EXAMPLE PROCESS AGENDAS

FOR MULTI- AND SINGLE DAY
CCVATCH SCORING APPLICATIONS

TABLE OF CONTENTS

Table of Contents

Multi-Day Process	1
Day 1 - Project planning	1
Day 2 – Data ID/Information needs	3
Day 3 – Introduction to scoring (with logistics)	5
Day 4 – Scoring	8
Day 5 – Optional on-line survey & discussion	9
Day 6 – Multiple assessment team scoring	10
Single Day Process	12
Pre-Meeting Prep	12
Single day tool overview and scoring	12
Supplemental Materials	16
Presentations	16
Handouts	16
Flipcharts	16
Spreadsheets	16
Example on-line survey	16

The following process agendas with listed supplemental materials were developed during this project and, while they are not likely to be a perfect fit for subsequent applications of the CCVATCH tool, these materials should provide a better understanding of how the tool may be applied over a single or multiple days. The length of time allocated to this process will be a function of how familiar project participants are with the available data and literature relating to potential stressor impacts on the habitat of interest as well as their preference for performing this tool application process at a series of meetings, via remote communication, or through some combination of the two. In addition to the basic support documentation available on the www.ccvatch.com website home page (e.g. CCVATCH Guidance Document, Scoring Sheet, etc.), additional supplemental material to assist in meeting planning is supplied on the website in the Resources/Project Planning section and indicated by bold text within the process agenda materials lists as well as in the last section of this document.

Multi-Day Process

The following sequence of process agendas reflect the numerous meetings held in Rhode Island during the application of CCVATCH during this project. The general activities that the RI project team engaged in included the following:

- Provide an introduction to the CCVATCH tool and Northeast Project overview;
- Identification of habitat to be assessed;
- Discussion of project logistics (e.g. who, how often, when);
- Identification of available data and knowledge gaps;
- Review of available reference material and outreach to experts for additional references;
- Generation of bulleted list of impacts to aid in scoring;
- Review of climate predictions and select appropriate time frame for scoring;
- Streamline scoring process by considering potential triggers that would make the; assignment of scores different for individual sites; and,
- Assign scores to individual sites

Project participants in Rhode Island were the first to begin their vulnerability assessments and are largely responsible for building out the northeast regional resource document for salt marsh habitat. They also elected to have multiple assessment teams assigning scores across multiple locations which required that all participants had a clear understanding of the potential impacts and the mechanisms by which score assignment would likely differ between sites. This decision resulted in the commitment of extra effort to develop a scoring 'cheat sheet' that ensured all teams were basing their assessments on the same set of assumptions.

DAY 1 - PROJECT PLANNING

PROJECT PLANNING **TOPIC MATERIALS** TIME **FACILITATION** Welcome & logistics 9:00-Introductions Sign-in sheet 9:10 Round the room – name and organization Objective: Launch the meeting and get folks 10 minutes comfortable

9:10- 9:45	An introduction to CCVATCH Objective: Provide an brief overview of the tool so we are speaking the same language	 Overall meeting objectives Tool development and components Example applications in RI Questions? 	Agenda PPT presentation (CCVATCHOverview_ NE_Project part 1) CCVATCH Guidance Document
9:45- 9:55	NSC Science transfer project overview Objective: Provide context for RI project, contributions to state of knowledge	 Brief description of project and how RI component fits into the whole Anticipated outputs Questions? 	PPT presentation (CCVATCHOverview_ NE_Project part 2) Fact sheet: NSC project
9:55- 10:05	Break		
10:05- 10:35	Planning for application of CCVATCH in RI Objective: Decide which habitats should be assessed and the geographic distribution of those selected	 Individuals complete discussion points handout (multi-voting) Tally scores on-screen by habitat (simple show of hands and capture numbers on spreadsheet) Sort habitats by response (on-screen) Considerations for selection (relating to effort by habitat and references response to questions 2 and 3 on handout) General discussion regarding results Final habitat selection (on-screen) 30 minutes 	Discussion Pts handout Excel spreadsheet with habitats (on-screen) (HabitatTally) Word document for 'Marina' items
10:35- 10:50	Facilitated discussion: Project logistics	 Given the habitat(s) selected, ask participants to share their thoughts on discussion points, taken sequentially Record general consensus (with just a reminder of need TBD among teams for last two bullet items if time is limited) 	Discussion points with options listed for each (onscreen) Frequency/duration of meetings Team structure Expert elicitation process Data collection & resource review

	Objective: Consider the types of choices necessary for pulling this off	15 minutes	Resource document build-out & sharing (CCVATCHOverview_ NE_Project part 3) Word document for 'Marina' items
10:50- 11:00	Wrap-up Objective: Reiterate what has been decided so that we all walk out with the same notion of what will happen next	 Brief overview of what we decided regarding application of CCVATCH in RI Habitat(s) Team(s) formation and 'next steps' 'Marina' items Additional comments/questions? Thanks for participation 	Habitat assessment team sign-up sheet
		10 minutes	

DAY 2 – DATA ID/INFORMATION NEEDS

ID DATA/INFORMATION NEEDS

TIME	TOPIC	FACILITATION	MATERIALS
1:00- 1:05	Objective: Launch the meeting and get folks comfortable with concept	 Welcome & logistics Round the room – name and organization 5 minutes 	Sign-in sheet
1:05- 1:15	Meeting objectives and process overview Objective: Provide a brief overview of the meeting objectives and planned	 Brief CCVATCH 'refresher' Overall meeting objectives Process overview Team assignment (=3) by non-climate stressor (2 each) and adaptive capacity (2 each) Roving flipcharts description 	Agenda PPT presentation with list of climate and non-climate stressors, adaptive capacity components; objectives; types of data sources (Pre-Meeting_Refresher)

	nformation needs	10 minutes	Printed index cards with stressors and adaptive capacity components (for random assign.)
1:45 ne gro	pture data / information eds for 1st of 2 stressor oups pjective: First crack at pturing data / formation needs (and urces) for first stressor oup	 Each team reads appropriate section of guidance document and resource document (if applicable) for assigned stressor (1st of 2) Team fills in assigned stressor flip-chart Teams rotate to each of two other flip-charts and fill in additional resource info Teams return to original flip chart and fill in any gaps Questions/concerns? 30 minutes 	Pre-printed flipcharts for stressor group 1 of 2 (FlipCharts-PreMeeting) CCVATCH Guidance document Draft Resource document 'Marina' sheet
1:45 - Ca	pture data / information	Each team reads appropriate	Pre-printed flipcharts for
2:15 ne gro	eds for 2 nd of 2 stressor oups ojective: First crack at oturing data / formation needs (and urces) for second stressor	section of guidance document and resource document (if applicable) for assigned stressor (2 nd of 2) Team fills in assigned stressor flip-chart Teams rotate to each of two other flip-charts and fill in additional resource info Teams return to original flip chart and fill in any gaps Questions/concerns?	stressor group 2 of 2 (FlipCharts-PreMeeting) CCVATCH Guidance document Draft Resource document 'Marina' sheet
2:30 ne col	pture data / information eds for adaptive capacity mponents ojective: First crack at pturing data / formation needs (and urces) for adaptive pacity	 Each team reads appropriate section of guidance document for assigned adaptive capacity components Team fills in assigned stressor flip-chart Teams rotate to each of two other flip-charts and fill in additional resource info Teams return to original flip chart and fill in any gaps 15 minutes 	Pre-printed flipcharts for adaptive capacity (FlipCharts-PreMeeting) CCVATCH Guidance document
	eak		Snack food and drinks

2:45- 3:45	Facilitated discussion: Flipchart data needs capture review and participant assignments Objective: Review data needs and determine if available/accessible and if not solicit additional input; volunteer assignment	For each stressor: Review data sources identified on spreadsheet Consider whether data sources, if available and reviewed prior to scoring effort, are sufficient to answer assessment questions If yes, solicit volunteers to find/review data sources If no, solicit volunteers to contact ID'd experts for input 60 minutes	Completed flip charts Sign-up sheet for review of data / expert elicitation 'Marina' sheet
3:45- 4:00	Project logistics Objective: Consider next steps and best format for scheduled scoring assignment meetings	 Determine how much time is appropriate for participants to complete their assignments for scoring meetings to begin (set scoring start date) ID mechanism for determining which salt marshes to assess (if less than all) Decide frequency/duration of meetings for score assignment Resource document build-out and sharing (e.g. dropbox, etc.) 15 minutes 	'Marina' sheet

DAY 3 - INTRODUCTION TO SCORING (WITH LOGISTICS)

INTRODUCTION TO SCORING (WITH LOGISTICS)

TIME	TOPIC	FACILITATION	MATERIALS
9:00- 9:15	Objectives and process description Objective: Provide a brief overview of the meeting objectives and planned process for resource	 Welcome & logistics Objectives Process for 'capturing' resource review bullets on flipcharts Team assignment (=6) by non-climate stressor; 	Sign-in sheet Agenda

	review capture & score assignment	adaptive capacity component • Questions? 15 minutes	
9:15- 9:45	Capture bulleted potential non-climate stressor impacts from resource document Objective: Make it easier to quickly revisit all the anticipated impacts (one time event for all scoring sessions)	Each team reads appropriate section of CCVATCH Guidance document and resource document and edits/adds content to pre-printed flipcharts 30 minutes	Printed index cards with stressors and adaptive capacity components (for random assign.) ResourceBulletScratchpad Pre-printed flipcharts with stressors (FlipCharts-Scoring) CCVATCH Guidance document Draft Resource document
9:45- 10:00	Capture bulleted adaptive capacity from resource document Objective: Make it easier to quickly revisit adaptive capacity effects (one time event for all scoring sessions)	Each team reads appropriate section of CCVATCH Guidance document and resource document and edits/adds content to pre-printed flipcharts 15 minutes	ResourceBulletScratchpad Pre-printed flipcharts with adaptive capacity (FlipCharts-Scoring) CCVATCH Guidance document Draft Resource document
10:00- 10:20	Brief overview of scoring levels and use of examples in Guidance; other scoring considerations Objective: Remind group of how CCVATCH scoring works and anticipate "known" scoring questions	 Provide overview of scoring levels and potential for average, majority vote, etc. Provide overview of scoring considerations (e.g. "double-counting", zero vs. blank, etc.) Determine appropriate time frame for scoring (e.g. 25, 50, 100 years) 	Pre-printed flipcharts (FlipCharts-Scoring) CCVATCH Guidance document Draft Resource document Climate Predictions SLR_Rhodelsland USGS Climate Summary 'Marina' sheet
10:20- 10:50	Objective: Decide on ground rules for applying CCVATCH to all sites as we progress through this project	 Facilitated discussion Final scores (e.g. consensus, majority vote, etc.) and time limits for discussion, etc. Time frame for assessment (e.g. 25 yrs, 50 yrs) 30 minutes 	CCVATCH Guidance document

10:50- 11:00	Break	10 minutes	Snack food and drinks
11:00- 11:10	Review of captured bullets Objective: Provide group an opportunity to review all bullets captured earlier and add/edit bullets	 Group walks around to read/review all captured resource bullets Share with group any additions (likely based on personal observations or additional resources not in resource document) 10 minutes 	Completed flip charts Sign-up sheet for review of data / expert elicitation 'Marina' sheet
11:10- 12:30	Objective: For specific location, capture notes on current or anticipated impacts and assign scores	 Group works sequentially through each row in a worksheet (Guidance document Tables D-1 to D-7) to capture site specific notes At the completion of each row in a worksheet, group assigns scores for anticipated impact and certainty Using pre-printed score cards, individuals simultaneously expose score Scores captured on interim score capture sheet Ask folks providing 'outlier' scores for basis of decision Allow for additional discussion (within allotted time frame) Solicit 'new' scores as necessary and/or record final 80 minutes 	Table D-Handout 'Marina' sheet
12:30- 1:00	Lunch	30 minutes	Pre-ordered lunch and drink
1:00- 2:20	Score assignment (Site 1 through x); cont	<same 11:10-12:30="" as="" block="" time=""></same>	
2:20- 2:30	Break	10 minutes	Snack food and drinks

2:30- 3:50	Score assignment (Site 1 through x); cont	<same 11:10-12:30="" as="" block="" time=""></same>	
		80 minutes	
3:50- 4:00	Wrap-up	Facilitated discussionAddress questions/concerns?	'Marina' sheet
	Objective: Re-visit logistics question (timing		
	and frequency of future meetings)	10 minutes	

Note: On day 3 of the process, it was not possible to fully complete scoring of the first site. As the information shared was generally 'new' to some or most of the participants, a great deal of discussion was necessary as each new climate/non-climate stressor interaction was introduced prior to score assignment. A greater portion of the day was focused on developing the bulleted list of potential impacts than was anticipated.

DAY 4 - SCORING

ĺ		 	
	SCORING		
ш			

TIME	TOPIC	FACILITATION	MATERIALS
9:00- 9:20	Objectives and review of process Objective: Provide an brief overview of the meeting objectives and review process for score assignment	 Welcome & logistics Objectives Review of process used to 'capture' resource review bullets on flipcharts (Note new content) Review of scoring levels (esp. certainty), 'ground rules', use of examples in CCVATCH Guidance Questions? 	Sign-in sheet Agenda w/ objectives Flipcharts with resource doc 'bullets'; handout (FlipCharts-Scoring¬es BulletsHandout) Tape, markers
9:20- 10:20	Score assignment	 Group works sequentially through each row in a worksheet (Guidance document Tables D-1 to D-7) to capture site specific notes At the completion of each row in a worksheet, group assigns scores for anticipated impact and certainty 	All flipcharts CCVATCH Guidance document Resource document Random site selection Site Maps Table D-1 to D-7 hardcopy for notes

10:20	Objective: For specific location, capture notes on current or anticipated impacts and assign scores	 Using pre-printed score cards, individuals simultaneously expose score Scores captured on interim score capture sheet Ask folks providing 'outlier' scores for basis of decision Allow for additional discussion (within allotted time frame) Solicit 'new' scores as necessary and/or record final 60 minutes 	(TableD-Handout) Pre-printed score cards Excel spreadsheet: Interim score capture (InterimScoreCapture_v2) 'Marina' sheet
10:20- 10:30	Break	10 minutes	Snack food and drink
10:30- 11:30	Score change/no change by site Objective: 'Stream-line' process for future scoring effort	<cont. as="" necessary="" scoring="" w=""> Stream-line scoring: Re-visit resource 'bullets' to determine which (if any) would not change by site or, if change, adopt discrete scoring levels (where possible) based on site characteristics 60 minutes</cont.>	<u>All</u> flipcharts
11:30- 12:00	Objective: Re-visit logistics question (who, process, and timing and	 Facilitated discussion Break out in teams? Continue with random assignment of sites (one ea. from N, C, S in order)? Timing and frequency of meetings? Address questions/concerns? 30 minutes 	'Marina' sheet

DAY 5 - OPTIONAL ON-LINE SURVEY & DISCUSSION

To facilitate scoring, the exercise designed to streamline scoring initiated on day 4 was continued via an on-line survey [**Survey_StreamlineScoring**]. The end product of this on-line survey and follow up phone conference was the development of a scoring 'cheat sheet' that captured the full

set of assumptions for scoring teams to apply during score assignment [see Scoring_CheatSheet2].

DAY 6 - MULTIPLE ASSESSMENT TEAM SCORING

TIME	TOPIC	FACILITATION	MATERIALS
11:30- 11:50	Objectives and review of process Objective: Provide a brief overview of agenda and meeting objectives; review process for score assignment	 Welcome & Logistics Objectives Review of process 'ground rules' team 'break-out' scoring handout support material sites to be assessed Questions? 20 minutes	Sign-in sheet Agenda w/ objectives
11:50- 12:30	'Working lunch' Objective: For specific locations, capture notes on current or anticipated impacts	 Group works in teams to capture notes on current or anticipated impacts at assigned sites (2 or more) Opportunity to ask others in larger group for input (quick report out, info sharing) Questions? 	CCVATCH Guidance document Resource document Table D-Handout Site maps RISMA site elevations
12:30- 3:45	Score assignment by teams	 For each row in a worksheet, each team assigns scores for anticipated impact and certainty Using pre-printed score cards, individuals simultaneously expose score Scores captured on interim score capture sheet Ask folks providing 'outlier' scores for basis of decision Allow for additional discussion (within allotted time frame) 	CCVATCH Guidance document Resource document Site Maps Table D-Handout Scoring_CheatSheet2 Pre-printed score cards

	Objective: For specific location(s), assign scores	 Solicit 'new' scores as necessary and/or record final 3 hours and 15 minutes 	
3:45- 4:00	Wrap-up Objective: Determine next steps, specifically do we continue with process and additional sites?	 Address any 'outstanding' questions Assess comfort level and willingness to continue scoring independently in teams? Note: Need at least one more session for 'robustness test' Assign prizes and adjourn 	'Marina'
	aria additional sites.	15 minutes	

Single Day Process

The application of the CCVATCH tool to a specific habitat at one or more sites over the course of a single day presumes that the assessment team participants are fairly well versed in the potential impacts from climate and non-climate stressors as well as the selected habitats' adaptive capacity components. It also presumes that assessment team members would have reviewed general resource documents and climate projections in advance of the meeting to minimize debate/discussion time during the scoring application process. Assuming some degree of premeeting preparation, and a 'learn as you go' approach which requires that a facilitator with knowledge/experience in tool application is available, the process agenda for the Massachusetts application to cold water fisheries contained the following general components:

- Provide an brief overview of the CCVATCH tool:
- Introduction to specific sites to be assessed;
- Review of climate predictions and select appropriate time frame for scoring;
- Generation of bulleted list of impacts to aid in scoring;
- Set 'ground rules'; and
- Assign scores to individual sites.

PRE-MEETING PREP

In advance of the in-person full day meeting, the team lead distributed a draft bulleted list of potential impacts as well as climate projections for each of three timeframes to assessment team members for their review. Assessment team members were also tasked to contribute additional potential impacts for inclusion during the meeting.

SINGLE DAY TOOL OVERVIEW AND SCORING

TOOL OVERVIEW AND SCORING TIME **TOPIC FACILITATION MATERIALS** Welcome & logistics 9:00-Review Agenda & Sign-in sheet Objectives Objectives 9:10 Agenda w/ objectives Review of Agenda Tape, markers Questions? Objective: Provide an brief overview

	of the meeting objectives and	40	
	agenda	10 minutes	
9:10- 9:20	Participant Introductions	 Participants each have 1 minute to provide background / management interests 	
	Objective: Learn about expertise related to the habitats and locations selected for the process	10 minutes	
9:20- 9:35	Objective: Group has a preliminary understanding of	 Brief overview of CCVATCH tool components and what it is designed for 	PPT presentation (CCVATCHOverview_ Waquoit)
	the CCVATCH process	15 minutes	
9:35- 9:45	Objective: Participants become familiar with sites to be scored	 Brief overview of two primary streams; commonalities, differences Participants add more details, if known 10 minutes	Maps / descriptions of sites
9:45- 9:55	Climate Projections Objective: Group comes to agreement on climate change projections to be used (which model for predictions) and time frame for scoring	 Overview of model choices (high, intermediate, low) or if available, specific projections from state planning documents Discuss and agree on projections, time frame that is most appropriate for management (& scoring) 	Projected climate change information for MA (from USGS Climate Viewer or state docs) Handout on projections
9:55- 10:25	State of the Science Objective: Participants	 Process for 'capturing' resource review bullets on flipcharts Participants add bullets to climate/non- climate interactions; also, clarifications, question marks if appropriate 	Large scale worksheets on wall/easels with markers (ColdWaterSheet)

10:25- 10-35	individually go over worksheets and add knowledge Break	30 minutes	
10:35- 10:50	Scoring Process & Ground Rules Objective: Brief review of scoring process and decide on ground rules for addressing disagreement	Brief overview of how CCVATCH scoring works, resources available Facilitated discussion What process will we use if the group can't agree on a score? Discuss/consensus Majority vote Average score How long do we want to work toward a decision?	CCVATCH Guidance document Table 1 handout Worksheets on wall / easels Flipchart for capturing ground rules
10:50- 12:00	CCVATCH Scoring — Sensitivity- Exposure part 1 Objective: Participants review bullets (captured earlier) and apply current condition, sensitivity- exposure, and certainty scores to each of two sites	 Group works sequentially through each row in a worksheet (Guidance document Tables D-1 to D-7) to capture site specific information. At the completion of each row in a worksheet, group assigns scores for anticipated impact and certainty Using pre-printed score cards, individuals simultaneously expose score Scores captured on interim score capture sheet Ask folks providing 'outlier' scores for basis of decision Allow for additional discussion (within allotted time frame) Solicit 'new' scores as necessary and/or record final 70 minutes 	All flipcharts CCVATCH Guidance document Excel scoring worksheet Maps / descriptions of sites Table D-Handout for notetaking Pre-printed score cards Excel worksheet for interim score capture – allows averaging (InterimScoreCapture_v2) 'Marina' sheet 'Data Gaps' sheet
12:00 - 12:30	Lunch	(Jim) 30 minutes	Food and drinks
12:30- 2:30	CCVATCH Scoring – Sensitivity- Exposure part 2	See above description (for part 1) 120 minutes	See above description (for part 1)
2:30- 2:40	Break	10 minutes	

2:40- 3:40	CCVATCH Scoring – Sensitivity- Exposure part 3	See above description (for part 1) • Group may elect to focus on specific interactions during this time block 60 minutes	See above description (for part 1)
3:40- 4:30	Objective: Participants review bullets (captured earlier) and apply adaptive capacity and certainty scores to each of two sites	 Group works through adaptive capacity section At the completion of each row, group assigns scores for anticipated impact and certainty Using pre-printed score cards, individuals simultaneously expose score Scores captured on interim score capture sheet Ask folks providing 'outlier' scores for basis of decision Allow for additional discussion (within allotted time frame) Solicit 'new' scores as necessary and/or record final Focus on management actions, institutional / human response 	All flipcharts CCVATCH Guidance document Excel scoring worksheet Maps / descriptions of sites Table D-1 to D-7 hardcopy for notes Pre-printed score cards Excel spreadsheet: Interim score capture (for averaging) 'Marina' sheet 'Data Gaps' sheet
4:30- 4:45	CCVATCH Vulnerability Score and Management Implications Objective: Participants translate results of scoring effort into real-world management decisions	 Reveal vulnerability ranking based on score input General discussion regarding what this ranking may imply for future funding / research opportunities 	Excel scoring worksheet 'Data Gaps' sheet
4:45- 5:00	Wrap-Up Objective: Address any outstanding questions and determine if next steps are required	 Address questions / concerns on 'Marina' sheet Next steps (additional habitats, sites)? Workshop Evaluation 	'Marina' sheet Evaluation handout

SUPPLEMENTAL MATERIALS

Supplemental Materials

[Note: All of the following are available on the www.ccvatch.com website in the Resources/Project Planning section]

PRESENTATIONS

- CCVATCHOverview_NE_Project
- Pre-Meeting_Refresher
- CCVATCHOverview_Waquoit

HANDOUTS

- <u>DiscussionPts</u>
- ResourceBulletScratchpad
- Climate_Predictions
- SLR_RhodeIsland
- TableD-Handout
- BulletsHandout
- <u>Scoring CheatSheet2</u>

FLIPCHARTS

- FlipCharts-PreMeeting
- FlipCharts-Scoring
- FlipCharts-Scoring¬es
- ColdWaterSheet

SPREADSHEETS

- HabitatTally
- <u>InterimScoreCapture_v2</u>

EXAMPLE ON-LINE SURVEY

Survey StreamlineScoring