



**1. Action item:** Lisa: Each year, update the Survey Summary Form with new funding amounts for each state.

**Update:** Completed. This is on Lisa's radar to do each year in June.

**2.** OPEP planned to run Brown Marmorated Stink Bug (BMSB) through the model in 2016, but did not report back to CAPS.

**Action item:** Lisa and Sherry will follow up with OPEP lead.

**Update:** The insect was run through the model. Lisa shared the results with Sherry:

"We assessed *Halymorpha halys* in our development of the arthropod model. The model predicted 'high impact' and this was consistent with the economics team's assessment of U.S. impacts."

And regarding how organic production is considered in the model:

"We don't really treat organic production any differently than conventional production. Specifically, damage is damage and controls are controls. Integrated pest management techniques are used in both production systems, and we don't score one any higher than the other. So, the important thing for organic producers to do is to report damage and management techniques. For the model, we would discuss organic production in the summary and would try and include any controls in the appropriate model sections."

**3.** OPEP summaries are not currently available. OPEP is partnering with PestLens and will post summaries on this system. The summaries may be behind a login, and if so, summaries will be uploaded to CAPS site.

**Action item:** Lisa and Heather will follow up with OPEP.

**Update:** OPEP summaries will be made available through the PestLens website (<https://pestlens.info/>). You must login to the PestLens website in order to access the OPEP summaries. Obtain PestLens login credentials by registering on the website. We will not post the OPEP summary pdfs to the CAPS R&C site directly. Instead, links to OPEP summaries will be provided, ensuring that the most current version is available and easily accessible.

**4. Action item:** Discuss how to improve PPQ, CAPS, and Farm Bill survey planning and submission. Can we capture which pests are found by each survey? How best to improve efficiency across pest surveillance? For example, in Maine, EWB/BB is the only federal survey, and the state does the more expansive surveys, including nursery surveys.

**Update:** PPQ, CAPS, and Farm Bill processes all happen in a relatively short period of time during late summer/early fall. States should be discussing planning for all these surveys during their annual State CAPS Committee or similar meeting. Everyone should know what each other is planning. NAPIS data entry requires Funding Year, Funding Source, and Survey Name. A report should indicate the results from each survey.

**5. Action item:** Review the CAPS Performance Measures and Pest Detection Metrics. How does your constituency want to see this? How else should the data be presented? Interactive metrics? Charts? Customizable by Survey or State?

**Update:** Completed, no feedback received.

**6. Action item (Lisa):** Put together a good table with a standard format that can be used in the template for work plans.

**Update:** Completed. Included in the work plan template for 2018.

**7. Action item (NCC):** Let's figure out how to make a good automated work plan template by the time of the guidelines (4/22) and a good accomplishment report template by summer. Ask for feedback from constituency and make suggestions to John/Lisa. Maybe we can start with a pilot program with new templates in one or two states.

**Update:** An automated or dynamically-generated work plan template is not possible at this time. The variation from state to state would make this difficult, and likely would default to something very similar to the Word template now used. We will, however, keep this in mind for a future action.

**8. Action item:** How can we get the work plan/Survey Summary Form to have the most current pest list? Maybe route it through the SPHDs? Maybe the PSSs? What time of year is good to submit information to the states? Maybe list those changes during guidelines?

**Update:** Currently, a Summary of Pest List Changes is published every year with the Guidelines. We will consider a companion document on changes to the approved methods from the prior year. These will appear on both the current year Guidelines page and the Resources page. Additionally, we will look into the feasibility of capturing all emails pertaining to updates in one place on the CAPS R&C site. Also, we will note these changes on the May PSS call. PSSs have responsibility to pass on this info to SSCs.

**9. Action item:** As a means for helping improvement of work plans, Dan and Heather will audit a few work plans per year and give an advisory for improvement.

**Update:** On hold due to staffing shortage in S&T.

**10. Action item:** 2018 guidelines are due to be published on Earth Day (4/22/17). Please review and provide feedback.

**Update:** Completed; 2018 National Pest Surveillance Guidelines published on the CAPS R&C 4/22/17.

**11. Action item:** John wants to rearrange the entire survey process. Why are there two different sources funding the same issue and the continuous guessing game for funding? Can we bundle the entire CAPS and Farm Bill processes into one single process? What are states needs and how do they manage their funding from different sources?

**12. Action item:** There still are a lot of questions that need to be answered. Some of these are italicized in the paragraphs below. The NCC should think this proposal through very carefully and talk with their constituents about it. Both the Pest Detection and Farm Bill Programs want to make sure that whatever changes are made benefit all our cooperators.

**13. Action item:** David McClure will draft a survey priorities submission form using the Survey Summary Form as a guide.

**14. Action item:** Develop a draft of Pest Surveillance Guidelines for the states. Who? When? (John, Lisa).

**15. Future action item:** Let's do a paper exercise. For the states represented at the NCC, what would be your survey list (with target pests) in priority order, and how much would it cost to do the survey? Don't worry about funding source.

**Update:** The above action items refer to discussions about merging the CAPS, PPQ, and Farm Bill Goal 1 Survey processes together. This is still the goal, but conversations within PPQ have stalled. A redrafting of the proposal will occur during 2018. The new suggestion format introduced for 2018 Farm Bill Goal 1 Survey was the initial attempt to start answering some process questions related to 14 and 15 above.

**16. Action item:** To the NCC, what are your documented needs from the CPHST CAPS Support Team? We need to understand how to meet the needs.

**Update:** Heather, Dan, and Lisa continue to collect ad hoc requests from the CAPS community; nothing specific came in from NCC.

**17. Action item:** Collaborate and document the roles of the CAPS support team. Be sure that the coordination aspect of the role is known. Make sure it does not get misconstrued as roles that can be doled out to others.

**Update:** The major duties and responsibilities of Lisa's and Melinda's previous positions have been entered as work requests into S&T's project tracking system Salesforce. In the next few weeks, John, Rick, Lisa, and Russ will prioritize the list of work requests. For the high priority tasks, S&T leadership will assign other scientists to accomplish the work until additional staff has been hired onto the CPHST CAPS Support Team. [Lisa will confirm with Russ that this is the approach. This is how we left the CPIA meeting the other day, we still need to have a call with the PDMT to discuss this.]

**18. Action item:** NCC and constituents: Please review the host matrix and notify CPHST support staff if there are additional hosts that should be represented.

**Update:** The CPHST CAPS support team did not receive any suggestions of hosts to add. There will be some minor changes to the matrix, and Dan will review them at the NCC meeting.

**19.** The Otis lab has several new staff that are interested in providing CAPS support. This will require a lot of coordination. We may not be able to tap into this resource while the CAPS support positions are vacant.

**Action item:** Enter coordinating Otis CAPS support into project tracking system.

**Update:** This is going well. Heather, Lisa, John Bowers, and John Crowe had a two-day meeting at the Otis Lab in November 2017. They discussed both Otis and Farm Bill research projects that support CAPS and also the Otis lab's role in survey supplies. We are having great collaboration and communication with this group. We are making important strides in the quality control of lures.

**20.** New Pest Risk Mapping Strategy - Oregon State University (OSU). Sherry works with the geospatial group at Clemson and would like to know how the maps are built.

**Action item:** Lisa will provide Sherry the whitepaper.

**Update:** Completed.

**21. CAPS Educational and Learning Modules**

**Action item (NCC):** Send nominations for individuals to join steering committee to John.

**Update:** Completed; steering committee consists of representatives from all four core constituent groups.

**22. CAPS Educational and Learning Modules**

**Action item (NCC):** Send suggestions on training needs to John and the Steering Committee.

**Update:** Completed; John and Lisa will report out at the NCC meeting.

**23. Kira Metz's Domestic Identifier position at Texas A&M has been refilled by Xanthe Shirley. Do we know her area of specialty yet?**

**Action item:** Steve will find out Xanthe's specialty and get that to Lisa.

**Update:** Completed. Xanthe provides general entomology coverage. The majority of her workload is wood borer bark beetles and moths, followed by ants, boll weevil, and Khapra beetle.

**24. Action item:** Lisa will develop guidance on how states should use the request of taxonomic assistance field on the Survey Summary Form and also the check box on work plans.

**Update:** Completed. New fields have been added.

**25. Access to Carnegie/Mississippi State University for EWB/BB Samples**

There is a good identifier in these two places that can identify bark beetles. How can we maximize use of these resources? Lisa, Avi, and Steve need to collaborate and figure out how to get help for everybody.

**Action item:** Steve and Lisa will meet to discuss how to increase efficiency, and how best to determine who needs help and where will that help come from.

**Update:** Started, and an ongoing process.

**26. Action item:** Lisa will determine where there is need in identification support. She will also determine whether Carnegie, MSU, and the other ID centers can accept more samples. This may take some time.

**Update:** In progress. Lisa requested more funding for Carnegie, but they are also in the process of renegotiating their 5-year contract. She does not yet know what the number of samples we will be allowed for 2018. For MSU, Lisa encouraged MSU to request more funding through Farm Bill. We do not yet know if they received their requested amount. Lisa and Steve will visit MSU in late February 2018. They plan to visit other collaborating institutions as they are able.

**27. Action item:** We need clear instructions as to when it is appropriate to submit ad hoc samples, who to send them to, and how to submit them. Steve will add more detailed instructions to his contact sheet.

**Update:** Instructions were sent out, but there is still some confusion. A request has been made to develop flow charts per pest type (insect, plant pathogen, etc.). This will be discussed at the NCC meeting.

**28. Action item:** David McClure. Take care of the issue that requires repeated entering of the same survey name. Allow it to be replicated.

**Update:** Will be considered as the three individual Survey Summary Forms are merged.

**29. Action item:** Communicate to your constituencies that new in state records must be confirmed before entering into NAPIS. Do states always know if it is new in the state?

**Update:** Ongoing discussions

**30. Action item:** Form a working group to clarify the Survey Summary Form fields and definitions. Due date: August 1 for the next survey year.

**Update:** Ongoing; the group clarified field definitions and created new fields. The group may need to reconvene in the spring to evaluate how well people understood the new definitions and entered information for 2018.

**31. Action item:** Give a webinar on how to use the Lure Calculator for help in lure ordering.

**Update:** John Crowe gave two webinars in January 2018, one on how to place orders and one on how to approve orders. The Lure Calculator was covered during these webinars.

**32. Action item:** NCC and constituents. Develop a list of CAPS webinar topics. What topics are not covered in the existing list? Should the webinar be given once, recorded, and then posted to the CAPS site for future use or should it be given multiple times?

**Update:** Webinars on the pest list assessments and OPEP model, and an overview of the CAPS R&C site have been delivered. These were produced by PDC and recorded. Links to the recording have been posted on the CAPS R&C. We will discuss future webinars at the NCC meeting.

**33. Action item (John Crowe)** Organize twice yearly call for SSCs and PSSs to communicate important changes to survey methods and survey supplies. One call will be held in February/March before the survey season begins and the other will be held in late October/November when the survey supply ordering period is open.

**Update:** Calls and webinars completed:

3/2017: Attended Eastern PB SSC call and provided updates.

2/07/2017: Call with NPB regarding communication.

1/10/2018: Webinar offered to SSCs and PSSs on how to place orders.

1/11/2018: Webinar offered to SPHDs and PSSs on how to approve orders.

**34. Action item:** Draft a plan for the Pest Surveillance Summit and communicate it and the target date to the National Plant Board and Regional Plant Boards so that they can adjust the resolutions they submit each year in support of the National CAPS meeting. Seek confirmation for summit by August 2017 so travel can be included in future work plans.

**Update:** The National Plant Board circulated a survey about a national meeting, and the NPB BOD presented the results to the PPQ MT in late December 2017. Ann Gibbs and Paula Henstridge were asked to get a group together to continue the conversation. No word yet. It is getting late to have a meeting in 2018 as it appears to be in limbo over concerns within the PPQ MT.

**35. Action item:** NCC and constituents. Review the SSPP Communication Plan and provide feedback to the SSPP CFWG at [SSPP@aphis.usda.gov](mailto:SSPP@aphis.usda.gov).

**Update:** Ongoing. Plan will be finalized and distributed by March 15, 2018.

**36. Action item:** SSPP CFWG: Revise the SSPP Communication Plan with recommendations from the NCC, including adding a section about the acknowledgement of receipt of an email.

**Update:** Ongoing. Plan will be finalized and distributed by March 15, 2018.

**37. Action item (NCC, especially PPQ employees):** Please let your management teams know how critical of a role the warehouse crew plays in the CAPS program. The warehouse is understaffed, and any employee turnover would be disastrous for the entire CAPS program. Please make it clear that more resources are necessary.

**Update:** Good progress has been made to find additional staff for the warehouse. The staffing situation should improve in the coming months.