Appendix G: Yearly Project Task List

Version 1.02 (September 16, 2020)

Change History

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| --- | --- | --- | --- | --- | --- |
| New Version # | Revision Date | Author | Changes Made | Reason for Change | Previous Version # |
| 1.02 | 9/16/2020 | Kim Weisenborn | Minor updates to content | To update outdated external links | 1.01 |
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Only changes in this specific SOP will be logged here. Version numbers increase incrementally by hundredths (e.g., version 1.01, version 1.02) for minor changes. Major revisions should be designated with the next whole number (e.g., version 2.0, 3.0, 4.0). Record the previous version number, date of revision, author of the revision, changes made, and reason for the change along with the new version number.

This appendix presents a table that identifies tasks by project stage, indicates who is responsible for the task, and establishes the timing for execution.

**Table G.1** Yearly Project Task List for Focal Terrestrial Plant Communities Monitoring Protocol.

| Project Stage | Task Description | Responsibility | Timing |
| --- | --- | --- | --- |
| Preparation | Notify data manager and/or GIS specialist of needs (field maps, Global Positioning System [GPS] support, training) | Project Lead, Field Leader | ASAP,  by Feb 1 |
|  | Ensure that project workspace is ready for use and GPS download software is loaded at each park | Project Lead, Data Manager and GIS Specialist | by Apr 1 |
|  | Implement working database copy | Data Manager | by Apr 1 |
|  | Prepare and print field maps | GIS Specialist | by Apr 1 |
|  | Update and load data dictionary, background maps, and target coordinates into GPS units | GIS Specialist | by Apr 1 |
|  | Provide database/GPS training as needed | Data Manager and GIS Specialist | by Apr 1 |
|  | Train field crew in safety, species identification, equipment usage, and field sampling protocols | Field Leader, Project Lead, Park Botanists | by Apr 1 |
|  | Verification of field observer qualifications | Field Leader | by Apr 1 |
| Data acquisition | Collect monitoring data and GPS data in the field | Field Leader, Field Technicians | Apr-Oct (varies by park) |
|  | Review data forms after each day and identify any unknown species | Field Leader, Field Technicians | daily |
|  | Regular review of field forms for completeness and accuracy | Field Leader | bi-weekly |
| Data entry & processing | Download GPS data and email files to GIS specialist for correction | Field Leader, GIS Specialist | ASAP, after each tour |
|  | Enter data into working copy of the database | Field Leader, Field Technicians | ASAP, after each tour |
|  | Verification of accurate transcription as data are entered | Field Leader, Field Technicians | ASAP, after each tour |
|  | GPS data correction | GIS Specialist | ASAP, after each tour |
|  | Periodic review of GPS location data and database entries for completeness and accuracy | Field Leader | bi-weekly |
|  | Upload processed and verified coordinates to database | GIS Specialist | Oct |
| Product development | Complete field season report | Field Leader | Nov 30 |
| Product delivery | Send field season report to project lead and data manager | Field Leader | by Dec 1 |
| Quality review | Quality review and data validation using database tools | Project Lead | Dec |
|  | Prepare coordinate summaries and/or GIS layers and data sets as needed for spatial data review | GIS Specialist | by Nov 15 |
|  | Joint quality review of GIS data | Project Lead and GIS Specialist | Nov-Dec |
| Metadata | Identify any sensitive information contained in the data set | Project Lead | Oct-Dec |
|  | Update project metadata records | Project Lead | Oct-Dec |
| Data certification | Certify the season’s data and complete the certification report | Project Lead | Dec |
| Data delivery | Deliver certification report, certified data, and updated metadata to data manager | Project Lead | by Dec 31 |
|  | Upload certified data into master project database, store data files in PACN Digital Library 1 | Data Manager | Jan |
|  | Notify project lead of uploaded data ready for analysis and reporting | Data Manager | by Jan 31 |
|  | Update project GIS data sets, layers and associated metadata records | GIS Specialist | Jan-Feb |
|  | Finalize and parse metadata records, store in PACN Digital Library 1 | Data Manager and GIS Specialist | Jan |
| Data analysis | Export data required for analysis from database | Data Manager and Project Lead | Feb |
|  | Compute annual summary statistics for status report | Project Lead | Feb |
|  | Run trend analysis after 2 or more years of data is available for a park | Project Lead and Statistician (as consultant only) | Feb |
|  | Export analysis results into database | Project Lead | Feb |
| Product development | Export automated reports from database | Project Lead | Feb |
|  | Produce park-wide and area-specific maps for archives | GIS Specialist | Jan-Feb |
|  | Generate quality maps for reports | GIS Specialist | Jan-Feb |
|  | Acquire the proper report template from the [NPS Natural Resource Publication Series website](https://www.nps.gov/im/publication-series.htm), create annual report | Project Lead | Mar-Apr |
|  | Screen all reports and data products for sensitive information | Project Lead | Mar-Apr |
| Product delivery | Submit draft report to program manager and initial peer reviewers for review | Project Lead | by Apr 30 |
|  | Review report for formatting and completeness, notify project lead of approval or need for changes | Program Manager | May |
|  | Revise manuscript and complete NRPM checklist. Resubmit to program manager. | Project Lead | upon approval |
|  | Submit manuscript and documentation to Regional I&M coordinator | Program Manager | upon approval |
|  | Assign a Peer Review Manager to review the manuscript for content, formatting and organization. | Regional I&M Coordinator | upon approval |
|  | Contacts project lead and schedules review. Determines if reviewer comments were addressed and if additional reviews are necessary. Approves report for publication. | Peer Review Manager | upon approval |
|  | Submits draft for formatting review and requests report numbers from NRPC | Project Lead | upon approval |
|  | Produce PDF and email submittal form to NRPC. | Project Lead | upon approval |
|  | Upload completed report and other products to PACN Digital Library1, notify data manager. | Project Lead | upon completion |
| Posting & distribution | Submit metadata to Natural Resource Information Portal2 | Data Manager | by Mar 15 |
|  | Post reports to Natural Resource Information Portal2 | Data Manager | upon receipt |
|  | Update Natural Resource Information Portal2 records according to data observations | Data Manager | Dec-Mar |
|  | Submit certified data and GIS data sets to Natural Resource Information Portal2 | Data Manager | by June of the second year |
| Archival & | Store finished products in PACN Digital Library1 | Data Manager | upon receipt |
| records management | Review, clean up and store and/or dispose of project files according to NPS Director’s Order #11D3 | Project Lead | Jan |
| Season close-out | Meet to discuss the recent field season, and document any needed changes to field sampling protocols or the working database | Project Lead, Data Manager, GIS Specialist, Field Leader | by Dec 30 of the same year |
|  | Discuss and document needed changes to analysis and reporting procedures | Project Lead, Data Manager and GIS Specialist | by Apr 30 of second year |

1 The PACN Digital Library is a hierarchical digital filing system stored on the PACN file server. Network users have read-only access to these files, except where information sensitivity may preclude general access.

2 The Integrated Resource Management Applications (IRMA) Portal (NPS 2011) is the National Park Service’s clearinghouse for natural resource data, metadata, bibliographic records, and park species information. Only non-sensitive information is posted to IRMA. Refer to the protocol section on sensitive information for details. Available at: <https://irma.nps.gov/Portal/> (accessed 31 July 2019)

3 NPS Director’s Order 11D provides a schedule indicating the amount of time that the various kinds of records should be retained. Available at: <https://www.nps.gov/policy/DOrders/DO_11D.pdf> (accessed 31 July 2019)