

Integrated Monitoring Protocol for Cave Entrance Communities and Cave Environments in the Klamath Network

Standard Operating Procedure #18: Revising the Protocol

Version 2017Feb10

Citation:

Krejca, J. K., G. R. Myers III, A. Chung-MacCoubrey, E. C. Dinger, S. Mohren, D. Riggs, D. Sarr, K. Smith, A. Snyder, and S. Thomas. 2017. Standard Operating Procedure 18: Revising the Protocol. Version 2017Feb10. Integrated monitoring protocol for cave entrance communities and cave environments in the Klamath Network. Unpublished National Park Service Report, Klamath Inventory and Monitoring Network, Ashland, Oregon.

To create a new version of this SOP, carefully follow the instructions in this SOP. Use the Revision History Log below to describe the revisions:

- Populate the top table of the revision history log, providing the previous version date, author of the change, a specific but concise description of the changes made, the footnote number associated with change details, and a new version date.
- In the bottom table, add a footnote and as much text as needed to describe in detail the reasons for and implications of the change.

Revision History Log

Previous Version Date	Author of Change	Changes Made	Footnote #	New Version Date

Footnote #	Detailed Reasons for and Implications of the Changes

1 Introduction

This Standard Operating Procedure (SOP) explains how to make and track changes to the Klamath Network (KLMN) cave monitoring protocol, including its accompanying SOPs. While this monitoring plan has been developed using current standardized methodology, all monitoring programs need to be flexible to adapt to changes. As new technologies, methods, and equipment become available, this protocol will be updated as appropriate by balancing the benefits of incorporating current best practices against the continuity of protocol information. Project staff will refer to this SOP whenever edits are necessary and will be familiar with the protocol versioning system in order to identify and use the most current versions of the protocol documents.

All edits require review for clarity and technical soundness. Small changes to existing documents (e.g., formatting, simple clarification of existing content, small changes in the task schedule or project budget, or general updates to data management) may be reviewed in-house by project cooperators, park staff, and KLMN staff. However, major changes to data collection or analysis techniques, sampling design, or response design will trigger an outside review. The KLMN Program Manager will determine if outside review is needed.

2 Timing

SOPs can be changed at any time; however, it is often most convenient for the changes to take effect at the beginning of a calendar year. Changing an SOP during a data collection period should be avoided. However, testing of proposed new methodologies alongside existing approaches is highly desirable and provides invaluable information necessary for evaluating whether the new methods are superior and how their measurements will correlate with the previous methods. Note recommended changes or minor errors and incorporate them into revisions in a timely manner to prevent the loss of this valuable information.

3 Instructions

The following procedures will ensure that both minor and major revisions to this document will align with the monitoring protocol and data management. Always maintain a working copy of the document in MS Word as the basis for ongoing edits and revisions.

1. Before making any changes, turn on “Track Changes” in the MS Word version of the document. Then, make the changes in the appropriate protocol document. Note that the protocol is divided into separate documents: a narrative with appendices, and separate documents for each SOP. Also note that a change in one document may necessitate other changes elsewhere in the protocol. For example, a change in the narrative may require changes to several SOPs; similarly, renumbering an SOP may mean changing document references in several other documents. Also, the project task list and other appendices may need to be updated to reflect changes in timing or responsibilities for the various project tasks.
2. Discuss proposed changes with other project staff prior to accepting modifications. It is important to consult with the Klamath Network Data Manager prior to accepting changes because certain types of changes may jeopardize dataset integrity unless they are planned and executed properly. Also, because certain changes may require altering the database structure or functionality, advance notice of changes is important to minimize disruptions to project operations. Consensus should be reached on who will be making the changes and in what timeframe

3. Circulate the edited document for internal review among project staff and cooperators. Minor changes and clarifications will be reviewed in-house. When significant changes in methodology are suggested, revisions will first undergo internal review by the project staff. Additional external review, including, but not limited to, National Park Service staff with appropriate research and statistical expertise, will be required.
4. Upon ratification of all changes:
 - a. Create and archive a pdf copy with all changes visible.
 - b. Document all edits in the Revision History Log embedded in the protocol narrative and each SOP. Log changes only in the document being edited (i.e., if there is a change to an SOP, log that change only in that document). Record the previous version date, author of revision, identify changes and the paragraphs and pages where changes were made, detailed reasons for and implications of changes, and the new version date. Finally, update Table 18-1 at the end of this SOP, which tracks the current version of the narrative and appendices document, as well as the current version of each SOP.
 - c. Accept changes and rename the document by appending the revision date in YYYY<3-letter month>DD (e.g., 2017Feb23) format. In this manner, the revision date becomes the version number.
 - d. Ensure that you have updated the version date in all places it occurs, including the document title, citation, and filename.
 - e. The Data Manager will incorporate the new documents into the project metadata.
 - f. Create PDF files of the documents to archive, post to IRMA, and distribute.
 - g. Use IRMA versioning tools to make this the new version of the SOP in IRMA.
5. Send a digital copy of the revised monitoring protocol to the Resource Chiefs of the parks and the Project Lead. The revised monitoring protocol should also be forwarded to all individuals who had been using a previous version of the affected document. Ensure that field staff members have a hardcopy of the new version.

Table 18-1. The current version of the narrative and appendices document and the current version of each standard operating procedure used to implement the Klamath Network cave monitoring protocol. SOPs are versioned by date only.

Document	Document Title	Version
Narrative and appendices	Integrated Monitoring Protocol for Cave Entrance Communities and Cave Environments in the Klamath Network: Narrative	1.00 2017Feb10
SOP 1	SOP #1: Training	2017Feb10
SOP 2	SOP #2: Scheduling	2017Feb10
SOP 3	SOP #3: Site Selection and Marking	2017Feb10
SOP 4	SOP #4: Water	2017Feb10
SOP 5	SOP #5: Climate	2017Feb10
SOP 6	SOP #6: Ice	2017Feb10
SOP 7	SOP #7: Visitation	2017Feb10
SOP 8	SOP #8: Bats	2017Feb10
SOP 9	SOP #9: Cave Entrance Vegetation	2017Feb10
SOP 10	SOP #10: Scat and Visible Organics	2017Feb10
SOP 11	SOP #11: Invertebrates	2017Feb10
SOP 12	SOP #12: Cave Database	2017Feb10
SOP 13	SOP #13: Data Entry	2017Feb10
SOP 14	SOP #14: Photograph Management	2017Feb10
SOP 15	SOP #15: Data Transfer, Storage, and Archiving	2017Feb10
SOP 16	SOP #16: Protected Data	2017Feb10
SOP 17	SOP #17: Data Analysis and Reporting	2017Feb10
SOP 18	SOP #18: Revising the Protocol	2017Feb10