site explicitly addresses Q13, and the data to be developed will be used over a long period of time to answer S&T1. Because the management questions are never explicitly linked to the assessment questions, it is left to the reader to dig through the proposal to determine if the assessment questions address the management questions. It’s clear that the analysis of trends does address S&T1 but linkages to other questions are tenuous. I would recommend a specific section in the proposal on the linkages. Outcome assessments are not explicitly addressed.

Interpretation seems to be based on a weight of evidence approach, which is consistent with the State Board Listing Policy. OPP benchmarks may not be appropriate for the 303(d) impairment evaluations. Discussion of the relevant and specific toxicity endpoints should be provided and is generally inadequate.

These are not the right evaluation criteria. They differ from those previously discussed and it's not clear how relevant they are or how to respond to them.

Tox and chem are good if I assume EPA methods on tox, but lacking on passive sampler.

Review of Survey Approach for questions B.12. through B.19. Comment on interpretation survey question and possible responses format/content

4 responses
I might split questions 14-16 into a separate section and allow comments on both sections. This section mixes study design with interpretation of results. It might be easier to comment if these two elements are in separate sections.

1) These are not the right evaluation criteria. They differ from those previously discussed and it’s not clear how relevant they are or how to respond to them.
2) Comments for each the evaluation criteria would help explain basis for response. Need to reconsider the range of responses - how to score incomplete/not stated or where there are concerns with approach? Some of the guidance for the range of responses are not clear.

We need refinement to enable differing opinions on different tools.

C. Budget, Priority, and Coordination Considerations

1. Budget. Is the proposed budget scalable in size?
4 responses

![Bar chart for 1. Budget. Is the proposed budget scalable in size?](chart.png)

2. Budget. Is the proposed study modular?
4 responses
3. Comment on budget

4 responses

Budget is well specified and sufficiently modular.

The provided budget information is adequate, though some refinement (no. of TIEs, addition of sediment, etc.) would be helpful.

Budget defines the scope of investigations and ability to answer Management Questions.

Not modular for the data management and reporting. Also lacks ability to refine TIEs.

Comment on budget survey question and possible responses format/content

3 responses

Adequate

Should be Section "C". The phasing question is a little difficult to answer since it may be hard to gauge the cost of loss of information.

not clear what is meant by "Study can be phased or combined with other studies without increased cost or loss of information"

4. Priority. Is there urgency to conducting the monitoring, such as to inform planned policies or regulations?

4 responses
5. Priority. Does the study provide enough time to inform time sensitive decisions?

4 responses

A study like this does not address time sensitive questions. It proposes the collection of baseline data to evaluate status and trends. The location of the monitoring allows no evaluation of Delta water quality. The proposed study brings into focus the problem of potentially bad water quality in Delta tributaries but good water quality in the interior of the Delta. The relevance of the results from low volume creeks at the edge(s) of the Delta to water quality in the Delta is not established.

The Pyrethroid TMDL has since developed other science needs that this study should better evaluated. A determination on how this would satisfy TMDL requirements would be helpful too. The TMDL has a 15 year evaluation and 20 year compliance so the timelines should be fine.

Meets Pyrethroid TMDL timing goals for information

6. Comment on priority

3 responses

A study like this does not address time sensitive questions. It proposes the collection of baseline data to evaluate status and trends. The location of the monitoring allows no evaluation of Delta water quality. The proposed study brings into focus the problem of potentially bad water quality in Delta tributaries but good water quality in the interior of the Delta. The relevance of the results from low volume creeks at the edge(s) of the Delta to water quality in the Delta is not established.

The Pyrethroid TMDL has since developed other science needs that this study should better evaluated. A determination on how this would satisfy TMDL requirements would be helpful too. The TMDL has a 15 year evaluation and 20 year compliance so the timelines should be fine.

Meets Pyrethroid TMDL timing goals for information
Comment on priority survey question and possible responses format/content

4 responses

Adequate

Questions are redundant though asked in a different manner.

Comments for each evaluation criteria would be helpful to explain answers.

My answer to 4 automatically gives them a higher score for 5. The next decision isn't for a long time, so of course it will give them enough time.

7. Coordination. Can the monitoring be coordinated with other efforts to increase data power or reduce overall study cost or duration?

4 responses

8. Comment on coordination

4 responses

The proposal does not address this point.

Coordination with other partners (Spot, STORMS, ILRP, MS4s, POTWs, etc.) would benefit the project in some cases. Coordination would be helpful but would not reduce the costs of this proposal.

The PI doesn't address coordination
Comment on coordination question and possible responses format/content

3 responses

Adequate

Comment should request suggestions for additional coordinating agencies.

there are 2 questions posed. separate evaluation criteria for cost and data power would be helpful

General comments

Provide general comments, concerns, or critical issues regarding the proposed study

3 responses

The passive sampling aspect of the proposed study is not developed and would result in a vote of "no funding" if this was a real proposal. Also, there is no link provided that would allow the reader to establish any link between the results of the proposed monitoring in the tributaries with water quality in the Delta. At best, results at any of the proposed sites would be usable only upstream which is likely to be outside of the legal delta. Proposals should not defer development of DQOs until after the study has been completed, as they will never be addressed.

Revisions should be made to better address the Pyrethroid TMDL.

There are many details yet to be determined and described for this proposal; therefore.

Provide general comments, concerns, or critical issues regarding the survey format and content

2 responses

This generally worked well for me. I was able to make comments as needed. The questions are understandable and translate well from the detailed work sheet. It will be interesting to see how others scored the proposal. The one question we might want to add is a recommendation to fund/not fund/partially fund with a reason for the recommendation. If this was available in the previous pages, I missed it. I assume that there will be an overall recommendation from the TAC and it's not clear how that recommendation will be developed. But, a question that asks for the reviewer's recommendation provides an initial set of votes that can be used as the framework for the TAC discussion. If 10 people review and vote "recommended for funding", there may be a few specific questions/requirements for the proposer(s), but the discussion can focus on providing the SC with information that will allow the project to be improved. Similarly, if the vote is "not recommended for funding" by all reviewers, no additional time needs to be spent on the proposal.
We need to work on the evaluation criteria, but this can be a useful tool once refined. Not a bad first effort.
Meeting Materials for Item 9
Memo

To: Delta RMP Steering Committee
From: Brock Bernstein
Date: August 7, 2017
Re: Conflict of Interest policy

At the July 28, 2017 Steering Committee meeting, the Steering Committee (SC) decided that the Aquatic Science Center (ASC), because it had prepared the scope of work for the interpretive pesticide report, should not be included as a potential bidder on the project. The SC prefers that that this project be put out to bid to ensure the program receives the benefit of the best expertise possible. The SC determined that ASC would have an unfair advantage if it bid on the project because of its role in preparing the project scope. The SC then voted to exclude ASC from bidding on that basis.

Since the Steering Committee meeting, several SC members mentioned to me that this policy, if applied strictly, could also result in several members of the TAC and SC being removed from the bidders’ list for this or future projects. TAC members provided substantial input into the scope of work and SC members reviewed, discussed, and will vote on accepting the scope of work. It could be argued that TAC and SC members should also be excluded from bidding because of this involvement. It would be unfortunate if all these parties, with their extensive local knowledge, were prevented from bidding on this and future projects.

It is not clear how the conflict of interest policy would strictly be applied in future efforts that involve putting projects out for competitive bid. For example, how much pre-project involvement crosses the line into a conflict of interest that would prevent bidding? Steering Committee members I talked with were concerned that a strict application of the policy could result in many members of the TAC recusing themselves from discussions in order to preserve their ability to bid on future projects. Such an outcome would be an unfortunate loss of important expertise and input to the Delta RMP.

It seems worthwhile to revisit this issue at the next SC meeting and to discuss it as a broader policy that would be applied to future projects, without creating disincentives for TAC and SC members to engage fully in the development of project ideas and designs. I look forward to hearing your thoughts on this matter.
Process for Use of Monitoring Contingency Funds

For expenses greater than $5,000, the Implementing Entity must obtain prior approval from the Finance Subcommittee (between $5,000 and $25,000) or the Steering Committee (greater than $25,000).

For expenses up to $5,000, the Implementing Entity may act without prior approval from the Steering Committee, under the following circumstances:

- A strategically important sampling opportunity arises (e.g., due to rare weather events or a chance to leverage other monitoring efforts);
- A mechanical failure during field sampling necessitates rapid action to repair or replace equipment in order to maintain the sampling schedule; or
- An unexpected event that, in the judgment of the Implementing Entity, requires immediate action.

Should the Monitoring Contingency Funds be obligated by the Implementing Entity under these circumstances, the Implementing Entity would inform the Steering Committee via email and provide a justification. The Steering Committee would then provide feedback at the next scheduled meeting on the appropriateness of the decision to maintain clear expectations for use of these funds.

If Monitoring Contingency Funds are used during a year, the Implementing Entity will seek SC approval to replenish the Set-Aside Fund up to the $50,000 balance when requesting approval for the following year’s budget.

8.E Conflict of Interest Policy

All Program Participants serving on Delta RMP committees shall avoid both actual and perceived conflicts of interest when selecting contractors. Any committee member with an actual or
perceived conflict of interest in a contract has a duty to disclose this interest to the committee and to recuse himself/herself from the decision. In order to avoid potential conflicts of interest with technical contractors, the TAC shall not recommend specific contractors, but may provide criteria to be used in the contractor selection process. Additional details about handling conflicts of interest by public officials are available in Government Code Sections 1090-1099.

8. F Adequate Participation

The Steering Committee has determined the basic criteria for “adequate participation” in the Delta Regional Monitoring Program (RMP) is contributing financial or in-kind services to the RMP, at the level established on a yearly basis, as described below. The Regional Board relies on the Delta RMP Steering Committee to determine what “adequate participation” is, and whether or not dischargers and other Steering Committee members are adequately participating in the Delta RMP. The Steering Committee expects and depends on the Regional Board to be sufficiently flexible in its approval of proposed monitoring requirement exchanges, so as to encourage permitted dischargers to participate.

Contributions from Permitted Discharger Participant Groups

Permitted dischargers are entities subject to NPDES or WDR permit requirements for monitoring. The Regional Board allows, through amended permits, permitted dischargers in the Sacramento/San Joaquin watershed to demonstrate “adequate participation” in the Delta RMP in lieu of conducting specific receiving water monitoring that is otherwise required by their permits.

Contributions from Non Permitted Participant Groups

For Participant Groups of Steering Committee members that do not have permits issued by the Regional Water Board requiring monitoring that could be exchanged, adequate participation will
Meeting Materials for Item 10
8.B.2 Services Provided by ASC

Contracts between the Program Participants and ASC as the Implementing Entity do not require a competitive process. See State Contracting Manual (Volume 1, Sections 3.06 “Contracts with other Governmental Entities & Public Universities” and 5.80 “Contracts Exempt from Advertising in the CSCR and Competitive Bidding” or successor documents). State contracts with an organization acting as a governmental agency under a joint powers agreement are statutorily exempt from the requirement for a competitive bid process.

8.C Fiscal Management

The Implementing Entity shall provide fiscal and administrative services for the Program with oversight by the Steering Committee and review by the Finance Subcommittee. Specifically, the Implementing Entity shall:

- Set up and maintain an account for funds received for the purpose of execution of the Program.
- Set up and maintain an invoicing system that provides an invoice to each Program Participant for its share of Program costs and provides written confirmation to the Central Valley Regional Water Quality Control Board of the amount paid by each Program Participant to the Program each year;
- Keep financial records of all transactions relating to the execution of the Program, and make these records available to all Program Participants upon request; and

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• Report to the Steering Committee and Finance Subcommittee quarterly regarding status of Program finances, including the status of payments from each Program Participant, expenditures, and an updated budget report.

If funds are insufficient to carry out the Annual Program Workplan, including reasonable program management costs, the Implementing Entity will work with the Steering Committee and Technical Advisory Committee to identify possible amendments to the Annual Program Workplan such that the work can be implemented within the budget, or propose to use other sources of funds, such as interest, Reserve Funds, grants, or matching funds, to complete the Program.

**Management and Re-allocation of Funds**

The Implementing Agency customarily plans for labor and expenditures by dividing the project into “tasks” and “subtasks.” In order to complete planned work within the available budget, Implementing Agency may re-allocate funds among subtasks by up to $5,000 at discretion. To re-allocate more than $5,000 shall require approval of the Finance Subcommittee, and more than $25,000 shall require approval by the Steering Committee.

### 8.D Reserve Funds

If there are excess funds in the Program account at the end of a budget year, the funds will be put into a Reserve Fund to be applied toward subsequent years of Program implementation with approval of the Steering Committee. The recommended minimum balance of Reserve Funds is $100,000 but the Steering Committee has the discretion to maintain a balance above or below this amount.

#### 8.D.1 Monitoring Contingency Funds

If there are sufficient Reserve Funds, the SC may allocate up to $50,000 of these funds to a Dedicated Set-Aside Fund for Monitoring Contingencies. The Monitoring Contingency Funds
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<td>Adam Laputz</td>
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### Attachment 2: Roster of Technical Advisory Committee Members (updated 07/20/2016)

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<tr>
<td>Rich Breuer</td>
<td>Regulatory – State</td>
<td>State Water Resources Control Board</td>
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<td>Shaun Philippart</td>
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<td>Stephen McCord</td>
<td>MEI</td>
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Meeting Materials for Item 12
7. Governance

As shown on Figure 1, the Steering Committee (SC) is the decision-making body of the Delta RMP, overseeing the Implementing Entity and reviewing recommendations of the Technical Advisory Committee (TAC) and Subcommittees.

7.A Steering Committee (SC)

The SC is responsible for establishing the Program’s strategic direction and the policies and procedures that govern its operation. It is responsible for authorizing the implementation of agreements among the Participants, specifically:

- Directs the Implementing Entity to request and receive federal, state, local, and private funds from any source and to expend those moneys to accomplish the Delta RMP’s goals;
- Approves budgets and expenditures;
- Directs the Implementing Entity to enter into partnerships, contracts, and other legal agreements on behalf of the Delta RMP, as necessary to fulfill the Delta RMP’s mission;
- Approves Delta RMP work products and any other plans, products, or resolutions of the Delta RMP;
- Provides direction to TAC on priorities, constraints, and management questions to develop technical recommendations and products within the resource allocations determined by the Steering Committee;
- Convenes a joint meeting with the TAC as necessary to communicate priorities and funding allocations;
- Selects, convenes, and oversees subcommittees to provide guidance on specific issues on an as needed basis; and
- Establishes and oversees the implementation of policies and procedures necessary to the day-to-day functioning of the Delta RMP.

7.A.1 Steering Committee Membership

The Steering Committee has seats for representatives from each of the following Participant Groups:

- 3 seats for publicly owned treatment works (POTWs) ideally representing small, medium and large POTWs;
- 3 seats for stormwater agencies, ideally one representing large cities and two representing smaller cities;
- 1 seat for coordinated monitoring;
- 1 seat for water supply;
- 2 seats for irrigated agriculture;
- 1 seat for the resources agencies; and
- 3 seats for regulatory agencies (USEPA, State Water Resources Control Board, and Central Valley Regional Water Quality Control Board).

See Figure 1, Organization Chart for Delta RMP.

Each SC member is responsible for working with agencies in their Participant Group to bring common interests forward. The SC may add seats for other Participant Groups or adjust the number of seats for certain Participant Groups by using its decision-making procedures to change the Charter.
The SC has agreed that a Participant Group can hold a seat on the SC, without contributing to the Program financially, but is not allowed to vote on financial issues. See Section 8 on Adequate Participation for more discussion of this issue.

Membership on the SC will not diminish the regulatory responsibilities or authority of any participating agency or organization.

SC members shall serve at the discretion of the Participant Groups they represent (i.e., they may be removed at any time) and shall be explicitly reconfirmed every two years. An individual representing a Participant Group can serve indefinitely with the support of their group.

Attachment 1 contains the most recent roster of SC members. This attachment may be updated as needed without requiring a vote to update the whole Charter document.

7.A. 2 Steering Committee Representative Resignation and Replacement

Representatives may resign from the SC at their choosing. If this occurs, the Participant Group will be notified and will be requested to select a new Representative for the Group. The Representative resigning will provide written resignation communication (e.g., letter, email) to the Steering Committee Co-Chairs, the Implementing Entity, and any other Steering Committee representatives of that Participant Group.

7.A.3 Steering Committee Co-Chairs

Steering Committee Co-Chairs serve as chair of the meetings, facilitate discussion, and encourage members to participate in discussions. The Co-Chairs have an oversight role and are responsible for the overall functioning of the committee. The SC will select or reaffirm the Co-Chairs once per year using its decision-making process. Co-Chairs have no term limits and may
continue to serve annual terms indefinitely with support of the SC. One Co-Chair represents a regulatory Participant Group and one Co-Chair represents a regulated Participant Group.

7.A.4 **Steering Committee Subcommittees**

The SC may convene subcommittees to focus on issues of particular concern on an as-needed basis. These subcommittees will report to the SC and may consist of Representatives of the Participant Groups on the SC as well as external experts in the subject of interest. The SC will determine the makeup of Participant Groups on the subcommittee and evaluate the need for external expertise (e.g., legal, financial, governance, etc.).

**Coordinating Committee**

The Coordinating Committee is comprised of the Steering Committee Co-Chairs, one representative from the Implementing Entity, one representative from the Central Valley Regional Water Quality Control Board, and the facilitator. The committee is responsible for setting the agenda for the Steering Committee, reviewing Steering Committee meeting summaries and record of decisions, communicating action items to the Technical Advisory Committee, and providing clarifications to the Implementing Entity required to fulfill their contractual obligations and be responsive to the Participant Groups. A TAC co-Chair may attend by invitation of the Coordinating Committee.

The Coordinating Committee has the following specific responsibilities:

- Review and confirm the record of decision by the Steering Committee as prepared by the Implementing Entity.
- Review and confirm the summary of Steering Committee action items prepared by the Implementing Entity for other Committees, Subcommittees, and Participants. In cases where interpretation of Steering Committee directions are necessary, the Steering Committee will be consulted for issues related to participant membership or any financial
issues. For other clarifications, the Coordinating Committee will document clarifying interpretations they make as part of the record of decision.

- As necessary, refine and clarify direction provided by the Steering Committee to the TAC and the Implementing Entity.
- Respond to clarifying questions from Participant Groups and committees.
- Coordinate report backs from committees and Participant Groups on action items from the Steering Committee.
- Review Steering Committee meeting agendas that the Implementing Entity has prepared.

The Coordinating Committee will meet within two weeks following Steering Committee meetings to review outcomes and action items and at least two weeks before Steering Committee meetings to set the agenda.

**Finance Subcommittee**

The Finance Subcommittee is responsible for reviewing financial planning documents, policies, goals, budgets, revenue, and expenditures, assuring that support for the mission and strategic goals of the Delta RMP are maintained. The Finance Subcommittee also reviews the Delta RMP’s financial performance and proposes recommendations to the Steering Committee.

The Finance Subcommittee’s specific responsibilities include:

- Recommending policies to the SC that maintain and improve the financial health and integrity of the Delta RMP.
- Reviewing draft long-term and short-term budgets and work plans for the Delta RMP.
- Recommending actions to improve program efficiency and identify potential cost savings to the SC.
- Reviewing expenditures.
• Reviewing and approving unbudgeted operating expenses that, per the SC-approved policy (See Section 8.D), are above the Implementing Entities authority ($5,000) but below the threshold ($25,000) required for SC approval.

• Reviewing the financial aspects of new contracts and services, as well as proposals to discontinue programs or services, and making action recommendations to the SC.

• Monitoring and evaluating the financial performance of the Delta RMP, comparing budgets and long term financial trends to other regional monitoring programs.

• Recommending and monitoring corrective actions to keep the Delta RMP in-line with its budget and other financial targets.

The Finance Subcommittee will meet quarterly before the Steering Committee meetings for reviewing finances from the Implementing Entity. The Implementing Entity will provide financial information in a format that meets the Finance Subcommittee needs on a quarterly basis, three weeks before Steering Committee meetings. The Finance Subcommittee will provide comments on the financial information to the Implementing Entity two weeks before the Steering Committee meeting so that the Implementing Entity can address them before submitting the report to the Steering Committee one week before the meeting. The Finance Subcommittee will report and make recommendations to the Steering Committee when necessary.

Revenue Subcommittee

The Revenue Subcommittee is a group of Steering Committee members charged with identifying opportunities for generating revenue for the Program though grant solicitations, cost-sharing, and coordination with other programs. The Revenue Subcommittee does not have defined membership nor rules for a quorum. Participation is voluntary and will include at least three Steering Committee members that are most appropriate.
7.A.5 Notice of Meetings and Frequency

All SC meetings must be noticed, which consists of e-mail distribution of the meeting date, time, and agenda at least one week prior to the meeting. The SC meets quarterly and the agenda package is distributed through the State’s lyris web service as well as posted on the Delta RMP website\(^1\) prior to the meeting. In addition, draft meeting summaries, specifically intended for only the SC, will be distributed via a separate e-mail list to SC members and their alternates for review and comment prior to posting of the final meeting summary on the Program’s website.

7.A.6 Steering Committee Decisions

A quorum is necessary for any decisions to be made by the SC; a quorum is defined as 50% or more of the SC members and 50% or more of the Participant Groups (e.g., POTW, agricultural, stormwater, etc.). A quorum may be established at any time during the meeting and, once established, will continue to exist for purposes of decision making even if the number of SC members present drops below the level defining a quorum (e.g., if one or more members leave the meeting).

Decisions are made by the SC through consensus unless one or more of the SC members dissent or for important decisions such as budget approvals, in which case the Chairs will call for a vote. If voting is required, a simple majority of the SC members will be required for a decision. Decisions can only be made for items that are on the agenda. Some decisions that are time sensitive or less significant can be made via e-mail or telephone conference, but only if these items have previously been discussed in a SC meeting.

\(^1\) [http://www.swrcb.ca.gov/centralvalley/water_issues/delta_water_quality/comprehensive_monitoring_program](http://www.swrcb.ca.gov/centralvalley/water_issues/delta_water_quality/comprehensive_monitoring_program)
7.B. Technical Advisory Committee (TAC)

Under direction of the SC, the TAC provides technical support to the Delta RMP. It consists of technical representatives from the Delta RMP Participant Groups, with technical and administrative support from the Implementing Entity.

The TAC makes recommendations to the SC based on technical evaluation of proposed or existing program elements. The TAC provides technical recommendations with options and justifications based on the priorities and resource allocations set by the SC. The SC then considers TAC recommendations in formulating their decisions. Recommendations should be reached through consensus. In the event that the TAC representatives cannot come to consensus on a recommendation, majority and minority opinions should be reported to the SC (See Section 7.B.6 for more details on the TAC decision-making process). The Coordinating Committee communicates SC direction to the TAC through the Implementing Entity and the TAC Co-Chairs.

The responsibilities of the TAC are to:

- respond to action items and specific requests from the Steering Committee as communicated through the record of decision and action item compilation prepared by the Implementing Entity and reviewed by the Coordinating Committee;
- assist the SC in developing, reviewing, and revising the Delta RMP’s monitoring design and special studies to ensure responsiveness to the management and assessment questions, consistent with the priorities and funding set by the Steering Committee;
- report to the SC on technical issues and guide the development of white papers as requested by the SC;
- select and convene subcommittees to develop monitoring designs and provide guidance on specific technical issues, with members drawn from both within and outside the TAC,
as needed, to include specialized scientific or technical expertise not fully represented on
the TAC;

- review subcommittee recommendations to the Steering Committee for monitoring
design and other technical requests from the Steering Committee;

- provide technical review and recommendations to the SC on project proposals;

- provide technical review and recommendations to the SC on policies being considered
for adoption;

  - provide technical review of the planning, development, and publication of Delta RMP
communication products, including the *Pulse of the Delta* report;

  - request clarification from the Coordinating Committee/Steering Committee if
instructions or action items to the TAC are unclear; and

  - work collaboratively to examine technical issues and develop advice and
recommendations for the SC.

7.B.1 Technical Advisory Committee Membership

The TAC consists of experts in water quality, estuarine science, and related fields who are able
to provide scientific opinions on the broad range of subject areas related to the Delta RMP’s
activities. TAC members will be drawn from Participant Groups represented on the SC. Each
designated SC member designates one person to sit on the TAC. Thus, the membership of the
TAC consists of technical representatives of the groups represented on the SC. That is,
membership of the TAC will reflect the membership of the SC (i.e., there will be the same
number of representatives from each of the Participant Groups on the TAC and the SC).

TAC members shall serve at the discretion of the Participant Groups they represent (i.e., they
may be removed at any time) and shall be explicitly reconfirmed every two years. An individual
representing a Participant Group can serve indefinitely with the support of their group.
In particular instances (e.g., a represented group has only a few staff with the appropriate expertise), a SC member or alternate may serve on the TAC. If a particular issue comes up that may create a conflict of interest, the SC member serving on the TAC would recuse themselves from decisions on the SC.

A conflict of interest may also arise if members of the TAC or its subcommittees have a direct financial interest in a funding recommendation or decision (e.g., a consultant or researcher intending to bid on a contract for a proposed program activity). The participation of local scientists in planning processes can bring tremendous value to the RMP, but the RMP needs to ensure that the monitoring that is recommended and performed is not inappropriately biased by scientists who may have a conflict of interest. In cases where a conflict of interest exists, the TAC or subcommittee members will recuse themselves from funding recommendations. External peer review of workplans and products by scientists with no financial interest in the work to be done is essential not only to attaining high standards of scientific rigor, but also to provide a mechanism for preventing the inappropriate influence of scientists with a conflict of interest. This practice is consistent with the Conflict of Interest Policy in Section 8.

Attachment 2 contains the current roster of the TAC members. This attachment may be updated as needed without requiring a vote to update the whole Charter document.

7. B. 2 Technical Advisory Committee Representative Resignation and Replacement

Representatives may resign from the TAC at their choosing. If this occurs, the Participant Group will be notified and will be requested to select a new Representative for the Group. The Representative resigning will provide written resignation communication (e.g., letter, email) to the Steering Committee Co-Chairs, TAC Co-Chairs, the Implementing Entity, and any other Steering Committee representatives of that Participant Group.
7.B.3 TAC Co-Chairs

The Co-Chairs coordinate the TAC’s oversight of the technical content and quality of the RMP, co-chair TAC meetings, and help ensure review of all program proposals and technical products. They also provide a communication link between the SC, TAC and Implementing Entity as members of the Coordinating Committee and help ensure consistencies and resolve timing and scheduling issues between the SC, TAC, and subcommittees. The members of the TAC will appoint two Co-Chairs for a two-year term. The selection of the Co-Chairs is subject to review by the Steering Committee. The Co-Chairs can serve indefinitely with the support of the TAC and the SC. A qualified Co-Chair has a broad understanding of scientific issues in the Delta and can provide strong leadership, meeting management, and direction to the group.

7.B.4 TAC Subcommittees

If there is need for additional expertise, subcommittees may be formed that report to the TAC. The subcommittees may have representatives from the Participant Groups as well as other sectors, such as academia, nongovernmental agencies, government agencies, and industry. The TAC will determine the makeup of Participant Groups on the subcommittee and evaluate the need for external expertise. If a subcommittee composition is not agreed upon by the TAC, the Steering Committee will determine the subcommittee members, considering recommendations from the TAC. A subcommittee formed to develop a specific monitoring design should be consulted about modifications to the subcommittees recommended design before any changes are presented to the TAC for recommendations to the Steering Committee. In addition, the TAC may recommend to the SC that the Implementing Entity convene appropriate science advisory panels and/or independent experts for program reviews, specific projects, initiatives, reports, and studies.
7.B.5 Notice of Meetings and Frequency

The TAC meets quarterly and the agenda package is posted on the Delta RMP website\(^2\) one week prior to the meeting. In addition, the agenda and relevant materials are sent by electronic mail to the TAC members.

7.B.6 TAC Decisions

Because the TAC makes technical recommendations to the SC, and not policy decisions, there is no formal procedure for voting. In the event that the TAC representatives cannot come to consensus on a recommendation, majority and minority opinions will be noted verbally at the meeting and described in the meeting summary. The TAC Co-Chairs will coordinate with the Coordinating Committee to ensure that the meeting summary prepared by the Implementing Entity adequately documents majority and minority viewpoints of the seated representatives. The meeting summary is the primary tool to communicate TAC discussions to the SC for SC resolution, and will include direct responses to SC requests and directives. If the recommendations do not reflect broad Participant input due to lack of attendance at a meeting, those not in attendance will be afforded an opportunity to weigh in on preliminary recommendations via email, conference calls, or another meeting, if necessary.

7.C Other Stakeholders

All meetings of the SC and TAC are open to the public. Stakeholders who are not Delta RMP participants will have the opportunity to weigh in by participating in meetings and providing

\(^2\) [http://www.swrcb.ca.gov/centralvalley/water_issues/delta_water_quality/comprehensive_monitoring_program](http://www.swrcb.ca.gov/centralvalley/water_issues/delta_water_quality/comprehensive_monitoring_program)
additional project and product review. Stakeholders may also participate in specific technical subcommittees.

7.D Implementing Entity

The Implementing Entity oversees and administers the Delta RMP. The main responsibilities of the Implementing Entity are outlined in Table 1. The Implementing Entity works closely with the committee co-chairs and the Coordinating Committee to 1) plan, guide, and lead program activities, 2) ensure planned activities efficiently achieve program goals and objectives, and 3) identify potential issues and challenges as well as options for effectively addressing them. The Implementing Entity is contracted to perform these services and manage the operation of the Delta RMP according to the annual Workplan approved by the SC and within the approved budget.
### Table 1. Main responsibilities of the Implementing Entity of the Delta RMP

<table>
<thead>
<tr>
<th>Responsibilities</th>
<th>Tasks</th>
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<tbody>
<tr>
<td>1. Program management</td>
<td>a. Program planning</td>
</tr>
<tr>
<td></td>
<td>• Prepare draft workplans / budgets and present to SC for approval</td>
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<td></td>
<td>b. Coordinate program activities</td>
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<tr>
<td></td>
<td>• Act as a liaison between the SC, the TAC, and the TAC committees</td>
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<td></td>
<td>• Convene the Coordinating Committee to review Steering Committee action items, document directives from the Steering Committee to the TAC and Participant Groups, and review Steering Committee agendas</td>
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<tr>
<td></td>
<td>• Coordinate with Participants</td>
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<td></td>
<td>• Plan workflow</td>
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<td></td>
<td>• Track deliverables</td>
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<td></td>
<td>c. Coordinate collaborating agencies and organizations</td>
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<td></td>
<td>• Organize and participate in meetings to coordinate work and programs</td>
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<td></td>
<td>d. Contract and financial management</td>
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<tr>
<td></td>
<td>• Track expenditures</td>
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<td></td>
<td>• Accounting</td>
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<td></td>
<td>• Coordinate audits</td>
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<tr>
<td></td>
<td>• Provide financial updates to SC and Finance Subcommittee</td>
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<td></td>
<td>• Develop and oversee contracts</td>
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<td></td>
<td>• Invoice Participants</td>
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<td></td>
<td>• Report finances quarterly to Finance Subcommittee for review of budget and work plan</td>
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<tr>
<td></td>
<td>e. Technical oversight</td>
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<td></td>
<td>f. Coordinate peer review</td>
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<tr>
<td></td>
<td>g. Review and coordinate review of RMP work products to ensure the quality of deliverables</td>
</tr>
</tbody>
</table>

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Revised January 26, 2017

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2. Governance | a. SC meetings:
- Prepare agenda packages and background documents; participate in meetings, write meeting summaries, action item follow-up, plan meetings with Coordinating Committee.
b. TAC meetings:
- Prepare agenda packages and background documents; participate in meetings, write meeting summaries, action item follow-up.
c. TAC subcommittee meetings
- Prepare agendas and background documents; participate in meetings, write meeting summaries, action item follow-up and communicate with Coordinating Committee.

3. Communications | a. Implement communications plan
- Produce and distribute RMP products
- Develop and maintain a calendar of RMP communications products
- Identify appropriate communication channels and disseminate RMP information
- Implement planned events (e.g. annual meeting)
- Respond to or coordinate response to inquiries for RMP data and reports, including press calls.
### 4. Data management

**Perform and/or coordinate the following activities**

- Data processing and upload to CEDEN:
  - Format data
  - Upload RMP results to RDC database and replicate to CEDEN
  - Coordinate data collection, data management, and laboratories
  - Track data deliverables and pending issues
  - Database maintenance and online data access:
    - Incorporate updates and corrections to data as needed, including re-analyzed results and updates implemented by CEDEN/SWAMP
  - Provide, maintain, and upgrade web-based data access tools
- Quality assurance:
  - Perform QA/QC review
  - Develop, maintain, and update Quality Assurance Program Plan (QAPP)
  - Coordinate interlaboratory comparison tests
- SOPs and templates:
  - Develop and maintain laboratory SOP file system
  - Provide, maintain, and enhance software tools and processes such as EDD templates
  - Write and maintain internal SOPs to increase efficiency of data management tasks

### 5. Sampling Coordination and Logistics

**Perform and/or coordinate the following activities:**

- Coordinate field sampling
- Prepare sampling plans
- Make maps of sampling locations
- Field sampling
- Ensure delivery of samples to laboratories

### 6. Analysis, Assessment, and Reporting

- Summarize information on data collected
- Develop technical content (text, analysis, graphics)
- Design and publish reporting products
- Establish, coordinate, and maintain web presence of RMP products and results