

Klamath Basin Fisheries Collaborative

Operating Guidelines

Adopted 06/13/2023

Background of the Collaborative

Dating back to the 1990's, passive integrated transponders (PIT tags) have been used to monitor endangered Suckers and Coho (*Oncorhynchus kisutch*) within the Klamath Basin. Since then, the use of PIT tags has expanded across multiple entities and to many Endangered Species Act (ESA) listed species such as Chinook salmon (*Oncorhynchus tshawytscha*), Lost River suckers (*Deltistes luxatus*), shortnose suckers (*Chasmistes brevirostris*), steelhead (*Oncorhynchus mykiss*) and other fish species with the first major collaborative effort being in 2007 Klamath River Coho Ecology Study.

The emergence of the Klamath Basin Fisheries Collaborative (hereafter, KBFC or the Collaborative) reflects an ambitious effort by many partners to integrate, standardize and provide access to data sets from diverse entities performing monitoring across the basin. With the Klamath River Basin facing an ecological crisis, post dam removal, and several imperiled fish species requiring ESA protections, there is increasing interest in a standardized, collaborative PIT tag data system that can be used for monitoring restoration success within the Basin. KBFC is primarily focused on the use of a common database that facilitates data sharing and, by extension, informs fisheries management and ecosystem restoration in the Klamath Basin (Basin).

Several years of PIT tag research—led by multiple entities across the Basin—catalyzed the formation of KBFC and informed many of the goals and strategies now driving collaboration, data sharing and database management. Key collaborators include Tribes, federal and state agencies, non-governmental and private organizations and Pacific States Marine Fisheries Commission (PSMFC).

These Operating Guidelines describe the KBFC's purpose, member commitments and organizational structure. Its contents are expected to evolve.

Leadership Team members of the Collaborative are listed in Appendix I. The KBFC Data Sharing Agreement is included as Appendix III.

Definitions

Controlled vocabulary- A standardized list of terms and their definitions used within a database.

Data exchange standards- Standards that describe protocols and formats to effectively exchange consistent and standardized data with the KBFC database.

Data exchange portal- A KBFC web interface that enables users to submit, query, download and view KBFC data.

Entity- A state or federal agency, Tribe, university or non-profit organization.

KBFC data- Data stored in the KBFC database, but does not infer ownership.

Data Sharing Agreement- Document to reflect data protection, ownership and attribution and prevent data misuse and abuse.

API - application programming interface (API) defines the rules that you must follow to communicate with other software systems.

RESTful API - an interface that two computer systems use to exchange information securely over the internet.

1. Purpose

KBFC supports the recovery of native fish and the advancement of needed ecosystem restoration across the Klamath Basin. A central task driving KBFC is the collaborative effort to manage and maintain a database which facilitates access to shared, standardized data that is critical to assess the effects of water management, fisheries management, ecosystem restoration actions, and impending dam removal on multiple fish species in the Klamath Basin.

KBFC members engage along several strategic lines of action to advance the Collaborative's goals, scale up, and integrate work across the region.

1.1. Manage a Standardized Database

- Manage a standardized database, accessible to all KBFC members as described in the [Data Sharing Agreement \(Appendix III\)](#)—which supports access to a greater depth of information at multiple temporal and spatial scales
- Ensure all members understand and adhere to the Data Sharing Agreement, controlled vocabulary and data exchange standards, and have the requisite training to do so
- Foster ease of use by supporting web-based and RESTful Application Programming Interface (API) data exchange, web-based query tools, and facilitating data submittal from electronic capture applications
- Support the human capacity needed to ensure database access

- Manage the database in a trusted, respectful and controlled manner to ensure the confidence of all members

1.2. Strengthen the Network of the Collaborators

- Foster information sharing and coordination among members working across the lower, middle and upper Basin
- Hold regular meetings (virtual and face-to-face) to enhance and improve collaborative engagement among members and interested parties
- Encourage and sustain participation in the Collaborative from a growing number of entities and individuals

1.3. Advance Research that Informs Fisheries Management and Restoration Actions

- Improve understanding of salmonid and other resident fish species' life history, fish survival and residency time
- Identify joint-learning opportunities from PIT tag work on multiple native fish species in the Basin
- Embrace emerging technology and build capacity to potentially monitor other fish in the Basin, including, as needed or appropriate, non-native species
- Advance individual and collective research that informs and helps assess fisheries management and guides ecosystem restoration decisions
- Generate a basis for comparability that supports adaptive management of restoration investments and secures the greatest benefit in the recovery of ESA listed species such as Coho Salmon, Chinook Salmon, Bull Trout, Lost River sucker (C'waam) and shortnose sucker (Koptu).
- Find alignment, particularly as congruent with the actions and activities of the KBFC, with the Klamath Basin Integrated Fisheries Restoration and Monitoring Plan and other monitoring plans.

1.4. Target Short-term and Long-term Funding Opportunities to Grow and Sustain Data Flow into the Collaborative Database

- Closely track and solicit annual funding opportunities linked to the Bipartisan Infrastructure Law (BIL), Inflation Reduction Act, and other sources to increase capacity, prepare for growth and evolution of the Collaborative, and increase the likelihood of securing long term funding
- Consider, as needed or opportunity arises, advancing other monitoring modalities, monitoring additional species, uses of emerging technology and geographic expansion
- As needed, revisit the goals, structure and direction of the Collaborative to ensure clarity of purpose and broad participation

2. Membership

Approximately 30 to 50 invested entities and associated individuals currently support, participate in, or are in some way linked to PIT tag or other fisheries research in the Klamath Basin. It is understood that different entities have different levels of participation or interest in the KBFC. Some will become members while others will remain as interested parties or observers. Several of the most active members serve on the Leadership Team which guides the Collaborative and fosters basin-wide communication and engagement.

Participation or interest in the KBFC generally occurs at three levels:

- Members on the Leadership Team who fundraise, shape and collaboratively drive the KBFC
- Members who contribute and or use data stored in the KBFC database
- Non-members who act as interested parties and observers

2.1. Membership Roles

Membership in the KBFC is voluntary and includes all individuals who adopt and adhere to the KBFC Data Sharing Agreement and Operating Guidelines. Members represent, to the extent of their authority, the unit of the Tribe, organization or agency that each is employed at.

Members lend various types and levels of support for the Collaborative, including, among other things, fisheries research, database management and use of the information generated from this

work to inform fisheries management and ecosystem restoration efforts. The diverse group of entities brought together through collaborative engagement respect and appreciate that each maintains autonomy and self-direction with its own research and monitoring programs.

Non-members can only access publicly available data as described in section IV.B.1 of the [Data Sharing Agreement \(Appendix III\)](#). Members are permitted to access the KBFC data exchange portal based on their assigned data permission level. Members are assigned a 1) technical data permission level if they contribute(d) data to the KBFC database or a 2) basic data permission level if they have not contributed and are currently not contributing data to the KBFC database, however they contribute funding and or research. The associated data accessible to each permission level is detailed in section IV.B.2 of the Data Sharing Agreement. When subsequent members from the same entity create an account for the data exchange portal, the existing entity members will be notified to determine your viewer access (i.e., view-only vs. editor) within 15 days of your account creation.

To become a member, a [Membership Application](#) must be submitted. The application can be found on the KBFC website within the Membership section (<https://www.kbfishc.org/about/kbfcmembership/>). Applications are reviewed and approved quarterly, with the exception for more frequent review as needed, by the [Leadership Team \(Appendix I\)](#). The KBFC member list within [Appendix II](#) of the Operating Guidelines is updated annually and posted on the KBFC website.

2.2. Membership Revocation and Withdrawal

Membership Revocation: Any entity or individual, including the Project Coordinator and Chairs, may have their membership revoked for violating the Data Sharing Agreement. Potential violators may be given a chance to take corrective measures prior to any loss of membership. The full Leadership Team must decide on the revocation of membership with majority (60%) voting to remove. Any leader may abstain from a vote on revocation due to a perceived conflict or other reason. Members facing revocation will receive formal notification with clear explanation of the reasons for revocation and any applicable appeal process.

Membership Withdraw: Entities are permitted to remove their data from the KBFC database if they opt to no longer participate in the KBFC.

Upon membership revocation or withdrawal, the member loses access privileges to the organization's systems and services but retains certain rights regarding their contributed data as detailed below.

- 2.2.2. **Member's Right to Request Removal:** The former member has the right to request removal of their contributed data from the active/live data system.
- 2.2.3. **Removal Request Process:** Former members wishing to exercise their data removal rights must submit a formal request within 15 days of membership revocation. The organization will process such requests within 15 days of receipt.

- 2.2.4. **Removal Confirmation:** Upon completion of the data removal process, former members will receive written confirmation that their data has been removed from live systems while noting its preservation in archival datasets.
- 2.2.5. **Data Preservation Protocol:** To maintain research integrity and reproducibility, all removed data will continue to exist in archived or versioned datasets even after removal from live systems.
- 2.2.6. **Archival Access Controls:** Access to archived data containing removed contributions will be strictly limited to authorized personnel for the specific purposes of: Ensuring research reproducibility, maintaining historical record integrity, fulfilling legal or regulatory requirements, supporting previously published reports and analyses and will follow the same data sharing rules as specified in the DSA.

3. Leadership Team

The Leadership Team is the primary decision-making body which guides the Collaborative and convenes at least four standing KBFC meetings a year. The Leadership Team fosters communication among members, discusses research findings, priorities and fundraising needs, and guides collaborative efforts. The Leadership Team roster can be found in [Appendix I](#), and is updated yearly or as needed.

The Leadership Team will make two types of decisions:

- Administrative decisions are about day-to-day activities, including but not limited to logistics, meeting dates and times, agenda revisions, schedules, etc.
- Substantive decisions concern financial and project-oriented issues, including but not limited to grants, goals of the Collaborative, data sharing protocols and agreements, changes to these Operating Guidelines, or removal of Leadership Team representatives, the Project Coordinator or other members, etc.

Leadership Team tasks include but are not limited to the following:

- Provide scientific, technical and collaborative leadership in support of PIT tag and other fisheries research and monitoring within the Klamath Basin.
- Review and approve new members, and ensure all members adhere to the Collaborative's Operating Guidelines and Data Sharing Agreement.
- Make administrative and substantive decisions to guide the Collaborative.
- Identify and help resolve disputes around data protocols, member commitments, or other substantive issues challenging the collaborative nature of the work.

- Select and provide oversight of the Co-chairs ([Section 4.1](#)) and Project Coordinator ([section 4.2](#)), and ensure that they have the support needed to serve effectively.
- Collaborate with the Project Coordinator and Co-chairs, all grant recipients, and others as needed to secure long-term funding for the database (e.g., proposal development, budget management, reporting).
- Maintain balanced Leadership Team composition and ensure all leaders actively participate and adhere to the procedures and rules described below in sub-section [3.1 Leadership Responsibilities](#).
- Foster internal communication among leaders and other members, as well as external communication with other partners, funders and interested parties.
- Help form and provide oversight of technical or other ad hoc workgroups.
- Assist with planning and organizing the annual meeting.
- Conduct an as needed annual review of the KBFC’s purpose, commitments and organizational structure, as well as making sure the Operating Guidelines and Data Sharing Agreement documents reflect the current status of the Collaborative. During this review, leaders will solicit input from all members of the Collaborative.

3.1. Leadership Responsibilities

The Leadership Team operates by the following procedures and rules.

- 3.1.1. **Representation on the Leadership Team.** Members voluntarily participate on the Leadership Team and self-select their representation. Each entity represented on the Leadership Team holds one seat (primary representative). To ensure continuity and broad participation, representatives may, but are not required to, have an alternate(s) available to serve as needed (alternate representatives). The total current number of primary representative seats held constitutes the full Leadership Team.
- 3.1.2. **Quorum requirement.** A quorum must be present in person or virtually for the Leadership Team to hold a meeting and conduct its work. A simple majority of the current Leadership Team or, if current membership is an even number, 50% of representatives, plus one additional representative, constitutes a quorum.
- 3.1.3. **Ad hoc meetings.** Communication or ad hoc meetings with a smaller set of leaders may occur. These are not considered standing Leadership Team meetings. Administrative decisions may be made over email with a quorum of leaders as needed. No substantive decisions can be made at ad hoc meetings.

- 3.1.4. **Agenda development and meeting facilitation.** The Project Coordinator will work with the Leadership Team to prepare and secure consent on meeting agendas, and then facilitate each meeting. In the absence of a Co-chair, the Project Coordinator or one or more Leadership Team representatives may volunteer for this task.
- 3.1.5. **Meeting attendance.** Active participation is defined as attending at least 75% of standing Leadership Team meetings in a calendar year. In addition, representatives commit to review materials in advance, come prepared for discussions, and follow-up on action items for which they agree to at meetings.
- 3.1.6. **Meeting summaries.** Following each standing meeting, the project coordinator documents any decisions, action items and other outcomes in a brief meeting summary. As needed or appropriate, meeting summaries may be shared with all members of the Collaborative.
- 3.1.7. **Use of alternates.** Designated alternates must be identified to the Project Coordinator, Co-chairs and full Leadership Team. Alternates serve the same role as representatives when representatives are absent. Representatives will keep alternates informed of Leadership Team activities on an ongoing basis. Representatives are encouraged to designate alternates during the annual review but may designate alternates outside this time period on an as needed basis.
- 3.1.8. **Term limits.** Representatives have no term limits. Representatives may continue to serve indefinitely on the Leadership Team with support from the entity for which they work.
- 3.1.9. **Adding representatives or adjusting Leadership Team composition.** Additional Leadership Team representatives may be added, or the overall composition of representatives adjusted, with the concurrence of the full Leadership Team using its decision-making procedures.
- 3.1.10. **Leadership Team resignation.** Representatives may resign from the Leadership Team at their choosing. If this occurs, the representative, or entity that the representative is employed by, will provide resignation communication in writing or email to the Project Coordinator and full Leadership Team.
- 3.1.11. **Leadership Team removal.** Representatives may be removed from the Leadership Team for not adhering to the Data Sharing Agreement and/or the tenets of these Operating Guidelines, or by not actively participating in Leadership Team meetings. Any individual facing removal will be given a chance to take corrective measures prior to any loss of representation on the Leadership Team. The full Leadership Team uses its decision-making procedures to determine Leadership Team removal.
- 3.1.12. **Project coordinator and Co-chair selection and removal.** The full Leadership Team selects and maintains oversight of the Co-chairs and Project Coordinator. The Co-chairs and Project Coordinator may be removed by the Leadership Team for not fulfilling their roles and responsibilities or not adhering to the Data Sharing Agreement and/or tenets of these Operating Guidelines.

- 3.1.13. ***Member participation at Leadership Team meetings.*** Leadership Team meetings are open to all KBFC members. Attending members who are not representatives on the Leadership Team may comment on any agenda item after leadership has completed its discussion on said item. Leaders may invite members to participate in any discussion topic or include agenda items which open group discussion to all members. Members may comment on previous decisions which have been made by the Leadership Team, or pending decisions, particularly if there are questions or concerns surrounding those decisions.

3.2. Consensus decision-making

The Leadership Team will strive for consensus in all of its decision-making, but is not bound by consensus to make decisions. Moreover, the Leadership Team commits to understand, consider and incorporate the views of all members in the decision-making process.

Consensus means all Leadership Team representatives present at a meeting with a quorum either fully support or can live with a decision. In reaching consensus, some may strongly endorse a particular proposal or recommendation while others may simply accept it as "workable." Others may only be able to "live with it" as less than desired but still acceptable. Still others may choose to "stand aside" by verbally noting disagreement, yet allowing the group to reach consensus without them, or by abstaining altogether. Any of these actions constitutes consensus.

The Project Coordinator or any leader may use straw polls to assess the degree of preliminary support for an idea or proposal before it is given consideration as a final Leadership Team decision. This may occur when moving from agreements in principle to agreements in detail, or when a consensus agreement appears near or is otherwise emerging. Representatives may indicate tentative approval during straw polls without fully committing support for a final decision or recommendation.

For substantive decisions such as the ones noted above in sub-sections 3.1.9 (Adjusting Leadership Team composition), 3.1.11 (Leadership Team removal), 3.1.12 (Project Coordinator selection or removal), input from all current Leadership Team representatives will be required.

In the absence of consensus on any particular issue or challenge before the Leadership Team, representatives may set aside or continue working on the challenge while the Data Sharing Agreement and Operating Guidelines continue to guide group collaboration. After thoroughly discussing and deliberating relevant issues from all representative perspectives, and not reaching consensus, leaders have the option to motion for and conduct back-up voting ([section 3.3](#) described below) to make a decision.

In general, consensus decision-making should occur at standing KBFC meetings, particularly for substantive decisions. Though not ideal or encouraged, substantive decisions using the procedures described above can be made on an as needed basis via email communication.

3.3. Back-up voting

In the absence of consensus, Leadership Team representatives present at a meeting with a quorum may, but are not required to, move to back-up voting to make decisions. Leaders may also defer substantive decisions to a later meeting if input is desired from more than a quorum of leaders, or from the broader base of all KBFC members.

One motion to vote by a representative, followed by a second, triggers back-up voting. For administrative decisions, the vote will pass if 50% or greater of representatives in attendance vote for it. For substantive decisions, the motion will pass if 75% or greater of representatives in attendance vote for it.

4. Project Coordinator and Co-Chair(s)

In addition to the Leadership Team, the KBFC is supported by Co-chairs and a Project Coordinator. The Co-chairs and Project Coordinator assist the KBFC in developing a stronger presence in Klamath Basin collaborative efforts, work diplomatically to bring parties together to discuss and deliberate relevant issues, especially those interested in exchanging data through the KBFC database, and identify funding opportunities to advance the KBFC's work. The Co-chairs and Project Coordinator serve at the direction of the Leadership Team and do not make substantive or unilateral decisions for the KBFC.

4.1. Co-chairs

The KBFC has two chairs, one representing the upper basin and one the lower basin, who work closely with and are supported by the Project Coordinator. The Co-chairs assist the KBFC with developing a stronger presence in Klamath Basin collaborative efforts, increasing interactions with KBFC members, especially those interested in exchanging data through the KBFC database, and assisting with identifying short-term and long-term funding opportunities to advance the KBFC's work.

The Upper Basin chair and the Lower Basin chair serve two year terms and are selected through confidential voting and nominated by members from the upper basin and lower basin, respectively. Co-chair appointments are generally made on a staggered schedule so that one Co-chair will have had one year of experience with the committee (known as the "ongoing Co-chair") and the other Co-chair will be new to the role (known as the "incoming Co-chair"). The initial nomination by the Leadership Team will begin with the Lower Basin starting with a one year term, and the Upper Basin having a two year term, eventually leading to a staggered two year term. Both Co-chair positions are eligible for re-election at the end of their term. Whenever

a Co-chair is unable to serve, the Co-chair's designated alternate will assist with the responsibilities for the relevant time period.

The Co-chairs have the following responsibilities:

4.1.1. **Leadership Team Meetings.**

- Assist the Project Coordinator with Leadership Team meetings on a quarterly basis (2-hr meetings).
- Assist the Project Coordinator to schedule quarterly leadership meetings, set meeting agendas, review meeting minutes and meeting decisions.
- Review meeting notes to ensure that decision outcomes, both verbally at meetings and in meeting summaries, are documented.
- Support the Project Coordinator in the information sharing platform, and communicate updates to the Leadership Team related to, (1) tasks and deliverables including following up on action items from meetings; (2) any reported potential data sharing violations; (3) requests for new alternates to serve on the Leadership Team; and (4) request to resign from the Leadership Team. Update content in KBFC Operating Guidelines and on KBFC website as appropriate.

4.1.2. **Annual Meetings.** Assist the Project Coordinator with KBFC Annual Meetings by helping to identify potential presenters, workshops, and field trip opportunities. Co-chairs also attend and assist during the Annual Meeting such as by providing opening remarks.

4.1.3. **Technical Workgroups and Community of Practice.** Lend support to Technical Workgroups and Community of Practice such as by assisting in recruiting participants and ensuring updates to the Leadership Team are provided.

4.1.4. **Non-KBFC Events.** Represent KBFC at conferences and similar events to promote the value of the Collaborative. Events are to be communicated in advance to the Leadership Team to ensure no concerns are voiced, and, preferably, be attended in person to facilitate relationship building.

4.1.5. **KBFC Membership.** Assist with tracking membership application requests and present prospective new members for consideration and approval by the Leadership Team. Engage with KBFC members to (1) encourage and promote data sharing, (2) solicit input from critical collaborators communicating on draft documents and processes, and (3) maintain awareness of socio-political challenges to successfully work with KBFC members. For new KBFC members, facilitate communication of KBFC goals, organizational structure and Data Sharing Agreement (with support from the Project Coordinator).

4.1.6. **Outreach.** Assist the Project Coordinator to communicate periodic updates to a larger set of interested parties (using email or the KBFC newsletter)

4.1.7. **Project coordinator support.** Communicate and meet with the Project Coordinator to assist with meetings, and to suggest outreach information for newsletter and website. Assist in obtaining information from members and other sources related to funding opportunities, assist PSMFC staff in working

with collaborators to submit applications to support KBFC data system and KBFC activities, and provide input on proposals for funding opportunities.

4.2. Project Coordinator

The Project Coordinator is directed by the KBFC Leadership Team and works with KBFC membership and partners to achieve the KBFC's goals and objectives, organize members and sustain momentum.

The Project Coordinator has the following responsibilities:

- 4.2.1. **Leadership Team Meetings.** Convene and assist with leading the Leadership Team meetings on a quarterly basis (2-hr meeting)
 - Provide logistical support by setting meeting agendas (to be reviewed by the Leadership Team), tracking and documenting meeting notes and decisions in the information sharing platform.
 - Review meeting notes to ensure that decision outcomes, both verbally at meetings and in meeting summaries, are documented.
 - Support the Leadership Team in the information sharing platform, and communicate updates to the Leadership Team related to, (1) tasks and deliverables including following up on action items from meetings; (2) any reported potential data sharing violations; (3) requests for new alternates to serve on the Leadership Team; and (4) request to resign from the Leadership Team. Update content in KBFC Operating Guidelines and on KBFC website as appropriate.
- 4.2.2. **Annual Meetings.** Assist Leadership Team and Co-chairs with organizing the KBFC Annual Meeting by seeking guidance from the Leadership Team and input from members on potential speakers, meeting venue, meeting program, workshops, field visits, and assisting with meeting facilitation and documentation. Annual meetings are generally held over multiple days.
- 4.2.3. **Technical Workgroups and Community of Practice.** Lend administrator and logistical support, as needed or desired, to Technical Workgroups and Community of Practice.
- 4.2.4. **Outreach.** Work with the Leadership Team and Co-chairs in putting together content for the KBFC website or newsletter to communicate periodic updates to a larger set of interested parties using email and KBFC newsletter (newsletter sent once a year, or more frequently if more events/activities warrant additional issues). Maintain and update the KBFC website.
- 4.2.5. **Funding.** Identify and track short and long-term funding opportunities, and develop funding proposals to advance KBFC work. Administer KBFC funds that contribute to the Co-chairs' travel expenses.
- 4.2.6. **General Support.** Assist with developing KBFC materials (presentations, handouts, other documents) and updating KBFC Operating Guidelines as needed.

5. Use of Technical Workgroups and Community of Practice Models

The KBFC forms technical workgroups or uses community of practice models to support planning, communication and common understanding of work taking place across the Basin. Workgroups develop advice, proposals or recommendations for consideration by the Leadership Team and, at times, other interested parties. No final advice, recommendations or decisions will be made by any workgroup. Rather, workgroups regularly report back to the Leadership Team.

Workgroups or community of practice models will generally be composed of KBFC members. However, in order to ensure participation of individuals with needed technical or other expertise, membership in the Collaborative is not required to participate.

Appendix I. Leadership Roster

Leadership Team

Yurok Tribe
 Karuk Tribe
 The Klamath Tribes
 United States Geological Survey
 Scott River Watershed Council
 Pacific States Marine Fisheries Commission
 Oregon Department of Fish and Wildlife
 California Department of Fish and Wildlife

Leadership Team members and alternates (in alphabetical order).

Last updated 09/08/2025

| Name | Affiliation |
|--|--|
| Sarah Beesley (Leadership Team alternate) | Yurok Tribe |
| Summer Burdick (Leadership Team alternate) | United States Geological Survey |
| Alex Corum (Leadership Team alternate) | Karuk Tribe |
| Monica Diaz (Leadership Team alternate) | Pacific States Marine Fisheries Commission |
| Jimmy Faulkner (Leadership Team alternate) | Yurok Tribe |
| Charnna Gilmore (Leadership Team alternate) | Scott River Watershed Council |
| Alta Harris | The Klamath Tribes |
| Mark Hereford | Oregon Department of Fish and Wildlife |
| Jacob Krause | United States Geological Survey |
| Nancy Leonard | Pacific States Marine Fisheries Commission |
| Oshun Orourke | Yurok Tribe |
| Benji Ramirez (Leadership Team alternate) | Oregon Department of Fish and Wildlife |
| Crystal Robinson (Leadership Team alternate) | California Department of Fish and Wildlife |
| Rosemary Romero | California Department of Fish and Wildlife |
| Toz Soto | Karuk Tribe |
| Betsy Stapleton | Scott River Watershed Council |
| Erich Yokel (Leadership Team alternate) | Scott River Watershed Council |

Past Leadership

| Name | Affiliation |
|---|-------------------------------|
| Harrison Morrow (Leadership Team alternate) | Scott River Watershed Council |

Appendix II. Membership Roster

Registered members (updated annually/last updated on 9/08/2025)

| First Name | Last Name | Entity Name | Email Address |
|------------|-------------|--|-----------------------------------|
| Erin | Benham | PSMFC | Ebenham@psmfc.org |
| Summer | Burdick | USGS | Sburdick@usgs.gov |
| Jeff | Duda | Usgs | jduda@usgs.gov |
| Amy | Fingerle | UC Berkeley | amyfing@berkeley.edu |
| Joshua | Gondek | Klamath Falls USFWS | joshua_gondek@fws.gov |
| Danielle | Hereford | USBR | dhereford@usbr.gov |
| Jacob | Krause | USGS | jrkrause@usgs.gov |
| Logan | Mckinnon | Yurok tribe | lmckinnon@yuroktribe.nsn.us |
| Rachael | Paul-Wilson | PSMFC | rpaul-wilson@contractor.usgs.gov |
| Shahnie | Rich | Klamath Tribes | Shahnie.rich@klamathtribes.com |
| Rosemary | Romero | CDFW | Rosemary.romero@wildlife.ca.gov |
| Sarah | Schaefer | Quartz Balley Indian Reservation | Sarah.schaefer@qvir-nsn.gov |
| Betsy | Stapleton | SRWC | Betsy@scottriver.org |
| Michael | Stapleton | SRWC | frenchcreek@gmail.com |
| Mitzi | Wickman | Mid Klamath Watershed Council | mitzi@mkwc.org |
| Erich | Yokel | SRWC | erich@scottriver.org |
| Jimmy | Faukner | Yurok Tribe | jfaukner@yuroktribe.nsn.us |
| Toz | Soto | Karuk Tribe | tsoto@karuk.us |
| Sarah | Beesley | Yurok Tribe | sbeesley@yuroktribe.nsn.us |
| Oshun | O'Rourke | Yurok Tribe | oorourke@yuroktribe.nsn.us |
| Nancy | Leonard | PSMFC | nleonard@PSMFC.org |
| Mark | Hereford | ODFW | mark.e.hereford@odfw.oregon.gov |
| Harrison | Morrow | SRWC | harrison@scottriver.org |
| Crystal | Robinson | CDFW | Crystal.Robinson@wildlife.ca.gov |
| Charnna | Gilmore | SRWC | Charnna@scottriver.org |
| Ben | Ramirez | ODFW | Benji.S.RAMIREZ@odfw.oregon.gov |
| Alta | Harris | Klamath Tribes | alta.harris@klamathtribes.com |
| Alex | Corum | Karuk | acorum@karuk.us |
| Karl | Seitz | Hoopa Valley Tribal Fisheries Department | kseitz@hoopa-nsn.gov |
| Joel | Ophoff | RES | Jophoff@res.us |
| Richard | Lis | CDFW | richard.lis@wildlife.ca.gov |
| Carolyn | Malecha | ODFW | carolyn.j.malecha@odfw.oregon.gov |

Appendix III. KBFC Data Sharing Agreement

(version finalized on 06/11/2024, revised 09/08/2025)

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I. Background

The Klamath Basin Fisheries Collaborative (KBFC) is a network of dedicated partners collaboratively working to facilitate access to tag information, associated data and metadata within the Klamath River Basin. Bringing together Tribes, federal and state agencies, and non-governmental organizations, the KBFC plays a crucial role in informing fisheries management and ecosystem restoration efforts within the Klamath River Basin. Currently, the KBFC database is focused on data originating from monitoring and research activities dating back to 2006, these data are derived from PIT tag remote detection systems and various capture, mark, recapture, and recovery efforts. Drawing strength from member collaboration, the KBFC is committed to data sharing, data protection and attribution, and expanding its network through member recruitment. The KBFC acknowledges that cooperation will align with each entity's independent policies and procedures, as exemplified by the unique relationships Tribes maintain with federal and state governments, consistent with the USFWS Native American Policy (U.S. Fish and Wildlife Service, 2016) and guided by the CARE Principles (Carroll, S., et al., 2020). In doing so, the KBFC fosters a community of researchers and contributes to the advancement of fisheries and restoration sciences.

II. Definitions and Acronyms

Co-chair(s)- Appointed individual(s) representing the upper and lower portion of the Klamath Basin and who work under the direction of the KBFC leadership team. They assist the KBFC with developing a stronger presence in related Klamath Basin collaborative efforts, increase interactions with KBFC members, and identify short-term and long-term funding opportunities to advance the KBFC's work.

Data Originator- The KBFC member entity(s) who originally deployed a tag and or detection equipment. The resulting tag data, including capture metadata, and detection data by default are considered owned by the Data Originator.

Data Steward- A KBFC member who is primarily responsible for submitting their entity's data to the KBFC database and or managing data.

Database Administrator- A person appointed to manage the KBFC collaborative database.

Entity- A state or federal agency, local, Tribe, or non-profit organization.

KBFC- Acronym for Klamath Basin Fisheries Collaborative.

KBFC data- Data stored in the KBFC database, but does not infer ownership.

KBFC database- A collaborative, standardized database used by members of the KBFC.

KBFC leadership team- The primary decision-making body which guides the KBFC, fosters communication among members, and discusses research findings, priorities and fundraising needs, and guides collaborative efforts.

KBFC member- An individual acting as a representative for their entity who has formally become a KBFC member as described in the KBFC Operating Guidelines.

KBFC Operating Guidelines- The standard operating procedure detailing KBFC work processes and organizational structure (KBFC Operating Guidelines, 2023).

KBFC data exchange portal- A web interface that enables users to submit, download and view data stored in the KBFC database.

MRR- An acronym for Mark, Recapture and Recovery. This may relate to MRR data or sites.

Project- A KBFC registered data collection project.

Project Collaborator- A member added as an official Project Collaborator within the KBFC database. Project Collaborators can access all data within the shared project.

Project Coordinator: The coordinator is directed by the KBFC Leadership Team and expected to work with the KBFC membership and partners to achieve the KBFC goals and objectives.

Public data- Publicly available data that can be shared, used and distributed without restriction (i.e., summary statistics, data available under the OPEN Government Data Act, etc.).

Restricted data- KBFC data with restricted user access in accordance to section [IV.B2](#).

III. Membership

- A. Members agree and adhere to the data sharing agreement and the purpose and commitments of the KBFC as described in the KBFC Operating Guidelines.
- B. To submit data to the KBFC collaborative database, you must be a KBFC member. Each member can access the KBFC data exchange portal via their unique username and password and has an assigned data permission level. Two data permission levels specify how members can interact with KBFC data as described in section IV.B2.

IV. Data Submission, Access, and Usage

- A. Data submission
 - 1. Data Stewards are responsible for ensuring that data are submitted in accordance with the KBFC controlled vocabulary and data exchange standards as described on the KBFC official website and data exchange portal.
 - a) Data shall be submitted in a timely fashion, but at least by December 31st annually.
 - 2. Data Stewards will inform the Database Administrator of any errors, inaccuracies or necessary updates with respect to data that have been submitted to KBFC as soon as possible after becoming aware of such issues.
 - 3. Submitted data and metadata are by default considered as owned by the KBFC member entity(s) who collected and submitted these data. For tag related data, this would include who deployed the tag and who deploys and monitors the detection equipment.
- B. Data Access
 - 1. Public Data Access
 - a) Public data are accessible via the KBFC official website (<https://www.kbfishc.org/>) and include but are not limited to:
 - (1) Summary statistics
 - (2) A map illustrating generalized locations of data collection sites, which for PIT tags includes remote PIT tag detection and MRR sites and other public features within the Klamath River Basin.
 - (3) Data made available by agencies under the [OPEN Government Data Act](#) and published in a machine readable format.
 - (4) A query tool to search for a specific tag code.
 - (a) If a match is found in the KBFC database and associated with a “mark” record, then the Data Originator’s contact information is shared.
 - (b) If a match is found in the KBFC database and only associated with a detection record, then the Data Originator’s contact information is shared.

- (c) If a match is not found in the KBFC database, then no information is shared.

2. Restricted Data Access

- a) Restricted data are accessible only to KBFC members. A member is assigned either a Technical or Basic data permission level.

- (1) A Technical data permission level is assigned to KBFC members who contribute(d) data to the KBFC database, such as:

- (a) Remote and mark, recapture and recovery (MRR) site metadata

- (b) MRR data

- (c) Remote detection data

- (2) A Basic data permission level is assigned to KBFC members who have not contributed and are not currently contributing data to the KBFC database, however they contribute funding and or research.

- b) Technical data permissions include:

- (1) Access to data collected and submitted by their entity, which for PIT tag data includes:

- (a) Remote and MRR site metadata

- (b) MRR data

- (c) Remote detection data

- (2) Access to data collected and submitted by other members, which for PIT tag data includes:

- (a) Remote and MRR site metadata

- (b) Detection data (remote and physical) for PIT tags that the member entity owns. If the member entity has not deployed any PIT tags, detection data (remote and physical) from other members are not accessible.

- (3) Search for unknown tag codes detected on their remote detection equipment.

- (a) If a match is found within the KBFC database and associated with a “mark” record, then the species, original tagging location and timestamp, and contact information of the Data Originator is shared.

- (b) If a match is found in the KBFC database and only associated with a detection record, then the Data Originator’s contact information is shared.

- c) Basic data permissions include:

- (1) Access data collected and submitted by other members, including:

- (a) Detection and MRR site metadata

- d) A member with Basic or Technical data permissions may be added as a Project Collaborator within the KBFC database.

3. Member Data Request

- a) A non-member must become a KBFC member, following the steps described in the KBFC Operating Guidelines, prior to requesting data.
- b) KBFC members who wish to access additional restricted data and are not a listed Project Collaborator must submit a detailed data request to the Data Steward(s) of the data of which they are seeking.
- c) Data requests must entail specifics including, but not limited to the intended purpose for the data, the specific data they request and deadline for when they need the data.
- d) Determination of a data request approval or declination
 - (1) The data request must be approved by the respective Data Originator whose data is being requested.
 - (a) If the request is granted, the Database Administrator will run the data query and share the data with the member.
 - (b) If the request is denied, the member will not receive data.
 - (2) A Data Originator may:
 - (a) Decline a data request for their data if they can document (i.e., notes, emails, files, etc.):
 - (i) any inappropriate intended uses or interpretations of the data by the requestor,
 - (ii) implied or intended data applications by the Data Originator that are similar to those proposed by the requester,
 - (iii) any other extenuating circumstances.
 - (b) Request a time-delay in fulfilling the data request for situations that include, but are not limited to performing data quality checks and corrections or working with sensitive data tied to a specific holding period.

C. Data Usage

1. Data may be used as informational and promotional material for the KBFC. Consent of the KBFC Data Originator is required for use of all data except:
 - a) Generalized specifics of remote detection and MRR site locations for map visuals.
 - b) KBFC summary statistics, such as total number of PIT tagged animals released and species of animals tagged.
 - c) Project information including description and a point of contact.
2. Data Attribution
 - a) Data users must give proper attribution for all data used in formal and non-formal publications to all contributing data providers, or otherwise via mutual agreement, and to the KBFC data infrastructure. It is strongly recommended that users utilize the

citation provided when downloading data from KBFC data exchange portal.

(1) If data are used to conduct an analysis leading to the publication of a report or journal manuscript, the Data Originator will be invited to participate as a full collaborator and co-author on project development and write-up to the extent they desire.

(a) Data Originators have 90 days to respond to data publication review.

b) Data users must inform KBFC (project@kbfishc.org) of publications, data products (e.g. tables, graphs, maps, etc.), and commercial applications resulting from use of the KBFC data.

3. Data Constraints

a) Data stored in the KBFC database are dynamic and may be updated at any time.

(1) Database versioning will occur at least once per year, and if specifically requested by a member. A history of these versions will be available for download as a static dataset per request.

b) The KBFC and data providers are not liable for inaccuracies in the data.

c) Data users are responsible for using KBFC database data properly and investigating and understanding any limitations of these data.

d) Report all concerns with respect to data to project@kbfishc.org.

4. Data Violations

a) All KBFC members commit to reporting any possible or observed data violations to the KBFC Co-chair(s) and leadership team.

b) Any entity or individual, including a KBFC Co-chair, may have their membership revoked for a violation of data sharing or use protocols.

(1) You will be notified of any accusations of failure to comply and have an opportunity to defend your actions or take corrective measures to ensure continued KBFC database access as described in the KBFC Operating Guidelines.

(a) If violations are indefensible and or corrective actions do not occur, the full leadership team (all current representatives) will decide on the revocation of membership. Any leader may abstain from a vote on revocation due to a perceived conflict or other reason.

(b) Failure to comply with the requirements may result in denial of access to data in future requests.

V. Data Removal

A. Membership Revocation

1. Any entity or individual, including the project coordinator and chairs, may have their membership revoked for violating the Data Sharing Agreement. Potential violators may be given a chance to take corrective measures prior to any loss of membership. The full Leadership Team must decide on the revocation of membership with majority (60%) voting to remove. Any leader may abstain from a vote on revocation due to a perceived conflict or other reason. Members facing revocation will receive formal notification with clear explanation of the reasons for revocation and any applicable appeal process.
- B. Membership Withdraw
1. Entities are permitted to remove their data from the KBFC database if they opt to no longer participate in the KBFC.
- C. Upon membership revocation or withdrawal, the member loses access privileges to the organization's systems and services but retains certain rights regarding their contributed data as detailed below.
1. ***Member's Right to Request Removal:*** The former member has the right to request removal of their contributed data from the active/live data system.
 2. ***Removal Request Process:*** Former members wishing to exercise their data removal rights must submit a formal request within 15 days of membership revocation. The organization will process such requests within 15 days of receipt.
 3. ***Removal Confirmation:*** Upon completion of the data removal process, former members will receive written confirmation that their data has been removed from live systems while noting its preservation in archival datasets.
 4. ***Data Preservation Protocol:*** To maintain research integrity and reproducibility, all removed data will continue to exist in archived or versioned datasets even after removal from live systems.
 5. ***Archival Access Controls:*** Access to archived data containing removed contributions will be strictly limited to authorized personnel for the specific purposes of: Ensuring research reproducibility, maintaining historical record integrity, fulfilling legal or regulatory requirements, supporting previously published reports and analyses and will follow the same data sharing rules as specified in the DSA.

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