

Operational Review and Closeout Meeting

Stream Animals 2024

Purpose

Operational review and closeout meetings are annual meetings to discuss the most recent field season and data collection activities, and to document matters related to protocol implementation. The purpose is to discuss and capture lessons learned and to make improvements for future seasons. This meeting also provides staff with an opportunity to discuss the state of the science of the protocol, and to make suggestions for changes to the protocol documents, with the goal of ensuring that the written protocol remains up to date and in sync with monitoring activities.

Important Links

- [IMD Implementation Memo – Reviewing and Revising Approved Vital Signs Monitoring Protocols](#)
- [IMD Protocol Review Guidance](#)

Objectives

1. Review the most recent field season or data collection effort;
2. Obtain feedback that may help improve implementation in future years;
3. Discuss safety concerns associated with implementation and make sure risks are appropriately mitigated;
4. Document deviations from protocol that could potentially affect data quality or utility;
5. Document suggestions for improving protocol documents, and decisions regarding suggestions;
6. Establish a path and plan (with tasks and timelines) for staff to make changes to the protocol documents and/or initiate a scientific review of proposed changes, as needed.

Evaluation Questions and Agenda

Review and discuss issues, feedback and lessons learned related to the following:

1. Preparations

- a. Hiring/staffing, housing, onboarding, IT privileges. SIP intern for field season is very helpful.
- b. Training – sufficient, effective, ways of improving? Pre training with NPSA staff prior to surveys may improve efficiency.
- c. Field support – GPS, field maps, pre-printed packets, site directions, species lists, etc. Sufficient

2. Logistics, Communications and Safety

- a. Accommodations & park permits (front- and back-country) – changes needed? Permits were reviewed as renewals submitted as needed.
- b. Site accessibility. No changes.
- c. Scheduling and logistics planning. Efforts made to include park staff when possible.
- d. Travel and communications. Normal.
- e. Was everyone satisfied with the flow of information among staff during the field season? Yes.
- f. Any safety incidents or near misses? Explore concerns and suggestions for making procedures safer. Determine an appropriate means of mitigating each concern (e.g., improved training, equipment, detailed safety discussions). A NPSA intern slipped and hit her head on the rock. She was wearing felt soled tabis and was not carrying heavy gear. Weather was sunny and dry. Rocks are just naturally slippery. She was evaluated in the field and by a doctor upon returning from the field. No medical concerns. Staff behaved appropriately.
- g. Is the sampling schedule reasonable? Sufficient buffer time for schedule interruptions? Yes, could have used one more day in NPSA but that is not possible due to flight schedule.

3. Equipment

- a. Any equipment, GPS or camera issues? Field maps layer needs some updates, but we were able to make it work. Need to have field maps on both phones and tablets for redundancy especially at KALA.
- b. Any equipment changes? May any of these changes lead to a discontinuity in the data? Are side-by-side data comparisons needed? We started using fieldmaps for image collection.

4. Protocol Implementation

- a. Lessons learned from this year's implementation. At KALA, we learned to always keep InReach devices on to receive messages from our POC because if we had received the message that we were to leave the field when it was sent, our course of action would have been different. At HALE, the bunkhouse could use some maintenance, and a tent is

advised until this happens. However, it made the trip go much faster to stay at the bunkhouse as it eliminated the commute on the windy road. Consider pre training with staff or adding another I&M staff member to increase efficiency in the field and allow completion of all sites.

- b. Discussion of any issues with surveying/sampling and field methods
- c. Were all sites visited as intended/planned?
 - i. HALE- All sites completed
 - ii. KALA- 9 of 16 sites completed. Team was evacuated from the backcountry due to impending storm.
 - iii. WAPA- All sites completed
 - iv. NPSA- 6 of 7 sites on Tutuila completed. Ran out of time to complete FTUT06 on Fagatuitui Stream.
- d. Any known deviations from protocol that could potentially affect data quality or utility? No. If so, do these need to be addressed with changes or clarifications to procedures?
- e. Concerns related to data quality or repeatability – were there any for the year/period in question?
- f. Concerns related to lab analyses. N/A
- g. Any suggestions for changes to field data sheets/forms, SOPs or other protocol documents? No
- h. Any new methods or procedures that need to be considered or developed? No

5. Data Management

- a. Any changes needed to data management workflows or guidance? No
 - b. Any problems with data entry? No
 - c. Are linkages with SOPs and field forms sufficiently clear? Yes
 - d. Are there other changes that need to be made to the database (including QAQC checks, validation procedures, data summaries or reporting output)? Some updates to QAQC queries made. Field lead worked directly with data manager.
 - e. Was the data entry schedule reasonable? Sufficient time to enter, verify, scan data? Yes
 - f. Status of data and progress toward data approval/certification. Data entered. Ready to be verified. Verification plan made.
 - g. Review the project season closeout checklist for status of other items (e.g., scans, file management)
6. Reporting and Analysis – review current plans, discuss needs and follow-up tasks as appropriate. KALA trend report in progress.
7. State of the Science – do changing needs, new conditions, or emerging information suggest the need for updating or revising the design, or otherwise suggest a scientific review?
8. Develop Summary of Decisions, Action Items and Timeline

Participants

David Raikow, Anne Farahi, Amanda McCutcheon

Meeting Notes

[Following the general order of the agenda, with emphasis on clearly documenting issues related to safety concerns, deviations from protocol, data quality concerns, and suggestions for improving the protocol documents.]

WAPA shrimp data from lab (generally older data) needs to be revised after certification. Things are not matching up. This needs to be looked at and decisions need to be made.

Summary of Decisions

[The following items are placeholders for organizing decision content; these can be modified to convey the actual discussions and decisions in a suitable manner.]

1. Protocol document updates, including a determination of whether the update is a clarification or a major/substantive change
2. Data follow-up: Follow-up on any data flagging or other special handling as a result of deviations from protocol, equipment changes, or quality concerns identified above
3. Database updates:

Plan for Follow-up Action Items

Category	Task	Who	When
Protocol			
Other docs	Upload permits to SharePoint	Raikow	March 2025
Data updates			
Database changes			