

**National Cooperative Agricultural Pest Survey (CAPS) Conference  
December 3-4, 2008**

**Notes to the Breakout Sessions**

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# **National Cooperative Agricultural Pest Survey (CAPS) Conference**

## **December 3-4, 2008**

### **What will a Commodity-like Survey Look Like in the Future?**

#### **Eastern States**

Chair: Vicki Smith (EPB, CT)

Facilitator: Troy Fine

#### **Questions asked of the group:**

What have we learned from commodity based surveys that could be applied to a regionally based (concept) survey?

How could the concept be applied to your region?

What do we need to do to make it work?

Question 1: What have we learned from commodity based surveys that could be applied to a regionally based (concept) survey?

- Once thing that we have learned is how effective it can be to work together through a multi-agency approach. (i.e. federal, state, Otis Lab)
- Another thing that we have learned is to focus on pests of concern to collaborating states. However, this may not be applicable for nurseries.
- It is apparent that a smaller pest list is needed.
- Taxonomic support is needed for increased volume
- Because of limited funding the 25% of the budget for pest surveys should focus only on one or two pests.
- A priority should be placed on multi-state surveys instead of regional surveys.
- Commodity groups need to be fully engaged for increased funding.
- It is important to pinpoint who the stakeholders are for certain commodities both traditional and non-traditional.
- It is important to be transparent and share information by full disclosure.

Question 2: How could the concept be applied to your region?

- It would be helpful to know what other states are surveying for.
- It would be helpful to have a prescreening of other state's pest lists prior to the CAPS meetings.
- The National CAPS program needs to develop an interstate pest list.

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- States do not want commodity surveys forced upon them.

Question 3: What do we need to do to make it work?

- We need a process for a multi state approach for dealing with the difficult challenge of collaborating together on unified surveys. (i.e. a possible web page room on the National Plant Board's website)
- We need to look at both the pests of concern and their pathways.
- We need greater flexibility in the guidelines.
- We need good leadership.
- We need better regional lists.
- We need a mechanism for inventorying resources to survey and a way to deploy them.
- We need to make better use of the tools that we have currently available to us. (i.e. NAPPFAST, host data bases, etc.)
- We need to utilize the National Plant Diagnostic Network (NPDN) for improved collaboration.

### **Participants:**

Emilie Inoue  
Tom Durkis  
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Gibbs Smith  
Jonathan Staples  
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Sherrie Hutchinson  
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James Kruse  
Rose Hiskes  
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Charles Schwalbe  
Michael O'Connor  
Matthew Royer

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### **What will a Commodity-like Survey Look Like in the Future?**

#### **Southern States**

Chair: Benny Graves (SPB, MS)

Facilitator: Doug Codner

#### **Questions asked of the group:**

What have we learned from commodity based surveys that could be applied to a regionally based (concept) survey?

How could the concept be applied to your region?

What do we need to do to make it work?

Benny Graves began by stating the session goal and asked the group to highlight some “past surveys” from the Southern States.

- 1) Pine
- 2) Grape
  - a) These two “commodity” surveys are currently available.
- 3) Citrus
- 4) Small Grains
- 5) Oak
- 6) Cyst Nematodes
- 7) Soybean
- 8) Cotton
- 9) Bark Beetle

Question 1: What have we learned from commodity based surveys that could be applied to a “regionally based” (concept) survey?

- Soybean sentinel surveys provide access to areas for “additional pest” detections.
  - Negative survey “too restrictive”.
- Kentucky has bundled the Beet Army worm with their Gypsy Moth survey.
- PCN integration of:
  - Burrowing Nematode
  - Zebra Chip Disease
- “Bait the hook” for grower support by offering a free Nematode report.
- Florida offered their version of the “bundled” survey with:
  - Red Palm Mite
  - Fruit Fly
  - They are thinking of adding LBAM to this bundle in the future.
- Noxious Weeds: Look for multiple noxious weeds within the same survey.

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- Isolate and capitalize on the “High Risk” areas such as
  - Nurseries
  - Ports
- Allow flexibility to the State to survey for LBAM and EAB concurrently. (as an example)
- Surveying for snails on a “Tile and Marble” inspection site.
- Make a Nursery survey a National survey and allow it to be “Open Ended”
  - Removal of the pest from the nursery won’t allow it to “get out”.
  - Allow for “Add-on’s to these Nursery surveys.
- Additional pest for survey can be taken from the National list.
  - Allow for ease of pest additions to the National list.
- The Nursery survey would need to be standardized and flexible.
- Good pest information is available. States could “pick and choose” pests by “Area” within the state.
- Creation of a “Prototype Resource Database” with information to link the pest to the host. This would include:
  - Field
  - Lab
  - Potted
  - “In the ground”
  - And Border
- APSnet.org is an excellent resource for insects and diseases.
- Don’t survey for the insect, survey for the vector.
  - Bundle this over to another “host”.
- Noxious weeds are a wintering source.
- What about Aquatic weeds?
  - No means or focus for this type of survey.

Question 2: How could this concept be applied to your region?

- Funding for commodity surveys could be applied to a different survey
  - Justification
  - Have a pest focus, not a commodity focus.
  - Flexibility is KEY.
- Nursery surveys a happening now in some in some states.

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- They are making it work.
- Nursery surveys need to be proposed. “Nursery Commodity Survey”
  - Searching for 3-5 items at a time.
  - Early detections
- A need for a Flexible regional survey does exist.
  - This survey would need to be standardized with technical back up.
  - How is this going to “fly” with the CAPS committee?
- Pest lists for the South need to be:
  - Universal
  - Flexible
  - Allow access to the “production pathways”.
- It was noted that the flexibility would allow for “differences” within the region.

Question 3: What do we need to do to make this work?

- Allow for additions and individual selections from the National list.
  - 75% category.
- Information sharing and availability to the States that have similar interests.
  - Sharing should happen before development of the work plan.
- Survey the “Big Box” Retailers.
- An area wide Bordering State survey.
  - Communication pipeline to see what direction these states are heading for the survey season.
  - PSS/SSC conference call. This currently does not exist.
  - The Eastern Region call can be too much.
  - A Regional - state call would be better.
  - Oklahoma and Arkansas meet once a year for similar type coordination and this works well.
  - Meet once or twice a year for this coordination, regionally.
  - A web blog or thread could be helpful. A PSS session thread already exists
  - Need Lotus Notes for access.
    - These typically are under utilized and would require a reminder email to stay fresh in peoples minds.
  - NAPPIS has good info, but requires permissions for use.

Recommendations:

- “Bundled” Nursery Surveys
  - Standardized

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- Flexibility
- Allow for addition and choice from the National pest list.
  - In turn allow for a percentage adjustment. i.e. 50/50.
- Allow for a communication pipeline
  - Timing should occur after the release of the guidelines.

### **Participants:**

Elizabeth Long  
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Ralph Cooley  
Bill Moore  
Ken Ahlstrom  
Janet Lensing  
Ken Glenn  
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Deborah Stewart  
Bill Kauffman  
Stephen Schmidt

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### **What will a Commodity-like Survey Look Like in the Future?**

#### **Central States**

Chair: Bob Dahl (CPB, WI)

Facilitator: Jacob Faibisch

#### **Questions asked of the group:**

What have we learned from commodity based surveys that could be applied to a regionally based (concept) survey?

How could the concept be applied to your region?

What do we need to do to make it work?

Question 1: What have we learned from commodity-based surveys that could be applied to a regionally-based (concept) survey?

- What grows in one part of the region is different elsewhere and the pests are different. This makes bunching the survey target species difficult.
- There are few commodity-based surveys in the central region.
- The pest list is too broad.
- We can get more data for the same effort by bunching the target species.
- It is best when there is a standardized number of pests to survey for.
- Pests on the national list may not apply within or across a region.
- When the survey coordinators understand the reason a pest is on the list, the better the survey results.
- When a crew surveys a particular commodity, they may lack the expertise to find all of the pests on a broader list or target species.

Question 2: How could the (regional) concept be applied to your region?

- We must rethink regional boundaries for the sake of the survey – surveys based on plant-board regions, for example, won't be effective.
- Consistent survey guidelines are needed so that a negative finding in one state means the same thing in another state. Protocols must be consistent.
- Need a high level of communication and coordination among states.
- Need to coordinate with CPHST, PSS, and SCC to make sure all entities are working consistent with each other.



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- CPHST needs input from PSS and SCCs before developing guidelines.
- Need someone as designated lead to coordinate the surveys within the region.
- May need to survey both entry stages of a pathway (such as a warehouse) as well as the habitats (such as forests for EAB).
- Need other partners (such as the US Forest Service) to help with surveys.
- Need quality control / quality assurance to ensure that the surveys are comparable across jurisdictions.

Question 3: What do we need to do to make regional surveys work?

- Define the region based on biological / climate rather than political boundaries.
- Need consistent survey protocols among all entities.
- Regional plant board should endorse survey design, development, and implementation of regional surveys.
- Create training to ensure surveys are consistent and follow protocols.
- Need diagnostic support and training.
- Introduction of new protocols and associated training needs to be timely.
- Need funding - for training, coordination, etc.
- To ensure that there is a mechanism that permits flexibility of a state to meet particular needs or emerging issues – The flexibility somehow needs to compliment the push for consistency. For example, the regional (or national) survey has a standard for a few pests that all states would include in their survey, but states would also have the flexibility to add new pests to their own lists and survey for the additional pests as needed.

Prioritized Recommendations:

- Regional plant board should endorse survey design, development, and implementation of regional surveys.
- Define the region based on biological / climate rather than political boundaries.
- Need consistent survey protocols among all entities.

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**Participants:**

Robert Dahl  
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Douglas LeDoux  
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Christopher Pierce  
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Robert Koch  
Mark Cinnamon  
Kelly Mitchell  
Carrie Larsen

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### **What will a Commodity-like Survey Look Like in the Future?**

#### **Western States**

Chair: Jeff Knight (WPB, NV)

Facilitator: Christina Lohs

#### **Questions asked of the group:**

What have we learned from commodity based surveys that could be applied to a regionally based (concept) survey?

How could the concept be applied to your region?

What do we need to do to make it work?

**KEY MESSAGE:** Bundled surveys provide flexibility to the States to support their survey needs.

#### **Report Out Recommendations:**

- The bundled survey could consist of surveying for multiple pests in one place.
- The bundled survey could consist of surveying in multiple sites (e.g., nurseries, shipyards, etc.) with a more limited number of pests.
- Ecological range and pathway pest surveys should be a part of the bundled survey concept (not only commodity-based surveys)
- The bundled surveys and their methodology which contain pests that are not on the national pest list must be justified.

#### **General Notes:**

- National-based surveys are too big. Breaking down to regional- or area-based surveys would better serve the States.
- When a pest is found, you have to ask if it is of regulatory significance.
- Surveyed pests need to be exotic and justified if the pests are not on the national pests list.
- One thing to consider is there might be more cost associated with bundled surveys. The costs will be due to additional diagnostics, traps, and lures.
- There might be a problem with identifying the pests to include in the bundled survey that are on the CAPS pest list.
- For this and all survey efforts to be fully effective, industry needs to buy into the survey concepts.

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- Identify the pests, then have elements that the States can choose the survey elements that are appropriate to use.
- Regions or individual States would need to get together and write a proposal for their bundled survey.
- This could seem like more work and would not be timely for survey implementation
- A challenge for the States could occur when they cannot justify the target pests in their survey bundle because they don't have sufficient scientific knowledge.
- Who would approve the list or proposal?
- PSS and SPHD need to work closely with their States and universities to accurately develop the bundled survey proposals.
- A benefit to the bundled survey concept is that the surveys can be built upon over time.
- The bundled survey could consist of surveying for multiple pests in one place.
- The bundled survey could consist of surveying in multiple sites (e.g., nurseries, shipyards, etc.) with a more limited number of pests.
- The surveys must consist of CAPS listed pests.
- Question: Do we still need to maintain or provide a national pest list or national surveys?
- States should look for pests of concern for export (regulatory pests).
- Ecological range and pathway pest surveys should be a part of the bundled survey concept (not only commodity-based surveys)
- Current funding areas would have to be grouped together to sufficiently fund the bundle surveys.
- The developed surveys must be biologically and scientifically sound and logistically feasible to be successful.
- More technically educated staff would need to be hired to survey for multiple pests at one time.
- Biological influences must be considered in the development and approval of the bundled surveys, e.g., lures that attract one insect might detract another at the

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same time. This could be problematic if the target pests are being surveyed in the same area.

### **Participants:**

Kerry Bryan	Patricia Danke	Gregory Watson
Gary Adams	Richard Zink	Melinda Sullivan
Susan Schechter	Larry Cain	Ann Ferguson
Jerald Levitt	Dawn Holzer	Russell Campbell
Robert Little	Matthew Travis	Brett Miller
Dave Kowalski	Helmuth Rogg	Mike Wallace
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Mitch Yergert	Victor Armendariz	Ben Simko
Clair Allen	Charles Knight	Curtis Knight
Yolanda Inguanzo	Hilary Eastman	Barbara Maehler
Sandy Jordan	Mary Mahaffey	Neil Reimer
Debra Tanouye	Lisa Peraino	Hank Uhden
Clinton Campbell	Clint Burfitt	Brad Lewis
George Nash	Margaret Rayda	Erin Stiers
Bruce Shambaugh		

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### **What Does the Future Look Like for These CAPS Topics?**

#### **Analytical Tools to Conduct CAPS Business**

Chair: Kristian Rondeau (PPQ, CO)

Facilitator: Doug Codner

#### **Questions asked to the group:**

What is working well?

What could work better?

What can we do to make it better?

- Pest Host Matrix.
  - NAPPFAST
  - Development
- EAN Database
- CBP Database
  - Not searchable
  - Inaccessible
- Bob English report.
- There is no consistency to the data that is going out.
- Frustration from the states.
  - “Some database somewhere”
- Need for a filtered report that is available to the states.
  - Consistency
  - Regular sharing
- Accessible information.
- Databases work well for some and not others.
  - Fed/State
- The Pest ID database is accessible.
- Some information makes it to the states from the port identifier.
- Need for a centralized data warehouse for these reports.
- Would PPQ be willing to share CBI with the states.

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- The Campground reservation system has provided information for successful “trace backwards” on pests like:
  - Gypsy Moth
  - ALB
  - EAB quarantine areas
- Mark Hitchcock can provide guidance with these queries.
- The GAP is consistency, consistency and reporting.
  - Distributed a list of available sites to everyone.
  - Post links to sites on the CAPS website.
- Update and re-introduce the PSS Survival Guide.
- Group information sharing
  - SSC conference call
    - Monthly
    - Quarterly
  - Allow SSC to “plug into” the PSS calls
- Valuable data is not being filtered down to the states.
- States asking for filtered, raw data to disseminate on their own.
  - CAPS site inventory
- SCOPUS (Agricultural Library website) works well for information and knowledge gathering.
- Utilization of Geospatial Land use for GAP analysis.
  - USDA information is behind the firewall.
  - Unavailable to the states.
- Develop a land use tool through GIS for ease of isolating high probability areas for survey.
- Sanitize the data and release it to the states.

### **Recommendations:**

- Consistent, regular reporting of appropriate data to the states.
- Identify and inventory available databases and resources (reports and newsletters)
  - Distribute
- A centralized, searchable space. Possibly the CAPS website.

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**Participants:**

JoAnn Cruse	Robin Rosenbaum	Coanne O'Hern
Laurinda Ramonda	David McClure	William (Bill) Scott
Mitch Yergert	Sherrie Hutchinson	Dick Bean
Clair Allen	Philip Marshall	Neil Reimer
David Dick	Margaret Rayda	Albert Roche
Dan Borchert	Mark Hitchcox	Mary Mahaffey



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### **What Does the Future Look Like for These CAPS Topics?**

#### **Survey Methodology and Guidelines – What is the Reality**

Chair: Dan Fieselmann (PPQ, NC)

Facilitator: Jacob Faibisch

#### **Questions asked of the group:**

From last year's survey:

What worked well?

What could we have done better?

How do we make it better?

From last year's survey:

Question 1: What worked well?

- CHPST finalized negative data
- The guidelines for commodity surveys were excellent
- The survey went well when there was higher-level organization. Emerald Ash Borer survey was offered as an example.
- Mini-pest risk assessments were very good. Wants more.
- Periodic reporting or survey results (such as EAB) was very helpful. Getting the interim results while surveys were underway helped the surveyors.
- The introduction of degree-days maps were helpful for timing trap deployment.
- It was helpful to have pest lists on one (internet accessible?) site as a matrix was useful.
- Standardized ISIS templates were helpful.

Question 2: What could we have done better?

- Get money to the states faster
- Trap procurement was too slow. The traps were not sent to the survey teams on time meet their survey schedule.
- Could have used more NAPIS templates.
- Traps placed near NASCAR sites were taken down, damaged, etc.
- ISIS and NAPIS templates were not released to the data collectors soon enough.

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- PDAs did not work well for data collection in some cases. PDAs do not work in 95 degree plus temperatures – not good in the south.
- There was a new record on red-fire bug that did not get posted on NAPIS for 3-4 months. This is too long and inhibits other states from taking advantage of the information before the pest could be problem somewhere else.
- Description of life-cycle of pest in commodity survey guidelines was insufficient.
- Identifier was not informed when samples were shipped, and this caused problems when the sample arrived unexpectedly.
- Terminology in statistical guidelines were not consistent.

### **Question 3: How do we make it better?**

- Offer training on statistics to field personnel
- Decisions need to be made quicker at the higher levels. Delayed decisions make for slow starts of surveys and cause problems when traps do not arrive in time.
- Need different data collection tool besides PDA. Someone suggested tablet PCs, others suggested GPS units. The group felt that the tools needed to be selected based on the needs on the ground.
- Increase input from field personnel in creating survey guidelines.
- More training should be offered in how to search databases.
- States need to know what information is in the databases.
- Need OTIS to develop traps and lures for exotic pests other than in emergency situations.
- CPHST should help obtain reference specimens for target species.
- Need better instructions on traps and lures.
- Need guidelines on how to submit samples and consistency from region on where to send samples.

### **The highest priority recommendations were:**

- Decisions need to be made quicker at the higher levels. Delayed decisions make for slow starts of surveys and cause problems when traps do not arrive in time.

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- Need different data collection tool besides PDA. Someone suggested tablet PCs, others suggested GPS units. The group felt that the tools needed to be selected based on the needs on the ground.
- Need OTIS to develop traps and lures for exotic pests other than in emergency situations.
- By far – 2:1 margin, quicker decisions was the highest priority recommendation.

### **Participants:**

Kerry Bryan  
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Dennis Barclift  
Douglas LeDoux  
Robert Brown  
Lee Tuten  
Robert Little  
Kay Kromm  
Janet Lensing  
William Glenn  
Jack Qiu  
Terry Carrington  
Travis Taylor  
Greg Buntrock  
Arthur Wagner  
Essam Dabaan  
Michael O'Connor  
Bruce Shambaugh

Emilie Inoue  
Debra Martin  
Thomas Durkis  
John Weaver  
Bill Moore  
John Corban  
Liz Lopes-Duguay  
Jeanetta Cooper  
Bill Spitzer  
Miriam Cooperband  
Joel Floyd  
Yolanda Inguanzo  
Lisa Peraino  
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Jen White  
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### **What Does the Future Look Like for These CAPS Topics?**

#### **Appropriate Data to Collect and Record**

Chair Brian Kopper (PPQ, NC)

Facilitator: Christina Lohs

#### **Questions asked of the group:**

What data are we collecting serve the needs well?

What data are we collecting that do not serve the needs?

What additional data should we be collecting?

#### **Report Out Recommendations:**

- The data that is appropriate to collect and record:
- Need to determine needs before deciding what is appropriate to record
- New county or State regulatory pest finds should be recorded
- All survey data using pest detection funds – Federal dollars
- Negative data of target pests
- The committee needs to evaluate whether native species should be recorded

#### **General Notes:**

- First pest detections in a State are submitted to the appropriate SPHD for recording
- Record positive detections to have a history of insects to accurately conduct trace-forward and –back surveys
- Do we record all the detected pests or only the pests on the national CAPS pest list?
- If written in a work plan, the pest is recorded.
- New detections to a State, the exotic (regulated) pests are record.
- Negative data should be recorded. How many consistent years do you record negative data?
- The PPQ program managers, with input from the States, need to define the criteria of the recorded data.

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- The committee needs to evaluate whether native species should be recorded.
- Natives important for export (may not be of concern to U.S. but may be to foreign countries)

### **Participants:**

Katherine Handy  
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Margaret Rayda  
James Manor  
Jonathan Staples  
Curtis Knight  
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Gary Adams  
Erin Stiers  
Greg Rentschler  
Brett Laird  
Christopher Pierce  
Ethan Kane  
Ken Ahlstrom  
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Victoria Smith  
Robert English  
Russell Campbell  
Jeff Knight  
Kennoth Carnes  
James Kruse  
Carol Motloch  
Matthew Royer

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### **What Does the Future Look Like for These CAPS Topics?**

#### **Risk-Based vs. Commodity-Like Surveys**

Chair: Adam Silagyi (PPQ, FL)

Facilitator: Jacob Faibisch

#### **Questions asked of the group:**

From last year's survey:

What worked well?

What could we have done better?

How do we make it better?

Question 1: What are the advantages to commodity-like surveys?

- One advantage is that a dollar value may be tied to commodity surveys; commodity surveys offer an economic value
- Another advantage is that certain commodities are tied to higher pest risk
- Commodity-like surveys offer a more effective and efficient use of resources and this is not because of the commodity. It is because it is a multi-pest survey.
- The reference guide that if provided with commodity-like surveys is very helpful and useful

Question 2: What are the disadvantages?

- Commodity-like surveys do not allow for multi host pests.
- Commodity-like surveys are visual. (i.e. one visit) This is not necessarily so with all commodities for example small grains.
- Farm Bill – getting away from the money
- Safeguarding review – trade based not on .....
- In a commodity-like survey there is not enough choices for commodities
- In a commodity-like survey, there could be a better use of the money, for instance some states only offer one or two main crops that could be over-surveyed due to the vast amount of acreage devoted to those two main crops. A better use of resources could occur by using non-traditional methods.

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Question 3: What do you recommend?

- The National CAPS programs needs to offer greater flexibility back to the state so that they can make the choices and decide which approaches to use in the survey programs.
- The National CAPS program needs to conduct commodity based surveys using a risk based methodology.
- The National CAPS program needs to conduct surveys by taking into consideration the various stages of the pest pathway.
- The National CAPS program needs to discuss and focus on specific pests of concern by thinking about which pests they are trying to detect.

General comments:

- The National CAPS program needs to consider what the purpose of the survey is. (i.e. trade purposes)
- The National CAPS program needs to design surveys that are tied specifically to the specific pests of concern.

### **Participants:**

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George Nash  
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Collin Wamsley  
Sherry Aultman  
Matthew Travis  
Mitchell Nelson  
Karen Jenkins  
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Terry Bourgoin  
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Norm Dart  
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Larry Nichols

## **National Cooperative Agricultural Pest Survey (CAPS) Conference December 3-4, 2008**

### **Discussion of Topics of Interest Relevant to the Perspective of the Various Roles in the CAPS Program**

#### **State Plant Health Directors (SPHD)**

Steve Knight (PPQ, IL)

Facilitator: Tom Scott

#### **Questions asked of the group:**

What is working well within the CAPS program?

What could be better?

What are your recommendations to improve the CAPS program?

What issues still needs to be addressed?

#### **Well –**

- States are completing what PPQ is asking them to do
- Getting along- good relationships
- We use the State(s) as a tool
- Putting PSS's in States (increased outreach)
- I can get more done with PSS
- We have the same goals (with States)
- We know how to work with C.P.
- Leveraging SPRO to increase Network
- Able to use State personnel to get work done.
- CAPS agreement allows a person.
- Stable funding
- Forces planning
- Get more accomplished through use of State.
- Improve public outreach
- Implement same processes (multi-state) and other partner states



## **National Cooperative Agricultural Pest Survey (CAPS) Conference December 3-4, 2008**

- Venue to learn from one another; able to assist in seeing each other's perspective
- Concept of survey to find I.S. – more interaction
- Provides cooperator, stakeholder to be involved (assist building work plans)
- Field level consistency

### **Better –**

- Cooperative agreement (forms, due dates...)
- Performance measures (standards)
- Incentive to make good work plans
- Sign forms digitally
- Spread work with other C.A.
- QA (within PPQ) (verify reports)
- Build up of PSS in every State (look at EAN volume)
- Standard pricing (Traps)
- QA on traps & lures
- Utilization of PSS (standardization) and/or how they are used
- Get traps and lures on time
- Data (requests for information) (what do coop. need to collect) and reporting tool
- Term CAPS is confusing
- RPM's and HQ should get data themselves
- System to ID needs (PSS)
- More money to TN for presentation materials
- Proactive plans to provide industry
- Training for SSC (yes)

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- Notification of information (EAB)
- Look at unfreezing funds to allow access to more money (incentive for hard work and good plans)
- Make all funds competitive
- Plant Board needs to engage pest detection more

Top three priorities:

1. Great cooperation and common goals
2. QA (PPQ responsibility) traps and lures, activities, reports, plans
3. Streamline administrative process (paperwork)

## **National Cooperative Agricultural Pest Survey (CAPS) Conference December 3-4, 2008**

### **Discussion of Topics of Interest Relevant to the Perspective of the Various Roles in the CAPS Program**

#### **State Plant Regulatory Officials (SPRO)**

Bob Dahl (CPB, WI)

Facilitator: Doug Codner

#### **Questions asked of the group:**

What is working well within the CAPS program?

What could be better?

What are your recommendations to improve the CAPS program?

What issues still needs to be addressed?

What is working well within the CAPS program?

- Eventually they'll be getting the money
  - SSC
  - PSS – variable by state
    - Sometimes they're out of state
    - Handle multiple states
    - UT & NV share a PSS and that works well for them
  - Getting info that's needed from PSS
  - Interaction/Communication

What could be better?

- Definition of roles and responsibilities
- Clear definition of lines of communication
- Accountability: must run both ways
- CAPS deadline accountability for the states
  - Excuses from the Fed.
  - Is there a deadline for the Fed?
- Understanding of State's financial systems
  - sensitivity to the needs of different states
- Need flexibility to the cooperative agreements dates and times.
- Timelines of communication from Fed. To states in regards to the work plan
- Commodity survey manual is ridiculous
- Sum it up

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- Give us the cliff notes
  - Completeness of commodity survey information
    - Availability and timeline of commodity survey manual
- Use common sense
- Employee turnover
  - New members require IMMEDIATE orientation
- CAPS meeting for instance
  - Short notice produces small state representation base
  - Some states require longer time frames for approvals and funding to attend
- CAPS meeting scheduling
  - Timeframe short
  - Meeting on/meeting off
  - 4 days to 3 days to no meeting to 2 day meeting with a very short approval process timeframe for the states
  - The CAPS committee did an excellent job with this meeting given what they had to work with.
- Budgeting accountability
- Not the Feds and the States
  - We are 50 different individual entities
  - Need to be more aware of the 50 differences and effects
- Work plans
  - Time
  - Funding
- Timeframe ultimatums
  - Unreasonable
  - This needs addressed

What are your recommendations to improve the CAPS program?

- Better expectations of funding for the work plan
  - Time frame
- Explore different federal agencies (i.e. EPA and Forest Service) for their cooperative agreement protocols
  - They are working better than agricultures
  - Grants
    - Multi-year

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- Consolidated
  - Provide flexibility and they're easy to manage
- Stop budget cuts

What issues still need to be addressed?

- Concern and awareness of budget cuts
- A system for evaluation of additional survey requests
- Needs and risks based CAPS funding
- Cognoscente of each individual state's assets
- National pest list
  - Massage the list to address flexibility for the states
  - Meant to be an evolutionary tool
    - Needs revisited and updated for additions and subtractions
  - Additions and subtractions to the list
  - Better state utilization can occur

Recommendations

- Better Collaboration both ways
  - Listen to individual states for guidance on their surveys
- Spending choices and flexibility
- How and when we get the funding

## **National Cooperative Agricultural Pest Survey (CAPS) Conference December 3-4, 2008**

### **Discussion of Topics of Interest Relevant to the Perspective of the Various Roles in the CAPS Program**

#### **Pest Survey Specialists (PSS)**

Chair: Erin Stiers (PPQ, KS)

Facilitator: Christina Lohs

#### **Questions asked of the group:**

What is working well within the CAPS program?

What could be better?

What are your recommendations to improve the CAPS program?

What issues still needs to be addressed?

What is working well?

- Filled the national program manager position
- Good method to support and fund State detection programs
- These types of meeting are good for networking
- The shift to 25% for spending has been a good advancement
- The National Guidelines are consistent
- The specific information CPHST contributes to the guidelines, which is posted on the Web
- Commodity Guidelines are helpful
- The trap and lure order forms are in one location

What could be done better?

- There could be PSS participation at the Regional Plant Board meetings

Guidelines:

- The work plan template could be improved
- Clear guidelines on the work plan submission process (i.e., streamline the pest detection and CAPS submission process)
- Communicate the difference on some funding lines as they relate to CAPS pests and provide the different funding options to be consistent.

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- Need better and consistent feedback or corrections on work plan submissions for cooperative agreements for CAPS pest and other line items
- The 25%/75% funding could be limiting to some States

### **Trap and Lure Database:**

- Need timely distribution of traps and lures
- Improve quality control of traps and lures
- Data requirements need to be provided before the survey
- Need feedback mechanism or system on trap and lure effectiveness and efficacy
- More flexibility on trap and lure ordering times. The ability to order twice a year would be better

### **Territories:**

- Some territories are too large and are difficult to manage
- Lack of feedback from SPHDs on work performance
- Survey environments are extensive (forests, urban, agricultural fields, etc.), which creates more travel time
- Lack of funding to hire more PSSs in large or high activities territories
- Guidelines support work responsibilities
- Performance standards should reflect the territory size and workload for each PSS

## **National Cooperative Agricultural Pest Survey (CAPS) Conference December 3-4, 2008**

### **Discussion of Topics of Interest Relevant to the Perspective of the Various Roles in the CAPS Program**

#### **State Survey Coordinators (SSC)**

Ken Carnes (SSC, NY)

Facilitator: Troy Fine

#### **Questions asked of the group:**

What is working well within the CAPS program?

What could be better?

What are your recommendations to improve the CAPS program?

What issues still need to be addressed?

Question 1: What is working well within the CAPS program?

- The National CAPS program is being successful in their outreach efforts.
- State Survey Coordinators (SSCs) are receiving good communication from their National CAPS Committee (NCC) Representatives.
- The SSCs feel that there is flexibility in funding for some state targeted pests.
- The SSCs feel that there has been some increased success in the overall CAPS program philosophy and in detection.
- The SSCs feel that National Agricultural Pest Information System (NAPIS) is working well. (i.e. maps)
- The SSCs feel that there is flexibility among some of the State Plant Health Directors (SPHDs).
- The SSCs feel that they have received good support on Integrated Survey Information Systems (ISIS) from the Western Region (WR).
- The SSCs feel that they have received good support from the Center for Plant Health Science and Technology (CPHST). (i.e. Otis Lab and methods development)
- The SSCs in some states are not feeling overwhelmed by having to report out only on a semi annual basis as opposed to more frequent reporting time lines.
- The SSCs feel that there is good cooperation between their states and PPQ.
- The SSCs feel that there is better information on lures cited in the work plans.



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- The SSCs feel that the Pest Survey Specialists (PSSs) are a great resource in some states and are great to respond to questions or needs when they are effectively communicated back to the PSS.
- The SSCs feel that there has been great NAPIS support!!!!
- The SSCs feel that the funding is working well in some states.
- The SSCs feel that having consistent work plan that aren't changed frequently works well.
- The SSCs feel that the taxonomic support that is available is working well. (i.e. states are lining up prescreeners)
- The SSCs feel that the Agreement Specialists who work in each of the regions are working well.
- The SSCs feel that the National CAPS Program is working better now that it has someone in a national leadership position within PPQ. (i.e. John Bowers)
- The SSCs feel that the support gained through national and regional meetings is working well.
- The SSCs feel that the willingness to share new detections between states is working well.

### **Question 2: What could be better?**

- The SSCs feel that the funding could be better in some states!!!!
- The SSCs feel that there could be better timeliness!!!! (i.e. applying for funding, managing survey data, quantifying accountability for reports)
- The SSCs feel that there could be better accessibility to tools.
- The SSCs feel that the National CAPS program could be better if the process of starting surveys and starting funding could be synchronized.
- The SSCs feel that the National CAPS program could be better if there was greater uniformity in the way SPHDs shared information and if SPHDs would standardize the work requirements between states.
- The SSCs feel that the National CAPS program could be better if there was clearer information and guidance on what federal data goes into NAPIS. (i.e. Forest Service pests)

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- The SSCs feel that National CAPS program could be better if the survey data provided to them by PPQ was complete and properly formatted.
- The SSCs feel that the National CAPS program could be better if trap materials were delivered in a timely fashion!!!! [i.e. Emerald Ash Borer (EAB) traps and midseason add ons like Light Brown Apple Moth (LBAM) in June]
- The SSCs feel that the National CAPS program could be better if there were consistent expectations for both the state and PPQ on trap placement methodology.
- The SSCs feel that the National CAPS program could be better if PPQ would honor each state's list of pests when requesting funding to survey under the 25 % funding category.

Question 3: What are your recommendations to improve the CAPS program?

- We need to have equal percentages on funding for it to be a true cooperation. (i.e. 50 – 50 % instead of 25-75 %) (25)
- We need better data distribution [i.e. Emergency Action Notifications (EANs)] (19)
- We need to provide training to PSSs on the state's policies, procedures, and practices (15)
- We need easy access to other state's alerts. (11)
- We need one PSS for each state. (10)
- We need multi-year agreements. (8)
- We need continued training on ISIS. (0)

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**Concurrent Breakout Session – SPHDs and SPROs**

**Managing Cooperative Agreements at the State Level**

Chair: Bruce Shambaugh (PPQ, WY)

Facilitator: Christina Lohs and Troy Fine

**Questions asked of the group:**

What is working well?

What are the possible gaps/barriers in the current roles and responsibilities?

What do you recommend?

What is working well?

- Western and Eastern Regions appreciate and find the agreements staffs to provide superior support in writing the agreements, providing templates, and overall high competence.
- Flexibility to lump line items and ability to work under agreement cycles other than fiscal year.
- Being able to have the flexibility to move money between programs for functions. ER Agreement personnel clarified this to be that there is flexibility to move money within activities only within the same line item funding, and NOT being able to move money between programs.
- Good communications between the SPHDs and SPROs.
- There is a good template for reporting.
- SharePoint is a good tool to share workplans (Eastern Region).

What can be done better?

- What can be done better?
- CAPS could include the cooperative agreement procedures in the guidelines
- Have additional support from the CAPS coordinators
- Some States are not receiving the SPHD meeting minutes in a timely manner, if at all. The meeting minutes should be sent out to the SPHDs, SPROs, and ADODR. The main issue here was that the right people in larger states were not getting the minutes. Recommendation was to send to all ADODR's and remind the SPHD's to forward them to appropriate people.

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- Share Point is only available to PPQ employees and not the States and needs to have better access.
- Share Point only works within a State. PPQ States cannot view each other's workplans and funding. They only have access to their own State's information in Share Point. The system needs to be opened to all parties, State and Federal.
- Western Region needs to utilize Sharepoint to share agreements.

### Possible Gaps and Barriers and Recommendations

- The funding is not always available in a timely manner.
- Electronic signatures would help expedite the agreement process.
- Both Regions need to improve transparency (funding, surveys, etc.) to reduce redundancy.
- There is a new FACA law that requires transparency, which is found on the Web.  
*\*This information needs to be distributed to the SPHDs and SPROs*
- One problem with ADODR is the continued increase in added responsibilities. The regional program managers' role and responsibility need to provide more cooperation with the cooperative agreement workplans. (i.e., the RPM needs to work more closely with ADODR early in the workplan process.)
- Some of the legalese that is required by the Federal is not the same as the State and results in conflict in policy or law. (e.g., the loaning of vehicles in an agreement requires an indemnity clause by PPQ and some state cannot indemnify a Government agency as per the statutes.)
- Multiple agreements, especially smaller dollar ones, aren't worth the administrative costs – Suggestion: may utilize umbrella agreements. One potential problem - Umbrella agreements may not be able to be revised if separate program/line monies come later on.
- The States are not closing their agreements and returning leftover funds promptly.
- The increased paperwork sent to the State for processing.
- The policy for writing amendments to cooperative agreements has changed. A separate new agreement will have to be processed. *\*This needs to be distributed to the PPQ and the States.*

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- Carryover of unspent dollars (getting money too late to effectively spend it)/ explore or obtain new abilities to extend the length of the agreement with justification.
- Mechanisms are available for extending agreements. This needs to have good justification and PPQ support. **\*Distribute information about the process**
- Delay in funding of agreements. One potential solution is to have the agreement become effective upon signature. This may lead to other potential issues such as multiple cycles for multiple agreements and problems tracking them all.
- Agreements that are not on the same cycle create more work.
- Umbrella agreements add problems, such as multiple approval persons. (e.g. an agreement may require approval from the noxious weed, pest detection, and bio control RPM before approving the entire agreement. Also if one funding source has not been allocated to region, it may hold up the entire agreement approval unless it's separated.)
- Include regional program managers in the process with ADODR (amendment to earlier comment about RPMs)
- Potential to move towards a grant type process was discussed. Is there another alternative or method? With grants, the paperwork is the same.
- Grants instead of agreements???
  - Within an agreement PPQ has greater involvement
  - Improve mechanism for processing paperwork
  - Look at a “contract” with each State – probably not a feasible option
  - A cooperative agreements suggests “cooperation” which is what CAPS is all about.
- CAPS agreements timeline may not work with States with year round surveys (warmer States). Pre-award letters may be a solution or option.
- Updated cooperative agreement training (i.e., SF 425) for both Federal and State
- Streamline agreement process for States to have greater expediency in processing agreements and eliminate changing of financial plans
- Find a way to put CAPS's obligations for the States on equal footing with other responsibilities given to them by PPQ (i.e., EAB)
- Coordinate CAPS with other program agreements – ease labor projections

**\*The statements in red indicate an action that can easily be done.**