2019

National Cooperative Agricultural Pest Survey Program

Minutes of the National CAPS Committee (NCC) Annual Meeting

Customs & Border Protection

Portland, Oregon

March 20-21, 2019

Annual National CAPS Committee Meeting
March 20 - 21, 2019
Customs & Border Protection
Portland, Oregon
Meeting Minutes

Contents

Participants

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*for Brad Danner

NCC in Portland, OR ⬆

The meeting this year in Portland, Oregon marks the 12th meeting of the National CAPS Committee (NCC) in its current, modern form after the program was redesigned in 2006-2007. The first NCC meeting under the new structure was held in Raleigh, NC, on January 15-17, 2008, at what was then called the PPQ Eastern Region headquarters. Since then, the meeting has been held in various locations across the United States with the intent on selecting a location that highlights a part of the safeguarding continuum, e.g., PPQ State Plant Health Director (SPHD) offices in the border states Texas and Arizona, State Plant Regulatory Official (SPRO) offices in the high risk states of Florida and California, the Miami Plant Inspection Station, and McAllen and Edinburg, Texas, with the Survey Supply warehouse and the Fruit Fly SIT program. The NCC also met at the National Detector Dog Training Center in Newnan in 2010, and again last year in 2018. This meeting is the first at a CBP facility.

Customs & Border Protection and PPQ Welcome ⬆

John Brennan, Port Director, and Steven Lewis, Assistant Port Director, welcomed the NCC to Portland and the CBP office, and provided a brief overview of the work CBP conducts in the Portland area that includes both land and maritime ports. Clint Burfitt, the PPQ State Plant Health Director for Oregon followed with a PPQ introduction.

NCC Introductions and Rotations ⬆

There were some new faces at the NCC meeting this year. Joy Goforth (SPRO representing the SPB from NC) and Chris Pierce (PSS from MO) are starting the first year of their first term. Chris had previously served on the NCC several years ago by finishing the term of Marge Rayda (PSS from ND) when she retired from government service. Brad Danner (SSC representing the SPB states), also starting the first year of his first term, was unable to attend due to prior commitments. Brad and the SPB SSCs were represented by Sherry Aultman (SSC from SC). Alison Neeley (Asst. Dir. PERAL) currently is serving as the PPQ Science & Technology

representative on the Pest Detection Management Team replacing Tara Holtz. Alison has participated in NCC meetings in the past as a subject matter expert, especially with regards to the OPEP pest lists.

This was Sherry's last NCC meeting. Sherry completed her two terms on the NCC last year, but was unable to attend the Newnan meeting. Sherry's participation this year fully completes her rotation. This meeting also is the last for Ian Foley (SSC representing the WPB states from MT). Ian is completing the last year of his second term. Thank you Sherry and Ian for your participation and valuable insights. Greg Rentschler (SPHD from IL), Megan Abraham (SPRO representing the CPB from IN), and Tiffany Mauro (PSS from NJ) are all in the final year of their first term, and are eligible for a second term.

The NCC values everyone's participation and input. While we gladly welcome new members and say fond farewells to those completing their terms, all feel that the rotation schedule is working well and keeping the NCC fresh, enjoyable, and fully capable of moving the program forward.

Meeting Overview

Everyone at the meeting was there because they represent a constituency in the CAPS community. The NCC members are the voice of the larger CAPS community so that the whole community can have ownership in the Program. While the NCC needed to bring their local and regional perspective, they also needed to think nationally, and how what was discussed, and what will be discussed in the future, will affect the program as a whole.

At all NCC meetings, everyone is equal without regard to role or responsibility; everyone's perspective and voice is respected, and needed. NCC participation as a voice for their constituency is what makes these meetings successful, and by extension, the CAPS Program successful. The NCC meeting is a safe place to speak your mind, bring up ideas, and provide feedback and input. This is where we talk through issues, and move forward with tactics that work for everyone.

NCC Bylaws Review

The NCC was asked to consider and discuss two proposed changes to the Bylaws: 1) the one person per state rule and 2) formal PPA 7721 (Farm Bill) representation. The NCC rotation schedule is over 10 years in, and the pool of available people who may want to participate may not be growing. To establish maximum national geographical diversity and perspective, the NCC established a rule where no two people on the NCC can be from the same state (excluding permanent members). The continuation of this rule may not be possible, and may exclude possible volunteers in some years. The NCC voted to approve a change in the Bylaws where,

instead of one person per state, two people can be from the same state, but need to be from different organizations. However, the NCC further decided that the NCC should 'strive' to adhere to the one person per state rule if at all possible to ensure that the exception does not become the rule. <u>Each constituency will need to keep in mind these rules and who currently is serving on the NCC when nominating their representative</u>.

Action Item (John): 1. The draft language presented at the meeting will be edited and reworded to say that the NCC will strive not to have two members from a state, but it may be necessary from time-to-time as an exception and way to allow maximum participation. The draft language will be distributed to the NCC for review before the document is finalized and posted on the CAPS R&C site. 2. The table(s) listing NCC members and rotation schedule will be updated to include member's State, and a color key added to the rotation schedule.

The second topic concerned the proposal that the PPA 7721 representative be moved to ad hoc membership instead of being permanent. This is keeping in line with NIS and Purdue representation. The NCC rejected this proposal and voted to keep the PPA representative as a permanent member of the NCC for now as a large portion of surveys are conducted with this funding. The PPA program is going through some changes, and this topic will be addressed again next year once the changes have been implemented. The NCC also requested a table that lists ad hoc members with a short descriptive paragraph.

Heather Moylett (PPQ S&T CAPS Support Lead) currently is listed as an ad hoc member of the NCC, although she participates as a member of the PDMT. S&T reorganization is still in flux, and it is not known if Alison will remain as part of the PDMT. Until these things get settled, Heather will remain in ad hoc status, and we will also address this topic next year.

Action Item (John): 1. Keep PPA representation as permanent and revisit this status next year. 2. Keep CAPS Support Lead as ad hoc and revisit next year. 3. List out Ad hoc members' titles out specifically and their responsibilities (examples: Survey Supply Procurement Program, Domestic Diagnostic Coordinator, etc.). The draft language will be distributed to the NCC for review before the document is finalized and posted on the CAPS R&C site.

2018 NCC Meeting Action Items Review

The 2017 NCC Action Items and updates were made available to the NCC in advance of the meeting so that they could be reviewed and any questions prepared. This was done to be more efficient and save time at the meeting. See [Action Items from 2018 Mtg](#) for details. Several generated enough discussion to be documented under separate headings in these Minutes, and usually with other Agenda topics. The 2018 Action Item will be copied for reference where this occurs.

CAPS and PPA 7721 (Farm Bill) Performance in 2018 ⬆

John gave his annual update on CAPS and Farm Bill Measures and Metrics. These metrics also are reported out to Congress through the APHIS budget process. The terminology used is that 'Pest Detection' comprises of CAPS and PPQ surveys funded by the Pest Detection line item. 'Pest Surveillance' is used as the overall effort of Pest Detection and Farm Bill Goal 1 surveys.

Below is a portion of the report delivered to APHIS in the annual Status of Program Report for Congress. This summarizes information in the presentation. More details are in the presentation on the CAPS R&C site.

> In FY 2018, APHIS and cooperators conducted a total of 271 commodity- and taxon-based surveys in 50 States and 3 territories (with 119 surveys conducted by States and 152 by APHIS). The program targeted 123 high-risk Priority Pests of national concern for survey in corn, oak, pine, small grains, soybean, and nursery crop commodities, as well as exotic wood boring bark beetles and cyst nematodes, among others, representing 96 percent of the target pests suggested for survey in the 2018 Pest Surveillance Guidelines. Including pests of State priority, the program targeted 259 unique pests for survey in FY 2018, surpassing its performance target of 240. Surveys consisted of multiple pests for efficiency and economy of survey, with an average of 5.6 pests per survey, 14.3 pests per State, and 2-3 surveys per State. Along with surveys conducted through the FY 2018 Farm Bill Plant Pest and Disease Management and Disaster Prevention program, APHIS and cooperators added 186 additional taxon and specialty crop commodity surveys resulting in the targeting of 381 unique pests in the overall pest surveillance effort.

Action Item (Heather, S&T): Look at Priority Pests that have not been surveyed for over the last five years. Are these pests the same each year? Why do we think the pests have not been surveyed for, lack of survey or identification methods? S&T may need to reach out to the CAPS community for more information.

Action Item (Lisa): The Survey Supply Procurement Program has had increases in Pest Detection over the last five years (from $160,000 in FY2015 to $425,000 in FY2019). The Program has received less funding from Farm Bill (high of $1.16 million in FY2016 to $620,000 in FY19). The NCC would like more details on how these requests are derived.

Budget and Funding ⬆

Sequestration in 2013 resulted in the decrease of funding in cooperative agreements by 7.8%. These levels have been maintained through 2019 (see the Measures and Metrics presentation), and are losing real value due to inflation. Salaries and benefits associated with agreements are increasing, as is the cost of everything (identification services, etc.). Several states each year

request increases in their Infrastructure agreements due to increased salary and benefits of the SSC. This additional cost gets pushed over into the Survey work plan. Over time, we will end up paying more for the State Survey Coordinator with less survey work being performed. Contributing to this has been flat funding for Pest Detection from Congress. However, due to the hiring restrictions and other factors, Pest Detection has realized a surplus at the end of the fiscal year for several years, but it has not been available to add to agreements. The PDMT has worked with PPQ management to use this money to fund additional needed projects and initiatives.

As of this writing, PPQ has not received yet the full year FY19 budget from the Department that was authorized in the appropriations bill that the President signed in February (we do not expect a decrease in funding despite the Department asking for much less). However, the 2020 budget development process has started, and because the FY19 budget is not finalized, budget calculations will reference FY18 funding. Based on FY18 funding, and the expected surplus to materialize once again, the PDMT will be looking to increase each state's cooperative agreements by 7%. The increase will become part of the 2020 Pest Detection budget submitted to PPQ management. The 7% increase likely will be applied to each state's FY19 figures. This is only fair, can be justified, and is becoming a necessity due to increases in indirect rates, salaries, promoted travel to regional plant board meetings, and other costs.

The options for applying the 7% increase are: 1) add the increase to each Infrastructure and Survey agreement, or 2) apply the increase to each state's total amount, and let each state decide where best to use the money. The PDMT has yet to decide the best approach, but option 2 is likely the better option. Option 2 will necessitate the relaxation of the funding rules in the Guidelines for 2020. Whether this change in the funding rules progresses into 2021 or not will be decided at a later date. States will be given their new amounts soon after the 2020 Guidelines are published.

Note: The FY19 Pest Detection allocation to PPQ was received after the meeting, was less than expected, and less than the FY19 budget request. The PDMT had to work with their budget analysts to find lapse salary to balance the budget before the allocation could be distributed within PPQ. This situation puts into doubt whether or not a 7% increase across the board can be achieved or whether the PPQ management team will accept it. This will be a fluid situation as the FY20 budget is being developed, and the PDMT will communicate updates to the CAPS community as things are settled.

2020 National Pest Surveillance Guidelines   ⬆

Changes to the 2020 Guidelines likely will be minimal, with the exception of the funding rules discussed above and annual changes to the pest lists discussed below. However, there will be some clarification of guidance concerning PPQ surveys, ADODR responsibilities, and data entry, among others. Some of these topics will be considered under this and other headings below.

PPQ Pest Detection Guidance

Starting in FY19, it became mandatory that PSSs fill out the PPQ Survey Summary Form for Pest Detection surveys. This requirement will continue for 2020 and future years. There are no work plans for these surveys, so this is the only way to capture what surveys PPQ conducts with Pest Detection funding. The selection of surveys and survey targets is at the discretion of the SPHD and PSS, in collaboration with their state CAPS committee. Ideally, PPQ Pest Detection surveys should complement what is being done in CAPS and PPA surveys. Experienced SPHDs said that they would appreciate more guidance on what surveys should be done with Pest Detection funding. General guidance on PPQ Pest Detection surveys will be included in the 2020 Guidelines.

PPQ surveys should follow similar guidance as both CAPS and PPA surveys. The surveys should be multi-pest and focus on pests on the Priority Pest List. There are some historical single pest surveys (Khapra beetle – limited budget; Cactus moth – PPQ has an agreement with Mexico to do surveys); however, these should be the exception, not the rule. Over time, John and Lisa will review the Survey Summary Forms to look for surveys that do not fit the overall mission of Pest Detection (e.g., single-pest surveys), and suggest changes. What we do not want is for Pest Detection to be a dumping ground for miscellaneous pests or just because these surveys have always been done in the past.

Generic Lures

In the past, there were three generic lures that were used for the EWB/BB survey; 1) ethanol, 2) ethanol + alpha pinene, and 3) Ips lure. Over the years, we have moved towards using specific lures that matched up with our targets, as many of these were found to use pheromones or different host volatiles. One of the lures, ethanol only, is a good generic lure for picking up cerambycids, ambrosia beetles, and other species of concern. Currently, ethanol only is approved only for the target, *Trichoferus campestris* (Velvet longhorned beetle), and this method is being phased out as we are able to bring on a more effective lure. There are several targets that use it in combination with alpha-pinene. However, having alpha-pinene with it may deter the hardwood pests. We have had interest for several years on this topic from Pest Survey Specialists who would like to hang an ethanol only trap in conjunction with their other traps for EWB/BB surveys.

The purpose of a generic lure is to provide a check on the background population of the survey area. As such, the generic lure is not for negative data, but to identify something that should not be there that may escape detection with more targeted lures. Target species cannot be assigned to a generic lure, thus negative data may not be valid in the manner that we define valid negative data. It can, however, be a powerful tool for positive data for species we may not know to target or do not have the chemistry to target.

The first generic lure to roll out as part of our survey methodology will be ethanol only. Lisa will work with Cindy and David on how to record a survey activity in the Survey Summary Form without a target. We also have talked about doing this with some of the general cerambycid lures that may bring in certain tribes of cerambycids that we currently do not have specific lures or targets.

A main concern in using generic lures is from the identification standpoint. We will need to develop guidance that identification needs to be taken into consideration when deploying generic lures. If you currently use an identification service like Carnegie or MSU, then it will actually be a good bang for our buck to place out ethanol traps. These groups process raw samples and look for any new species, not just targets. However, if the state does their own ID or on the PPQ side, if they have to screen samples, then this could create a lot of work, as the ethanol lure will bring in many non-target species. For now, deploying a few strategically placed traps with an ethanol lure may be a good practice as a check, but too many will overwhelm the identification process. Until we get more solid guidance drafted and identification issues straightened out, please be judicious when using traps with only ethanol lures. For now, these are considered outside the normal survey planning for target species. Official guidance may not be ready until next year.

Action Item (Lisa, Heather): Revisit discussion of ethanol lures during survey season on a call with SCCs. Put together ethanol trap guidance and discuss adding this to 2021 guidelines at 2020 NCC meeting. S&T will consider developing guidance for executing a generic lure survey.

Guideline Files
In 2008 the National Survey Guidelines consisted of the main Guidelines document and five appendices. Since then, the Guidelines have grown so that the 2019 Pest Surveillance Guidelines consists of the main Guidelines document and 52 supporting stand-alone files. Maintaining these files year after year is becoming a logistical and administrative issue. Many of these files simply roll over from one year to the next, but each is reviewed, the file renamed to the current year, and posted on the current Guidelines page of the CAPS R&C. Versioning also becomes an issue.

Not all files need to remain on the current year Guidelines page as the most current, or the latest version, is accessible through the Resources page. The way the CAPS R&C is set up is that the most current version, regardless of when it was last updated, will always be on the Resources page. We have been maintaining these files on the current Guidelines page so that, if necessary, we could go back to a previous year and know what the current guidance was for that year. In reality, this is a rarity. We do recognize, however, that some files must be updated every year, and we will gladly do that if they are being used in the states and field. The question is, "What files do you use every year that are currently on the 2019 Guidelines page, and need to be either updated or found in one place for reference?" What files do we keep on the current year Guidelines page, and what files need only reside on the Resources page?

Action Item (NCC): The NCC and their constituencies should review the 2019 Guidelines page and determine which files are used every year and/or need to be on the Guidelines page for reference, with the result that all other files will be found on the Resources page.

Action Item (Cindy, David): The NCC requested that the date be included within the link to the work and financial plan templates so they would know which version was the most recent (several changes were made and new versions were posted in 2019).

Action Item (John, Lisa): Request that a footer be inserted into the work and financial plans and accountability reports with "Last Updated and the Date."

Work Plans and Cooperative Agreements   ↟

2019 cooperative agreements have been put on hold by the Department pending review by the Under Secretary. At this time we do not know what the plan is or the timeline for being able to finalize the agreements. Lisa is continuing to amend CAPS work plans and approve PPA work plans in the order they are received, and the agreements staff is preparing documentation to finalize CAPS agreements to the full value and develop PPA agreements up until the point that they go out the door. We realize that some states cannot function, do work, or hire under a pre-award. This will cause hardships as surveys need to get underway, but is out of our control and at the Department level. We will communicate out to the NCC and CAPS community as soon as we hear something.
Note: On April 18, 2019, The Department issued updated guidance on the cooperative agreement review process. All CAPS and PPA 7721 agreements could now be executed without further delay, and instead, undergo a post-review process. That process has not been defined as yet.

2020 work and financial plans will be due around September 6 or 13. This is similar to last year, and after PPA 7721 suggestions have been submitted. Purdue is working on an online work plan template to replace the Word version. The plan is for this to be available for 2021 CAPS and PPA work plans, not for 2020.

Action Item (Lisa, Heather, Cindy): A webinar will be developed to focus on changes to the Guidelines, pest lists, Accountability Report, Survey Summary Form, and other topics and issues that should be considered when developing 2020 work plans. Look for an announcement for an early June webinar after the 2020 Guidelines are published.

Guidance for Selecting Survey Names
Guidance for Selecting Survey Names has been posted on the CAPS R&C website on the Resources and 2019 Guidelines pages. The CAPS community is asked to follow this guidance when naming surveys, work plans, and PPA suggestions. Extraneous or obscure survey names

hinders reporting and matching surveys in the Survey Summary Form with the PPQ Pest Detection spending plan. This guidance is even more important with PPA suggestions as it facilitates both the review process and communication within the eventual spending plan. Think of survey names as short, standardized descriptions that make it easier to handle when a large number of survey or suggestions need to be managed and reports developed.

Guidance for Bundling Pests Removed from the Priority Pest List

Each year, S&T CAPS Support evaluates and updates the Priority Pest List for CAPS and Plant Protection Act 7721 Goal 1 early detection surveys. The Objective Prioritization of Exotic Pests (OPEP) model and the Survey and Diagnostic Feasibility Assessment (formerly called Post-assessment) are used to objectively review the potential impacts of a pest and the feasibility of survey and identification, respectively. Over the past few years, S&T has used this process to evaluate the pests added to the Priority Pest List prior to the development of the OPEP model and the Feasibility Assessment. If a current CAPS pest is predicted to have a low impact or lacks effective survey and/or identification/diagnostic methods, it will be removed from the Priority Pest List. In addition, if a pest is deregulated, it will also be removed from the Priority Pest List. The following is guidance on whether or not these pests are suitable for bundling into CAPS and Plant Protection Act 7721 Goal 1 surveys.

1. Federally deregulated pests
- If effective survey and identification/diagnostic methods are available, the pest may be bundled.
- If the pest does not have an effective survey or identification/diagnostic method, then the pest **should not** be bundled.

2. Pests without effective survey or identification/diagnostic methods
- If the pest was removed from the Priority Pest List because it does not have an effective survey or identification/diagnostic method, then the pest **should not** be bundled.

The pests predicted to be high impact are a priority for research and methods development. Once effective methods are available, the pest will return to the Priority Pest List.

The Summary of Pest List Changes document is included in the National Pest Surveillance Guidelines each year. The summary provides information about the status of priority pests and states whether they are appropriate for bundling. This information is also distributed to the National CAPS Committee and Pest Survey Specialists via monthly calls. When preparing work plans, please refer to Summary of Pest List Changes document. If pests that are identified as "not appropriate for bundling" are included in work plans, the National Operations Manager for Pest Detection will ask for their removal during the work plan review process.

<u>Work Plan Review - Expectations</u>
Going forward, certain expectations will have to be met when Lisa reviews work plans: 1) The current year template (now marked with the year) will have to be used; 2) The Survey Summary Form and work plan must match with surveys and target pests; 3) Surveys must follow Bundled Pest Guidance; 4) Data entered and the Accountability Report is complete (pending the discussion below); and 5) Other instructions as communicated on the monthly NCC calls.

Accomplishment and Accountability Reports   ⬆

- 2018 Action Item (PDMT): Message to Pest Detection ADODRs. All <u>ADODRs shall check both the CAPS and Farm Bill Accountability Reports when deciding to approve an Accomplishment Report and a final request for reimbursement</u>. If NAPIS data is missing in the Accountability Report, then an explanation needs to be present in the Accomplishment Report justifying why the data is not in NAPIS. Otherwise, the Accomplishment Report and final request for reimbursement should not be approved.

This topic generated considerable discussion. The main gist of the discussion revolved around the question of <u>what to do when the Accomplishment Report is due (90 days after the conclusion of the agreement) and results are not back from the identifier yet</u>, thus there is no data entry into NAPIS. The discussion centered on ADODR responsibilities and how to determine if a cooperator either completed the survey but does not have results yet to enter into NAPIS vs. a cooperator that has the data but has not yet entered it into NAPIS vs. a cooperator that did not do the survey and did not submit a change request to delete the survey from the Survey Summary Form.

A couple of proposals were suggested so that the information needed to evaluate the Accomplishment Report appears in the Accountability Report on the CAPS R&C site. Since the Accountability Report matches information from the Survey Summary Form and NAPIS data entry, a suggestion was made to add a comment box, check box, and/or other types of fields to the Survey Summary Form to indicate whether samples are pending or not, e.g., complete or pending. This would then show up at a glance in the Accountability Report in some fashion. The Accomplishment Report could then proceed, signed and entered into ezFedGrants, with the understanding that results will be entered into NAPIS as soon as they are received. Once an Accomplishment Report is loaded into ezFedGrants, it is difficult to change.

An alternative approach was suggested whereby a) negative data or b) a separate code for a pending identification would be entered for any identifications that are pending. This would then show up in the Accountability Report as a completed survey with data entry. The drawbacks to this approach are: 1) Will people remember to go back and change the entry a) if a positive identification is returned or b) change the pending code to the correct value? 2) It may not be

possible to enter negative data without the trap information and a confirmation data, but a screening date may be useful. Again, the record will need to be changed once results are known.

Action Item (John. Lisa, David): John and Lisa will discuss possibilities with the staff at Purdue to determine if these or other suggestions are technologically feasible so that the end result is some sort of indication on the Accountability Report that the survey is complete and data is pending results from an identifier or diagnostician (adding a "Pending" column to the report, for example). Solutions will be discussed on subsequent monthly NCC calls.

Action Item (NCC members): If there are Institutions or PPQ Domestic Identifiers that have a continued problem supplying late identification results, let John and Lisa know. We need to deal with the problem at the source. If the workloads of the institutions or identifiers are too great, we need to better manage the number of samples sent to them.

ADODR Responsibilities   ⬆

- 2018 Action Item (Lisa): Lisa will review the Accountability Reports ahead of when work plans are due for the next year. States with missing data without justification will have their work plans placed at the bottom of the pile, and may not be reviewed until data entry has occurred.

The NCC discussed adding to the ADODR responsibilities in the 2020 Guidelines that it is incumbent on the ADODR to check for data entry into NAPIS throughout the year, especially for previous year's data. If data is missing when closing an agreement, the ADODR should communicate with the cooperator that the data needs to be entered before a new agreement is developed. For example, when developing a 2020 agreement, all data from 2018 surveys need to be entered if the 2020 agreement is to go forward. This should encourage better use of the Accountability Report by SPHDs and SPROs for quickly determining compliance. As each state interacts within the state differently, it is important that all (SPHD, SPRO, PSS, SSC) are aware of the data entry status of their surveys and act promptly to correct any deficiencies. Lisa, as the National Operations Manager, will be implementing this policy for 2020 work plan reviews. The ADODR should check the status of data entry before the next work plan is submitted to Field Operations.

Action Item (John, Lisa, NCC): 1. Language will be added to the 2020 Guidelines indicating that it is the responsibility of the ADODR to ensure that data entry from previous surveys is entered before a new work plan is forwarded or agreement developed. 2. Work plans will not be approved at Field Operations unless data entry is complete and up-to-date, resulting in no funding for the current year unless a cooperator is in compliance. 3. Draft language will be distributed to the NCC for review, and well as to PPQ management. 4. Successful updating of the Survey Summary Form and Accountability Report based on the discussion in the previous

section will facilitate knowledge of the status of data entry. 5. NCC members should discuss this topic at the Regional Plant Board meetings.

Action Item (John, Lisa): John and Lisa will begin to have individual conversations with states that are having difficulty meeting these requirements.

Action Item (John, Lisa, Cindy): A webinar will be developed to aid the ADODR and ROAR in understanding the Accountability Report and Workflow of the Survey Summary Form, and how the Survey Summary Form interacts with NAPIS data entry to produce the Accountability Report.

Data Entry – Roles and Responsibilities

This topic appeared several times in the Agenda, and was discussed thoroughly for almost a half day. These conversations addressed and somewhat modified the Action Item from last year, copied here for reference.

- 2018 Action Item (NCC): Message to PSSs and SSCs. The SSCs and PSSs (or the person fulfilling that role in a state) should discuss data entry. The PSSs should make sure that all Pest Detection-funded surveys are captured in the Survey Summary Form. The SSC will then be able to download a My Surveys spreadsheet for the PSS to prepare data before sharing with the SSC. Both the PSS and the SSC should work together to ensure all of a state's Pest Detection/CAPS data is correctly entered into NAPIS.

The discussion on data entry was about 1) who does what, 2) what needs to be done, and 3) what goes where.

Data: Where Does It Go and Who Is Responsible?
1. *CAPS data*
This data is collected by the State/SSC or other state survey staff. It is the SSC's responsibility to prepare and upload this data into NAPIS.

2. *PPQ Pest Detection data*
This data is collected by the Pest Survey Specialist or other PPQ staff. It is the PSS's responsibility to prepare the data and send to the SSC for upload into NAPIS.

3. *PPA Goal 1 Survey (Farm Bill)*; traditional CAPS cooperator*
This is a survey proposal that was submitted by the State/SSC. The data is collected by the SSC or other state survey staff. It is the SSC's responsibility to prepare and upload this data into NAPIS.

4. *PPA Goal 1 Survey (Farm Bill)*; non-traditional cooperator (see process below)*
These are survey proposals that were submitted by other intuitions than the typical State/SSC. The non-traditional cooperator will complete the survey. This cooperator will prepare the data for the SSC to upload into NAPIS. The SSC should provide the cooperator with survey templates before the survey season begins.

5. *Other PPQ agreements*
These are surveys for other PPQ programs and line items through agreements (not Pest Detection or PPA). The data should be entered into the required database listed in the agreement. The data should be entered by the SSC or whoever is listed in the agreement. In some instances, local PPQ staff may assist in data entry, if there is agreement by the SPRO, SPHD, PSS, and SSC. The data may also be entered into NAPIS, if the SPRO, SPHD, PSS, and SSC determine that this is appropriate.

If the state CAPS committee or a PPQ agreement determines that the SSC will need to enter data into IPHIS, IPHIS training may be needed. The SSC should first approach their PSS or SPHD for assistance to help locate IPHIS training.

6. *Other PPQ programs (by PPQ staff)*
This is survey work performed by PPQ staff for other PPQ programs. The data should be entered into the required database for the program. The data may also be entered into NAPIS, if the SPRO, SPHD, PSS, and SSC determine that this is appropriate. If this is determined, the PSS should prepare the data and send to the SSC for upload into NAPIS.

Type of Survey	Required database	Who enters data
CAPS	NAPIS	SSC
PPQ Pest Detection	NAPIS	PSS prepares for the SSC
PPA Goal 1 Survey (Farm Bill)*; traditional CAPS cooperator	NAPIS	SSC
PPA Goal 1 Survey (Farm Bill)*; non-traditional cooperator	NAPIS	Other cooperator prepares data for SSC
Other PPQ agreements	As stated in agreement. NAPIS is optional.	SPRO, SPHD, PSS, and SSC to determine
Other PPQ programs (survey work performed by PPQ staff).	Per Program guidance. NAPIS is optional.	SPRO, SPHD, PSS, and SSC to determine

*For National Priority Surveys, as denoted in the [Survey Summary Form and Data Requirements for Funded Surveys](#).

PPQ Program Surveys

For PPQ program surveys performed by state cooperators or PPQ staff, states need clear guidance on which databases are required. States need something similar to what has been created for PPA Goal 1 Surveys.

Action Item (Eric, Greg): With the SPHDs, make a request to PPQ Field Operations (maybe to the Data Steward?) to develop a table with a list of all PPQ programs and their corresponding required databases.

Process for Non-Traditional Cooperators Conducting PPA Goal 1 Surveys to Fill Out the SSF and Have Data Entered:
- When the PPA Spending Plan is announced, the ADODR will need to email the non-traditional cooperator and the SSC, effectively matching them up to work together and identifying their responsibilities.
- The SSC will send the cooperator an Excel version of the SSF for them to complete.
- The SSC will enter this into the PPA SSF.
- The cooperator will need to prepare their data for the SSC (what form can be sent, "My Survey?").
- The SSC will enter the prepared data into NAPIS.

Action Item (Cindy, David): Create a downloadable Excel file for the Survey Summary Form. The SSC can send this to non-traditional cooperators for PPA surveys.

Action Item (Cindy, David): Add the 11 targets in the PPA Honey Bee Survey to the SSF to auto populate.

Survey Supplies ⬆

Survey Supplies Acting National Policy Manager

Velia Fagetti continues in her roles as the acting National Policy Manager for the Survey Supply Procurement Program. During her detail, Velia will focus on domestic survey supply needs and procurement activities. Velia currently is working on the Mexican Fruit Fly Trapping Program as a Domestic officer in McAllen, TX. The National Policy Manager position has been announced and will likely be filled in the coming weeks.

Note: Paul Ijams (paul.m.ijams@usda.gov) has been selected to fill the permanent position as the National Policy Manager for the Survey Supply Procurement Program. Paul will begin to transition into the position on April 29.

Meeting at Moore Airbase

The Survey Supply Procurement Program had a very successful two day meeting at Moore Airbase this week. Velia Fagetti participated in her TDY role with the rest of the team. The team discussed long-term staffing at Moore Airbase, developing a process to incorporate lure expiration date into our inventory and shipping practices, and the team's internal and external communication plans.

Staffing at Moore Airbase

At the meeting at Moore, we established our critical long-term needs in terms of staffing:

1) Distribution Specialist
2) Material Handler
3) Material Handler

Currently, the Distribution Specialist position is vacant, but we have had several rotations of staff through this position since January. It is a high priority to fill this position. One of the two Material Handler positions is filled and one is vacant. We are pursuing strategies to quickly fill the vacant position.

December – May is the busy season for shipping orders. June – November is the busy season for receiving new products. There is no true "slow season." We realized that we need three staff in the warehouse full time, year-round to provide the level of service we want to provide.

This year we successfully used detail assignments to fill the vacant Material Handler position and to assist during the busy shipping season. We had two employees on detail in February, we have two more for March, and one for April. This has worked out well and we will plan to continue to use this in the future if needed.

Lure Expiration Dates

We had a good discussion at the Moore Airbase meeting on lure expiration dates. We are developing a process to better capture expiration dates in our workflow.

- We will now capture lure expiration dates as part of inventory process (completed twice per year).
- The warehouse staff will continue to check expiration dates on products as they ship them out.
- The Program will work closely with the lure vendors and the S&T Otis lab to determine when products will expire.
- Program leadership will provide guidance to warehouse staff on when to no longer ship a product.
- We will request that the manufacturer apply lure expiration date labels to individual lure packets. This may be challenging when we purchase small orders "off the shelf" but should be possible when we have contract with the vendors.

Plant Protection Act 7721 (aka Farm Bill)   ⬆

Feridoon presented an overview and summary of the 2019 cycle in his presentation PPA 7721 (Farm Bill). This pptx file is posted on the NCC page of the CAPS R&C under the Portland meeting. A funding slide from the presentation provides a nice summary for FY19.

FY19	Requested		Supporting	
Goal	**Projects**	**Funding**	**Projects**	**Funding**
1 Analysis	62	$6,069,730	18	$2,110,939
1 Survey	215	$23,075,492	150	$14,438,976
2	5	$7,990,612	5	$5,749,907
3	174	$13,168,814	50	$6,386,504
4	32	$3,107,992	14	$2,016,350
5	121	$9,235,063	61	$3,950,000
6	182	$35,847,682	68	$12,518,619
**RR	16	$18,975,777	17	$16,189,338
NCPN	30	$7,583,876	26	$6,024,227
Total	**837**	**$125,055,038**	**409**	**$69,384,860**

For the FY20 cycle, the time frame will be similar to FY19; a 7 week open period for suggestions starting in early July, a 3-week period for SPHD, SPRO, and SME review, followed by a 6-week window for goal team reviews. The Team hopes to have a draft spending plan for PPQ review by mid-November, with Agency and Departmental review following. Release of the PPA Spending Plan is anticipated for January or February based on Departmental politics.

The Team held a program review meeting the week before the NCC meeting in which many things were discussed, many about how the program functions internally. We likely will not see much change, but the program should run more smoothly internally going forward.

Note: Sharla Jennings (sharla.m.jennings@usda.gov) has been selected as the new National Policy Manager for the PPA 7721 program, replacing Mike Tadle. Mike has taken another position assisting the Associate Deputy Administrator with several projects. Sharla will begin transitioning into the position on April 29.

Identification / Diagnostic Issues   ⬆

Coordination roles and responsibilities formerly were distributed among all three PPQ Core Functional Areas (CFAs). Over the last several years as personnel in all CFAs have changed, the network of support and coordination of domestic identification is not what it once was. Without this critical infrastructure in place, we are limited to only being able to provide the status quo of identification support. John, Lisa, and Tara brought this to the attention of their leadership in the fall of 2018. Pest Detection leadership has been meeting with National Identification Services over the winter and is working on a more sustainable solution. There is a meeting planned in early May to hopefully resolve some of our needs and issues.

A current trend that we have observed since CAPS agreements are stagnant, is that states are looking to recoup their costs by no longer processing their own samples. Several states in 2018 requested to begin sending raw samples to PPA-funded institutions. This now causes us to pay up to $25 per sample, when before, these states were performing this work themselves. Another state, who used to process their samples down to species, will no longer perform this work. This state rarely sent on any suspect positives to identifiers, and now they will send raw samples.

We need to look into and overhaul how samples are charged back to agreements. Currently, some states perform the work themselves and either absorb the cost or pay some of their agreement to staff. Some states pay to contract out the work to universities. Some states do not include any cost and request assistance for raw samples, again at a cost to us at up to $25 per sample. We need to better manage and capture the financial costs of this support. In PPA suggestions and work plans, we may need to make it mandatory to capture the cost of sample processing so that it will be included in the agreement.

We know of some institutions who can ramp up or can provide specific types of services. How do we know if states would like to start doing a new survey, but are limited to not knowing if their samples could be processed? How would we pay for this? We are hitting a wall with the Pest Detection budget. Do we make more use of PPA funding? If we knew of the need, we could add it to the Implementation Plan. But then, we are not assured of getting it/not assured that states would request to do that survey. It is a Catch-22 situation. Do we allow the state to contract that work in the agreement on a fee per sample basis with cooperating institutions? That way, only funded survey projects would need to "bill" their work to the institution. But this may also cut back on the survey work being done.

This type of coordination requires a dedicated PPQ staff person to coordinate and oversee this work. We do not have the capacity right now to oversee this. It listed it as a priority for when there is a dedicated staff person or team to oversee this work. This is all part of the conversation we will have with NIS in May.

There also is the question of identification and/or screening training. What is the need in the states? What screening aids are needed? Everyone conducting screening of samples should have the necessary training, skills, and aids to help them in their work. How do we accomplish this?

If someone in the community can identify a need for training and coordinate with an appropriate institution and interested states, John and Lisa would be supportive. This would make for a good PPA suggestion. As it is hard for SSCs to find additional funds for travel to training, it would be best if a travel budget for participants could be included in the suggestion.

Action Item (NCC): The NCC should canvass their constituency to determine: 1. What identification and/or diagnostic training is wanted/needed; 2. What screening aids are wanted/needed; 3. What are the effects of the identification situation in your state, or how identification issues are affecting survey and financials. John and Lisa will consider developing a survey to collect this information, but the conversations within the constituencies can start now.

Science & Technology CAPS Support   ⬆

Alison and Heather presented a range of topics in support of CAPS including a summary of proposed changes to the Priority Pest List, Approved Methods for Pest Surveillance (AMPS), coordination of research needs, and ad hoc science support for pollinator bycatch, traps and lures, and other topics. The CAPS Science Support presentation can be found on the NCC page of the CAPS R&C site under the Portland Meeting.

S&T Realignment
Prior to 2018, the S&T Ft. Collins lab in Colorado coordinated CAPS Science Support. In March 2018, CAPS Science Support moved to the Plant Epidemiology and Risk Analysis Lab (PERAL) in Raleigh, NC. Science support for CAPS remains a shared activity across PPQ Science & Technology (S&T) and includes PERAL, Otis and Beltsville labs. The move to PERAL increases the capacity of the S&T CAPS Support Team, which now includes an Assistant Director, Team Lead, Biological Science Technician, and access to a large staff of analysts. In conjunction with the Pest Detection Management Team, the team revised the CAPS Process and Priority Pest workflows to increase efficiency and maximize resources between the PERAL, Otis, and Beltsville labs. The "Cooperative Agriculture Pest Survey (CAPS) Process Flowchart" and the "Priority Pest Workflow" are in the Supplemental Info Booklet available on NCC page of the CAPS R&C site under the Portland Meeting.

CAPS Datasheet Stakeholder Survey
CAPS Pest Datasheets provide pest-specific information to the CAPS Community to support early detection surveys. The datasheets are formatted as PDFs and available on the CAPS Resource and Collaboration website. Once posted, it is difficult to update datasheets regularly. The S&T CAPS Support Team is exploring new ways of providing pest-specific information to the CAPS Community. They are especially interested in closing information gaps and improving the ability to update information promptly. Before making any changes, the team wants to hear from the CAPS Community. A stakeholder survey will be used to gather feedback from stakeholders. The feedback is important and it will help the team better understand information needs and improve the presentation and delivery of pest-specific information to the field.

A 20-25 question survey (mostly multiple choice) distributed through the CAPS Community Forum on May 21, 2019.

Action Item (Heather): Heather will write an explainer for the Datasheet Stakeholder Survey and send it to the NCC before Regional Plant Board meetings begin. Plant Board representatives will announce and discuss the upcoming datasheet stakeholder survey at their respective meetings. This will provide community members time to consider their information needs prior to taking the survey.

OPEP Model

Alison reviewed for the NCC the Objective Prioritization of Exotic Pests (OPEP) framework which includes models used to assess and prioritize pests based on evaluation of risk. The OPEP Impact Assessment predicts the potential impact (e.g., direct impacts to any host) of pests should they become established in the United States. There are separate models for arthropods and pathogens. A mollusk model is in development. The Likelihood of Introduction (entry + establishment) model will be added this year. In the future, an economic analysis will be added that will include survey feasibility and cost effectiveness. More detailed information on the OPEP framework is included in the presentation.

OPEP Impact Assessment summaries for each pest are available on the PestLens website (pestlens.info). Alison gave a demonstration of PestLens website and showed the NCC where the summaries, as well as other pest specific information/reports were located. The PestLens User Guide is included in the Supplemental Info Booklet.

Pest List Changes

Heather discussed proposed changes to the Priority Pest List for the 2020 Guidelines. Twenty-one pests were proposed for removal. Thirteen of these pests will be removed based on predicted impact, distribution in the U.S., and/or regulatory status. Four of the twenty-one pests lack appropriate survey or diagnostic tools, and if removed would be added to the research list and identified as needs in Goal 3 of the PPA 7721 Implementation Plan. The remaining four pests presented had justification for removal but also significant reason to remain on the list. The discussion will inform the final changes to the Priority Pest List.

The Guidance for Bundling Pests Removed from the Priority Pest List (as discussed above under the Work Plans and Cooperative Agreement) was further discussed and clarified. The take-home message is that if a former pest lacks effective survey methods and identification capability, then the pest should not be bundled in a survey. The Summary of Pest List Changes document included in the National Pest Surveillance Guidelines will indicate whether a pest is appropriate for bundled survey.

While reviewing the pests needing research for methods development, the group discussed whether molecular protocols for pathogens must validated by Beltsville before the tool can be offered as an approved method. Should pests be removed or withheld from the Priority Pest List if a good protocol is published and the states have the capacity carryout the diagnostic tests?

Action Item (Heather): Heather will work with the PDMT, Beltsville, and NIS to determine whether validation of molecular protocols is required before relevant pathogens are added to the Priority Pest List.

Apple/Pear Commodity Manual

The Apple/Pear Commodity Manual and Pest List is in development. Twenty-two pests were identified as candidates for the pest list. The OPEP impact assessment for these pests is underway, and the survey and identification feasibility assessment is pending. This will be our first new manual in quite some time. More than a handful of states annually survey in apple orchards, and this new manual will support those efforts.

Approved Method Updates

Heather reviewed changes to the Approved Methods for Pest Surveillance (AMPS) for the 2019 season and for the 2020 Guidelines. The changes discussed are available in the presentation. They will also be distributed as part of the National Survey Guidelines.

AMPS Update: Fluon-coated cross-vane panel traps and multi-funnel traps (8 and 12 funnels) are in stock at the survey supply warehouse. However, the inventory is limited so it is not possible to replace all traps at this time. Please follow this guidance:

Cross-vane panel traps

New orders for cross vane panel traps in 2019 will receive the fluon-coated cross-vane panel traps. Please keep in mind that we do not have enough traps in stock for everyone to throw away their non-coated traps and request coated traps. These traps are expensive ($30 per trap) and we cannot afford to have everyone request replacement of their non-coated traps.

At this time, fluon-coated cross vane panel traps are only required for *Callidiellum villosulum* (brown fir longhorned beetle) and *Trichoferus campestris* (velvet longhorned beetle); therefore, you do not need to buy these new traps for all of your other targets. If you are specifically surveying for one or both of these targets you may place an order for these traps.

If you need additional traps or your traps are near the end of their life expectancy, then you may place an order for new traps. Please be mindful of the needs of others and the cost of these traps and only order what you need at this time.

For other targets, it is important that you continue to use cross vane panel traps you have in stock throughout the full lifecycle of the traps. You may apply Fluon® or Teflon™ yourself to the traps in your inventory, using the guidance developed by S&T:

Francese, J. and Moylett, H. 2017. Guidance for applying fluoropolymers to panel traps

Multi-funnel traps (8 and 12 funnel)

Fluon-coated multi-funnel traps are also in stock; however, the Survey Supply Procurement Program will exhaust the remaining stock of untreated multi-funnel traps before shipping fluon-coated multi-funnel traps.

Fluon-coated multi-funnel traps are not currently required for any Priority Pests. Please use the multi-funnel traps you have throughout their full lifecycle before ordering new multi-funnel traps. Orders for multi-funnel traps placed during the 2019 open period will receive untreated multi-funnel traps.

Trap Product Names will not change in the IPHIS Survey Supply Ordering System.

Trap Product Names:
> Cross Vane Panel Trap, Black
> Black Multi-funnel Trap, 8 Funnel, Wet
> Black Multi-funnel Trap, 12 Funnel, Wet

Action Item (Heather): Heather will work with Joe Francese (Otis) to develop a guide for fluon-coated traps. The guide will include instruction on proper trap care and storage, telltale signs of degradation, how to manage your stock of traps, and useful tips and tricks for using the fluon-coated traps.

New Screening Aids

The PPQ Identification Technology Program (ITP) and Colorado State University produced seven new screening aids supporting eleven species. Nine species are CAPS targets. The screening aids are available on the Taxonomic Services page on the CAPS R&C website under the References tab. The list is in the CAPS Science Support presentation.

Lure Cross-Contamination

Recent exploratory research from the US Forest Service found that cross-contamination can occur when lures are stored within the same container (e.g., bag), even in the freezer. This has implications for the CAPS program. To determine whether additional guidance and/or research is needed, S&T CAPS is gathering information about storage conditions at the warehouse and in the field (see questions below).

Ahead of the NCC meeting, Heather sent three questions to the NCC and asked that they discuss with or distribute to their staff/constituents.
1. Storage practices after opening manufacturer packaging.
   a. What types of containers do you use for lure storage (e.g., mylar bag, sandwich bag, glass jar, plastic container, etc.)?
   b. Are lures components stored separately, by target, or comingled?

2. How are lure components stored short-term (during the survey season (days to weeks)) versus long-term (between the survey season (months, years))?
3. General observations – are there storage practices you have questions/concerns about?

At the NCC meeting, Heather gave a brief update on lure storage at Moore Warehouse and S&T's tentative plan for addressing lure cross-contamination.

All lures are stored in freezers at Moore. Manufacturer packaging is not broken down. Lures are stored and shipped in the manufacturer packaging. If a state orders an odd or small number of a lure, to avoid opening the package, the warehouse staff will round up to the number included in the sealed package. Not all lures are packaged in Mylar. If found to be necessary, SSPP will request the manufacturer begin shipping in Mylar.

Moving forward, S&T CAPS will evaluate whether current practices, types of lures, or particular situations warrant research or guidance. Some examples include:

- Not all lures are shipped to Moore in Mylar. Should they be?
- Are any of the lure components cross-inhibitory?
- Have identifiers (i.e. Carnegie and Mississippi State) noticed any unexpected species in samples?

If deemed necessary, research will be conducted and/or guidance documents will be developed. If cross-contamination is found not to be an issue, no further action will be taken.

Action Item (Heather): Heather will work with Lisa to contact identifiers about unexpected species in samples. She will also work with Otis to determine whether lures shipped in netting should be shipped from the manufacturer in Mylar. If so, she will notify the Survey Supply and Procurement Program of the need and ask that the requirement be communicated to the manufacturer.

Pollinator Bycatch Update
Heather presented the current draft of the Pollinator Bycatch Update document. The draft includes recommendations for the 2019 survey season, pollinator bycatch samples, and pollinator bycatch research. The Pollinator Bycatch Update will be finalized distributed soon.

Note: Until scientific evidence is available, tricolored bucket traps are the only color combination approved for use in CAPS surveys. Previous guidance stated that green traps (green lid, funnel, and bucket) would be available on a case-by-case basis. At this time, green traps are no longer offered as an alternative due to lack of efficacy.

Purdue Update   ⬆

Cindy presented an update for the work ongoing at Purdue for [CAPS Information Services](#).

New CAPS Resource & Collaboration Website
Purdue is in the final stages of developing a new CAPS R&C website. Roll out of the new site will occur soon. The Purdue Marketing and Media Department aided in the development of the new look and improved navigation. This has been a major software update and will allow users some customization with log in. The Quick Links boxes on the left-hand side of the page will allow users to pick what links they want to appear. The default is six, but can be more. Are there choices that are not present in the list that you would like? As with the present CAPS R&C, the site will be public accessible outside of a log in.

Online Work Plans
Cindy provided a handout of a mock online interface for work plans. As an added benefit, this is an opportunity to combine/integrate the work plan with the Survey Summary Form and Survey Planning for facilitating survey information. The goal is to produce a pdf file suitable for signatures and upload into ezFedGrants. They are using some prior year's work plans to test the interface and as a foundation for developing drop-down boxes. Other benefits are that John and Lisa will be able to pull similar information from all work plans for reports and analysis (ex: travel costs or indirect rates). Right now, this has to be manually pulled from all pdfs. This effort requires a great deal of software development, so it will not be available for 2020 work plans (sorry, Ian), but Purdue is looking for it to be available for 2021 CAPS and PPA Goal 1 Survey work plans.

Action Item (NCC, CAPS Community): Before an online work plan can be implemented, PPQ and states need to consider their processes for reviewing, editing, and signing work plans before submission. At what point in time or at what stage of the review process would it be best to fill in the online form? Will it work best to fill in the online form initially and have it produce a Word document for review, or initially use a Word template for the review process and fill in the online form as the last step? Should the online form have a work flow for review (similar to the SSF review process) and be editable? Who should have the rights/responsibility for filling in and/or editing the online form? These and other process questions need to be answered to facilitate use in the states.

Survey Summary Form
The current Survey Planning Page and Survey Summary Form (SSF) are set up by State. With CAPS, there usually is only one entity within that state, so there is not much of an issue. However, there are a couple of instances where that is not entirely true, even more so with PPA 7721, where there may be multiple entities or organizations within a State conducting surveys.

With CAPS, two instances currently are present where the NCC needs to decide how the Survey Planning page is structured. First in Georgia, both the Georgia Department of Agriculture (GDA) and the Georgia Forestry Commission (GFC) conduct EWB/BB surveys and have separate CAPS agreements. The second is in Wisconsin where the WI Tribal Conservation Advisory Council (WTCAC) will have an Infrastructure agreement starting in 2019, with Survey to come in succeeding years. This question also is relative to the discussion above as to who has the responsibility of entering information into the SSF and survey results into NAPIS. Do we change the structure of the Survey Planning Page, and thus the SSF to be based on organization, with organizational responsibilities for data entry and not by State, or we keep the current structure and somehow denote surveys within a state with a modifier for the organization responsible for the survey?

The NCC discussed the ins and outs of each approach keeping in mind the discussion above about individual responsibilities. The NCC decided that the best path forward at this time will be:

- The Wisconsin Tribal Conservation Advisory Council will be handled as if it were a separate state. Federally recognized tribes are independent nations, and while they may work with State counterparts, are independent of the State. The agreements with the WTCAC will be with the Federal government with the SPHD as the ADODR, similar to any State. Thus, the Survey Planning Page will have a separate listing for the WTCAC apart from the State of Wisconsin. The WTCAC will hire a Tribal Pest Survey Coordinator who will become a peer of the SSCs in the Central Plant Board states, be included in their conversations and discussions, and have all the responsibilities of an SSC.
- The NCC recommended, otherwise, that the State-based structure of the Survey Planning Page remain State-based. Entities within a State will be designated by an acronym placed after the survey name for that State. For the example above in Georgia:
  - Exotic Wood Borer / Bark Beetle Survey (GDA)
  - Exotic Wood Borer / Bark Beetle Survey (GFC)
- The SSCs on the NCC agreed that it would be their responsibility to enter information in the Survey Summary Form and survey results in NAPIS from other organizations in their State as long as the information and data was given to them in the correct format. SPHDs (as ADODRs) and PSSs will assist the SSC in making contacts and making sure the information is available to the SSC.

Action Item (Cindy, David): 1. Add the Wisconsin Tribal Conservation Advisory Council (WTCAC) to the Survey Planning Page and Survey Summary Form as a State-level entry. 2. Add an acronym to the survey name for those occasions when more than one organization within a State has cooperative agreements to conduct surveys. 3. With PPA 7721 surveys, the SSCs will help Cindy and David identify the surveys and organization within their State.

Action Item (Cindy): Cindy will prepare and deliver a webinar on the proper format for cooperators to share survey information for the Survey Planning page and survey results for entry into NAPIS, to focus on PPQ and cooperators that will be required to share their information with the SSC for entry into the proper forms.

Change Request Process for Surveys and Target Pests and Accountability Report

A seemingly unconnected question arose when discussing the Accountability Report. At certain times random states disappeared from the Accountability Report, and there was no information for that State for any survey or target pest. The answer was that when a State requests a change through the Change Request Process, that State is not available in the Accountability Report until the change request is finalized. The NCC discussed several 'remedies,' but it was ultimately decided to leave the processes as is due to the amount of software coding that would be required to effect any change. Changing things was not deemed a high priority. The best remedies are: 1) If it is your state, make sure everyone completes the change request promptly, and 2) Check back at a later time. All States appear in the Accountability Report, so if you do not see a State listed, then this is the reason why.

Cindy outlined the Change Request Process.
- Set the appropriate Funding Year, Source, and State on the Survey Planning Page
- Click on Request Modification link
- Make a detailed request stating justification for the change, then click Request
  - State will not appear in the Accountability report until the change is complete
- Check the status of the request in Workflow and emails
- When approval is given, make the necessary edits and Save

Data Report Request Form

The Data Report Request Form was instituted as a result of multiple requests for NAPIS access from those outside the CAPS community. Access was being requested to NAPIS for people that really did not needs access, but rather just a report of NAPIS data on a one-time or annual basis. A work flow was created whereby John and Lisa would vet the data request and approve its release or not. This also will provide security by not expanding the list of NAPIS users beyond that which is needed. The core four, SPHD, PSS, SPRO, and SSC have the ability to create reports and do no need to utilize the form. This is for those outside the CAPS community that may have a legitimate need or use of the information. If necessary, John or Lisa will reach out to the SPRO of the state of the requestor for clarification or approval before granting the request. The goal is to protect NAPIS data from misuse and secure the list of those with NAPIS access.

NAPIS Fair and Appropriate Use Statement

Purdue has developed a fair use statement that will appear upon login to NAPIS and with the generation of maps. This is to ensure that Purdue's intellectual property is protected. This is in

response to pulling data from NAPIS and handing it over to a commercial entity to include in a data collection application, which the entity then shopped for sale. NAPIS is not a public use database and its use must be protected. The draft language appears below. Cindy requests that anyone with experience with such matters, suggestions on what to include, edits, or comments contact her to discuss. Is data for publication something to include? This is a check similar to the Data Report Request Form for users that do have access to NAPIS.

> "Permission to access data in the National Agricultural Pest Information System (NAPIS) does not confer rights to share, present, or publish any raw, processed or summary data outside of your own individual use. Specific permission is required for each disclosure event whether digital or analog, oral or written and can be granted only by the PPQ National Policy Manager or the PPQ National Operations Manager."

Action Item (NCC): The NCC should review the Fair Use Statement for NAPIS and contact Cindy with any edits, comments, suggestions, and/or questions.

Facilitation Training ⬆

- 2018 Action Item (NCC): The NCC should discuss the need or desire for facilitation training with their constituency. If enough people, including SPHDs, SPROs, PSS, and SSCs, are interested, John then will talk with PDC about the possibility of arranging the training.

The PDC has agreed to look into providing the training either by dusting off the previous training or by contracting out, but not making any commitments right away. The PDC is looking into overall needs as two other groups (National Plant Board may be one) also requested this type of training. Training likely to occur via webinar. We will know more late March/April. To prepare for the next contact with PDC on this topic, we should get an estimate of how many people may be interested.

Action Item (NCC): 1. Each member of the NCC should canvass their constituency to see who would be interested in facilitator/meeting design training, and provide head count to John. 2. NCC members also should talk about this at the Regional Plant Board meetings.

Training Needs ⬆

The NCC discussed possible training needs of the CAPS community. While there was lots of discussion, no real progress was made. Other than for the facilitation training mentioned above, there is a void in the knowledge base of exactly what training would benefit whom. The S&T Beltsville Lab offers diagnostic training, and several successful identification / screening workshops have been held in the past, such as those held by the Oregon Department of Agriculture, and there was one organized by the several PSSs with Farm Bill funding. Someone

likely needs to step up and organize, work out the logistics (including microscopes, etc.), advertise, and find funding for any workshop. It may be the responsibility of a future Identification Coordinator to help facilitate and coordinate screening and identification training. But for now, someone will need to do it if there is a perceived need. Advance notice and advertising will be important so that potential attendees can plan for travel funding either in the Infrastructure agreement or from other funding sources.

CAPS Introductory Guidebook

The CAPS Introductory Guidebook and several Trap Videos were released last year. Several questions were raised. Do people find this resource helpful? Are there other topics that the next version of the Guidebook should address? Are the trap videos helpful and useful? What other trap and/or survey videos of this nature would the CAPS community like to see? We lost our cooperator at TX A&M due to a departmental reorganization and shift in direction. Does anyone know of anyone that may be a good cooperator to extend this initiative?

Action Item (NCC): 1. The NCC should discuss with their constituency the need for any training that would facilitate their job performance, be it survey, screening, more detailed identification, trap procurement, construction, and/or placement, or administrative and process topics, etc. The NCC should compile a prioritized list of training that could be addressed. 2. The NCC also should discuss with their constituency the value of the CAPS Introductory Guidebook and trap videos, and entertain ideas for a future versions. Ideas for a possible cooperator to lead the project also should be discussed.
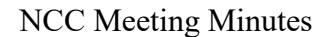
Action Item (John): Prepare a short introduction to the NCC for new members with a possible bullet list of their role and responsibilities.

National CAPS Webinar / Conference Calls   ⬆

After discussion, John and Lisa agreed to look into the possibility of having a conference call with PSSs and SSCs twice a year. These may be in the form of a town hall where questions from the field can be discussed and answered. The agenda would be based on what the field would like to know.

The biannual conference calls would be in addition to two standing CAPS Webinars that have been discussed previously. One webinar will be in the spring after the Guidelines come out and will focus on topics such as administrative changes, pest list and approved methods changes, and other topics that will help states think about surveys for the following year. The second webinar will be in the summer as work plans become due. This webinar will focus on work and financial plans, the process, and any specific requirements to have your work plan successfully approved.

Additional CAPS webinars can be held based on need and topics of interest from the CAPS community, such as how the Survey Summary Form, NAPIS data entry, and the Accountability Report interact and work together, for example. Alison and Heather discussed presenting a webinar on the OPEP model for next January or February, after the likelihood of introduction piece is incorporated into the model.

Action Items (NCC, John, Lisa): 1. John and Lisa will plan to have a national town hall-style conference call with PSSs and SSCs, tentatively scheduled for November-December. The NCC will need to canvass their constituency for topics. 2. The PDMT will organize, schedule, and deliver the two standing webinars based around the i) Guidelines and ii) work plan requirements and process. 3. Alison and Heather will organize and schedule a webinar on the OPEP model for January-February of 2020.

CAPS Recognition

The NCC decided to extend the timeframe for receiving nominations for CAPS Recognition. The new deadline is Friday, May 24, 2019. This is the Friday of the week after the Western Plant Board meeting. The goal is to give everyone a chance to talk about CAPS Recognition and solicit more nominations. Only one nomination had been received at the time of this meeting.

The NCC also decided to change the timeframe of CAPS Recognition so that the process is completed and awardees announced before the first Regional Plant Board meeting in the spring. This will allow the presentation of recognition at the Regional meetings if appropriate.

Action Item (NCC, John): 1. The NCC will announce to their constituency the extended deadline for CAPS recognition, and 2. Discuss and solicit nominations for CAPS Recognition at the Regional Plant Board Meetings. 3. The guidance documents for CAPS Recognition will be updated to reflect the new timeline with the publication of the 2020 Guidelines.