

# Monitoring and Adaptive Management Procedures and Guidelines Manual Version 2.1

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## Acronyms

BACI	before-after, control-impact
DIVER	Data Integration Visualization Exploration and Reporting
DWH	Deepwater Horizon
ESA	Endangered Species Act
FGDC	Federal Geographic Data Committee
GOMA	Gulf of Mexico Alliance
GRTS	Generalized Random Tessellation Stratified
ID	identification
ISO	International Organization for Standardization
MAM	Monitoring and Adaptive Management
MMPA	Marine Mammal Protection Act
MSA	Magnuson-Stevens Fishery Conservation and Management Act
NOAA	National Oceanic and Atmospheric Administration
NRDA	Natural Resource Damage Assessment
OPA	Oil Pollution Act
PDARP	Programmatic Damage Assessment and Restoration Plan
PDF	Portable Document Format
PEIS	Programmatic Environmental Impact Statement
QA	quality assurance
QAPP	Quality Assurance Project Plan
QC	quality control
RESTORE	Resources and Ecosystems Sustainability, Tourist Opportunities, and Revived Economies of the Gulf Coast States
SMART	Specific, Measurable, Achievable, Results-Oriented, and Time-Fixed
SOP	Standard Operating Procedure
SOW	scope of work
TIG	Trustee Implementation Group

# 1. Introduction

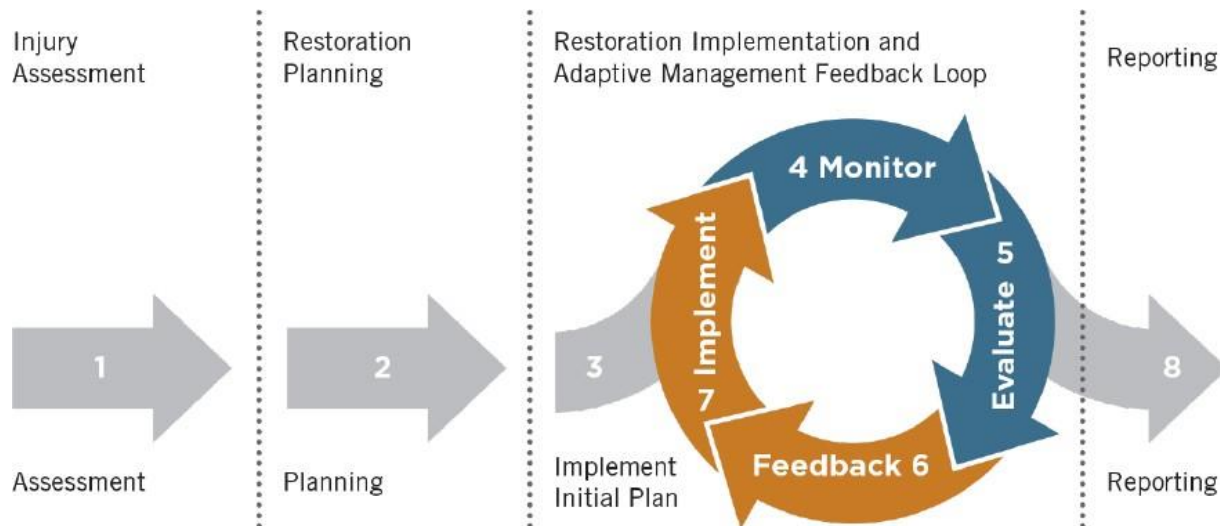
In the Deepwater Horizon (DWH) Oil Spill Final Programmatic Damage Assessment and Restoration Plan and Final Programmatic Environmental Impact Statement (PDARP/PEIS; DWH NRDA Trustees, 2016), the DWH Natural Resource Damage Assessment (NRDA) Trustees (Trustees) selected a comprehensive, integrated ecosystem approach to restoration in the Gulf of Mexico. The restoration portfolio allocates up to \$8.8 billion (including funds already spent for Early Restoration) paid out over 15 years for natural resources restoration across the five Gulf States and the open ocean. Given the unprecedented temporal, spatial, and funding scales associated with the DWH oil spill restoration effort, the Trustees have recognized the need for robust monitoring and adaptive management (MAM) to support restoration planning and implementation. As such, one of the programmatic goals established in the PDARP/PEIS is to “Provide for Monitoring, Adaptive Management, and Administrative Oversight to Support Restoration Implementation” to ensure that the restoration portfolio of projects provides long-term benefits to the resources and services injured by the spill. Therefore, the Trustees have committed to monitor and evaluate restoration outcomes within an adaptive management framework (Appendix 5.E of PDARP/PEIS; DWH NRDA Trustees, 2016). An adaptive management framework will allow the Trustees to evaluate restoration effectiveness; address potential uncertainties, as applicable, related to project planning and implementation; and provide feedback to inform future restoration decisions.

In the PDARP/PEIS, the Trustees committed to “develop a set of guidelines for standard monitoring and adaptive management practices” to support the implementation and evaluation of restoration projects over time (Appendix 5.E of PDARP/PEIS; DWH NRDA Trustees, 2016). The Trustee Council’s Standard Operating Procedures (SOPs; DWH NRDA Trustees, 2021) state that the Cross-Trustee Implementation Group (Cross-TIG) MAM work group will develop a Monitoring and Adaptive Management Procedures and Guidelines Manual (MAM Manual), which will incorporate recommended MAM procedures and guidelines, building upon the monitoring frameworks and conceptual monitoring plans developed by the Trustees for Early Restoration (Appendix 5.E of PDARP/PEIS; DWH NRDA Trustees, 2016), to meet the needs of the Restoration Types and approaches laid out in the PDARP/PEIS. This document is Version 2.1 of the MAM Manual. For information on MAM roles and responsibilities at the Trustee Council, TIG, Cross-TIG MAM work group, and Implementing Trustee levels, see the Trustee Council SOPs (DWH NRDA Trustees, 2021).

## 1.1 MAM Framework

The Trustees presented a general MAM framework in the PDARP/PEIS to guide DWH restoration efforts, as illustrated in Figure 1. The Trustee Council SOPs and this MAM Manual build upon the PDARP/PEIS MAM framework by providing additional details and guidance to the Trustees in implementing the framework within the new process and structure for restoration planning, administration, and implementation occurring through the respective TIGs. This MAM Manual provides guidance on steps 2 through 8 of the MAM framework, including TIG MAM restoration planning (including the development of MAM Plans), implementation of TIG project MAM Plans, monitoring of restoration actions, evaluation of restoration effectiveness, feedback of information to future restoration planning and implementation, and reporting on restoration progress toward meeting restoration goals and objectives. Importantly, this adaptive

management feedback loop provides the Trustees the opportunity to adjust restoration actions, as needed, based on monitoring and evaluation of restoration outcomes (Williams et al., 2009; Williams, 2011). Once a project is completed, data obtained are used to inform the next set of restoration project decisions. Additional information on implementing adaptive management at the project scale is described in Section 2.3.



**Figure 1.** The MAM framework presented by the Trustees in the PDARP/PEIS.

MAM may be applied at multiple scales, including the project, Restoration Type, and programmatic levels. At a broader scale, monitoring information will be synthesized to document progress toward Restoration Type goals and may inform the planning and implementation of future restoration projects (Appendix 5.E.3.3 of PDARP/PEIS; DWH NRDA Trustees, 2016). At a programmatic level, evaluation of collective progress in restoring the injuries associated with the spill may also inform refinements to the restoration portfolio over time. Future iterations of this MAM Manual will elaborate on these broader-scale concepts.

## 1.2 Cross-TIG MAM Work Group

The Trustee Council established the Cross-TIG MAM work group to help meet its monitoring and adaptive management obligations. The work group contains representatives from each of the Trustee Council members and serves as a forum for the TIGs to collectively address relevant MAM topics. The work group provides recommendations to the Trustee Council regarding MAM responsibilities as well as procedures and guidelines (including this manual).

In addition to internal coordination on MAM with the work group, TIGs, and Trustee Council, the Cross-TIG MAM work group also engages with external Gulf of Mexico restoration and science programs and the broader scientific community, where appropriate. The Cross-TIG MAM work group's designated federal and state co-leads serve as the work group's external coordination points of contact. The work group's external engagement activities include coordinating with Gulf of Mexico monitoring groups (e.g., RESTORE Council Monitoring and Assessment Work Group), participating in restoration science and monitoring discussions and workshops, and attending (and possibly presenting at) conferences to remain apprised of new developments in restoration or monitoring science (e.g., Gulf of Mexico Conference).

For more information on the Cross-TIG MAM work group, see the Trustee Council SOPs (DWH NRDA Trustees, 2021).

## 1.3 MAM Manual Overview

### 1.3.1 Purpose of the MAM Manual

The purpose of this MAM Manual is to provide the TIGs with detailed information on recommended MAM procedures and guidelines, as well as additional guidance for the development of MAM Plans and the implementation of MAM at the project, Restoration Type, and programmatic levels; further Restoration Type and program-level guidance will be developed in future versions of the MAM Manual. The Manual presents MAM guidelines to execute the broad goals articulated in the PDARP/PEIS, which go beyond the minimum requirements of Oil Pollution Act (OPA) regulations. The guidelines described in this Manual may not be implemented at the same level of effort across all TIGs or for every project. For example, a TIG may have a great deal of experience implementing a specific Restoration Technique and, therefore, would not require the level of adaptive management provided in these guidelines. In addition, the Trustees are conscientious of the limited funds available for restoration and recognize the need to balance restoration on-the-ground with MAM needs. The Trustees are committed to meeting the monitoring and reporting requirements specified in the OPA regulations, consent decree, and PDARP/PEIS; and to consider the guidelines in the Manual at the appropriate scale. Version 1.0 of this MAM Manual focuses on MAM at the project scale. The TIGs will develop MAM objectives and monitoring parameters that pertain to their restoration activities; and will determine the frequency and duration of monitoring, and the associated budget they deem appropriate.

This MAM Manual includes:

- A template that may be used for project-specific MAM Plans by TIGs.
- Guidance for monitoring and data management.
- Recommendations and procedures for data quality assurance/quality control (QA/QC), clearance, and release.
- Recommended procedures for project-level reporting progress and tracking restoration and recovery.
- Guidance for identifying and addressing information gaps.

### 1.3.2 Audience

The primary audiences of the MAM Manual include:

- The TIGs and Implementing Trustees: The MAM Manual is intended to provide the TIGs and Implementing Trustees with guidance and resources for the development and implementation of MAM, and evaluation and reporting of restoration progress and success.
- The public, the scientific community, and other stakeholders: The MAM Manual is intended to provide transparency to the public, the scientific community, and other stakeholders on recommended MAM processes, procedures, and guidelines related to the DWH NRDA restoration planning effort.



## 1.4 Organization of the MAM Manual

The MAM Manual includes information on MAM activities at the project and Restoration Type levels. The MAM Manual is organized as follows:

- Section 1 (this section): MAM Manual overview
- Section 2: Guidelines and procedures recommended for restoration project MAM, including MAM Plan development and MAM considerations during project implementation
- Section 3: Guidance for data management
- Section 4: MAM priorities overview and purpose
- Section 5: Guidance for examining the restoration program
- References: List of references cited in this MAM Manual
- Attachment A: Agencies that are participating in the Cross-TIG MAM work group
- Attachment B: Glossary of terms frequently used in the MAM Manual
- Attachment C: MAM Plan Template table of contents
- Attachment D: MAM Report Template table of contents
- Attachment E: Monitoring guidance, including core and objective-specific performance monitoring parameters; additional adaptive management or validation monitoring parameters; as well as definitions and data collection methods for core and objective-specific performance monitoring parameters.

## 2 Restoration Project MAM

### 2.1 Background

The PDARP/PEIS states that the Trustees will implement monitoring and evaluation to inform decision-making for current projects; and to refine the selection, design, and implementation of future restoration projects (Section 5.5.1 of PDARP/PEIS; DWH NRDA Trustees, 2016).

In this section, the Cross-TIG MAM work group builds upon the guidance developed in the PDARP/PEIS and the Trustee Council's SOPs (DWH NRDA Trustees, 2021) for restoration project implementation for the DWH oil spill. The Cross-TIG MAM work group seeks to provide guidance and consistency in MAM-related activities for the Trustee Council, TIGs, and Implementing Trustees, including guidance on the role of MAM in various phases of project-level activities, the development of MAM Plans for restoration projects, and considerations for MAM during planning and restoration implementation. Specifically, this section provides additional guidance to help the Trustees meet the MAM responsibilities described in Chapter 9 of the SOP (DWH NRDA Trustees, 2021) and Chapters 5 and 6 of the PDARP/PEIS (DWH NRDA Trustees, 2016).

The remainder of Section 2 is divided into five main sections. Sections 2.2 and 2.3 describe the overarching components of MAM and how they may be applied at the project scale. Section 2.4 provides guidance and resources for the development of MAM Plans (Attachment C).

Section 2.5 provides guidance for developing a MAM budget for individual projects. Section 2.6 presents MAM considerations during restoration implementation, including project monitoring, data management, evaluating, reporting, and the incorporation of new information into future decisions. Each of these sections is targeted to be specific and concise with references to additional documents provided for further elaboration or discussion. In instances where the Cross-TIG MAM work group anticipated that more detail may be helpful, topic-specific attachments were developed and referenced throughout in order to keep the content of each of these sections concise.

### 2.2 Monitoring Components at the Project Scale

Project-level monitoring may include a variety of activities such as pre-implementation monitoring, as-built monitoring (to document successful completion of construction elements, if applicable), performance monitoring, or post-implementation monitoring. Monitoring can be conducted to identify environmental factors that may influence project success, support project compliance, and/or provide data to better understand ecological functions and benefits that would be used to inform decisions related to current or future DWH restoration projects. Pre-implementation monitoring can include monitoring to support project planning, design, location, or implementation; or monitoring to document initial conditions. Post-implementation monitoring can help gauge restoration progress and success. The bulk of project monitoring activities may fall under performance monitoring, which is intended to document whether projects have met their established performance criteria and determine the need for interim corrective actions (15 CFR § 990.55(b)(1)(vii)). The Implementing Trustee(s) will conduct project-level performance monitoring (including data collection, analysis, and synthesis) and associated adaptive

management/corrective actions using project-specific funds, as available, and in accordance with final project-specific MAM Plans (Section 9.5.1.4 of SOP; DWH NRDA Trustees, 2021).

Project-level monitoring may be conducted at reference and/or control sites, if needed, to determine progress and success. For some projects, the Endangered Species Act (ESA), the Marine Mammal Protection Act (MMPA), and other applicable statutes may require monitoring in addition to performance monitoring described herein to demonstrate compliance. Project monitoring may also include collection of data on environmental conditions that could influence restoration outcomes to better understand drivers of project performance and support project adaptive management, including corrective actions. In an effort to inform implementation of future DWH restoration projects, the Trustees may also choose to conduct additional validation monitoring to better understand the ecosystem functions and services provided by projects.

## 2.3 Adaptive Management

### 2.3.1 Adaptive Management in NRDA

Adaptive management is a form of structured decision-making applied to the management of natural resources in the face of uncertainty (Pastorok et al., 1997; Williams, 2011). It is an iterative process that integrates monitoring and evaluation of management actions, where adjustments are made to management approaches based on observed outcomes (NRC, 2004). Within the context of ecological restoration, adaptive management addresses uncertainty hindering restoration decisions by linking science-based approaches to restoration decision-making (Steyer and Llewellyn, 2000; Thom et al., 2005). Within the context of DWH NRDA restoration, adaptive management includes implementing corrective actions, when necessary, to projects that are not trending toward established performance criteria; making adjustments over time to projects that require recurrent or ongoing decision-making; and informing the selection, design, and implementation of restoration projects. The emphasis of adaptive management for DWH NRDA restoration projects is learning from the results of strategic implementation and targeted monitoring as a way to reduce uncertainties concerning restoration decisions.

Adaptive management activities may occur during DWH NRDA restoration project planning and selection. Prior to the selection of a restoration project, the TIGs may review information concerning the effectiveness of past restoration projects and other scientific information, including ecosystem functions and processes. This may also include consultations with experts and review of relevant literature or existing planning documents, feasibility studies, preliminary or final engineering designs, alternative analyses, permitting, environmental reviews, data gathering to support project design, pilot studies, and other similar activities. Creation and completion of these efforts provide information and data that may be used to evaluate uncertainties, prioritize projects based on those uncertainties, and/or modify projects to reduce those uncertainties and improve their likelihood of success. This information is used in the evaluation process required by OPA regulations to select restoration projects (i.e., alternatives) for implementation. Proposed projects are evaluated and compared to other similar projects.

The TIGs must evaluate “the extent to which each alternative is expected to meet the Trustees’ goals and objectives” and the “likelihood of success of each alternative” (15 CFR § 990.54(a)).

### 2.3.2 Project-Level Adaptive Management Components

Adaptive management at the project level includes activities that occur during project planning, implementation, and evaluation. The level of adaptive management needed for a given project (and in turn described in the MAM Plan) will vary based on project specifics. Some DWH NRDA restoration projects may be well-understood and not have uncertainties that warrant adaptive management beyond corrective actions. For elements of the Restoration Plan with higher degrees of uncertainty or where numerous restoration projects are planned within a given geographic area and/or for the benefit of a particular resource, a more robust approach to adaptive management may be described in the MAM Plan (Appendix 5.E.1 of PDARP/PEIS; DWH NRDA Trustees, 2016). Examples of situations that may require more robust MAM include restoration of resources with limited scientific understanding, the use of novel approaches and/or techniques, and restoration at large spatial scales and/or long time scales.

Implementing restoration projects within an adaptive management framework involves exploring different ways to meet the project's restoration objectives, predicting the outcomes of different restoration actions based on the current state of knowledge, implementing and monitoring one or more restoration actions, and evaluating compliance with performance criteria. It also involves establishing feedback mechanisms to incorporate new information to inform corrective actions or other decision points which may arise during project implementation, where data would be evaluated and used to inform a future management action within the scope of the project. Under OPA and its implementing regulations, restoration provides several mechanisms by which adaptive management is actively addressed.

Examples where adaptive management components could be incorporated into the project planning or implementation process include (see Lyons et al., 2008; Gregory and Long, 2009; Williams et al., 2009; and Runge, 2011 for more information on each of these components):

1. Effective problem framing during restoration planning to identify restoration objectives (see Section 2.4.1).
2. Informed and interactive deliberations among the Trustees and with stakeholders to identify the information needed for project decision-making and implementation to meet project restoration objectives.
3. Incorporation of decision-support tools, such as conceptual models, decision trees, influence diagrams, or population models, to inform project selection and design (see Section 2.4.2.1) and the identification of MAM priorities (see Section 4).
4. Acknowledgement and characterization of uncertainties that could influence restoration outcomes (see Section 2.4.3). Where uncertainties may exist related to the implementation of a particular Restoration Technique, additional project MAM approaches could be developed to mitigate those uncertainties during project implementation. Decision-support tools (e.g., models that describe the linkages between Restoration Approaches, Restoration Techniques, and/or project concepts and expected outcomes) that can predict how the system will respond to the proposed restoration actions may be helpful in identifying uncertainties and developing MAM strategies to manage these uncertainties.
5. Implementation of pilot projects or engineering and design projects to assist in reducing uncertainties and increasing knowledge (e.g., when additional information is needed to evaluate the feasibility or likelihood of success) can be used to inform future restoration

projects. Pilot projects should be undertaken when, in the judgment of the Trustees, they are likely to provide the information “needed to evaluate the alternative at a reasonable cost and in a reasonable timeframe” (15 CFR § 990.54(c)).

6. Establishment of feedback loops to facilitate the incorporation of new information gained through monitoring and assessment into subsequent rounds of restoration decision-making (see Section 2.6.2).

Recurrent decisions that occur within the TIGs that may benefit from an adaptive approach include:

- Which projects or techniques to select for a Restoration Plan to meet restoration objectives
- How to implement a project to reduce uncertainties
- Whether and when to implement corrective actions, and what actions to take
- Whether to consider additional data collection and/or analysis to help resolve uncertainties
- Whether to discontinue investments in existing projects
- How to select a portfolio of projects to achieve an overall objective.

TIGs and Implementing Trustees may request Cross-TIG MAM work group support in incorporating these MAM principles into restoration efforts.

## 2.4 MAM Plan Development

MAM Plans (which are part of the Restoration Plan) will be developed for all projects other than those selected only for engineering and design (Section 10.3.3 of SOP; DWH NRDA Trustees, 2021). While projects selected only for engineering and design are not required to develop MAM Plans (Section 10.3.3 of SOP; DWH NRDA Trustees, 2021), considering MAM needs during engineering and design is encouraged. Engineering and design projects may proactively explore ways to resolve or minimize uncertainties, before implementation and construction plans are initiated.

Collectively, the components of the MAM Plan, as described below, document the level of MAM at the project scale. The degree of MAM needed at the project level depends on several factors, including the status of scientific understanding of key species, habitats, or ecosystem dynamics; the novelty of a given approach or technique; the scale at which restoration is implemented; the influence of socioeconomic factors; and the time scale over which restoration will be implemented (Appendix 5.E.3 of PDARP/PEIS; DWH NRDA Trustees, 2016). Adaptive management at the project level can include employing corrective actions, performance criteria, or other decision points where data would be evaluated in order to direct a future management action within the scope of the project. Some of the information obtained through the adaptive management process, such as information found in planning documents (e.g., feasibility studies, alternative analyses, permitting, preliminary or final engineering designs, environmental reviews) and other previously undertaken planning activities may be used to inform the need for adaptive management and the development of the MAM Plan, but may not necessarily be discussed in the MAM Plan.

MAM Plans will include objectives with associated performance criteria to track progress toward restoration goals; methodologies and parameters for data collection; identification of uncertainties; and potential corrective actions (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). To the extent practical and appropriate, MAM Plans may also include decision points related to the defined uncertainties and the extent to which an adaptive management approach to decision-making will be used for the project.

MAM Plans may follow the MAM Plan Template developed by the Cross-TIG MAM work group, as presented in Attachment C; however, the template may be adapted to fit the needs of each project (e.g., land acquisition projects). The project-specific MAM Plan may be updated as needed. For example, if changes arise during implementation that will alter the planned monitoring activities, the project-specific MAM Plan should be updated to reflect these changes (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021).

A MAM Plan should be reviewed by the TIG, as appropriate, for consistency with the SOP and the MAM Manual (Sections 9.5.1.4 and 10.3.2 of SOP; DWH NRDA Trustees, 2021). Once approved by the TIG in conjunction with the Restoration Plan, the MAM Plan will be included with the Restoration Plan (Section 9.4.2.1 of SOP; DWH NRDA Trustees, 2021). In addition, the published project MAM Plan (and any future revisions to the MAM Plan) will be uploaded to the Data Integration Visualization Exploration and Reporting (DIVER) Restoration Portal (Section 10.7.1 of SOP; DWH NRDA Trustees, 2021). These documents will then be made publicly available through the Trustee Council website (<http://gulfspillrestoration.noaa.gov>) (Section 10.7.1 of SOP; DWH NRDA Trustees, 2021).

The remaining subsections in this section of the MAM Manual are intended to provide specific instructions for completing the MAM Plan Template (Attachment C), as well as provide additional guidance and resources for Implementing Trustees developing project-specific MAM Plans. For each section of the MAM Plan Template, we describe the intended purpose of the section and the kinds of information that may be included. We also acknowledge when the content in a project's MAM Plan may deviate from this guidance. For areas where additional guidance was deemed appropriate, we provide an example process for how one would produce the information.

## **2.4.1 Guidance for Establishing Restoration Objectives for a MAM Plan**

Restoration objectives will be developed for each project and included in the Restoration Plan (Section 9.4.2.1 of SOP; DWH NRDA Trustees, 2021). As specified in the OPA regulations, these restoration objectives should be specific to the injuries (15 CFR § 990.55(b)(2)) and clearly specify the desired outcome of the project, including performance criteria by which successful restoration will be judged (15 CFR § 990.55(b)(2)). The objectives should also be consistent with the goals of the Restoration Type and Restoration Technique and be described in the MAM Plan (Attachment C, Section C.1.2). Although the likelihood of project success is evaluated under the OPA regulations (15 CFR § 990.54(a)(3)), uncertainties may exist regarding how to best implement the selected project(s) to achieve the greatest benefits for the injured resources. Uncertainty about how to best achieve the restoration objectives can motivate the need for adaptive management for some projects and can also drive the collection of supplemental project monitoring data (Williams et al., 2009), as further described in Sections

2.4.3 and 2.4.5. Performance criteria consistent with the restoration objectives should be provided in the MAM Plan, as described in Section 2.4.7.

#### 2.4.1.1.1 Example Process for Developing Objectives

When developing restoration objectives, it is recommended that the Trustees make them as Specific, Measurable, Achievable, Results-Oriented, and Time-Fixed (SMART) as possible. If this level of specificity is not included in the restoration objectives, this approach could also be applied to the development of performance criteria (Section 2.4.7).

As adapted from Williams et al. (2009), components of SMART objectives include:

- **Specific:** Objectives should be unambiguous, with specific metrics and conditions. Specificity can be encouraged by answering the following questions:
  - What is the outcome you are expecting?
  - Where do you hope to achieve it?
  - When do you expect the outcome to be achieved?
  - Why do you want to achieve this outcome in this way?
  - How do you plan to achieve this outcome?
- **Measurable:** Objectives should contain elements that can be readily measured, in order to evaluate the effectiveness of restoration actions and the benefits they provide to the resources injured by the spill (e.g., support habitat utilization of constructed living shorelines breakwaters by increasing the average infauna and epifauna invertebrate biomass to at least 84 g wet weight/m<sup>2</sup> over 5 to 7 years).
- **Achievable:** Objectives should be realistic given the current condition of the restoration site or resource and any existing stressors that could influence the project.
- **Results-oriented:** Objectives should identify endpoints and/or conditions representing their achievement. For example, an objective might describe the habitat conditions expected at a certain time point following the restoration.
- **Time-fixed:** Objectives should indicate the timeframe for achievement, consistent with the duration of the project. Project implementation may be in stages, but the overall timeframe should be clear.

### 2.4.2 Guidance for Establishing the Conceptual Setting for a MAM Plan

The purpose of the conceptual setting is to identify, document, and communicate, within the MAM Plan, the interactions and linkages among system components at the project site to understand how the system works and how it might be affected by restoration. If this has already been developed for the Restoration Plan, a reference to the section of the Restoration Plan where the description is located could be provided in lieu of repeating the information in the project-level MAM Plan. In a project-level MAM Plan, the conceptual setting section (see Attachment C, Section C.1.3) aims to serve as a tool to:

- Simplify complex ecological relationships by organizing information and clearly depicting important components, processes, and interactions for a particular project
- Identify outside drivers and stressors that may influence the project
- Document assumptions about how components and processes are related

- Identify gaps in our knowledge and uncertainties where they exist, and identify additional metrics needed to manage these uncertainties
- Supplement numerical models for assessing project benefits and impacts
- Make qualitative predictions of ecosystem response
- Identify which species will show ecosystem response
- Identify appropriate monitoring indicators and metrics in order to detect changes
- Provide a basis for implementing adaptive management strategies
- Identify additional parameters that may need to be monitored to understand the effects of outside drivers on the project outcomes
- Outline further restoration, adaptive management, or monitoring activities, and computational efforts (such as modeling)
- Link planning, monitoring, evaluation, and adaptive management
- Communicate with managers and decision-makers (Barnes and Mazzotti, 2005; Fischenich, 2008; Margoluis et al., 2009, and others cited therein).

#### 2.4.2.1.1 Example Process for Establishing the Conceptual Setting

Because of the wide array of possible applications, no single format can satisfy the needs for describing and/or illustrating the conceptual setting for all projects (Jorgensen, 1988; Scott et al., 2005). This section should be scaled commensurate with the level of complexity of the conceptual setting; as well as the scope, scale, and Restoration Type of the project. Content can take the form of narratives, tables, matrices of factors, schematics, box-and-arrow diagrams, or some combination of the same (Gucciardo et al., 2004; Table 1). The format and presentation will be project-dependent; for simple or well-understood systems, a short, narrative description of the conceptual setting in restoration planning documents may be referenced or a written summary describing the project site and references to existing literature and/or existing conceptual diagrams may suffice. For complex or poorly understood systems, a project may benefit from the process of developing a diagram with associated documentation describing interactions between components.

**Table 1.** Comparison of presentation types for conceptual setting section

Presentation Type	Description	Strengths	Drawbacks
Narrative	Word descriptions, mathematical or symbolic formulae	Summarizes literature, information rich	No visual presentation of important linkages
Tabular	Table or two-dimensional array	Conveys the most information	May be difficult to comprehend amount of information
Picture models	Plots, diagrams, or drawings	Good for portraying broad-scale patterns	Difficult to model complex ecosystems or interactions
Box and arrow (stressor model)	Diagram of key components and relationships	Intuitively simple, one-way flow, clear link between stressors and vital signs	No feedback, few or no mechanisms, not quantitative
Input/output matrix (control model)	Box and arrow with flow between components	Quantitative, most realistic, feedback and interactions	Complicated, hard to communicate, state dynamics may not be apparent

Source: Adapted from Gucciardo et al., 2004.



Depicting the conceptual setting, regardless of format, involves the following steps (adapted from Grant et al., 1997; Maddox et al., 1999; Ogden et al., 2005; Wood et al., 2000; Barnes and Mazzotti, 2005; Fischenich, 2008; Margoluis et al., 2009):

1. Defining the goals and restoration objectives of the project.
2. Defining the boundary of the system or project site of interest.
3. Identifying the outside drivers and stressors affecting the achievement of the goals and restoration objectives. The conceptual setting should include the main outside drivers and stressors, and indicate which outside drivers and stressors are affecting which goals and restoration objectives.
4. Identifying the components that the restoration project will be designed to influence as well as those that may influence the outcomes of the project, including:
  - a. Major external drivers, including natural forces (e.g., sea level rise); anthropogenic (e.g., regional land use changes); or other contributing factors such as political, social, economic, or cultural forces.
  - b. Physical, chemical, and biological attributes of the system or project.
  - c. Mechanisms by which ecosystem drivers, both internal (e.g., flow rates) and external (e.g., climate), cause change, with particular emphasis on those drivers that the project is intended to change.
  - d. Critical thresholds of ecological processes and environmental conditions.
  - e. Spatial and temporal scales of critical processes.
  - f. Current and potential stressors.
  - g. Identification of assumptions and knowledge gaps that limit the predictability of restoration outcomes.
  - h. Identification of current characteristics of the system that may limit the achievement of restoration objectives.
  - i. Indicators representative of ecosystem attributes and drivers.
  - j. Identification of parameters to be monitored to determine project performance in meeting the restoration objectives.
5. Identify the relationships among the components of interest. If portraying in a diagram, use arrows to show the causal links among components.
6. Add the restoration project and describe what part of the model implementation it is designed to influence.
7. Incorporate references, as appropriate.

Due to the dynamic nature of and timelines associated with restoration project planning, implementation, monitoring, evaluation, and adaptive management, it may be necessary to revisit and revise the project-specific conceptual setting as new information is acquired through monitoring or scientific advancement (Fischenich, 2008).

### **2.4.3 Guidance for Identifying Potential Sources of Uncertainty for a MAM Plan**

The project-specific MAM Plan may include any uncertainties identified for the project (Attachment C, Section C.1.3.1). These uncertainties may be referenced, when appropriate, in subsequent sections of the MAM Plan to discuss how decisions will be made in the face of uncertainty in order to maximize project benefits and help ensure that restoration objectives are achieved. The tools described in Section 2.4.2 can be used to help identify uncertainties that

directly relate to project decision-making. Furthermore, information obtained in planning documents (e.g., feasibility studies, alternative analyses, permitting, preliminary or final engineering designs, environmental reviews) and other previous planning processes may also assist in identifying uncertainties.

The focus for adaptive management is on identifying and, where possible, reducing those uncertainties that affect the decisions within the scope of a project or groups of projects (adaptive management beyond the single project-scale will be addressed in subsequent sections). These decisions may include how to improve the likelihood of achieving favorable project outcomes or selecting corrective actions in the event a project is not performing as expected and intended (see Section 2.4.7). If not addressed, uncertainties may delay the time it takes to achieve the restoration objectives or hinder the project's ability to fully achieve its objectives.

The Cross-TIG MAM work group has identified potential uncertainties for some of the Restoration Techniques included in the PDARP/PEIS (DWH NRDA Trustees, 2016; Attachment E). These are not intended to be exhaustive, but instead represent examples that can serve as a starting point for Implementing Trustees when identifying uncertainties for a specific restoration project.

#### 2.4.3.1.1 Example Process for Identifying Uncertainties

To aid in the identification of project uncertainties, science/data gaps identified in previous documents developed by the Trustees and other regional restoration/management programs can be reviewed to determine their relevance to the restoration project. Example documents could include:

1. DWH NRDA: Restoration Type strategic frameworks, PDARP/PEIS Restoration Type MAM sections, injury assessment technical reports, and other documents.
2. Others: Watershed planning documents, science needs documents, State management plans, Resources and Ecosystems Sustainability, Tourist Opportunities, and Revived Economies of the Gulf Coast States (RESTORE) Council planning documents, Gulf of Mexico Alliance (GOMA) reports, etc.

In addition, various presentation types (e.g., conceptual models, Table 1) may be used as a tool to identify and communicate assumptions and uncertainties. Specifically, uncertainties related to information gaps relevant to planning, implementation, and evaluation of the restoration project could be considered:

1. Planning: Consider information that would be needed to inform the selection, design, siting, etc., of the project. Examples include:
  - a. Information needed to improve the design of the restoration project that, if addressed, would improve the project longevity and likelihood of success.
  - b. Information needed to improve project siting, to determine the selection of one project location over another. For example, consider gaps in existing datasets or modeling capabilities that, if addressed, would improve the identification of priority restoration sites.

2. Implementation: Consider information needed to inform implementation of the project, including information needs prior to implementation as well as during implementation. Examples include:
  - a. Information needed to determine the best timing for project implementation such as potential uncertainties regarding environmental conditions, and whether any environmental conditions must be met prior to implementation.
  - b. Information needed to determine the best implementation strategy to maximize the likelihood of meeting restoration objectives.
3. Evaluation: Consider information that would be needed to evaluate effectiveness of the project or understand potential impacts. Examples include:
  - a. Information needed to evaluate outcomes in terms of meeting one or more project objectives.
  - b. Information needed to understand and mitigate the potential adverse impacts of a restoration project.

## 2.4.4 Guidance for Developing Monitoring Design for a MAM Plan

The project-specific MAM Plan (Attachment C, Section C.2) should include information on monitoring, including a list of parameters (with units) that will be measured. For each parameter, the reason(s) for monitoring; the methods for measurement; the timing, frequency, and duration of data collection; the sample size; and the monitoring design should be described. For those parameters intended to evaluate progress toward meeting restoration objectives, performance criteria and corrective actions should also be identified (see Section 2.4.7). The MAM Plan should also include parameters needed to evaluate progress toward Restoration Type goals, as appropriate for each Restoration Approach. When applicable, the MAM Plan should also include the monitoring needed to track compliance with appropriate regulations and adaptive management protocols (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). Further guidance on the development of the monitoring section of the MAM Plan is provided below.

### 2.4.4.1.1 Selecting Monitoring Parameters and Identifying their Purposes

Attachment E provides guidance on monitoring parameters for performance monitoring and/or adaptive management and validation monitoring. The monitoring parameters identified in a project MAM Plan should be consistent with the monitoring guidance defined in Attachment E, wherever appropriate. If adjustments from the monitoring guidance in Attachment E are needed, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). Depending on the project, additional parameters may be needed to inform adaptive management or validate the functions and services associated with a project. The monitoring guidance subsections in Attachment E provide a list of other parameters that may be considered, as appropriate, for resolving uncertainties, explaining outside drivers, optimizing project implementation, supporting adaptive management and decisions about corrective actions, and informing the planning of future DWH NRDA restoration projects. Implementing Trustees may also choose to conduct additional monitoring beyond the recommended parameters described in Attachment E (Section 9.5.1.4 of SOP; DWH NRDA Trustees, 2021).

The Trustees should consider relevant existing information sources (e.g., fisheries observer programs, marine mammal and sea turtle stranding networks, regional monitoring networks) to

evaluate project performance, where appropriate (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). When existing relevant datasets are available and will be utilized for restoration decision-making, the Trustees should confirm that the collection methods are well- documented, the data are current and complete, and the data collection methods and the timing and frequency of data collection are appropriate to address the project's monitoring needs.

For each of the identified monitoring parameters, the MAM Plan should include information on the intended purpose of the parameter (e.g., monitor progress toward meeting one or more of the restoration objectives, regulatory compliance, support adaptive management of the project, support evaluation of restoration progress for the Restoration Type), methods, sites, frequency, and duration of monitoring. Potential monitoring methods for each core and objective-specific performance monitoring parameter are provided in Attachment E for a subset of Restoration Approaches.

#### 2.4.4.1.2 Determining the Method for Measuring the Parameter for a MAM Plan

To enhance the compatibility of project monitoring data among projects and with other relevant datasets and monitoring efforts, recommended monitoring methods are included as part of the monitoring guidance (Attachment E). This guidance outlines potential methods for measuring each recommended parameter, including any preferred monitoring methods for each parameter. For core performance monitoring parameters, Section E.3 in Attachment E indicates an acceptable method or methods of data collection to ensure compatibility with data collected for similar DWH NRDA restoration projects. The Implementing Trustees may consider, in no particular order, methods recommended by other restoration programs or in regional guidance documents, data collection protocols used on past DWH NRDA projects or other regional restoration projects, data collection protocols used by existing monitoring programs, and data collection protocols used to collect existing baseline data available for the project or reference site. Replication of previous protocols, not described in this MAM Manual, may suit restoration and data collection objectives. The Trustees may consider adopting the data collection methods used in previous projects to allow for comparison with existing data.

#### 2.4.4.1.3 Determining Timing, Frequency, Duration, and Spatial Scale for a MAM Plan

In designing the monitoring strategy for each parameter, the frequency and spatial scale of monitoring should be relevant to capture variability in the parameter, as well as any temporal cycles in the factors affecting restoration performance (NAS, 2016). Project-level monitoring may include pre-restoration baseline monitoring to document initial conditions, as-built monitoring (sometimes referred to as construction, implementation, or execution monitoring) to verify that the project was successfully implemented as described in the Restoration Plan, compliance monitoring, and post-implementation monitoring to gauge restoration progress and success. The exact period of pre-restoration and post-restoration monitoring should be adequate to evaluate project performance and determine progress toward restoration objectives, as appropriate, and should scale with the size, complexity, and timeframe of the project.

#### 2.4.4.1.4 Determining the Sample Size for a MAM Plan

Effective monitoring of restoration projects requires the identification of an appropriate sample size. Key points to consider are the relative magnitude of changes in the parameters that might be relevant to decision-making, the level of accuracy needed, the scope and scale of the project, and the cost of data collection. For parameters for which inferential statistical analyses will be conducted (e.g., analyzing the parameter’s response to a restoration action, making comparisons from one time period to another, evaluating differences between restoration sites and control sites), sample size selection should consider the amount of change in the parameter that is statistically detectable and is meaningful for the restoration objectives, the confidence in statistically detecting the change (i.e., Type I and II errors), and the unexplained error within the dataset. Power analysis (Cohen, 1992) is a common approach for estimating adequate sample size, as it incorporates the considerations listed above. It can also be used to explore the value of increased sample size, in terms of increased power or more precise effect sizes, relative to the cost of data collection. Exploring the relationships between sample size and improved confidence and effect sizes with a power analysis allows for a strong justification in sample size, and ensures the data being collected result in defensible estimates necessary for decision-making. In instances in which power analyses may not be feasible, previous studies can be used as a guide to estimate appropriate sample sizes, although the relative variability in the dataset and the monitoring objectives for similar studies should be considered. Additionally, experts who have done similar research may be able to provide input on how many samples to collect. Pilot monitoring studies to evaluate the distribution and variability of the data may be implemented when there is no prior knowledge of the distribution for a particular monitoring parameter.

#### 2.4.4.1.5 Identifying Monitoring Site Locations for a MAM Plan

Probability-based designs involve a randomized component to site selection and are recommended for ecological data as they result in unbiased and defensible parameter measurements (McDonald, 2012). These designs allow for conclusions to be drawn concerning the project’s effect on the entire project footprint, rather than just the location for which data was physically obtained. Examples of commonly used monitoring designs are listed in Table 2.

**Table 2.** Example monitoring designs for project monitoring

Design	Summary
Cluster	Cluster design requires identification of the “cluster” of the element or population being studied and randomly selects sites from within that cluster. Cluster monitoring can have a one-stage (all elements within the selected cluster are sampled) or two-stage (a subset of the elements within the selected cluster are randomly included in the sample) approach (Thompson, 1992). This form of monitoring may be used when the resource being studied has a restricted geographical distribution or is sparse in nature. Multi-stage is similar to cluster monitoring (see Thompson, 1990; and Bried, 2013 for more information).
Generalized Random Tessellation Stratified (GRTS)	GRTS is a spatially balanced survey design that accommodates different spatial scales of monitoring, spreads points “evenly” across the area of interest, and allows replacement of sites (after the fact), if site locations are unsuitable. It thus combines the advantages of being a true probability sample with the spatial balance properties of systematic monitoring (Stevens and Olsen, 2004). The drawback of GRTS design is the site selection procedure can be difficult to understand or implement, although free tools are available (e.g., Kincaid et al., 2016).

Design	Summary
Simple random	Simple random monitoring should meet two criteria: (1) each combination of a specified number of sampling units has the same probability of being selected; and (2) the selection of any one sampling unit is in no way tied to the selection of any other (McCall, 1982). This method is recommended for smaller areas where physical and biological conditions are fairly uniform throughout. Applicability in larger areas may become cumbersome as the distance between plots becomes greater and more time consuming (Murray et al., 2002).
Stratified random	Stratified random monitoring involves dividing the area into two or more subgroups (i.e., strata) prior to monitoring; sites within the same stratum are very similar, while the units between strata are very different. After stratification, simple random samples are taken within each stratum. The inclusion of "strata," or groups with the same set of characteristics, can improve the precision of estimates for each strata (Elzinga et al., 1998). Stratification may be employed if different performance criteria are identified for different habitat types, for example.
Systematic random	In systematic (or grid) random monitoring, the first site is selected at random and all subsequent sites are then placed equidistant from each other, to form a grid. Projects with a variety of habitats, where truly "even" monitoring across the landscape and precise interspersion of monitoring locations need to be achieved, may consider using a systematic random design (Scott, 1998; Fancy, 2000).
Transect	A transect is a line along which samples are taken. Transects may run parallel or perpendicular to environmental gradients depending on the purpose of the project. Transects may be spaced evenly or randomly, or relative to features of interest. Similarly, samples may be taken evenly or randomly along a transect.

Adding a reference site and/or control site is often desirable to distinguish natural variability from the effects of the project. The BACI (before-after, control-impact) design assesses the performance of a project relative to a reference or control site. Samples are taken at a restoration site and a control or reference site both before and after restoration, which allows project managers to distinguish changes caused by the restoration actions from changes caused by other factors. A single pair of reference and control sites measured before and after restoration will allow the statistical comparison of the monitored locations, while the inclusion of multiple reference and/or control sites will allow for statistically driven conclusions about the effects of the project.

### 2.4.5 Guidance for Developing the Rationale for Adaptive Management for a MAM Plan

The project-specific MAM Plan should evaluate the extent of adaptive management that is needed for the specific project (Attachment C, Section C.3). The need for adaptive management will vary with the scope, scale, and Restoration Type of the project. For example, higher uncertainty may be associated with certain Restoration Types, novel approaches, larger restoration scales (e.g., number and area of projects), limited scientific understanding of target resources, increasing influence of socioeconomic factors, and longer time scales of restoration implementation (see the PDARP/PEIS for more information; DWH NRDA Trustees, 2016).

MAM Plans should include the identification of potential corrective actions, if appropriate, for the project.

Although all projects are encouraged to consider adaptive management, there may be some projects for which adaptive management beyond corrective action is not necessary. Adaptive

management is appropriate when there are consequential decisions to be made, there is an opportunity to apply learning, the value of reducing uncertainty is high, and a targeted monitoring plan can be put in place to reduce uncertainty (Williams et al., 2009). Adaptive management should not be used when the impacts of decisions may be irreversible; when learning is unlikely on a time scale relevant to informing decisions or where no opportunity exists to revise or re-evaluate decisions based on new information (Doremus et al., 2011).

Section 2.4.5.1 provides an example of considerations that could be used to determine if adaptive management may be appropriate for a specific project. In cases where it is determined that adaptive management beyond corrective action is not needed, the adaptive management section of the plan may describe why additional adaptive management is unnecessary for the project.

#### 2.4.5.1.1 Example Process for Evaluating the Extent of Adaptive Management for a MAM Plan

Adaptive management may be an appropriate approach to decision-making for restoration projects or suites of restoration projects with all or most of the following characteristics (adapted from Williams et al., 2009):

- There is more than one potential restoration action and there is an opportunity to re-evaluate restoration decisions in the future.
- Relevant stakeholders are engaged during the project, as appropriate.
- Management objectives have been identified.
- Uncertainties about potential restoration actions are affecting the decision-making process.
- Uncertainties, risks, alternatives, siting factors, and other potential influences on a project or suite of projects have not already been evaluated in a previous feasibility study, alternatives analysis or project planning effort, or the evaluations are no longer relevant or applicable.
- It is possible to describe or predict how resources may respond to restoration actions.
- Monitoring can be conducted to explicitly reduce uncertainties tied to the decision-making process.
- Progress and understanding of restoration actions can be measured.
- Learning can inform decisions and be used to adjust restoration strategies.
- Adaptive management tools (e.g., tradeoff analysis, additional monitoring) have been budgeted in the project.
- Any adaptive management activities are compliant with applicable laws, regulations, and authorities.

#### 2.4.6 Guidance for Describing the Project Evaluation for a MAM Plan

The project-specific MAM Plan should include information on how project performance will be assessed in terms of meeting its restoration objectives and performance criteria, and informing whether corrective actions are needed (Attachment C, Section C.4). For performance criteria without specific numeric targets, the evaluation may be an assessment of whether the performance criteria have been met. However, for quantitative performance criteria, the

evaluation may include modeling, analysis, interpretation of results, and estimates of uncertainty (e.g., Type I or Type II errors), as appropriate.

The results of the analyses may be used to evaluate the following:

- The project's success, as measured by performance criteria and restoration objectives.
- The need for corrective actions and the type of corrective actions.
- Whether the restoration project produced unanticipated effects and, if so, what those effects were.
- Whether any unanticipated events unrelated to the restoration project affected the monitoring results (e.g., hurricanes) and, if so, identification of those events and assessment of how the monitoring results were affected.
- The status of uncertainties identified prior to project implementation.
- New uncertainties.

The TIGs and Cross-TIG MAM work group will also compile project-level monitoring data to evaluate restoration progress for each TIG and Restoration Type, as well as to contribute to the overall evaluation of NRDA restoration outcomes for Trustee Council programmatic reviews. Collectively, project monitoring results will contribute to the Trustees' knowledge base to inform future decisions related to project prioritization and selection, implementation techniques, and the identification of uncertainties. Additional guidance on compiling and evaluating project-level data at broader scales will be included in future versions of this Manual.

#### 2.4.6.1.1 Example Process for Conducting Evaluation for a MAM Plan

The analytical methods will likely vary for each of the monitoring parameters. However, the following options may serve as a useful guide for considering the options for analyzing, evaluating, and interpreting the data (adapted from Segura et al., 2007):

- Data summarization and characterization
- Calculation of basic statistics from monitoring data, including measures of location and dispersion. Summarization encompasses measured and derived parameters specified in the monitoring protocol, and forms the basis of more comprehensive analyses, as needed, and communication of results in both graphical and tabular formats, for example.
- Status determination
- Analysis and interpretation of the status may be used to inform the following:
  - Comparison of observed values to historical levels
  - Observed values compared to the performance criteria (for parameters used to evaluate project performance)
  - Observed values compared to a regulatory threshold (for compliance monitoring parameters)
  - Observed values compared to an ecological threshold (for parameters intended to inform adaptive management or interpretation of project performance)
- Spatial distribution of observed values for a given point in time
- Patterns indicating directional relationships with other ecological factors
- Status determination will involve both expert interpretation and statistical analysis. Statistical assumptions and level of confidence will be ascertained during the analysis.



- Trends evaluation
- Used to address whether there is directional change over the period of measurements
- Can inform how this trend compares with trends over broader spatial scales
- Where appropriate, additional variables, such as natural or random phenomena that may influence the parameter, will be accounted for in the analysis.
- Synthesis and modeling
- Examination of patterns and trends across multiple parameters to gain broader insights on ecosystem processes. Analyses may include:
- Qualitative or quantitative comparisons of parameters with known or hypothesized relationships
- Data exploration and confirmation (e.g., correlation, ordination, classification, multiple regression, structural equation modeling)
- Development of predictive models.

## 2.4.7 Guidance for Describing Project-Level Decisions: Performance Criteria and Corrective Actions for a MAM Plan

### 2.4.7.1.1 Performance Criteria

Performance criteria will be developed for each project and included in the project-specific MAM Plan (Section 9.4.2.1 SOP; DWH NRDA Trustees, 2021; Attachment C, Section C.5).

Performance criteria will be used to determine: (i) what constitutes success or (ii) the need for corrective actions (15 CFR § 990.55(b)(2)). If appropriate, performance criteria should be established for at least a subset of the monitoring parameters, as well as potential corrective actions that could be taken if the performance criteria are not met. The selection of performance criteria may be based on desired conditions of the restoration site, conditions at appropriate reference site(s), or derived from the literature (Appendix 5.E.3.1 of PDARP/PEIS; DWH NRDA Trustees 2016). Because most restoration projects may take many years to reach the project objective, performance criteria may include conditions representative of interim recovery (Appendix 5.E.3.1 of PDARP/PEIS; DWH NRDA Trustees, 2016). Establishment of interim milestones may help project managers determine if the project will be able to meet restoration objectives at an acceptable pace or if interim corrective actions are needed (Section 9.5.1.4 of SOP; DWH NRDA Trustees, 2021).

When requested, the Cross-TIG MAM work group can provide support to the TIGs and Implementing Trustees in developing project-specific performance criteria.

Example quantitative performance criteria from Early Restoration projects:

- Objective: Support habitat utilization of constructed living shorelines breakwaters by invertebrate infauna and epifauna
- Performance criterion: Over 5 or 7 years, the average infauna and epifauna invertebrate biomass is at least 84 g wet weight/m<sup>2</sup> (“Restoring Living Shorelines and Reefs in Mississippi Estuaries” project monitoring plan, Phase IV Early Restoration Plan)
- Objective: Reduce discards in the Gulf of Mexico pelagic longline fishery
- Performance criterion: Reduce the biomass of dead discards in the Gulf of Mexico pelagic longline fishery by an average of 11,600 dkg per vessel year over 60 vessel

years of project participation (“Pelagic Longline Bycatch Reduction Project” monitoring plan, Phase IV Early Restoration Plan)

- Objective: Promote establishment of native brackish marsh vegetation
- Performance criterion: Average live vegetative cover is equal or greater than 66% at year 5 (“Lake Hermitage Marsh Creation Project” monitoring plan, Phase I Early Restoration Plan)
- Objective: Reduce invasive species plant cover within the project footprint
- Performance criterion: Invasive plant cover in the project footprint is less than 5% in the marsh creation area by year 5 (“Lake Hermitage Marsh Creation Project” monitoring plan, Phase I Early Restoration Plan).

### 2.4.7.1.2 Project-Level Decisions, including Corrective Actions

The project-specific MAM Plan may provide a description of the corrective actions for the project and the process for making decisions about if and when to conduct corrective actions, if appropriate, for the project (Attachment C, Section C.5). Corrective actions aim to address changing circumstances and incorporate new information that indicates a project is not achieving its intended restoration objectives or is causing unintended and undesirable effects. A project may not be achieving its intended restoration objectives because of previously identified uncertainties, unanticipated consequences, unknown conditions, or unanticipated environmental drivers. The decision to implement a corrective action for a project should holistically consider the overall outcomes of the restoration project (i.e., looking at the combined evaluation of multiple performance criteria) in order to understand why project performance deviates from the predicted or anticipated outcome. If pre-defined recurring decisions are anticipated and identified during project planning and design, each decision point should be described along with the set of potential options or corrective actions associated with that decision point.

However, corrective actions are not limited to the pre-defined options identified in the MAM Plan. A table in this section of the MAM Plan could be used to identify potential interim corrective actions for each performance criterion (Table 3), as defined in the OPA regulations (15 CFR § 990.55(b)(1)(vii)), but should not be considered an exhaustive list of all possible corrective actions. Additional corrective actions may be identified post-implementation, as appropriate.

**Table 3.** Example table that could be used to list project monitoring parameters, interim and final performance criteria, and potential corrective actions

Monitoring Parameter	Final Performance Criterion	Interim Performance Criterion	Potential Corrective Actions
Example: Elevation	Example: At year X, marsh elevation ranges between Y and Y for Z area of marsh.	Example: Performance criteria not met for year X.	Example: (1) Add, regrade, or remove sediment; or (2) continue to monitor.
Example: Marsh spatial extent	Example: At year X, the marsh spatial extent is equal to or greater than Y acres.	Example: Performance criteria not met for year X.	Example: (1) Add, regrade, or remove sediment; or (2) continue to monitor.
Example: Tidal inundation	Example: No performance criteria.	Example: If berms are still present at year X.	Example: (1) Gap berms; or (2) continue to monitor.

Monitoring Parameter	Final Performance Criterion	Interim Performance Criterion	Potential Corrective Actions
Example: Survival of plantings	Example: At day X, the percent survival is equal to or greater than Y%.	Example: Performance criteria not met for day X.	Example: (1) Plant/replant vegetation; (2) continue to monitor; or (3) modify monitoring plan.
Example: Vegetation species percent cover	Example: At year X, the percent cover is equal to or greater than Y%.	Example: Performance criteria not met for year X; or if percent cover is less than Y% at years X–Z.	Example: (1) Plant/replant vegetation; (2) add fertilizer; or (3) continue to monitor.
Example: Presence of undesirable plant species (e.g., invasive species)	Example: At year X, undesirable plant species, Y, are not present at the project site.	Example: Performance criteria not met for year X; or if percent of undesirable plant species is greater than Y% at years X–Z.	Example: (1) Remove undesirable plant species; or (2) continue to monitor.

## 2.4.8 Guidance for Describing the Data Management Strategy for a MAM Plan

The project-specific MAM Plan should include a description of the anticipated data and how those data will be collected, processed, reviewed, stored, and shared (Attachment C, Section C.7). The project-specific MAM Plan should include the following information:

1. Data description
2. Data review
3. Data storage and accessibility
4. Data sharing.

Data management should also be consistent with the guidance in Section 3.

### 2.4.8.1.1 Data Description

The project-specific MAM Plan should include information on how the data will be recorded, the type of data that will be collected, the data standards that will be followed, the timing and frequency of data collection and processing, the location of data collection, and the quantity of data that are expected. If data from an existing program will be utilized, a description of the relevance and usability of the data and how it will be obtained and utilized should be included.

### 2.4.8.1.2 Data Review

The project-specific MAM Plan should include information on the QA/QC, review, and clearance processes for the data. If needed, the QA/QC procedures may be provided in a separate document, such as a Quality Assurance Project Plan (QAPP) or a scope of work (SOW), and referenced in the MAM Plan. The QA/QC and review processes are outlined in Section 3.1.2.

If applicable, the project-specific MAM Plan should also provide information on how the transfer of samples or data between parties will be documented. This could include using a standard chain of custody form (as used for the injury assessment), documenting the transfer in a README file or other means.

### 2.4.8.1.3 Data Storage, Accessibility, and Sharing

The project-specific MAM Plan should include information on the data storage process and data accessibility.

MAM data should be stored in the DIVER Restoration Portal or a similar outside data platform (Section 10.6.5 of SOP; DWH NRDA Trustees, 2021). Data should be submitted as soon as possible but no more than one year from when data were collected (Section 10.6.5 of SOP; DWH NRDA Trustees, 2021). If it will not be possible to add data to the DIVER Restoration Portal within the one-year timeframe, an estimated timeframe for submission should be provided in the MAM Plan (Section 10.6.5 of SOP; DWH NRDA Trustees, 2021). If project monitoring data will be provided by an outside data platform, the process for the data submission to the DIVER Restoration Portal should be specified in the MAM Plan (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021).

The frequency of data submission should be defined in the MAM Plan and SOW. The frequency should be at least yearly during years when monitoring is being conducted.

Data storage and accessibility should be consistent with the guidelines in the data management section (Section 3.1.3).

The project-specific MAM Plan should include information on the data-sharing mechanisms and frequency.

Monitoring data will be made publicly available, in accordance with the Federal Open Data Policy, through the DIVER Restoration Portal or other mechanisms (Sections 10.6.6 and 11.4 of SOP; DWH NRDA Trustees, 2021). In the event of a public records request related to project data and information that are not already publicly available, the Trustee to whom the request is addressed will provide notice to the other Trustees within the TIG prior to releasing any project data that are the subject of the request.

If MAM data are protected from public disclosure under other statutory or regulatory authorities [personally identifiable information, Magnuson-Stevens Fishery Conservation and Management Act (MSA), ESA, etc.], state law, policies, or security measures, these reasons should also be explained, and any such limitations should be identified in the MAM Plan (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021).

Data sharing should be consistent with guidelines in Section 3.1.4.

## **2.4.9 Guidance for Describing the Reporting Strategy for a MAM Plan**

The project-specific MAM Plan (Attachment C, Section C.8) should include:

1. Information to be reported.
2. The frequency of reporting.

Reporting activities include:

- Reporting on general MAM activities in the DIVER Restoration Portal on an annual basis (Sections 10.7.1 and 12.0 of SOP; DWH NRDA Trustees, 2021).
- Developing MAM Reports at a frequency defined in the MAM Plan (Section 10.7.1 of SOP; DWH NRDA Trustees, 2021). These MAM Reports should be consistent with the MAM Report Template (Attachment D).

- Developing a Final MAM Report before a project is closed out (Section 10.7.1 of SOP; DWH NRDA Trustees, 2021). This MAM Report should be consistent with the MAM Report Template (Attachment D).

See Attachment D for the project MAM Report Template.

## 2.5 Funding: Project MAM Activities

During project development, costs related to MAM should be captured in the overall project budget. MAM costs identified in the budget may cover MAM activities related to planning, implementation, and management; potential corrective actions for a specific project; and Trustee administration, oversight, and decision-making. The costs should be estimated based on currently available data and may be revised as needed if additional information becomes available and/or there are changes to the project or the MAM Plan that affect the MAM budget. In some cases, certain items that will be used for MAM may already be included in the overall project budget (e.g., baseline and as-built costs covered under the construction costs and/or potential corrective actions covered in project contingencies).

MAM budget estimates should be developed based on the scope, scale, and duration of the project; and may include costs for monitoring activities, QA/QC, data management, evaluation and assessment, reporting, and other adaptive management activities. The MAM budget should consider the costs for similar programs, and account for the identified risks and uncertainties described in the MAM Plan, as well as the potential need for corrective actions. The costs of any potential corrective actions should be considered to ensure that any required adaptive management adjustments are captured.

## 2.6 MAM Considerations during Project Implementation

### 2.6.1 Monitoring and Data Management

Following the development and approval of the project-specific MAM Plan and the corresponding final Restoration Plan, project-specific monitoring will be conducted in accordance with the MAM Plan and QA/QC procedures. If changes arise during implementation that will alter the planned monitoring activities, such as a change to the monitoring design, the project-specific MAM Plan and/or QA/QC procedures should be updated to reflect these changes, approved by the TIG, and the revised version uploaded to the DIVER Restoration Portal (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). This updating may occur concurrently with the annual project reporting (see Section 2.6.3 below).

The Implementing Trustee(s) may choose to conduct the monitoring themselves or contract the monitoring. If an outside party is conducting the monitoring, the Implementing Trustee(s) should coordinate closely with the outside party to ensure monitoring and data collection are being conducted in accordance with the MAM Plan and/or QA/QC procedures. It is recommended that the SOW be as detailed and specific as possible to provide sufficient direction to the party conducting the monitoring. The MAM Plan and QA/QC procedures should also be provided to the party conducting the monitoring. Further, data collection and management should be consistent with the guidelines in Section 3.

To the extent practical, environmental and biological data generated during monitoring activities should be collected using standardized field datasheets (Section 3.2). If standardized datasheets are unavailable or not readily amendable to record project-specific data, then project-specific datasheets should be drafted prior to conducting any project-specific monitoring activities. Photographs and original hardcopy datasheets, and notebooks or electronic datasheets will be retained by the Implementing Trustee(s).

## 2.6.2 Project Evaluation and Learning from Adaptive Management

An essential component of adaptive management is the feedback of new information to inform future decision-making. Monitoring data collected during project monitoring will be analyzed to evaluate whether the project is trending toward its identified performance criteria, and assess the overall progress toward meeting the project's restoration objectives. The analysis of project monitoring data may also help resolve uncertainties related to the best ways to meet restoration objectives and/or the presence of any external factors that could influence the ability of the project to meet its restoration objectives.

During project evaluation (Section 2.4.6), the Implementing Trustee(s) can use the information gained to inform project-level decisions, such as proposing potential corrective actions to the TIG, if needed (Section 10.4.2.1 of SOP; DWH NRDA Trustees, 2021). Understanding the specific drivers that influence project performance, such as unanticipated outcomes or events, can help guide the development and implementation of appropriate corrective actions if the Implementing Trustee(s) determines that corrective actions should be implemented for the project. Further, new information learned through project evaluation can also be used to inform the current understanding of the project's environmental setting to help determine how the system may respond to subsequent corrective actions or changes to project operations. If corrective actions will be implemented, the Implementing Trustee(s), in coordination with the TIG, should determine whether:

- Any modifications to the project MAM Plan are required as a result of the corrective action (Section 10.4.2.1 of SOP; DWH NRDA Trustees, 2021)
- The proposed corrective actions require additional environmental review, including modifications to regulatory permits and consultations; or if the modifications result in a material change to the project as selected in the final Restoration Plans, determine whether public notification is required (Section 9.5.1.4 of SOW; DWH NRDA Trustees, 2021).

In addition, the Cross-TIG MAM work group may share project-level outcomes across TIGs to identify any lessons learned that can inform the design and implementation of future, similar projects. The Cross-TIG MAM work group will serve as a forum for the TIGs to share knowledge gained through the implementation, monitoring, and evaluation of individual restoration projects. The Cross-TIG MAM work group may elect to hold meetings following the annual reporting period to discuss the monitoring results of existing projects and any lessons learned that may be relevant to the TIGs. The work group members who serve as liaisons to each of the TIGs could provide updates to the TIGs on the outcomes of this discussion. When relevant and appropriate, the Cross-TIG MAM work group will share lessons learned with other DWH restoration programs as part of their external engagement efforts.

## 2.6.3 Project Reporting

As stewards of public trust resources under OPA, the Trustees acknowledge the importance of informing the public on restoration project progress and performance, as well as on the collective progress toward meeting Restoration Type and programmatic goals (Chapter 7 of PDARP/PEIS; DWH NRDA Trustees, 2016). Reporting is also a key step of science-based adaptive management (Appendix 5.E of PDARP/PEIS; DWH NRDA Trustees, 2016). Thus, the Trustees committed themselves to reporting regularly on the progress of restoration projects via the DIVER Restoration Portal (Chapter 7 of PDARP/PEIS; DWH NRDA Trustees, 2016).

Information collected during each reporting cycle will be shared with the public and other interested entities.

Specific reporting activities are described below.

### 2.6.3.1.1 Reporting in the DIVER Restoration Portal on MAM Actions

The Implementing Trustee(s) will report on MAM actions through the DIVER Restoration Portal page (Sections 10.7.1 and 12.0 of SOP; DWH NRDA Trustees, 2021) in the monitoring tab of the “Project Details” page. This monitoring tab currently describes project restoration objectives, monitoring activities, parameters, and performance criteria (Section 12.0 of SOP; DWH NRDA Trustees, 2021); and will be expanded with the input and approval of the Trustees to include adaptive management activities, such as lessons learned and new reporting templates, as they are developed. These components should be filled out once the project has a published MAM Plan; and these sections should be reviewed and updated, if needed, in the DIVER Restoration Portal annually to reflect the status of MAM activities.

In addition to the annual reporting process described above, if changes arise during implementation that will alter the planned MAM actions, the MAM details in the DIVER Restoration Portal should be updated accordingly, as needed, and the revised MAM Plan should be uploaded to the DIVER Restoration Portal as a new file.

### 2.6.3.1.2 Interim and Final MAM Reports

Interim (if applicable) and Final MAM Reports should be developed at the frequency defined in the final MAM Plan (Section 10.7.1 of SOP; DWH NRDA Trustees, 2021). The report template provided in Attachment D should be used, to the extent practicable, when developing the Interim and Final MAM Reports:

- Interim MAM Reports should contain results of the evaluation, summary statistics for MAM data, an overview of progress toward project restoration objectives, a determination of the need for corrective actions, an adequate description of the methods used to obtain the project MAM results, and any additional information deemed relevant by the Implementing Trustee(s) or TIG.
- Final MAM Report should contain a final evaluation of project monitoring data; a report on the final project outcomes, including lessons learned or uncertainties addressed; considerations for planning and implementing future projects; and any additional information deemed relevant by the Implementing Trustee(s) or TIG.

- The Final MAM Report should be developed once the project is complete and no additional NRDA monitoring is planned. A Final MAM Report is required before a project is considered complete (Section 10.7.1 of SOP; DWH NRDA Trustees, 2021).

Once reviewed by the TIG, the Interim (if applicable) and Final MAM Reports should be uploaded to the DIVER Restoration Portal to be shared with the Trustee Council and the Cross-TIG MAM work group (Section 10.7.1 of SOP; DWH NRDA Trustees, 2021). The review and clearance of monitoring reports should follow the same clearance and release process as the monitoring data, as outlined in Section 3.1.2. Once the reports are cleared for release, the documents will be made publicly available.



## 3 Guidance for Data Management

### 3.1 Data Procedures

#### 3.1.1 MAM Data Recording

Following data collection, data should be recorded in accordance with the MAM Plan, QA/QC procedures (if a separate document), QAPP, and/or SOW (if applicable). The steps are as follows:

1. Enter or download the data into established digital formats, consistent with the data standards (Section 3.2). For example, relevant project data that are handwritten on hardcopy datasheets or notebooks should be transcribed (i.e., entered) into Excel spreadsheets (or a similar digital format).
2. Develop the metadata. Geospatial metadata should follow the [International Organization for Standardization \(ISO\) metadata standards](#) (ISO, 2014; see data standards described in Section 3.2) to the extent practicable and in accordance with individual agency requirements.
3. Store and manage documents and electronic data files in a secure location in such a way that the Implementing Trustee is guaranteed to have access to all versions of the data at least as long as agency retention requires.

It is recommended that all hardcopy field datasheets and notebook entries be scanned to Portable Document Format (PDF) files, and the files archived along with the hardcopy datasheets. Changes to electronic data files should be tracked. All photographs, original hardcopy datasheets, notebooks, and revised data files should be retained.

#### 3.1.2 MAM Data Review and QA/QC

Before being added to the DIVER Restoration Portal, all data will go through the appropriate QA/QC process in accordance with the data management section of the MAM Plan and QA/QC procedures (if contained in a separate document), QAPP, and/or SOW (if applicable), and be consistent with the process outlined below.

##### Step 1. Data Verification

1. Verify that the data are correctly entered and convert into a format that may be imported into DIVER (transcription verification, see details below), consistent with the data standards (Section 3.2).
2. Perform an initial validation check for suspected errors other than data entry/transcription errors (e.g., units, expected value range).
3. Address any suspected errors, and document the changes made to correct actual errors and suspected errors that were found to be valid data.
4. Verify the metadata are in standard ISO format (see data standards described in Section 3.2) to the extent practicable and in accordance with individual agency requirements.
5. Corrections to errors should be made before the data are used for any analyses or distributed outside the agency. As needed, the initial data analysis may be conducted at this time in accordance with the SOW, QAPP, and/or MAM Plan.

**Additional Information**

Transcription verification is a process where the entered data are checked to ensure they are transcribed accurately. There are two common approaches to transcription verification:

- Visual check – Have the entered/converted data visually inspected, preferably by a person who did not enter the data. This could be performed on the entire dataset or a portion of the dataset (e.g., 10%).
- Double data entry – Have two people independently enter the data and check for agreement.

Any errors/corrections may be double-checked by the original data entry/conversion personnel or an independent reviewer. The robustness of the verification review may depend on the type of data, how the data were collected and recorded, the quantity of the data, and the required data quality (e.g., data quality objectives).

**Step 2. Data Procurement**

Data should be made available to the TIG at least yearly during years when monitoring is being conducted. Data submitted to DIVER or another data repository should be verified. Submissions may also include scanned datasheets, raw data, and/or analyzed data.

The Implementing Trustee(s) is responsible for ensuring that the data submitted are consistent with the data standards (Section 3.2), and that the data transfer is documented (e.g., chain of custody form, README file).

**Step 3. Data Validation and Final QA/QC**

In accordance with the MAM Plan and/or QA/QC procedures, the Implementing Trustee(s) is responsible for reviewing submitted verified data and verified processed data, and checking for suspected non-data entry errors (e.g., units, expected value range, date/time, latitude/longitude). After any and all suspected errors are addressed, the data are considered to have gone through the QA/QC process.

**Additional Information**

Depending on the type of data, there are a number of checks that can be done when reviewing the transcription-verified data to ensure the data are accurate and complete. Some examples include (adapted from <https://www2.usgs.gov/datamanagement/qaqc.php>):

- Check units.
- Compare values to expected value ranges (e.g., existing datasets, reports).
- Check date and time.
- Perform geospatial checks (e.g., coordinates).
- Ensure data columns and rows line up properly.
- Look for missing or irregular data entries.
- Look for blank entries.
- Note any data qualifiers.
- Perform statistical summaries.

- Check for outliers. This can be done by creating graphs (e.g., normal probability plots, regression, scatterplots), creating maps, or performing additional data analysis (e.g., subtract values from the mean).

#### **Step 4. Information Package Creation**

The Implementing Trustee(s) is responsible for creating an information package for public release, which should include the following documents if applicable:

- Monitoring data
- Metadata
- Geospatial metadata following ISO standards (see data standards, Section 3.2, Step 6)
- Data dictionary (defines codes and fields used in the dataset; see data standards, Section 3.2, Step 6)
- README file (e.g., how data were collected; QA/QC procedures; other information about data such as meaning, relationships to other data, origin, usage, and format – can reference other documents; see data standards, Section 3.2).

Prior to upload and release of the monitoring data and associated metadata, the Implementing Trustee(s) should confirm with the relevant TIG(s) that the package is ready for release.

### **3.1.3 MAM Data Storage and Accessibility**

The Implementing Trustee(s) is responsible for ensuring that documents and electronic data files are stored in a secure location in such a way that accessibility is guaranteed for as long as the agency requires.

The DIVER Restoration Portal offers a centralized storage option for each Trustee that will meet data storage and accessibility (internal and public) requirements; however, the Trustees may maintain records on other platforms. If data are stored on another platform, an explanation of where the data are stored, as well as a description of the long-term management and archiving procedures of that database, will be provided in the DIVER Restoration Portal (Section 10.6.5 of SOP; DWH NRDA Trustees, 2021). Options to link data from a source database to the DIVER Restoration Portal are available as well.

The Implementing Trustee(s) will provide MAM data and information to the DIVER Restoration Portal or similar outside data platforms as soon as possible and no more than one year from when data are collected, unless otherwise specified in the MAM Plan (Section 10.6.5 of SOP; DWH NRDA Trustees, 2021).

More detailed data entry steps and workflows for restoration data management can be found in the DIVER Restoration Portal Manual (NOAA DWH Data Management Team, Undated).

### **3.1.4 MAM Data Sharing**

The Trustees will ensure that data sharing follows standards and protocols set forth in the Open Data Policy (Section 10.6.6 of SOP; DWH NRDA Trustees, 2021). However, some MAM data may be exempt from the Open Data Policy due to protection from public disclosure under other regulatory authorities (e.g., Privacy Act, ESA, MSA). No data release can occur if it is contrary to Federal or State laws (Section 10.6.4 of SOP; DWH NRDA Trustees, 2021). Trustees will

provide notification to the Cross-TIG MAM work group when new data and information packages have been uploaded to DIVER or another similar data platform. In the event of a public records request related to project data and information that are not already publicly available, the Trustee to whom the request is addressed will provide notice to the other TIG Trustees prior to releasing any project data that are the subject of the request.

Trustees will provide DWH NRDA MAM data and information to the DIVER Restoration Portal or another similar data platform as soon as possible and no more than one year from when data are collected. If it will not be possible to add data within that timeframe, an estimated timeframe of when to expect the data after they have been collected should be provided in the data management component of the MAM Plan (Section 10.6.5 of SOP; DWH NRDA Trustees, 2021). If the data are stored in the DIVER Restoration Portal, it can be shared to the public by publishing the data to the Trustee Council website (Section 10.6.6 of SOP; DWH NRDA Trustees, 2021). For further instructions on this process, see the DIVER Restoration Portal Manual.

## 3.2 Data Standards

These data standards reflect the guidelines developed during Early Restoration and will continue to serve as interim monitoring reference materials for the TIGs and Implementing Trustees until the Trustees further develop these standards in future iterations of the MAM Manual (Section 10.2 of SOP; DWH NRDA Trustees, 2021). The Trustees developed these data standards to increase consistency in the way data are described and recorded.

1. Data collection: Field data should be collected with standardized datasheets or project-specific datasheets electronically on digital tablets where feasible, or on hard copy datasheets.
  - a. Field datasheets should include standard data fields (described below) identified by the Trustees.
  - b. Agreed-upon standard units of measure should be used if available.
2. Document revision: If a data file is revised after it has been published to the DIVER Restoration Portal or other data repository, the original datasheet should be preserved and changes to electronic data files should be tracked.
3. Sample/data transfer: Transfer of samples or data should be properly documented (e.g., chain of custody form, README file).
4. Document/data retention, storage, and accessibility: All documents (e.g., photographs, original hardcopy datasheets, notebooks) and electronic data files should be stored and managed in a secure location in such a way that the Implementing Trustee(s) is guaranteed to have access to all versions of the data for at least as long as agency retention requires. All original and revised data files should be retained.
  - a. If an outside party is conducting the monitoring, the data submission to the Implementing Trustee(s) should occur at least yearly during the years when monitoring is being conducted.
5. Data format: The data format should be consistent with data standards developed by the Cross-TIG MAM work group. This includes the type of data file, standard data fields, and the units of the data.

6. Metadata: The data should have properly documented metadata, which may include geospatial metadata, a data dictionary, and/or a README file as appropriate.
  - a. Federal geospatial metadata standards can be found at <https://www.fgdc.gov/metadata/iso-standards>.
  - b. The data dictionary defines codes and fields used in the dataset.
  - c. The README file should include information on how the data were collected, the QA/QC procedures, and other information about the data (e.g., meaning, relationships to other data, origin, usage, format). The README file can reference different documents.
    - Example data fields: Data source; data collection purpose; data use qualifications; study; station; methods and QA/QC procedures; sample collection; sample analysis (if applicable); qualifiers; time and date of creation; creator or author of the data; and location of the data.
7. Data QA/QC and review: All data should undergo proper QA/QC protocols and be reviewed, following the process outlined in Section 3.1.2.
8. Data submission: Data should be submitted to the DIVER Restoration Portal or similar outside data platform within one year of data collection, unless otherwise specified in the MAM Plan.
9. Data sharing: All data should be made publicly available, in accordance with the Open Data Policy, through the DIVER Restoration Portal or another acceptable platform within a year of when the data collection occurred, unless otherwise specified in the MAM Plan. If MAM data are protected from public disclosure under other regulatory authorities (personally identifiable information, MSA, etc.), policies, or security measures, these reasons should also be explained, and any such limitations will be identified in the MAM Plan
10. (Sections 10.6.3 and 11.4 of SOP; DWH NRDA Trustees, 2021).

Standard data fields may include:

- Date
- Time
- Site
- Site name
- Station name/identification (ID)
- Latitude
- Longitude
- Sample ID
- Sample measurement
- Sample unit of measurement
- Field team leader
- Field team members.

Examples of commonly used digital formats:

- Excel spreadsheets (.xls)
- Access databases (.mdb)
- CSV files (.csv)

- Point, line, or polygon shapefiles (.shp)
- Rasters/imagery, such as TIFFs (.tif), ESRI grids, ASCII grids (.asc), ERDAS (.img), ENVI imagery, DEMs, and HDF
- Photographs, such as TIFFs (.tif), JPEGs (.jpg), or PNGs (.png)
- Geodatabases
- Web Mapping Services
- Google maps (kml, kmz).

## 4 MAM Priorities

The Trustee Council SOP specifies the need for TIGs to identify MAM priorities for the use of their designated MAM funds, including activities to identify and possibly address critical science and monitoring gaps relevant to its restoration priorities (Section 10.4.1.2 of SOP; DWH NRDA Trustees, 2021). MAM priorities are defined as the knowledge gaps or information needs relevant to planning, implementing, and/or evaluating restoration that, if addressed, would help the Trustees successfully implement Gulf restoration. MAM priorities may be identified at any scale or at any time, including at a project concept or Restoration Technique level, a single Restoration Area or multiple Restoration Areas, and for a single Restoration Type or multiple Restoration Types. These knowledge gaps or information needs can change over time, and will be re-evaluated periodically, and are not meant to limit project selection.

Once MAM priorities are identified, MAM activities (e.g., monitoring, modeling, data collection, research) can then be planned and implemented by the TIGs to address the MAM priorities. The distinction between MAM priorities and MAM activities is important to differentiate the information need from the mechanism to obtain it. Distinguishing between MAM priorities and activities allows for more efficient use of resources as multiple information needs (i.e., multiple MAM priorities) may be identified for different injured resources, for example, but ultimately may be addressed through the same MAM activity. This identification of priorities and activities also allows for screening MAM activities to those that best help address a MAM priority. MAM activities can be funded through multiple allocations depending on the nature of the information need that the activity is addressing, as further described in the SOP (Section 10.5 of SOP; DWH NRDA Trustees, 2021). While MAM activities can be funded to address MAM priorities through the TIGs, it is also possible that activities addressing MAM priorities may be addressed by other programs or funding mechanisms (e.g., projects funded by other science or restoration programs). For MAM and other activities supporting restoration planning and/or evaluation, funded through the TIGs, Implementing Trustees may develop a MAM Activity Implementation Plan (MAIP; for activities funded under the TIG MAM allocation) or another type of Activity Implementation Plan (for activities funded under other TIG allocations). These Implementation Plans may document the Trustees' approach to implementing the activity, the purpose and objectives of the activity, data management process, and other considerations. Published Implementation Plans (and any future revisions) will be made publicly available on the Trustees' Administrative Record ([www.doi.gov/deepwaterhorizon/adminrecord](http://www.doi.gov/deepwaterhorizon/adminrecord)). Each of the seven existing TIGs is responsible for identifying MAM priorities for their Restoration Areas, although the spatial scale at which they are identified may differ among the TIGs. TIG MAM priorities can include important science and monitoring gaps relevant to the TIG's restoration priorities for planning, implementation, and evaluation. As such, the TIG MAM priorities will be used to guide decision-making for the usage of TIG MAM funds. The TIG MAM allocations are intended to support restoration planning and the evaluation of restoration progress across all Restoration Types within the respective TIG, allowing the Trustees to adjust restoration implementation over time, based on monitoring and evolving scientific understanding.

MAM priorities can also be identified for specific Restoration Types, which can be addressed using funding from the respective Restoration Type allocations. For example, data gaps and information needs identified in the Regionwide TIG Strategic Frameworks for oysters, birds, marine mammals, and sea turtles could be utilized by the individual TIGs to help plan and

implement MAM activities that address those Restoration Type priorities that are relevant to their Restoration Area. TIGs may also identify and communicate additional Restoration Type MAM priorities specific to their Restoration Area (e.g., the Louisiana and Open Ocean TIGs developed monitoring and adaptive management strategies). As such, coordination among the TIGs is essential as MAM priorities for all resources and Restoration Areas are identified. This coordination is facilitated, in part, through discussions across Trustees within the Cross-TIG MAM Work Group and the Regionwide TIG.

The Cross-TIG MAM work group may review, upon request of a TIG, MAM priorities developed by each of the TIGs, including specific Restoration Type data gaps and information needs defined through the Regionwide TIG Strategic Frameworks, to identify MAM activities that can support multiple MAM priorities identified by different TIGs and/or for the restoration of different injured resources.



## 5 Examining the Restoration Program

### 5.1 Purpose of a Programmatic Review

Approximately every five years, the Trustees will re-examine the restoration program to track the progress towards meeting restoration goals and to identify any potential needs for program adjustments. This process is referred to as a “programmatic review.” The Cross-TIG MAM work group is responsible for assisting the Trustee Council with programmatic reviews, including synthesizing monitoring information and overall restoration results across Restoration Types and Restoration Areas (i.e., TIGs). In addition to evaluating monitoring information and restoration results, as part of programmatic reviews, the Trustee Council may also report on general restoration program progress such as restoration planning efforts, governance, public engagement, and the status of restoration funding.

Injuries from the Deepwater Horizon oil spill were broad and affected numerous natural resources and ecological services over an expansive area (DWH NRDA Trustees, 2016). The NRDA settlement included up to \$8.8 billion in restoration funding, and the Trustees’ restoration efforts will span many years to implement the comprehensive, integrated ecosystem restoration described in the PDARP/PEIS (DWH NRDA Trustees, 2016). As such, the program reviews the Trustees perform will provide valuable information on restoration progress over the duration of the restoration program.

### 5.2 Overall Process for Conducting a Programmatic Review

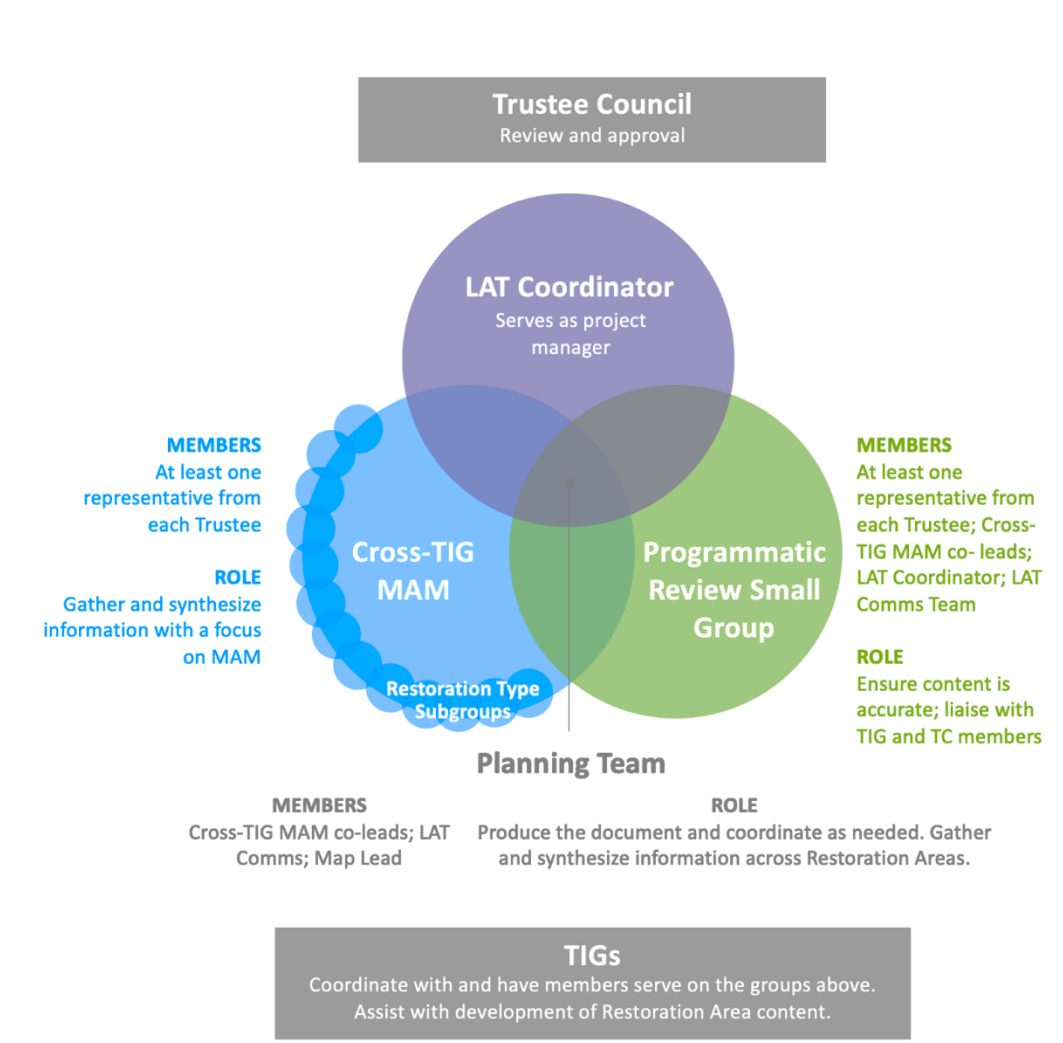
The Trustees will rely on the Lead Administrative Trustee and several other groups of Trustee representatives to coordinate and develop each programmatic review, following decisions and guidance provided by the Trustee Council on content, format, and organization. The Trustee Council will review and approve the programmatic review. In addition to coordinating with the Trustee Council, each group of Trustees developing the programmatic review will work with Trustee project managers, subject matter experts, and TIG representatives as needed to verify content and solicit feedback.

The responsibilities of those involved in developing each programmatic review are described briefly below and illustrated in **Figure 2**.

- **Trustee Council.** Make decisions and provide guidance and direction, as needed, to the groups; review and approve the programmatic review.
- **Lead Administrative Trustee (LAT) Coordinator.** Facilitate and coordinate efforts among each of the groups, facilitate the Trustee Council Programmatic Review Small Group discussions, develop administrative oversight content for the programmatic review, and provide regular updates to the Trustee Council.
- **Trustee Council Programmatic Review Small Group.** Review and provide feedback on draft content prior to sharing with the Trustee Council for final review and approval. This group includes representatives from each Trustee as well as the members of the Programmatic Review Planning Team (i.e., the LAT Coordinator, Cross-TIG MAM work group Federal and State co-leads, and the LAT Communications Team). Participants

from each Trustee will be solicited before the Programmatic Review Small Group work commences for each programmatic review.

- **Programmatic Review Planning Team.** A subset of the Trustee Council Programmatic Review Small Group (the LAT Coordinator, Cross-TIG MAM work group Federal and State co-leads, the LAT Communications Team, and the Map Lead), this group leads efforts to coordinate with TIGs to develop content related to progress across Restoration Areas, review draft content for accuracy and consistency, and coordinate directly with the Trustee Council Programmatic Review Small Group to solicit feedback on draft content. The Planning Team will generally meet more frequently than the Small Group and will focus on making sure that all aspects of the Programmatic Review are well-coordinated and moving ahead according to schedule.
- **LAT Communications Team.** Subgroup of the Programmatic Review Planning Team, responsible for assisting with content development (as needed), reviewing content for consistency and suggesting changes to the Programmatic Review Planning Team, prior to Trustee Council Programmatic Review Small Group reviews. This group includes Trustee communications representatives.
- **TIGs.** Coordinate with the Programmatic Review Planning Team, and directly with the LAT Communications Team, as needed, to develop and review content for the Restoration Area sections of each programmatic review.
- **Cross-TIG MAM work group.** Lead efforts to review and evaluate project information and monitoring data, develop content related to progress across Restoration Types, and coordinate with Trustee project managers and subject matter experts as needed.



**Figure 2.** Roles and responsibilities of groups involved in programmatic review.

## 5.3 Programmatic Review Content

Each programmatic review may include sections similar to those listed below. The Trustee Council may update the programmatic review content and outline as the restoration program changes over time.

1. Executive Summary
2. Introduction
3. Administrative Oversight (e.g., administrative, financial, public engagement)
4. Monitoring and Adaptive Management
5. Progress and Accomplishments by Restoration Type
6. Progress and Accomplishments by Restoration Area
7. Summary

The guidance below generally corresponds to the content provided in a programmatic review in the Administrative Oversight, Progress and Accomplishments by Restoration Type, and Progress and Accomplishments by Restoration Area sections. The Trustee Council may update guidelines to reflect content and process modifications.

### 5.3.1 Administrative Oversight

Development of general restoration program progress information, including administrative updates such as financial and public engagement progress, will follow a similar process to that of the Restoration Type (Section 5.3.2) and Restoration Area (Section 5.3.3) summaries. The development of this summary will be led by the LAT Coordinator and Communications Team using information available in DIVER (e.g., expenditures to-date across Restoration Types and TIGs) as well as from Trustee representatives (e.g., related to public engagement highlights).

This summary will undergo review by the Programmatic Review Planning Team, Trustee Council Programmatic Review Small Group, and then the Trustee Council for final review and approval.

### 5.3.2 Progress and Accomplishments by Restoration Type

The Cross-TIG MAM work group will lead development of content on progress by Restoration Type through the formation of Restoration Type subgroups. Each subgroup will be made up of Cross-TIG MAM work group members and resource subject matter experts and will examine restoration progress for their respective Restoration Type. A lead point of contact for each subgroup will facilitate the process and coordinate with other Trustees as needed (e.g., project managers, Trustee Council Programmatic Review Small Group).

Each subgroup will implement the following steps, described in more detail below.

- **Step 1.** Identify relevant data.
- **Step 2.** Compile and process data.
- **Step 3.** Evaluate data and develop Restoration Type summaries

#### 5.3.2.1.1 Step 1. Identify relevant available data from DIVER and other sources

The primary source of information on restoration project activities, project monitoring data, and related documents is the DIVER Restoration Portal. Each subgroup lead will begin programmatic review efforts by querying DIVER to download monitoring information available for each project that was completed or is in progress for the time period to be covered by the respective programmatic review. In addition to monitoring data, DIVER may contain other relevant project information such as the types of activities that were conducted and progress made. Relevant information is available not only in the monitoring section for each project in DIVER (i.e., the Monitoring and Adaptive Management tab), but also from Overview and Activities sections, and from relevant documents available for a given project in DIVER (e.g., project reports or MAM reports).

Subgroup leads will also coordinate with Implementing Trustees, project managers, and others, as needed, to identify any relevant sources of information in addition to DIVER. Implementing Trustees may also supplement project information by sharing lessons learned or challenges faced during restoration implementation that may assist the Cross-TIG MAM work group in summarizing restoration progress.

#### 5.3.2.1.2 Step 2. Compile and process available data

Each subgroup lead will compile relevant project data into a Restoration Type-specific spreadsheet to organize the quantitative information in one location for processing. The

subgroup lead will verify the available information with the Implementing Trustees. This may include a series of reviews of the identified information to verify progress against project reports and documentation. Any errors identified will be corrected in the spreadsheet and the revised data will be updated in the DIVER Restoration Portal. Data will be supplemented with any available qualitative information related to restoration outcomes, as needed, to create a comprehensive record of project activities, monitoring parameters, and project outputs.

### 5.3.2.1.3 Step 3. Evaluate available data and develop Restoration Type summaries

Each Restoration Type subgroup will review, evaluate, and discuss the available information across projects relevant to the specific resource to identify monitoring parameters or restoration outputs that can be synthesized and aggregated to summarize restoration progress and outcomes for the Restoration Type. Aggregating monitoring parameters across projects will help illustrate cumulative outputs and outcomes. Examples of parameters that may be aggregated across projects include acres acquired or protected, counts of sea turtle or bird nests, miles patrolled for sea turtle nests, acres of marsh or other habitats created or restored, and counts of watersheds with nutrient reduction or water quality projects.

After evaluating the available information, each subgroup lead(s) will draft a summary of restoration progress for the specific Restoration Type. This will include, but may not be limited to, basic summary information such as counts of restoration projects completed and in progress (project counts include the number of restoration projects completed or in progress, engineering and design projects and restoration implementation projects, excluding terminated projects and administrative and planning activities), counts of MAM activities related to the specific Restoration Type, and descriptions of outputs for parameters that can be aggregated across projects. Maps of the relevant projects and MAM activities will also be developed by the Map Lead (Figure 2) to illustrate the geographic scope of projects for a given resource. Project outputs may be organized according to restoration themes, if relevant. For example, Wetlands Coastal and Nearshore Habitat Restoration Type projects may be described in groupings such as seagrass, marsh, and living shoreline projects. Themes should be identified based on the Restoration Approaches from the PDARP/PEIS for the given Restoration Type.

In addition to aggregating monitoring parameters and restoration project outputs, Restoration Type subgroups will use the available data to evaluate overall progress towards meeting Restoration Type goals (as identified in the PDARP/PEIS). This analysis may be supplemented by other available qualitative information about restoration outcomes and the results of any MAM activities conducted for the Restoration Type. Restoration Type subgroups may also assist the Trustee Council with identifying any potential adjustments to the restoration program and project implementation that may improve future restoration planning efforts. Finally, the Cross-TIG MAM work group will review information across Restoration Types to help evaluate progress towards meeting the programmatic restoration goals from the PDARP/PEIS.

During the development of the Restoration Type summaries, resource subgroups will discuss progress with and obtain feedback from Implementing Trustees and subject matter experts to ensure the appropriate summary information is being evaluated and documented. Before finalizing summaries for the Programmatic Review, each Restoration Type summary will undergo review by the Cross-TIG MAM work group, Implementing Trustees and subject matter

experts, the Trustee Council's Programmatic Review Small Group, and finally the Trustee Council.

Restoration Type summaries will focus on conclusions, monitoring parameters that illustrate the progress made, and a presentation that is clear and easy to understand.

### **5.3.3 Progress and Accomplishments by Restoration Area**

A similar process to that described in Section 5.3.1 will be implemented to summarize progress for each Restoration Area. This effort will be led by each TIG for their specific Restoration Area in coordination with the Programmatic Review Planning Team. The development of Restoration Area summaries will be coordinated with the development of Restoration Type summaries to ensure any information compiled may be utilized as needed in either section, but not repeated across summaries, for the final programmatic review.

Restoration Area summaries will focus on projects completed or in progress in each Restoration Area, during the time period covered by the programmatic review. Reporting topics will include:

- The geographic scope of those projects (e.g., maps of restoration project locations or specific restoration project footprints);
- Funding expended across Restoration Types relevant to the specific Restoration Area;
- Lessons learned or challenges faced within the specific Restoration Area; and
- Project highlights.

Restoration Area summaries will undergo a similar review process to Restoration Type summaries with several reviews by the TIG, Programmatic Review Planning Team, Trustee Council Programmatic Review Small Group, and the Trustee Council, as needed. Final reviews and approval will be completed by the respective TIG for each Restoration Area.

## **5.4 Programmatic Reviews Over Time**

The project monitoring guidance included in Attachment E of this Manual provides a framework to help the Trustees collect consistent information across similar projects so that monitoring data can be more readily aggregated across projects. As data become available from project monitoring using these consistent approaches, the Trustees expect that they will be able to draw broader conclusions about restoration outcomes beyond the project scale.

In addition to the procedures described in Section 5.3 above, the Trustees may perform additional analyses of restoration project monitoring data, data collected through MAM activities funded by the TIGs, or other sources of relevant existing data to further evaluate progress towards the PDARP/PEIS restoration goals as part of future programmatic review efforts. The format and level of detail included in programmatic reviews may change as more restoration projects and MAM activities are implemented and additional monitoring data become available. Finally, the Trustee Council will evaluate the programmatic review process after completing each review to identify opportunities/scope for improvement for future reviews and may update the procedures described in this section.

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## **A. Composition of the Cross-TIG MAM Work Group**

Alabama Department of Conservation and Natural Resources

Florida Department of Environmental Protection

Florida Fish and Wildlife Conservation Commission

Geological Survey of Alabama

Louisiana Coastal Protection and Restoration Authority

Mississippi Department of Environmental Quality

National Oceanic and Atmospheric Administration

Texas Commission on Environmental Quality

Texas General Land Office

Texas Parks and Wildlife Department

U.S. Department of Agriculture

U.S. Department of the Interior

U.S. Environmental Protection Agency

## B. MAM Manual Glossary of Terms

**Adaptive management** – Adaptive management is a form of structured decision-making applied to the management of natural resources in the face of uncertainty (Pastorok et al., 1997; Williams, 2011). It is an iterative process that integrates monitoring and evaluation of management actions with flexible decision-making, where adjustments are made to management approaches based on observed outcomes (NRC, 2004). Within the context of ecological restoration, adaptive management addresses uncertainties by linking science to restoration decision-making (Steyer and Llewellyn, 2000; Thom et al., 2005).

**Compliance monitoring** – Compliance monitoring is the collection of monitoring information needed to demonstrate compliance with regulatory requirements, including ESA and MMPA, among other applicable statutes. Compliance monitoring may include documentation that a project was built according to design and meets the terms and conditions of ESA Section 7 consultations.

**Conceptual model** – A conceptual model provides a visual and/or narrative framework that connects key environmental and social factors to ecosystem structure and processes (Thom, 2000; NAS, 2016).

**Control site** – A control site is a site (or other entity) that is similar to the site/entity to be restored before any restoration activities take place, but is left unrestored in order to evaluate the effectiveness of restoration treatments (NAS, 2016).

**Core performance monitoring parameters** – Core performance monitoring parameters are those used consistently across projects in order to facilitate the aggregation of project monitoring results and the evaluation of restoration progress for each Restoration Type (Appendix 5.E.4 of PDARP/PEIS; DWH NRDA Trustees, 2016).

**Corrective actions** – Corrective actions are adjustments to the restoration project in order to comply with the terms of a Restoration Plan, monitoring plan, and/or settlement agreement (adapted from 15 CFR § 990.55(b)(2)). Corrective actions are typically triggered if performance criteria are not met; however, unanticipated consequences, previously unknown conditions, or unanticipated environmental drivers uncovered during the evaluation of data may also determine the need for corrective actions.

**Cross-Trustee Implementation Group (Cross-TIG) Monitoring and Adaptive Management (MAM) work group** – The Cross-TIG MAM work group was established by the Trustee Council to serve as a forum for the TIGs to collectively address MAM topics relevant to multiple TIGs.

The Cross-TIG MAM work group has no independent authority to act except when directed by the Trustee Council. See Trustee Council SOPs for more information (DWH NRDA Trustees, 2021).

**Data dictionary** – A data dictionary defines the codes and fields used in the dataset.

**Data Integration Visualization Exploration and Reporting (DIVER)** – DIVER is a data warehouse and query application developed by the National Oceanic and Atmospheric Administration (NOAA). DIVER integrates and standardizes datasets so users can query across

data holdings and download information and results. See the DWH DIVER website for more information (<https://dwhdiver.orr.noaa.gov/>). DIVER has both an authorized user access and publicly available access.

**DIVER Explorer** – The DIVER Explorer is a querying tool that provides the ability to quickly browse, search, visualize, and download that data using different data categories:

- **Projects and planning details:** Logistical, financial, and organization information specific to projects, including site-specific restoration efforts.
- **Environmental data:** Detailed field and laboratory-based environmental characterization data obtained from the files collected in DIVER. These may include field observations; laboratory results for samples; and photographs that were logged and keyword-tagged using NOAA’s Photologger, telemetry, and continuous-read instruments [e.g., conductivity temperature depth (CTD)]. See the DWH DIVER website for more information.

DIVER Explorer has both an authorized user access (<https://portal.diver.orr.noaa.gov/group/deepwater-horizon>) as well as a publicly available access (<https://www.diver.orr.noaa.gov/#explorer-section>).

**DIVER Restoration Portal** – The DIVER Restoration Portal was created by the Trustee Council to provide a centralized platform to support tracking and reporting of the Trustee Council restoration planning and project activities, monitoring, and financial expenditures. The Restoration Portal includes information for the project description, the location, the budget, restoration activities, monitoring, as-built accomplishments, and environmental compliance.

Authorized users may access the Restoration Portal at <https://portal.diver.orr.noaa.gov/group/trustee-council>. The information and data gathered from the DIVER Restoration Portal are available for public consumption through the DIVER Explorer interface or through the Trustee Council Gulf Spill Restoration website (<http://www.restoration.noaa.gov/dwh/storymap/>).

**Data quality objectives** – Data quality objectives identify and define the type, quality, and quantity of data needed to satisfy a specified use (U.S. EPA, 2002).

**Data standards** – Data standards are documented agreements on representation, format, definition, structuring, tagging, transmission, manipulation, use, and management of data (<https://www.epa.gov/data-standards/learn-about-data-standards>).

**Data validation** – Data validation is an analyte- and sample-specific process that extends the evaluation of data beyond method, procedural, or contractual compliance (i.e., data verification) to determine the analytical quality of a specific dataset (U.S. EPA, 2002). The Implementing Trustee(s) should review the verified data and check for non-data entry errors (e.g., units, expected value range, date/time, latitude/longitude).

**Data verification** – Data verification is the process of evaluating the completeness, correctness, and conformance/compliance of a specific dataset against the method, procedural, or contractual specifications (U.S. EPA, 2002). This could include transcription verification;

performing an initial check for non-data entry errors (e.g., units, expected value range); and verifying the metadata are complete.

**Drivers** – Drivers are outside forces, natural or anthropogenic, that have the potential to influence the outcomes of a restoration project. Drivers tend to be large-scale, long-term forces that are not easily controlled at the scale of a single restoration project (Harwell et al., 2016).

**Evaluation** – Evaluation is the synthesis of monitoring information to understand the progress toward restoration outcomes. This could be conducted at the project, Restoration Type, and programmatic levels.

- **Project evaluation:** A project evaluation is the synthesis of project-specific monitoring information to understand restoration effectiveness and the need for corrective action.
- **Restoration Type evaluation:** A Restoration Type evaluation is the synthesis of monitoring information at the resource level to understand restoration benefits within each of the Restoration Types. This evaluation will provide the feedback needed for adaptive management at the Restoration Type level and inform the planning and implementation of future restoration actions for a specific Restoration Type.
- **Programmatic evaluation:** Programmatic evaluation is the synthesis of monitoring information and overall restoration results to document progress toward meeting restoration goals and objectives. This evaluation will provide the feedback needed for adaptive management at the programmatic level, and inform the planning and implementation of future restoration actions under the Restoration Plan.

**Federal Geographic Data Committee/International Organization for Standardization (FGDC/ISO)** – These are Federal geospatial metadata standards ([http://www.fgdc.gov/standards/projects/FGDC-standards-projects/metadata/base-metadata/v2\\_0698.pdf](http://www.fgdc.gov/standards/projects/FGDC-standards-projects/metadata/base-metadata/v2_0698.pdf)).

**Implementing Trustee** – The Trustee Agency designated by the TIG that is responsible for leading the implementation of a specific restoration project and MAM activities.

**Injury** – Injury is an observable or measurable adverse change in a natural resource or the impairment of a natural resource service (15 CFR § 990.30). Injury may occur directly or indirectly to a natural resource and/or service (15 CFR § 990.30).

**Metadata** – Metadata are data that provide information about other data.

**Monitoring and Adaptive Management (MAM) activities** – MAM activities are projects or other MAM efforts (e.g., monitoring, modeling, data collection, research) developed to address identified MAM priorities.

**Monitoring and Adaptive Management (MAM) framework** – The MAM framework is the iterative process that the Trustees outlined in Chapter 5 of the PDARP/PEIS (DWH NRDA Trustees, 2016) to measure the impacts of restoration and support restoration decision-making. The steps of this iterative process include injury assessment, restoration planning (including the development of MAM Plans), implementation of the initial Restoration Plan, monitoring of restoration actions, evaluation of restoration effectiveness, feedback of information to restoration

planning and implementation, refinements to restoration implementation, and reporting on restoration progress toward meeting restoration goals and objectives.

**Monitoring and Adaptive Management (MAM) Plan** – MAM Plans are project-specific plans developed by the Implementing Trustee(s) that outline MAM for a specific restoration project. MAM Plans are designed to evaluate the effectiveness of the proposed restoration projects in meeting the restoration objectives and to assist, where feasible, in determining the need for adaptive management, which includes corrective actions.

**Monitoring and Adaptive Management (MAM) priorities** – MAM priorities are the knowledge gaps or information needs that, if addressed, would help the Trustees successfully implement Gulf restoration. MAM priorities may be identified at any scale, or at any time, including at a project concept or Restoration Technique level, a single Restoration Area or multiple Restoration Areas, and for a single Restoration Type or multiple Restoration Types.

**Monitoring and Adaptive Management Procedures and Guidelines Manual (MAM Manual)** – The MAM Manual is a document developed by the Cross-TIG MAM work group that presents details on MAM procedures and guidelines.

**Monitoring data** – Monitoring data may include, but are not limited to, any datasets or model results collected, compiled, or utilized under a MAM Plan as part of the DWH NRDA restoration effort. Monitoring data may be generated during any phase or component of restoration (including, but not limited to, planning, compliance, engineering and design, construction, as-built, baseline, post-implementation, and others), or as part of any project-specific monitoring or non-project specific data collection (e.g., to address TIG, Restoration Type, or cross-resource MAM priorities).

**Monitoring information** – Monitoring information includes any descriptive activities, plans, documents, and reports generated outside of the Restoration Portal monitoring that support evaluations of progress toward restoration goals and potential needs for corrective actions.

**Monitoring parameters** – Monitoring parameters are physical, chemical, or biological factors (e.g., elevation, % cover, density) that will be measured.

**Natural resource damage assessment (NRDA)** – NRDA is the process of collecting and analyzing information to evaluate the nature and extent of injuries resulting from an incident, and determining the restoration actions needed to bring injured natural resources and services back to baseline and make the environment and public whole for interim losses (15 CFR § 990.30).

**Oil Pollution Act (OPA)** – OPA means the Oil Pollution Act of 1990, 33 U.S.C. 2701 et seq.

**Objective-specific performance monitoring parameters** – Objective-specific performance monitoring parameters are those parameters that are only applicable to projects with a particular restoration objective.

**Performance criteria** – Performance criteria are used to determine the success of restoration or the need for corrective actions (15 CFR § 990.55(b)(1)(vii)). Performance criteria may include structural, functional, temporal, and/or other demonstrable factors (15 CFR § 990.55(b)(2)).

Performance criteria may include post-construction/post-execution performance criteria as well as construction/execution performance criteria, if those construction/execution criteria are related to the project's performance monitoring.

**Performance monitoring** – Performance monitoring is the collection of monitoring information to support the evaluation of effectiveness of the project in meeting the established restoration objectives and assist in determining the need for corrective actions. Performance monitoring is intended to document whether the projects have met their established performance criteria and determine the need for corrective actions (15 CFR § 990.55(b)(1)(vii)).

**Pre-restoration baseline monitoring** – Pre-restoration baseline monitoring is information collected before or at the start of a given project that provides a basis for planning and/or evaluating subsequent progress and related impacts (adapted from NAS, 2016).

**Programmatic goal** (also referred to as programmatic trustee goals and ecosystem goals). Programmatic goals are the overarching goals the Trustees identified for restoration planning specific to addressing injury. Programmatic goals include Restore and Conserve Habitat; Restore Water Quality; Replenish and Protect Living Coastal and Marine Resources; Provide and Enhance Recreational Opportunities; and Provide for Monitoring, Adaptive Management, and Administrative Oversight to Support Restoration Implementation (Section 5.3.1 of PDARP/PEIS; DWH NRDA Trustees, 2016).

**Quality assurance (QA)** – QA is an integrated system of management activities involving planning, implementation, assessment, reporting, and quality improvement to ensure that a process, item, or service is of the type and quality needed and expected by the end user (U.S. EPA, 2002).

**Quality control (QC)** – QC is the overall system of technical activities that measures the attributes and performance of a process, item, or service against defined standards to verify that they meet the specifications established by the customer; and operational techniques and activities that are used to fulfill the need for quality (U.S. EPA, 2002).

**README file** – A README file can include information on the monitoring data (e.g., how data were collected; quality assurance/quality control procedures; other information about data such as meaning, relationships to other data, origin, usage, and format) and can reference different documents.

**Reference site** – A reference site is a site (or other entity) that is similar to the desired future state of the site/entity to be restored, after restoration activities take place (NAS, 2016).

**Restoration** – Restoration is any action or activity (or alternative), or combination of actions (or alternatives), to restore, rehabilitate, replace, or acquire the equivalent of injured natural resources and services (15 CFR § 990.30).

**Restoration Approaches** – Restoration Approaches are general restoration actions the Trustees identified for each of the Restoration Types. Restoration Approaches describe options for implementation, and some include techniques and provide examples for specific methods (Appendix 5.D of PDARP/PEIS; DWH NRDA Trustees, 2016).

**Restoration Areas** – Restoration Areas are the geographic areas the Trustees identified to allocate specific funding. The Trustees identified seven Restoration Areas, including each of the five Gulf states, Regionwide, and Open Ocean (Sections 5.10.2 and 7.2 of PDARP/PEIS; DWH NRDA Trustees, 2016). An eighth Restoration Area focused on Adaptive Management and Unknown Conditions will be established by the Trustees 10–15 years following the settlement (Sections 5.10.2 and 7.2 of PDARP/PEIS; DWH NRDA Trustees, 2016).

**Restoration objectives** – Restoration objectives are specific objectives of the restoration project. Restoration objectives should be specific to the injuries addressed by the project and should clearly specify the desired outcome of the restoration project (15 CFR § 990.55(b)(2)).

**Restoration Plan** – A Restoration Plan presents the Trustees’ preferred restoration alternatives that address one or more specific injuries associated with the incident. The Restoration Plan is developed in accordance with 15 CFR § 990.55(b).

**Restoration Technique** – Restoration Techniques are specific restoration actions the Trustees identified for each of the Restoration Approaches. Restoration Techniques may be used individually or in combination. Example Restoration Techniques are outlined in Appendix 5.D of the PDARP/PEIS (DWH NRDA Trustees, 2016).

**Restoration Types** – Restoration Types are the broad restoration categories the Trustees identified pertaining to the programmatic goals. The Trustees identified 13 distinct Restoration Types, including Wetlands, Coastal, and Nearshore Habitats; Habitat Projects on Federally Managed Lands; Nutrient Reduction (nonpoint source); Water Quality; Fish and Water Column Invertebrates; Sturgeon; Submerged Aquatic Vegetation; Oysters; Sea Turtles; Marine Mammals; Birds; Mesophotic and Deep Benthic Communities; and Provide and Enhance Recreational Opportunities. The Restoration Types are outlined in Chapter 5 of the PDARP/PEIS (DWH NRDA Trustees, 2016).

**Restoration Type goals** – Restoration Type goals are the specific goals the Trustees developed for each of the Restoration Types. Restoration Type goals are presented in Chapter 5 of the PDARP/PEIS (DWH NRDA Trustees, 2016).

**Stressors** – Stressors are the physical, chemical, or biological factors that directly cause ecological effects (Harwell et al., 2016).

**Transcription verification** – Transcription verification is a process where the entered data are checked to ensure they are transcribed accurately.

**Trustee Implementation Groups (TIGs)** – TIGs are the groups the Trustees established for the purposes of planning, administering, and implementing restoration. There are currently seven active TIGs, one for each Restoration Area, as follows: Alabama, Florida, Louisiana, Mississippi, Texas, Regionwide, and Open Ocean. An eighth TIG, the Adaptive Management and Unknown Conditions TIG, may be established by the Trustees 10–15 years following the settlement.

**Trustees** – Trustees (or natural resource trustees) are those officials of the Federal and State governments, of Indian tribes, and of foreign governments, designated under 33 USC 2706(b) of OPA (15 CFR § 990.30), to assess damages to natural resources, and develop and implement plans for the restoration, rehabilitation, replacement, or acquisition of the equivalent, of the



natural resources under their trusteeship. The DWH NRDA Trustee Council is comprised of Trustee agencies from the States of Texas, Louisiana, Mississippi, Alabama, Florida, and four Federal agencies: the U.S. Department of Commerce (represented by NOAA), the U.S. Department of the Interior, the U.S. Department of Agriculture, and the U.S. Environmental Protection Agency.

**Uncertainties** – Uncertainties are information gaps that may affect decisions for a project or groups of projects that are the main focus within the context of adaptive management.

**Unknown conditions** – Unknown conditions are factors that may be discovered in the future that could influence the overall restoration progress and/or the recovery of resources.

**Validation monitoring** – Validation monitoring is the additional project-scale monitoring beyond performance monitoring to better understand ecosystem functions and services provided by projects (Neckles et al., 2002; Roni et al., 2005; La Peyre et al., 2014). Validation monitoring is intended to help project managers optimize implementation of the approach and address uncertainties in understanding the project function, as needed. Validation monitoring would help the Trustees better evaluate the benefits provided by restoration projects to the injured resources and inform the planning of future, similar projects.

## References

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## C. MAM Plan Template

The Cross-TIG MAM work group has established this template and set of guidelines for the development of project-level MAM Plans (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). This template, in conjunction with the guidance in Section 2.4 of this MAM Manual and subsections within, is intended to serve as a resource for the TIGs in the development of their project-specific MAM Plans. Collectively, the components of the MAM Plan document the level of MAM needed at the project scale.

- C.1 Introduction
  - C.1.1 Project Overview
  - C.1.2 Restoration Type Goals and Project Restoration Objectives (Section 2.4.1)
  - C.1.3 Conceptual Framework (Section 2.4.2)
    - C.1.3.1 Potential Sources of Uncertainty (Section 2.4.3)
- C.2 Adaptive Management (Section 2.4.5)
- C.3 Project Monitoring (Section 2.4.4), Performance Criteria, and Potential Correction Actions (Section 2.4.7)
- C.4 Monitoring Schedule (Section 2.4.4.3)
- C.5 Evaluation (Section 2.4.6)
- C.6 Data Management (Section 2.4.8)
- C.7 Reporting (Section 2.4.9 and Attachment D)
- C.8 Roles and Responsibilities
- C.9 References
- C.10 MAM Plan Revision History

## Reference

DWH NRDA Trustees. 2021. Trustee Council Standard Operating Procedures for Implementation of the Natural Resource Restoration for the *Deepwater Horizon* (DWH) Oil Spill. Originally approved May 4, 2016; revised November 15, 2016 and August 2, 2021.

## D. MAM Report Template

The following report template was developed during Early Restoration. The Cross-TIG MAM work group will continue to refine the contents and may update in future iterations of this MAM Manual.

### Table of Contents

- I. Introduction<sup>1</sup>
  - a. Project Overview [*including project location and description of restoration activities*]
  - b. Restoration Objectives and Performance Criteria
- II. Methods<sup>2</sup>
- III. Results [*e.g., tables or graphs of progress toward performance criteria and/or restoration objectives; site visit summaries; other datasets that support the analysis of the project's progress toward meeting performance standards*]
- IV. Discussion [*optional for interim; standard for final*]
- V. Conclusions [*optional for interim; standard for final; e.g., summary findings, progress toward meeting performance criteria and restoration objectives, and recommendations for corrective actions*]
- VI. Project Highlights [*e.g., lessons learned on monitoring protocols, project engineering/design, etc., to inform future project planning and implementation*]
- VII. Data [*including data that have gone through the QA/QC process; or description of data types/formats, data status (e.g., raw, analyzed, QA/QCed), data location, contact information for data custodian, and other relevant information regarding data quality, such as data gaps or issues encountered during data collection. Please include or note all data that were collected, even if not used in the report*]
- VII. References

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<sup>1</sup> Introduction can be pasted from MAM Plans and reused from report to report.

<sup>2</sup> Methods can be pasted from MAM Plans and reused from report to report.

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## E.1. Introduction

### E.1.1 Background

The Deepwater Horizon (DWH) Natural Resource Damage Assessment (NRDA) Cross-Trustee Implementation Group (Cross-TIG) Monitoring and Adaptive Management (MAM) work group has developed monitoring guidance, including core and objective-specific performance monitoring parameters and associated measurement units and data collection methods, for Restoration Approaches from the Programmatic Damage Assessment and Restoration Plan and Programmatic Environmental Impact Statement (PDARP/PEIS; DWH NRDA Trustees, 2016), to promote consistency in data collection among similar types of projects and allow for future analysis across TIGs and Restoration Types (Section 10.6.2 of Standard Operating Procedures [SOP]; DWH NRDA Trustees, 2021). This guidance may also assist the TIGs by providing recommended methodologies for monitoring restoration projects, saving time and money spent developing suitable monitoring protocols for individual restoration projects. If adjustments from this monitoring guidance are needed for a particular project, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021).

Monitoring guidance is organized in this MAM Manual as follows. First, general information on the monitoring location applicable across monitoring parameters included in this MAM Manual is provided (Section E.3). The core and objective-specific performance monitoring parameters are presented in a single, alphabetized list that also includes recommended measurement units; monitoring methods; and guidance on the location, frequency, and duration of the sampling, as appropriate to each parameter (Section E.4). Finally, the remainder of the document presents guidance specific to each of the Restoration Approaches, with some guidance documents organized according to Restoration Type (Sections E.5 through E.19). For each Restoration Approach, core and objective-specific performance parameters, and additional parameters for adaptive management or validation monitoring (listed as parameters for consideration) are provided in tables. Information related to the process (Section E.2) that informed the identification of the parameters, such as example drivers and uncertainties, is also included.

Project teams within each TIG will identify parameters applicable to the objectives for each individual restoration project when developing the project MAM Plan. In addition to the project monitoring guidance identified in this MAM Manual, specific monitoring may be required to comply with permits granted by regulatory agencies. The TIGs are not restricted from adding additional parameters not identified herein, such as those needed for regulatory compliance, to evaluate pre-restoration baseline conditions, or to evaluate project “as-built” conditions. Other project monitoring that may be needed for specific projects should be determined by the TIGs.

### E.1.2 Changes from August 2019 Version 1.1

Previous versions of this Manual included monitoring guidance for Restoration Approaches related to coastal wetlands; beaches, dunes, and barrier island habitats; water quality improvements; protection and conservation of marine, coastal, estuarine, and riparian habitats; oysters; submerged aquatic vegetation; and recreational use projects. This version of the MAM Manual includes additional monitoring guidance for Restoration Approaches related to birds; fish

and water column invertebrates; mesophotic and deep benthic communities; marine mammals; and sea turtles.

This version of the MAM Manual also includes changes to monitoring parameter names contained within the previously published guidance (i.e., for Restoration Approaches related to coastal wetlands; beaches, dunes, and barrier island habitats; water quality improvements; protection and conservation of marine, coastal, estuarine, and riparian habitats; oysters; submerged aquatic vegetation; and recreational use projects). These changes were made to create consistency in naming conventions between the MAM Manual, project MAM Plans, and the Data Integration Visualization Exploration and Reporting (DIVER) Restoration Portal, and do not substantively change the monitoring guidance. Monitoring parameter name changes also increased consistency in parameter names across Restoration Approaches and Restoration Types. For example, parameters related to Abundance were changed such that the parameter name, “Abundance,” is consistent across all Restoration Approaches (e.g., for birds and fish and water column invertebrates). This promotes consistency in data collection among projects collecting similar types of data and allows for future analysis of project monitoring data across TIGs and Restoration Types.

In addition to changes to monitoring parameter names, parameter details have been added to provide greater specificity on the type of data being collected. Within the guidance documents provided in Sections E.5 through E.19, parameter names are listed in the monitoring guidance tables and parameter details are provided as sub-bullets under the parameter name. Note that not every monitoring parameter has associated parameter details. Where parameters are used across Restoration Types or across resources, the Restoration Type or resource may be provided after the parameter name and separated by a comma. Using the parameter “Abundance” as an example, this parameter is used under Restoration Approaches for multiple resources such as birds and sea turtles. In the Birds guidance table (Section E.18), the parameter is listed as “Abundance, Birds” and may be listed with sub-bulleted parameter details.

The parameters and parameter details provided within the monitoring guidance in this MAM Manual are not exhaustive. Additional parameters and parameter details may be identified by Implementing Trustees. When Trustees enter monitoring information into the DIVER Restoration Portal, a drop-down menu including the parameters and parameter details will be available.

Trustees will be able to identify new parameters when necessary. Finally, the parameter detail field may be left blank for parameters without a parameter detail and Trustees will be able to enter new parameter details if needed. For additional information on entering information into the DIVER Restoration Portal, see the DIVER Portal – DWH Restoration User Manual.

## E.2 Process for Developing Monitoring Guidance

The following process was used to develop monitoring guidance for each Restoration Approach:

1. Example project-specific restoration objectives were developed for each Restoration Technique, using the strategy described in Section 2.4.1.1 of the main body of this Manual.
2. Drivers and potential uncertainties that may influence the project’s ability to achieve the restoration objectives were documented. Existing conceptual models relevant to the

Restoration Approach were compiled and reviewed, if available, such as those described in Section 2.4.2.1 of the main body of this Manual.

3. Core performance monitoring parameters were identified, which could be used to evaluate progress toward the example restoration objectives. Monitoring frameworks developed by the Trustees for several commonly implemented types of projects during Early Restoration were reviewed to help identify relevant performance monitoring parameters. Existing monitoring plans developed for similar types of projects were also reviewed for relevant performance monitoring parameters.
4. Additional monitoring parameters were identified for each objective that may help resolve uncertainties, explain outside drivers, optimize project implementation, support decisions about corrective actions or other adaptive management of the project, and/or inform the design of future DWH NRDA projects.
5. The identified parameters were categorized into the following groups:
  - a. Performance monitoring parameters: Two types of performance monitoring parameters were identified:
    - Restoration Approach core performance monitoring parameters are used to evaluate project performance for restoration objectives common to projects under the Restoration Approach and should therefore be collected for projects within a Restoration Approach, to the extent practicable. The intent of performance monitoring is to document whether the projects have met their established performance criteria and determine the need for corrective actions (15 CFR § 990.55(b)(1)(vii)).
    - Objective-specific performance monitoring parameters are used for additional restoration objectives for a specific project under a Restoration Approach and should therefore be collected for projects that include those additional objectives to the extent practicable.
  - b. Additional parameters for adaptive management or validation monitoring that may be used to resolve uncertainties, explain outside drivers, optimize project implementation, support decisions about corrective actions and other adaptive management of the project, and inform the planning of future DWH NRDA restoration projects, as described in Appendix 5.E.3.1 of the PDARP/PEIS (DWH NRDA Trustees, 2016). Selection of specific additional monitoring parameters will depend on the needs of the individual project, and additional monitoring parameters may not be needed for all projects.
6. For each core and objective-specific performance monitoring parameter, the parameter was defined and some technically sound data collection methods, including methodology references, monitoring location, frequency and duration, potential additional analyses, and additional relevant references were summarized, as appropriate.

## E.3 General Guidance Applicable Across Monitoring Parameters

The guidance provided throughout this MAM Manual is intended to promote consistency in data collection among similar types of projects and allow for future analysis across TIGs and Restoration Types (Section 10.6.2 of SOP; DWH NRDA Trustees, 2021). This guidance may

also assist the TIGs by providing recommended methodologies for monitoring restoration projects, saving time and money spent developing suitable monitoring protocols for individual restoration projects. If adjustments from this monitoring guidance are needed for a particular project, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). Project teams within each TIG will identify parameters applicable to the objectives for each individual restoration project when developing the project MAM Plan. In addition to the project monitoring guidance identified in this MAM Manual, specific monitoring may be required to comply with permits granted by regulatory agencies. The TIGs are not restricted from adding additional parameters, and other project monitoring that may be needed for specific projects should be determined by the TIGs.

General monitoring guidance applicable across monitoring parameters is provided below. Monitoring parameter definitions and guidance on monitoring frequencies, durations of sampling, and additional analyses are included for each core and objective-specific performance monitoring parameter, if applicable, in Section E.4.

### **Core performance monitoring parameters**

Parameters applicable to most projects within a Restoration Approach and Restoration Type. These parameters are used consistently across projects to facilitate the aggregation of project monitoring results and the evaluation of restoration progress.

### **Objective-specific performance monitoring**

Parameters used consistently across projects with similar restoration objectives to facilitate aggregation of monitoring results and the evaluation of restoration progress.

### **Parameters for consideration**

Example parameters based on the relevant project objective that may or may not apply to a specific project.

## **Monitoring Location**

It is recommended that the spatial distribution of monitoring locations is sufficient to evaluate the performance of the project throughout its area of influence. In addition, monitoring reference or control sites outside the area of influence of the project is recommended so comparisons to baseline conditions can more easily account for changes that are not directly caused by the project.

## **Monitoring Frequency and Duration**

In general, monitoring is recommended pre-implementation and post-implementation. If control or reference sites are not used (see recommendation above), it is recommended that the frequency, timing, and duration of monitoring are sufficient to detect relevant changes or trends in the parameters while accounting for inter-seasonal, interannual, and other known sources of variance, when appropriate. If the monitoring parameter is linked to a performance criterion, the Implementing Trustee should establish a monitoring period long and frequent enough to satisfy project objectives.

## E.4 Core and Objective-Specific Performance Monitoring Parameters

This list of core and objective-specific monitoring parameters includes definitions and guidance for all core and objective-specific monitoring parameters contained within the guidance provided by Restoration Approach and Restoration Type in Sections E.5 through E.19. All core and objective-specific performance monitoring parameters across the Restoration Approaches covered in this MAM Manual are combined into an alphabetized list below and are numbered for ease of reference. This MAM Manual addresses Restoration Approaches included in the PDARP/PEIS (DWH NRDA Trustees, 2016).<sup>3</sup>

Additional monitoring parameters for consideration, such as those needed for additional Restoration Approaches identified in the PDARP/PEIS (DWH NRDA Trustees, 2016) and adaptive management or validation monitoring parameters listed in the monitoring guidance for each Restoration Approach, are not included in this list at this time. Each parameter in the alphabetized list includes guidance on measurement unit(s), monitoring methods, and potential additional analyses, where appropriate. Some parameters are measured directly while others are calculations (e.g., Percent Cover, Vegetation). Guidance on monitoring locations, frequencies, and durations of sampling are also included (if unique from or in addition to the guidance provided above in Section E.3). For some parameters, additional guidance for potential analyses using that monitoring parameter (see Section 2.4.6 of the main body of this Manual) is also provided. Although metric units are listed in the parameter descriptions, standard units are also acceptable.

This section is subject to change at the discretion of the Trustees, potentially as a result of newly identified and/or developed monitoring parameters, methods, and technologies. The monitoring parameters identified in a project MAM Plan should be consistent with the monitoring guidance outlined in this attachment, wherever appropriate. However, the content of the MAM Plan, including identification of Restoration Approaches, monitoring objectives, monitoring parameters, and budget is at the discretion of the TIG that is conducting restoration planning (Section 10.3.2 of SOP; DWH NRDA Trustees, 2021). Monitoring frequency and duration may vary by project due to objectives, performance criteria, project-level decisions, and/or the need for corrective actions.

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<sup>3</sup> Note the following Restoration Approaches from the PDARP/PEIS are not included in this Manual at this time: Restore and Preserve Mississippi-Atchafalaya River Processes, Restore Sturgeon Spawning Habitat.

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## E.4.1 Abundance

**Parameter Type:** Measured, Calculated, or Modeled

**Units:** individuals (count)

### Definition

Abundance is the total number of organisms within a defined area of interest. Abundance can be reported as an absolute (i.e., total number of organisms) or relative (i.e., corrected for effort) measure.

### Potential Methodologies

The appropriate sampling methodologies will be dependent on the species targeted by the project. See resource-specific methodologies below.

#### Guidance on Frequency and Duration

In general, monitoring is proposed pre-implementation and post-implementation. Monitoring could be conducted for three years post-implementation or longer to adequately capture the changes in community composition at the project site. Sampling could be conducted seasonally, during the spring and fall, both pre- and post-implementation, or more frequently. Monthly sampling for two–three years pre-restoration and at 2–3-year intervals post-restoration may be needed to evaluate changes associated with the restoration project. However, monitoring frequency and seasonal timing will depend on the species targeted.

### Other Potential Analyses

Species abundance data can be used for additional species and community level analyses such as **Density**, **Community Composition**, and **Species Composition**.

### Abundance, Birds

**Parameter Details (available in DIVER picklist):**

- Count by Species
- Nestling/Hatchling/Fledgling Count by Species
- Nest Count by Species

#### Bird-Specific Definition

Abundance, Birds is the total number of birds within a defined area of interest. Bird abundance can be determined for a specific life history stage (e.g., nests, eggs, hatchlings, fledglings, adults), for a specific species or guild, or for the entire population.

#### Bird Methodologies

The level of detail needed for abundance sampling should be determined based on the restoration objectives. Additionally, the sampling techniques may be dependent on the species of interest.



**Method 1: Abundance (index)**

Abundance index is a variable that is correlated with the abundance of a species in an area (Caughley, 1977; Johnson, 2008). Abundance indices can include a relative measure correlated with abundance of an entire species, or a segment of a population of interest (adults, nests, breeding females, etc.). For some seabirds, wading birds, and other beach nesting bird species, nest counts in breeding colonies can be used to estimate bird abundance, and nest counts could be done on the ground or via a remote sensing platform (Brush et al., 2019; Frederick and Green, 2019; Jodice et al., 2019). For species which do not nest colonially, point counts can be used as an index that can be compared between sites (Seymour and Coulson, 2019; Zenzal Jr. et al., 2019). For marsh birds and other elusive species, point count indexes may not meet the assumption of correlation between the index and abundance (Woodrey et al., 2019a). Conway (2011) provides a Standardized North American Marsh Bird Monitoring Protocol. This protocol, which employs a combination of point counts and call back surveys, was used to survey marsh birds in all affected states during the DWH oil spill.

**Method 2: Abundance (corrected for survey effort)**

Abundance corrected for survey effort is the abundance of birds per unit of effort (e.g., hours). This will require effort to be recorded at the survey level in a way that is statistically meaningful (i.e., in a way that represents the area actually surveyed).

**Method 3: Abundance (corrected for detection probability)**

Abundance corrected for detection probability provides meaningful abundance estimates for bird species with unknown detection probabilities and is especially relevant for cryptic species or those species that are hard to detect, e.g., secretive marsh birds. There are several methods available for estimating abundance, considering detection probability. The chosen method is a trade-off among people on the ground, survey duration, and the logistics of access to the sites where surveys will be performed. Detection probability (DP) is a means to correct the original raw bird count data due to issues associated with species-specific variation in DP and among observer differences in DP. DP is frequently modeled as a function of any number of variables and covariates that may lead to biased counts. Project proponents will need to determine a priori the most feasible analytical/statistical approach that best meets their needs and the type of data collected. Double-observer surveys, where two observers survey the same point simultaneously but independently, work well but require double the number of personnel (Moore et al., 2004). Distance sampling can be effective for species where distance from the point/transect line to the individual can be accurately estimated (Chandler et al., 2011; Fiske and Chandler, 2011). For species where distance cannot be estimated accurately, removal techniques (e.g., time-to-detection) are a powerful tool, allowing a single person to collect data in such a way that detection probability can be estimated while also estimating abundance (Farnsworth et al., 2002; Moore et al., 2004).

**Method 4: Nest Abundance**

The Implementing Trustee may collect information on the number of bird nests created, enhanced, protected, or evaluated. Methods may include field documentation of the number of nests and location of each nest or the number of nests and number of nesting females present.

Methods may also include aerial colony photographic census of nesting areas restored or enhanced. Colibri and Ford (2015) used a standardized aerial photography analysis method to count nests in colonial waterbird breeding colonies in the northern Gulf of Mexico following the DWH oil spill. This method is again being used to monitor performance of bird breeding colony restoration projects across the northern Gulf of Mexico. For dispersed-nesting species, survey a given site, locate all individual nests, plot nest location with GPS, identify species, and identify nesting stage (e.g., egg-laying, incubation, nestlings, fledglings) until the entirety of available habitat has been adequately/completely surveyed. The level of effort will be dependent on taxa and species, size of the area, and whether one is sampling vegetated cover or non-vegetated cover.

### *Monitoring Location*

Survey locations will vary depending on the method and the guild of interest. Methods that consider effort or detection probability will require more rigid establishment of points and/or transects. When possible, a reference and/or a control site should be established. Conway (2011) provides a discussion of survey site selection. The protocol recommends the establishment of permanent survey sites along a survey route.

### *Guidance on Frequency and Duration*

Establishing the frequency and duration of monitoring may involve capturing annual/inter-annual variability based on factors that could influence bird abundance at the project site. For example, migratory species may require repeated surveys within a short period of time to observe maximal abundance since the timing of migration varies from year to year. Ideally, surveys should be synchronized among states (e.g., every year, every third year) and conducted at the same point in the nesting cycle (e.g., during peak incubation for the colonially nesting species, Jodice et al., 2019). Conway's (2011) methods include three surveys or more during the peak marsh bird breeding season. Surveys are usually conducted during the morning or evening.

### *Selection of the Most Appropriate Method to Meet Project Objectives*

The bird guild of interest, project location, and availability of reference sites should be considered when selecting an abundance/density method. An index is a valuable tool for comparing relative abundance/density between restored and unrestored sites. For species with relatively high detection probability (e.g., land birds, shorebirds, waterfowl, wading birds), an abundance index can be a cost-effective way to estimate abundance/density. Models correcting for effort or DP can provide better estimates of abundance/density. For species that are dispersed, occur in low numbers (i.e., raptors), or are difficult to detect (i.e., marsh birds), using a method that accounts for effort or detection probability will ensure that the biology of the bird and/or its habitat will not bias the estimates of abundance or density. Abundance monitoring already exists in some parts of the Gulf of Mexico, and restoration efforts may be able to take advantage of this ongoing work. To learn about ongoing work in the Gulf of Mexico, contact the appropriate taxonomic leads in the Gulf of Mexico Avian Monitoring Network (GOMAMN) (Woodrey et al., 2019b, Appendix 3; <https://gomamn.org/>). GOMAMN taxonomic working group representatives may be consulted in the development of restoration project MAM plans development.

## Abundance, Corals

### Parameter Details (available in DIVER picklist):

- Count by Taxon

#### Coral Methodologies

Count the number of individual corals (by species). If the project includes coral transplantations, the Implementing Trustee could count the number of corals transplanted to the field and/or present at points in time after completion of transplantation.

## Abundance, Epibenthic or Infaunal Organisms

### Parameter Details (available in DIVER picklist):

- Count by Taxon

#### Epibenthic or Infaunal Organism Methodologies

Fisheries-independent monitoring approaches are recommended to measure epibenthic organism abundance in and around restored marshes. Sessile epifaunal invertebrates may be sampled with the quadrat method used for oyster density sampling. Infaunal invertebrates may be sampled with cores (15 cm diameter, 15 cm depth), washing samples over a 2 mm or smaller mesh.

**Method 1:** Use the quadrat sampling method for hard substrates to sample sessile invertebrates (see Oyster Density for methods).

**Method 2:** Use cores (15 cm diameter x 15 cm depth) to sample infaunal invertebrates, washing samples over a 2 mm or smaller mesh (Baggett et al., 2014).

## Abundance, FWCI (Fish and Water Column Invertebrates)

### Parameter Details (available in DIVER picklist):

- Catch per Unit Effort
- Count by Taxon per unit areas or volume (dependent on sampling gear)

#### FWCI Methodologies

Fisheries-independent monitoring approaches should be used to measure FWCI abundance in and around restored marshes. Sampling gears are designed to target specific sizes, species, and habitat(s). As such, different gears are recommended under specific circumstances. FWCI abundance along the marsh edge and within tidal creeks and adjacent open water areas may also be measured using trawls; this method provides an estimate of Catch per Unit Effort (CPUE) and abundance in open water habitat does not necessarily indicate FWCI utilization of the marsh surface.

**Method 1:** Seines or hand trawls can be used if sampling small/medium crustaceans and fish along the marsh edge or in shallow open water habitat. However, these sampling devices are not suitable for sampling the marsh platform. Seines do not provide an accurate estimate of fish

density but can be used to measure abundance. The length of the seine/trawl and the distance traveled should remain constant from one sampling event to another in order to consistently sample the same area.

**Method 2:** Beam trawls should be used in open water habitat that is typically greater than 2 m in depth to sample juvenile and adult fish or large crustaceans. This method may be less effective at sampling small crustaceans and fish than seines and drop samplers.

**Method 3:** Gill nets may be used to sample larger transient fish. The mesh size will vary depending on the size of the target species. Nets should be set 1 hour before sunrise and left in place for 2 hours. Data should be presented as the number of individuals of each species caught per hour (Baggett et al., 2014).

**Method 4:** For derelict fishing gear, count the number of dead individuals (by species) in each net or trap removed. Alternatively, multiply the number of abandoned traps or nets removed by the catch rate of the abandoned gear and the estimated time that each trap or net was abandoned.

Note that data collected using different sampling gears are not always comparable, although accepted sampling effect conversions/standardizations may be employed. Generally, data collected using methods that measure density can be standardized and adjusted for recovery efficiency but cannot easily be compared to data collected using methods that only measure abundance. See Rozas and Minello (1997) for a review of sampling gear in shallow estuarine habitats.

Optionally, in addition to determining species composition and abundance, measure length and biomass for each species for all or a subset of the sample as grams (g) wet weight. Data should be presented as CPUE, density (individuals/m<sup>2</sup>), volume (individuals/m<sup>3</sup>), wet weight (g/m<sup>2</sup>), and length-frequency distributions per species. For large collections (50 individuals or more of the same species), a subset of the entire sample for a given species may be measured and extrapolated to remaining individuals of the same species.

See Neckles and Dionne (2000) and Steyer and Llewellyn (2000) for more information on potential methodologies.

## Abundance, Marine Mammals

### Parameter Details (available in DIVER picklist):

- Count by Taxon

### Marine Mammal Methodologies

Systematic and standardized vessel-based photo-identification studies, which identify specific individuals and allow those individuals to be tracked over time, is a well-established approach for estimation of survival rates in marine mammal populations. Vessel-based surveys are also an appropriate method for estimating abundance and spatial distribution of dolphins for inshore areas (including bays), due to the high uncertainty and potential negative bias associated with aerial “count” surveys in these habitats. Furthermore, when conducted longitudinally, photo-ID studies allow for characterization of individual movements across seasons.

**Method 1:** Large vessel visual line transect surveys can be used in nearshore or offshore locations (Garrison et al., 2020). Document the number of sighted individuals and their species, if possible, and document probable re-sightings.

**Method 2:** Aerial transect surveys can be used in nearshore and offshore locations (Garrison, 2017). Document the number of sighted individuals.

**Method 3:** Photo-identification capture-mark-recapture surveys can be used in estuarine systems when conditions are not suitable for line-transect surveys (Rosel et al., 2011).

## Abundance, Other

### Parameter Details (available in DIVER picklist):

- Count by Taxon
- Count of Oyster Drills
- Count Removed by Taxon (e.g., invasive species)

### Definition for Other, Non-Target Species

Abundance, Other is the total number of other, non-targeted injured species within a defined area of interest. Abundance, Other can be used to capture abundance of prey, predator, invasive, and/or competing species.

### Methodologies for Other, Non-Target Species

For projects removing invasive species, count the number of individuals of each invasive species removed, as applicable.

## Abundance, Oysters

### Parameter Details (available in DIVER picklist):

- Count of Live Oysters
- Count of Oyster Larvae Distributed by Usage<sup>4</sup>
- Count of Oyster Larvae Produced
- Count of Spat

### Oyster-Specific Definition

Abundance, Oysters is the total number of oysters within a defined area of interest. Oyster abundance can be determined for a specific life history stage (e.g., larvae, spat, adult) or condition (dead, alive). Spat abundance is defined as the point at which a larva attaches to the substrate or metamorphoses into benthic form (Wildish and Kristmanson, 1997; Baggett et al., 2014). This differs from recruitment, which includes settlement and some period of post-settlement survival (Baggett et al., 2014).

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<sup>4</sup> These parameter details are in reference to hatchery-produced larvae.

## Oyster Methodologies

### **Method 1: Settlement Plates or Shell Strings**

Deploy settlement plates or shell strings. Collect and replace plates every 3 or 4 weeks. More frequent replacement will yield finer-scale temporal patterns of settlement.

### **Method 2: Quadrat**

Place a quadrat on the reef and excavate all live and dead oysters within the quadrat. For rigid structures, place a quadrat on the surface of the reef structure and excavate to a depth necessary to collect all live oysters within the quadrat. For reefs constructed of bagged shell, take random samples by removing a bag of shell; the area sampled is the areal coverage of the bag.

### **Method 3: Shell Bags**

If sampling with mesh bags filled with oyster shell, bags should be placed adjacent to or directly on the site of interest. Record the number and volume of bags of cultch material.

### **Method 4: Oyster Dredge**

For an oyster dredge, tow for a specified time and method (e.g., linear or circular tow direction, speed). Measure the dredge width and tow distance to calculate the area swept. Correct for dredge efficiency as appropriate. Report as, number of oysters/L of shell, or average number oysters/individual shell. If dredge efficiency is unknown, results can be reported as CPUE in units of number of oysters by size class of interest/unit of time.

### **Method 5: Hydraulic patent tongs**

Use hydraulic patent tongs to sample the oyster reef. For more information see Chai et al. (1992).

### *Guidance on Frequency and Duration*

Deploy plates or shell strings annually beginning the first week of April. Collect and replace plates or strings at least every 3 or 4 weeks until the end of the known settlement season for the area. Quadrat, shell bag, and dredge sampling may be conducted annually, preferably after fall settlement.

## **Abundance, Sea Turtles**

### **Parameter Details (available in DIVER picklist):**

- Count by Taxon
- Hatchling Count by Taxon
- Nest Count by Taxon

### *Sea Turtle-Specific Definition*

Abundance, Sea Turtles is the total number of sea turtles within a defined area of interest. Sea turtle abundance can be determined for a specific life history stage (e.g., nests, eggs,

hatchlings, juveniles, adults), for a specific species, or for the entire community within the defined area of interest. The Implementing Trustee may collect information on the number of sea turtle nests evaluated either in situ or in corrals.

### Sea Turtle Methodologies

Methods may include field documentation of the number and location of sea turtle or nest. Potential methodologies can be found in the following resources:

- Alabama Sea Turtle Conservation Manual, ver. April 2019.
- Florida Fish and Wildlife Conservation Commission Marine Turtle Conservation Handbook, 2016.
- Understanding, Assessing, and Resolving Light-Pollution Problems on Sea Turtle Nesting Beaches, Florida Fish and Wildlife Research Institute Technical Report TR- 2, 2014.

### Abundance, Sturgeon

#### Parameter Details (available in DIVER picklist):

- Count of Juveniles
- Count of Adults

No additional methods or guidance for this parameter. All above general guidance applies.

## E.4.2 Area

**Parameter Type:** Measured, Calculated, or Modeled

**Units:** square meters (m<sup>2</sup>) or square kilometers (km<sup>2</sup>)

#### Parameter Details (available in DIVER picklist):

- Habitat by type
- Project footprint
- Project influence

### Definition

Area may be defined three different ways depending on the project objectives. Projects should indicate which definition(s) is being used. Additional area definitions may also be developed for specific projects, as needed.

**Area of Habitat:** the summed area, by habitat type, of habitat patches within the project footprint.

**Area of Project Footprint:** the maximum areal extent of restoration.

**Area of Project Influence:** the area affected by restoration activities as determined by the Implementing Trustee. This area may extend beyond the project footprint.

## Potential Methodologies

### Potential Field-Based or Remote Sensing Methodologies

**Method 1:** Project and habitat boundaries can be mapped based on aerial imagery collected by airplane, helicopter, unmanned aerial systems (UAS); high-resolution satellite imagery; or other appropriate remote sensing platforms. Imagery used to map wetland boundaries should include true color and infrared bands and have a spatial resolution of 1 m or less. For comparison of different remote sensing platforms commonly used for wetland mapping, see Klemas (2011) and Klemas (2013). For additional information on the use of UAS for wetland mapping, see Klemas (2015), Madden et al. (2015), Zweig et al. (2015), and Samiappan et al. (2017). Source imagery should be orthorectified [i.e., free from distortions related to sensor optics, sensor tilt, and differences in elevation; see Rufe (2014)]. Collected imagery should be imported to spatial analysis software to digitize the perimeter of the project footprint and the boundaries of habitat areas within the project footprint. Additional guidance on using aerial imagery can also be found in Anders and Byrnes (1991), Crowell et al. (1991), Morton (1991), and Florida Department of Environmental Protection (FLDEP) (2014). For coastal wetland projects, see Steyer and Llewellyn (2000) and Dahl and Bergeson (2009) for wetland habitat mapping procedures. For guidance on mapping submerged aquatic vegetation (SAV), see Kirkman (1996) and Vittor and Associates (2016).

**Method 2:** Ground surveys can be used to map an area for smaller projects. Use a real-time kinematic Global Positioning System (RTK GPS) to take continuous measurements while walking, boating around, flying, or digitizing the perimeter of the project and along the boundaries of specific habitats within the project footprint. For wetlands, standard field wetland delineation techniques should be considered for areas where wetlands transition into non-wetland habitats (Federal Interagency Committee for Wetland Delineation, 1989). For SAV projects that aim to promote regrowth of native SAV, ground surveys should focus on areas targeted for regrowth.

**Method 3:** For SAV aerial mapping where airborne remote sensing cannot detect the deep edge of bed, towed underwater video can provide reliable estimates of seagrass area (Christiaen et al., 2016). New techniques for mapping SAV continue to be developed and piloted in localized applications.

**Method 4:** For intertidal oyster reefs, the footprint may be measured using a surveyor's measuring wheel, laser rangefinder, or transect tape (Baggett et al., 2014).

**Method 5:** For subtidal oyster reefs, the footprint may be measured using side-scan or multi-beam sonar (Baggett et al., 2014) or professional/survey grade echo sounder.

**Method 6:** For subtidal oyster reefs, the footprint may be measured using a sounding pole in conjunction with global positioning system (GPS) (Baggett et al., 2014)

**Method 7:** For sea turtle nesting or other restoration projects where area is being measured, each of the methods above (1-6) are also applicable.

**Method 8:** For mesophotic and deep benthic substrate placement, measure the area of each type of substrate unit placed, and multiply by the number of such units placed.



For many methods, the resulting data should be analyzed using spatial analysis software to calculate the area of habitat created, restored, enhanced, or protected. For habitat protection, conservation, or other habitat projects, the habitat type(s) should also be documented. For coastal wetland projects, Cowardin et al. (1979) provides an example for wetland classification standards.

#### *Monitoring Locations for Field-Based or Remote Sensing Methodologies*

Area of habitat built or enhanced should be determined for the entire project footprint. Some data, such as aerial photography, may be collected over larger areas. A reference and/or control site could be established, where appropriate and applicable.

#### *Guidance on Frequency and Duration for Field-Based or Remote Sensing Methodologies*

For projects that do not include construction, project monitoring is suggested before and after project implementation. In general, for projects including construction activities, monitoring is proposed pre-construction, immediately after construction (as-built), and post-construction. A baseline pre-construction condition could be established based on data obtained during the engineering and design (E&D) period.

**Beaches, dunes, and barrier islands:** Monitoring is proposed immediately after construction (as-built) and every 3 years up to 10 years post-construction.

**Coastal wetlands:** Monitoring is proposed immediately after construction (as-built), with at least one to two additional monitoring events over the monitoring period. For further guidance and recommendations on wetland monitoring frequency and duration, see Tiner (1999), Neckles et al. (2002), and the National Academies of Sciences (NAS) (2017).

**SAV:** Monitoring is proposed immediately after construction (as-built), 1 year post construction, and with additional monitoring every 5 years over the monitoring period (Neckles et al., 2012; Vittor and Associates, 2016). Seasonal sampling may be needed for species that exhibit high inter- and intra-annual variance due to seasonally changing environmental conditions.

**Oyster reefs:** Baggett et al. (2014) suggest monitoring occur pre-construction, within 3 months after construction, 1-2 years post-construction, and 4-6 years post-construction (a more ecologically relevant time scale, considering the oyster disease Dermo and salinity are correlated at a periodicity of 4 years (Soniati et al., 2009)) and after any event that may alter the habitat within the project footprint. For further guidance on oyster reef monitoring frequency and duration see Baggett et al. (2014) and NAS (2017).

Funding for one additional contingency monitoring event could be included in the monitoring budget, which could be implemented as needed to account for storm impacts.

#### *Modeling Methodologies*

Area of coastal wetlands with hydrology restored by the project will be estimated or modeled based on other parameters, including depth, duration, and frequency of flooding.

**Method 1:** The area influenced by a hydrologic restoration project can be estimated based on hydrodynamic modeling prior to project implementation. The area of influence should be

estimated prior to project implementation to establish the restoration target. See MacBroom and Schiff (2012) for a review of commonly used 1- and 2-dimensional hydraulic modeling approaches for tidal restoration projects. Models should document assumptions and limitations in estimating the area of influence.

**Method 2:** Post-restoration, the area influenced can be calculated as the area over which the target depth, duration, and frequency of flooding has been achieved, based on water-level measurements, elevation data, ground survey and/or remote sensing data, and compared to projections from the hydrodynamic model.

#### *Monitoring Locations for Modeling Methodologies*

The location of monitoring should be estimated/modeled across the area surrounding the restoration project. The modeled area should extend slightly beyond the area where any influence is expected as a result of the project.

#### *Guidance on Frequency and Duration for Modeling Methodologies*

The area influenced by the project could be estimated prior to project implementation to establish a baseline. The area of influence could be calculated/modeled immediately after project implementation (as-built) and annually for up to 5 years following implementation, based on water level data and/or elevation data collected for the project. Additional measurements could be taken after events that could alter habitat within the project footprint (e.g., severe storms, sedimentation events).

### **Other Potential Analyses**

Area measurements may also be used in conjunction with other parameters listed herein (e.g., elevation, vegetation percent cover and composition) to perform the following calculations and analyses: habitat type changes, shoreline change, land loss or gain, beach and dune profile change, volume change, bathymetric profile change, and sediment movement. Area measurements can also be used to help assess habitat or landscape connectivity and/or reductions in habitat fragmentation. Water depth and light availability may also be particularly relevant for understanding regrowth potential of SAV.

### **E.4.3 Biomass**

**Parameter Type:** Measured or Calculated

**Units:** grams (g) or kilograms (kg)

#### **Definition**

Biomass is the mass of organisms within a defined area of interest.

#### **Potential Methodologies**

The mass of an individual or group of organisms may be measured using a balance.

## Biomass, Epibenthic or Infaunal Organisms

### Parameter Details (available in DIVER picklist):

- Amount by Taxon

#### Epibenthic or Infaunal Organism Methodologies

See **Abundance, Epibenthic or Infaunal Organisms** for potential methodologies. Biomass may be measured for all or a subset of the sample. Data should be presented as wet weight (g/m<sup>2</sup>) per species, as appropriate.

#### *Guidance on Frequency and Duration*

In general, monitoring is proposed pre-implementation and post-implementation. Monitoring could be conducted for three years post-implementation or longer to adequately capture the changes in community composition at the project site. Sampling could be conducted seasonally, during the spring and fall, both pre- and post-implementation, or more frequently. Monthly sampling for 2–3 years pre-restoration and at 2–3-year intervals post-restoration may be needed to evaluate changes associated with the restoration project. However, monitoring frequency and seasonal timing will depend on the species targeted.

## Biomass, FWCI (Fish and Water Column Invertebrates)

### Parameter Details (available in DIVER picklist):

- Amount by Taxon
- Avoided by Taxon
- Caught per Trip by Taxon
- Dead Discards by Taxon

#### FWCI-Specific Definition

Biomass, FWCI is the mass of fish and invertebrates (by species) that would have been killed in the absence of the restoration work or the mass of fish and water column invertebrates added to the system (directly or indirectly) through restoration.

#### FWCI Methodologies

**Method 1:** For derelict fishing gear, count the number of dead individuals (by species) in each net or trap removed. Alternatively, multiply the number of abandoned traps or nets removed by the catch rate of the abandoned gear and the estimated time that each trap or net was abandoned. Estimate the mass from length-mass curves, where available.

**Method 2:** For fishing gear converted to have degradable parts, estimate the abandonment rate of traps and multiply by the length of time it takes degradable parts to break down and the estimated catch rate during the time the degradable parts are still intact. Compare to the catch rates over time of traps without degradable parts.

**Method 3:** For new gear types, including shrimping gear, compare the biomass of non-target fish and invertebrates captured with newly developed gear versus gear currently in use.

**Method 4:** For voluntary reduction in menhaden harvest, multiply the number of menhaden trips canceled by the average catch mass per trip (by species, menhaden and non-target species)

**Method 5:** For voluntary actions to increase biomass, estimate biomass added by species.

**Method 6:** For descender devices, multiply the number of fish (by species) lowered by descender devices by the difference in survivorship rates between fish returned with and without descender devices. Multiply by number of fish by average mass for that species to get dead biomass avoided.

**Method 7:** For individual fishing quota (IFQ) projects, compare the mass of fish discarded (by species) under an IFQ system to the mass of fish that would have been discarded had an IFQ system not been in place.

**Method 8:** For average biomass of FWCI caught per trip, sort and weigh the catch from multiple fishing trips. Calculate the average weight of each species caught per trip. See National Marine Fisheries Service (NMFS) (2019, 2020) for details.

#### *Guidance on Frequency and Duration*

Ongoing basis year-round for duration of project (for fishery projects), frequency dependent on implementation details.

#### *Other Potential Analyses*

The average biomass of fish and invertebrates (both target and non-target) caught per trip may be multiplied by the number of trips canceled to estimate the amount of biomass of dead fish and invertebrates avoided (by species).

### **Biomass, Other**

#### **Parameter Details (available in DIVER picklist):**

- Invasives Removed by Taxon

#### *Definition for Other, Non-Target Species*

Biomass, Other is biomass of prey, predator, invasive, and/or competing species.

### **Biomass, Oysters**

No additional methods or guidance for this parameter. All above general guidance applies.

### **Biomass, Vegetation**

#### **Parameter Details (available in DIVER picklist):**

- Aboveground
- Belowground

No additional methods or guidance for this parameter. All above general guidance applies.

## E.4.4 Bird Health

**Parameter Type:** Measured or Qualitative

**Units:** none or as appropriate based on measured attributes

### Definition

Bird health can be assessed from several measurements of a species or an individual bird's status in relation to various environmental and health related stressors and exposures.

### Potential Monitoring End Points and Methodologies

Physiological variables may be used to assess the nutritional state, stress, disease, injury, or overall health and reproductive performance of individual birds and across local bird populations. Such variables are influenced by habitat quality. Accordingly, avian health may provide an indicator of habitat quality and progress toward restoration goals. Avian health also provides an indicator of overall ecosystem health.

The GOMAMN avian health chapter provides a discussion of the value (i.e., information gained) and relative costs of the potential measurement endpoints described below (Ottinger et al., 2019; Woodrey et al., 2019).

**Stress:** A combination of data on feather fault bars, glucocorticoids from feathers and/or their metabolites from feces, heterophil/lymphocyte ratios (H/L-ratio), and ethoxyresorufin-O-deethylase activity may be used to assess stress in birds.

**Nutritional status:** A combination of body condition, fat score, hematocrit, and serum chemistry can be used to assess nutritional status in birds.

**Immune Defense:** White blood cell counts, parasite presence, and globulin levels can be used to assess immune defense in birds.

**Parasite Load:** To assess the parasite presence in birds, ectoparasite load can be visually assessed when birds are captured, and polymerase chain reaction analysis can be used to identify hemoparasite presence genetically.

### Selection of the Most Appropriate Method to Meet Project Objectives

The avian health chapter of the Gulf of Mexico Strategic Avian Monitoring Plan provide additional guidance on specific questions related to restoration and avian health assessment (Ottinger et al., 2019; Woodrey et al., 2019). Considerations will include what guild the species of interest belongs to, what habitats they live in, what kind of contact you will have with individuals from that population, and how invasive a technique is permissible/feasible given the project at hand. GOMAMN working group representatives may be consulted in the development of MAM plans for restoration projects (Woodrey et al., 2019, Appendix 3; <https://gomamn.org/>).

## E.4.5 Bycatch

**Parameter Type:** Measured

**Units:** individuals (count), grams (g), or kilograms (kg)

## Definition

Bycatch is the term used for the incidental or unintended capture of a species in commercial or recreational fishing gear. Bycatch can occur during fishing with most gear types, and is commonly observed in trawl, gillnet, and hook and line fisheries in the Gulf of Mexico.

Sea turtles, marine mammals, fish and invertebrate species, and birds are commonly bycaught species in the Gulf of Mexico. Management measures have been put in place in many fisheries to reduce bycatch of these taxa groups. For example, bycatch reduction devices and turtle excluder devices are required in otter trawl fisheries to reduce the bycatch of finfish and sea turtles.

## Potential Methodologies

Bycatch could be monitored in a variety of ways, depending on the goals and objectives of the project. Reductions in bycatch may be monitored via the number of individuals observed or estimated to be bycaught compared to pre-project observations/estimations or through a comparative measure such as compliance with regulations. Bycatch can be reported as a count (e.g., number of sea turtles caught by taxon) or amount (e.g., grams of fish caught), and can include the disposition of bycaught organisms (e.g., released, kept, alive, dead). Bycatch may be standardized by effort (e.g., number of trips, number of hooks set, area swept by gear, length of longline) depending on the intent of the analysis.

Programs to understand and reduce bycatch are critical to ensure the recovery and persistence of sea turtle, marine mammals, and fish populations. International bycatch reduction and management guidelines are developed by the United Nations Food and Agricultural Organization (FAO) (FAO, 2011). Some examples of the National Oceanic and Atmospheric Administration's (NOAA) programs focused on bycatch reduction include:

- **NOAA's National Bycatch Strategy:** The National Bycatch Reduction Strategy's objectives and actions build on past successes and guide NOAA's efforts to reduce bycatch and bycatch mortality. <https://www.fisheries.noaa.gov/national/bycatch/national-bycatch-reduction-strategy>
- **NOAA Gear Monitoring Program:** As part of the NOAA's NMFS Southeast Fisheries Science Center (SEFSC) Harvesting Systems Unit, a team of fishery biologists and gear specialists perform research into the critical problem of fisheries resource management as it relates to commercial and recreational fishing gear. They provide outreach and education to the fishing community on the use and installation of required gear modifications.
- **NOAA Fisheries Observer Programs:** NMFS uses fishery observers to collect data from U.S. commercial fishing and processing vessels. These professionally trained observers gather data to support science, conservation, and management activities. The data they collect are used to monitor federal fisheries, document protected species bycatch, assess fish populations, inform management, and monitor compliance with fishing and safety regulations.

*Guidance on Frequency and Duration*

The frequency and duration of monitoring will depend on the bycatch program, project specifications, and fishery.

**Bycatch, Birds****Parameter Details (available in DIVER picklist):**

- Caught by Taxon
- Landed by Taxon
- Number Reported
- Released Alive by Taxon
- Released Dead by Taxon

No additional methods or guidance for this parameter. All above general guidance applies.

**Bycatch, FWCI (Fish and Water Column Invertebrates)****Parameter Details (available in DIVER picklist):**

- Caught by Taxon
- Landed by Taxon
- Released Alive by Taxon
- Released Dead by Taxon

**FWCI Methodologies**

Identify, count, and measure the length each non-target individual or a subset from a larger sample. Estimate mass from length-mass curves. See NMFS (2019, 2020) for details.

For bycatch disposition, record the fate of each non-target individual caught. Assign each non-target individual in the catch to one of the following categories. See NMFS (2019, 2020) for category details.

- Landed
- Discarded alive (including condition upon release)
- Discarded dead
- Kept for personal use

**Bycatch, Marine Mammals****Parameter Details (available in DIVER picklist):**

- Caught by Taxon
- Landed by Taxon
- Number Reported
- Released Alive by Taxon
- Released Dead by Taxon

## Marine Mammal Methodologies

The appropriate sampling methodology depends on the species targeted by the project. Bycatch reduction activities implemented by marine mammal restoration projects could include spatial closures, acoustic alerting or deterrent devices, modifications to fishing gear, or changes to fishing operations (FAO, 2020).

**Method 1:** The NMFS Gulf of Mexico Shrimp Trawl Observer Program records fishing trip- and low-level data to determine the number of marine mammals caught per tow, their species, and their final disposition, among other collected information. Bycatch mortality can then be determined using fishery effort data (e.g., Soldevilla et al., 2015, 2016).

**Method 2:** The NMFS Marine Mammal Health and Stranding Response Program collects data for every stranded marine mammal responded to by the Program network members. Data includes basic information about the animal (species, age, sex) and the animal's condition/determination (e.g., stranded alive, dead), as well as information about evidence of human impacts, such as fishery interactions (e.g., NMFS, 2020).

## Bycatch, Sea Turtles

### Parameter Details (available in DIVER picklist):

- Caught by Taxon
- Landed by Taxon
- Number Reported
- Released Alive by Taxon
- Released Dead by Taxon

### Sea Turtle-Specific Definition

The bycatch of sea turtles in fishing gear is a major contributor to past declines and a major threat to future recovery of all sea turtle species, including populations in the Gulf of Mexico (NMFS and U.S. Fish and Wildlife Service [USFWS], 2008; NMFS et al., 2011). The primary commercial gear types include trawl, gillnet, pelagic and demersal longline, pound net, and pot/trap gear. Additionally, recreational hook and line fishing from piers and other land-based fixed structures also negatively impact sea turtles.

## E.4.6 Channel Dimensions

**Parameter Type:** Measured

**Units:** meters (m)

### Definition

The cross-sectional profile (e.g., width and depth) of channels intended to convey water for the restoration project.



## Potential Methodologies

**Method 1:** For shallower channels, cross-sectional profiles can be measured using advanced survey instrumentation, such as RTK GPS or Total Station; traditional survey instrumentation, such as a level and rod; or using a measuring tape or equivalent linear measurement device. Special care should be taken to not damage the escarpments.

**Method 2:** In deeper water that cannot be measured with topographic survey techniques, a bathymetric survey can be conducted using a depth finder fitted with a differential GPS or another acoustic method as appropriate. The position of the profiles should be carefully marked so that the same cross-sections can be repeatedly monitored following restoration. See Roegner et al. (2008) and U.S. Geological Survey (USGS) (2011) for more information on potential methodologies.

**Method 3:** For hardened channels or culverts, dimensions can be measured using a measuring tape or equivalent linear measurement device.

### Monitoring Location

Cross-sectional profiles should be measured in the channels specifically targeted by the hydrologic restoration within the project area. A reference and/or control site could be established, where appropriate and applicable.

### Guidance on Frequency and Duration

In general, monitoring is proposed pre-construction, immediately after construction (as-built), and post-construction. A baseline pre-construction condition could be established based on information obtained during E&D. Sampling could be conducted pre-construction (once), immediately following construction (as-built), and annually thereafter. Monitoring is proposed for 5 years post-construction or longer to ensure channel dimensions are being maintained sufficiently to meet performance criteria. For fixed or hard structures such as culverts, additional monitoring following as-built measurements may not be necessary because the dimensions are assumed to be stable. However, additional sampling may be needed after large storm events.

## Other Potential Analyses

Channel dimensions may also be used to calculate the cross-sectional area in square meters ( $m^2$ ) or volume in cubic meters ( $m^3$ ).

## E.4.7 Community Composition

**Parameter Type:** Calculated

**Units:** none or percentage (%)

### Definition

Community Composition is a derived value from Species Composition that measures the diversity of a sampled ecological community.

## Potential Methodologies

Community Composition and other community-based metrics have advantages over single species metrics, as they are not reliant on the response of a single species and are more all-encompassing of broader ecosystem processes. Community Composition can be derived in multiple ways using **Abundance** and **Species Composition**.

**Method 1:** Species richness is a count of the total number of different species present in a defined area (Weller, 1995; Melvin and Webb, 1998; Grippo et al., 2007; Shriver and Greenberg, 2012). Species richness can be seasonal, or across an entire year.

**Method 2:** Species diversity is the number of different species and their relative abundance in a defined area (Melvin and Webb, 1998; Shriver and Greenberg, 2012). Species diversity can be measured seasonally, or across an entire year. Species diversity requires abundance data for each species. Then, the inverse of weighted average of species proportional abundances is taken (Tuomisto, 2010).

**Method 3:** Species evenness evaluates the closeness of numbers of each species in an environment. For example, if the relative number between species A and B is very close, it is even; if it is not close, it is not even (Shriver and Greenberg, 2012). Species evenness is always a comparison between two species. This is often quantified with the Pielou's evenness index (Mulder et al., 2004). Species evenness could also be done at the group level, looking at the evenness across groups of birds (Grippo et al., 2007; Shriver and Greenberg, 2012; Weller, 1995).

**Method 4:** Species similarity is a united metric that subsumes several other indices and allows for more robust and nuanced examination and evaluation of restoration outcomes (Leinster and Cobbold, 2012; Shriver and Greenberg, 2012).

**Method 5:** Shannon-Wiener Index (Bradshaw and Brook, 2010).

**Method 6:** Simpson's Index (Bradshaw and Brook, 2010).

## Monitoring Methodologies and Other Potential Analyses

### *Monitoring Location*

Survey locations will vary depending on the method chosen. Methods that consider effort or detection probability will require more rigid establishment of points and/or transects, versus presence only methods, which can be more opportunistic in nature. When possible, a reference and/or a control site should be established.

### *Guidance on Frequency and Duration*

In general, monitoring is proposed pre-implementation, immediately after implementation, and annually for the project's design lifetime, or for a period of time defined by the Implementing Trustee. The season of the monitoring will be important depending on the restoration goals, and the species of interest. A baseline pre-implementation condition should be established.

Sampling is recommended immediately following implementation and at least annually thereafter, all in the same season and with the same methodology.

If the parameter is linked to a performance criterion the Implementing Trustee should establish a monitoring period long and frequent enough to satisfy project objectives. This may involve capturing annual/inter-annual variability based on factors that could influence bird abundance at the project site (e.g., habitat for migratory birds might not be used on the exact same dates each year, versus habitat for breeding birds may be more consistent, but not necessarily).

## **Community Composition, Birds**

### **Bird-Specific Definition**

Community Assemblage is a measure of the diversity of the avian community. The premise behind this approach is that avian community diversity is a function of habitat diversity.

### **Selection of the Most Appropriate Method to Meet Project Objectives**

First, whether community assemblage is of interest at the species level, or guild level needs to be determined. Species level information will be more informative, but also requires more effort to collect. Groups could include foraging guilds, taxonomic groups, or other biologically meaningful groupings of species that allow for the evaluation of restoration outcomes.

Community assemblage methods require careful consideration before selection, especially since in habitats including salt marsh, the relationship between community metrics, and site characteristics is not well understood (NAS, 2017).

Community-based approaches are effective because they efficiently capture a wide range of ecological functions, assuming they are being compared to an appropriate control site that represents conditions that could be restored (NAS, 2017).

The GOMAMN has developed a strategic monitoring plan to promote coordinated and consistent bird monitoring in the northern Gulf of Mexico (Woodrey et al., 2019). The GOMAMN plan and website (<https://gomamn.org/>) provide useful information development of monitoring approaches for specific for bird guilds. Additionally, GOMAMN taxonomic working group(s) representatives may be consulted in monitoring plan development (Woodrey et al., 2019, Appendix 3; <https://gomamn.org/>).

## **Community Composition, Epibenthic or Infaunal Organisms**

No additional methods or guidance for this parameter. All above general guidance applies.

## **Community Composition, FWCI (Fish and Water Column Invertebrates)**

No additional methods or guidance for this parameter. All above general guidance applies.

## **Community Composition, MDBC (Mesophotic and Deep Benthic Communities)**

No additional methods or guidance for this parameter. All above general guidance applies.

## Community Composition, Other

### Definition for Other, Non-Target Species

Species Composition, Other can be used to capture the species composition of prey, predator, invasive, and/or competing species.

No additional methods or guidance for this parameter. All above general guidance applies.

## Community Composition, Sea Turtles

No additional methods or guidance for this parameter. All above general guidance applies.

## Community Composition, Vegetation

No additional methods or guidance for this parameter. All above general guidance applies.

## E.4.8 Conservation Effort

**Parameter Type:** Qualitative or Measured

**Units:** description of or number (count, e.g., days or hours); as appropriate based on the nature of the activities

### Definition

Conservation Effort is the effort (i.e., hours, days, trainings, personnel, organizations) associated with implementing conservation improvements. Effort can be reported by the implemented activity and/or threat being targeted (e.g., marine debris removals, personnel dedicated to vessel strikes, trainings offered to reduce bycatch).

See **Education or Outreach Effort** for activities related to public education or outreach.

### Potential Methodologies

Monitoring methods will vary depending on the type of activities implemented or trainings conducted. For example, if resource monitoring is being conducted, the collection techniques may be documenting the number of personnel monitoring, trainings conducted for monitoring protocols, or the number of hours dedicated to monitoring. The information collected should include a description of the type of activity (e.g., marine debris removal) or threat (e.g., bycatch in recreational fisheries) addressed.

### Monitoring Location

Effort should be monitored where project activities occur. This could include location of personnel/organizations or location where conservation activities or trainings occur, such as a school, training center, or in the field.

### Guidance on Frequency and Duration

Effort should be monitored as conservation improvements occur. For trainings, the frequency and duration of monitoring will depend on the number of trainings planned in the project specifications. Further, depending on the project specifications, the number of people trained

(e.g., the number of people who attended a training session) and/or the number of training sessions offered could be tracked and documented. The rate at which trainings are offered or the number of people trained should be tracked throughout the training period and updated when needed.

### **Conservation Effort, Birds**

#### **Parameter Details (available in DIVER picklist):**

- Days by Activity
- Frequency of Activity
- FTE Positions Funded
- Hours by Activity
- Number of Participants or Organizations
- Number of Trainees
- Trainings Offered by Activity

No additional methods or guidance for this parameter. All above general guidance applies.

### **Conservation Effort, FWCI (Fish and Water Column Invertebrates)**

#### **Parameter Details (available in DIVER picklist):**

- Number of Participants or Organizations
- Number of Trainees
- Trainings Offered by Activity

No additional methods or guidance for this parameter. All above general guidance applies.

### **Conservation Effort, Marine Mammals**

#### **Parameter Details (available in DIVER picklist):**

- Funds Provided by Activity
- Hours by Activity
- Number of Participants or Organizations
- Number of Trainees
- Number with Adequate Training
- Percent Coverage
- Spatial Coverage by Activity
- Trainings Offered by Activity

#### **Marine Mammal Methodologies**

For marine mammal restoration projects, this may include maintaining or expanding marine mammal stranding network capacity or effectiveness, training, training materials or educational trainings for stranding responders, recreational fishermen, commercial fishermen, other marine recreational user groups, or enforcement officers or personnel. For trainings, the documentation should clarify whether the count represents number of people who were trained, number of people who attended a training session, or number of training sessions offered or conducted.

Documentation could also include information on whether those trained were receiving the training for the first time or as continued/repeat training.

Other methodologies include documenting the number and type of staff available or funded for conservation-related activities (e.g., Fair et al., 2006) or the level of effort associated with compiling and analyzing data (e.g., Lane et al., 2015; Moore et al., 2021; Pettis et al., 2004).

### **Conservation Effort, MDBC (Mesophotic and Deep Benthic Communities)**

#### **Parameter Details (available in DIVER picklist):**

- Inspections Conducted
- Number of Trainees
- Percent Compliance
- Trainings Offered by Activity

No additional methods or guidance for this parameter. All above general guidance applies.

### **Conservation Effort, Sea Turtles**

#### **Parameter Details (available in DIVER picklist):**

- Days by Activity
- Hours by Activity
- Inspections Conducted
- Number of Trainees
- Percent Coverage
- Shoreline Patrolled
- Staff Available
- Trainings Offered by Activity

#### **Sea Turtle Methodologies**

For sea turtle restoration projects, trainings could occur for recreational fishermen, commercial fishermen, or enforcement officers or personnel. For trainings, the documentation should clarify whether the count represents number of people who were trained, number of people who attended a training session, or number of training sessions offered or conducted.

Documentation could also include information on whether those trained were receiving the training for the first time or as continued/repeat training.

## **E.4.9 Conservation Improvements**

**Parameter Type:** Qualitative or Measured

**Units:** binary (yes/no) or number (count); as appropriate based on the nature of the activities

#### **Definition**

Conservation Improvements are water quality, habitat, living resource-specific conservation practices that were designed, developed, implemented, or evaluated as part of the project.

Conservation improvements is a general category of activities and may involve implementation of a number of different activities, such as bycatch reduction efforts in commercial fisheries, reduction of beach lighting on sea turtle nesting beaches, or encouraging voluntary changes in beach goer behavior. Conservation improvements or activities may also include restoration programs, management practices for specific areas or topics (e.g., state or federal lands), or individual improvements to areas or programs.

### Potential Methodologies

The methodologies to monitor conservation improvements or activities will be dependent on the project activities (e.g., USFWS, 2001). The information collected should include a description of the type of activity (e.g., marine debris removal) or threat (e.g., bycatch in recreational fisheries) addressed.

If the project includes a management agreement, the contractor would be responsible for collecting if the agreement is met and should record this as a part of their reporting and on-site inspections. Comparisons of management reports and site inspections or other planning materials may be necessary. If the project includes a conservation agreement (e.g., easement), the Implementing Trustee would determine if the conservation agreement terms were being met through a site visit or discussions with the managing agency or party.

### Conservation Improvements, Birds

#### Parameter Details (available in DIVER picklist):

- Incentives Provided
- Light Levels
- Number of Improvements Developed by Activity
- Number of Improvements Evaluated or Tested by Activity
- Number of Improvements Implemented by Activity
- Percent Compliance
- Terms of Agreement or Plan Met

No additional methods or guidance for this parameter. All above general guidance applies.

### Conservation Improvements, FWCI (Fish and Water Column Invertebrates)

#### Parameter Details (available in DIVER picklist):

- Fishing Effort Reduced
- Number of Agreements Executed by Activity
- Number of Improvements Implemented by Activity
- Percent Compliance
- Terms of Agreement or Plan Met

#### FWCI Methodologies

Consult agreements with fishing companies to determine the number of menhaden fishing trips canceled.

### Other Potential Analyses

The number of trips canceled may be multiplied by the average biomass of fish and invertebrates (both target and non-target) caught per trip to estimate the amount of biomass of dead fish and invertebrates avoided (by species).

### Conservation Improvements, Habitat

#### Parameter Details (available in DIVER picklist):

- Number of Agreements Executed by Activity
- Number of Protected Sites
- Terms of Agreement or Plan Met

No additional methods or guidance for this parameter. All above general guidance applies.

### Conservation Improvements, Marine Mammals

#### Parameter Details (available in DIVER picklist):

- Number of Improvements Developed by Activity
- Number of Improvements Evaluated or Tested by Activity
- Number of Improvements Implemented by Activity
- Percent Compliance
- Programs Established by Activity
- Utility of Improvements

### Marine Mammal Methodologies

For marine mammal Restoration Approaches, conservation improvements could include voluntary changes to individual behavior (reducing illegal feeding or harassment activities) or commercial activity (vessel speed or lane changes to reduce collision risk), and improvement practices could include gear changes to reduce entanglement risk. Utility of improvements could be determined through post-training questionnaire to training recipients or through risk analyses (e.g., Crum et al., 2019; Martin et al., 2016).

### Conservation Improvements, MDBC (Mesophotic and Deep Benthic Communities)

#### Parameter Details (available in DIVER picklist):

- Number of Agreements
- Number of Improvements Developed by Activity
- Number of Improvements Evaluated or Tested by Activity
- Number of Improvements Implemented by Activity
- Terms of Agreement or Plan Met

### MDBC Methodologies

Count the number of techniques tested for use in the field, found effective for restoration substrates, or substrates and restoration techniques suitable for use at a large scale.



## Conservation Improvements, Sea Turtles

### Parameter Details (available in DIVER picklist):

- Light Levels
- Number of Agreements Executed by Activity
- Number of Improvements Developed by Activity
- Number of Improvements Evaluated or Tested by Activity
- Number of Improvements Implemented by Activity
- Percent Compliance
- Terms of Agreement or Plan Met

### Sea Turtle-Specific Definition

For sea turtle Restoration Approaches, conservation improvements could include enhancements to sea turtle programs, or practices such as lighting retrofits, Leave Only Footprints efforts, and other techniques that reduce nesting barriers.

## Conservation Improvements, Water Quality

### Parameter Details (available in DIVER picklist):

- Number of Agreements Executed by Activity
- Number of Improvements Implemented by Activity
- Terms of Agreement or Plan Met

No additional methods or guidance for this parameter. All above general guidance applies.

## E.4.10 Data Sufficiency

**Parameter Type:** Qualitative or Measured

**Units:** binary (yes/no), confidence interval width, or as appropriate based on the nature of the activities

### Definition

Data Sufficiency is the sufficiency of ground-truthing samples for the interpretation of mapping data and/or the sufficiency of the resolution mapping data to characterize habitats for management purposes.

### Potential Methodologies

**Method 1:** Survey those individuals interpreting mapping data regarding the sufficiency of ground-truthing samples, examine the width of confidence intervals around model estimates.

**Method 2:** Survey resource managers about the sufficiency of the resolution of mapping data for management purposes, assess ability to classify habitat according to the Coastal and Marine Ecological Classification Standard, measure the area over which habitat classification is possible.

## E.4.11 Data Utility

**Parameter Type:** Qualitative or Measured

**Units:** binary (yes/no) or survey response scale

### Definition

Data Utility is the usefulness of information (including socioeconomic information) to resource managers.

### Potential Methodologies

Interview or survey resource managers regarding the utility (i.e., usefulness) of the data or information for management and decision making.

## E.4.12 Debris Accumulated

**Parameter Type:** Measured

**Units:** number (count of items), weight in kilograms (kg), or rate of accumulation (count or weight per unit time)

**Parameter Details (available in DIVER picklist):**

- By Source
- By Type
- Gear Abandonment Rate

### Definition

Debris Accumulated is the amount, source, movement and/or impact of debris accumulating in the marine environment. The gear abandonment rate is the number of traps lost over a certain period of time, standardized to a unit time.

### Potential Methodologies

For coastal projects, information about marine debris can be collected using shoreline surveys, benthic trawls, or floating litter survey operations (Cheshire et al., 2009). There are a number of different survey methods, including comprehensive and rapid beach assessments, and debris assessment and standing stock surveys [see Cheshire et al. (2009), Opfer et al. (2012), and Lippiatt et al. (2013)]. Surface water and at-sea surveys can also be conducted (Ryan et al., 2009).

For fishing gear abandonment, survey fishermen or count the number of traps lost over a certain period of time (a certain number of months or a year), then standardize to a unit time.

Alternatively, use side-scan sonar to identify abandoned traps in a particular area.

### Monitoring Location

Location of collecting debris is, in part, dependent on accessibility of the site and available equipment. Sampling should focus on areas where debris is suspected to accumulate but may

be stratified by factors such as land use, proximity to river mouths, substrate, tourism, fishing pressure, oceanic current patterns, bathymetry, and hydrodynamics (Lippiatt et al., 2013). For shoreline surveys, Opfer et al. (2012) developed walking patterns to ensure the entire shoreline site or transect is covered.

See E.4.2 Area for additional guidance about monitoring and/or reporting the location of accumulated marine debris.

#### Guidance on Frequency and Duration

The amount of sampling necessary to assess debris concentrations depends on the spatial variability of the debris, the desired level of detection, and whether the project's objective is to estimate flux rate (accumulation rate of litter) or just standing crop (quantity of litter per unit area or length of transect) (Cheshire et al., 2009). Collection events every 28 days provide good estimates of monthly averages (Lippiatt et al., 2013), while collection events every 3 months allow for the interpretation of seasonal changes. Collection could also take place before/after cleanup events as applicable.

### E.4.13 Debris Removed

**Parameter Type:** Measured

**Units:** number (count of items), volume (m<sup>3</sup>), or weight in kilograms (kg)

**Parameter Details (available in DIVER picklist):**

- By Source
- By Type
- Receptacles Installed

#### Definition

Debris Removed is the amount (number, volume, weight), source, movement and/or impact of debris removed from a designated area in the marine environment. This may include documenting fishing gear waste receptacles installed within a defined area of interest.

#### Potential Methodologies

Count and document volume and/or weight of derelict fishing gear removed, by gear type. Collection methods may vary depending on the type of derelict fishing gear removed. For coastal projects, information about marine debris can be collected using shoreline surveys, benthic trawls, or floating litter survey operations (Cheshire et al., 2009). There are a number of different survey methods, including comprehensive and rapid beach assessments, and debris assessment and standing stock surveys [see Cheshire et al. (2009), Opfer et al. (2012), and Lippiatt et al. (2013)]. Surface water and at-sea surveys can also be conducted (Ryan et al., 2009).

#### Monitoring Location

Location of collecting debris is, in part, dependent on accessibility of the site and available equipment. Sampling should focus on areas where debris is suspected to accumulate but may

be stratified by factors such as land use, proximity to river mouths, substrate, tourism, fishing pressure, oceanic current patterns, bathymetry, and hydrodynamics (Lippiatt et al., 2013). For shoreline surveys, Opfer et al. (2012) developed walking patterns to ensure the entire shoreline site or transect is covered.

See **E.4.2 Area** for additional guidance about monitoring and/or reporting the location of removed marine debris.

#### Guidance on Frequency and Duration

The amount of sampling necessary to assess debris concentrations depends on the spatial variability of the debris, the desired level of detection, and whether the project's objective is to estimate flux rate (accumulation rate of litter) or just standing crop (quantity of litter per unit area or length of transect) (Cheshire et al., 2009). Collection events every 28 days provide good estimates of monthly averages (Lippiatt et al., 2013), while collection events every 3 months allow for the interpretation of seasonal changes. Collection could also take place before/after cleanup events as applicable.

#### Other Potential Analyses

A pre-restoration assessment could be conducted to characterize conditions before cleanup.

### E.4.14 Density

**Parameter Type:** Measured, Calculated, or Modeled

**Units:** individuals per unit area (see **Area** for units)

#### Definition

Density is abundance of a given organism within per unit area.

#### Potential Methodologies

The appropriate sampling methodologies will be dependent on the species targeted by the project. Density may be measured with area-specific sampling methods (e.g., quadrats) or derived from Abundance and Area parameters.

#### Guidance on Frequency and Duration

In general, monitoring is proposed pre-implementation and post-implementation. Monitoring could be conducted for three years post-implementation or longer to adequately capture the changes in community composition at the project site. Sampling could be conducted seasonally, during the spring and fall, both pre- and post-implementation, or more frequently. Monthly sampling for 2–3 years pre-restoration and at 2–3-year intervals post-restoration may be needed to evaluate changes associated with the restoration project. However, monitoring frequency and seasonal timing will depend on the species targeted.

## Density, Birds

### Parameter Details (available in DIVER picklist):

- By Taxon

#### Bird-Specific Definition

Density, Birds is the abundance of birds per unit area. Bird density can be determined for a specific life history stage (e.g., nests, eggs, hatchlings, fledglings, adults), for a specific species or guild, or for the entire population.

#### Bird Methodologies

See Abundance, Birds for potential methodologies.

## Density, Epibenthic or Infaunal Organisms

**Additional Units:** number of individuals per square meter (individuals/m<sup>2</sup>)

### Parameter Details (available in DIVER picklist):

- By Taxon

#### Epibenthic or Infaunal Organism Methodologies

Fisheries-independent monitoring approaches should be used to measure epibenthic organism density in and around restored marshes. Sessile epifaunal invertebrates may be sampled with the quadrat method used for oyster density sampling. Infaunal invertebrates may be sampled with cores (15 cm diameter, 15 cm depth), washing samples over a 2 mm or smaller mesh.

**Method 1:** Use the quadrat sampling method for hard substrates to sample sessile invertebrates (see **Density, Oysters** for methods).

**Method 2:** Use cores (15 cm diameter, 15 cm depth) to sample infaunal invertebrates, washing samples over a 2 mm or smaller mesh (Baggett et al., 2014).

Data should be presented as density (individuals/m<sup>2</sup>) per species, as appropriate.

## Density, FWCI (Fish and Water Column Invertebrates)

**Additional Units:** number of individuals per square meter (individuals/m<sup>2</sup>) or number of individuals per cubic meter (individuals/m<sup>3</sup>)

### Parameter Details (available in DIVER picklist):

- By Taxon

#### FWCI Methodologies

Fisheries-independent monitoring approaches should be used to measure FWCI organism density in and around restored marshes. Sampling gears are designed to target specific sizes, species, and habitat(s). As such, different gears are recommended under specific

circumstances. FWCI density on the marsh surface could be measured using drop samplers, lift nets, or throw traps.

**Method 1:** Use drop samplers to sample small/medium crustaceans and fish on the marsh platform and in shallow open water habitat. Drop samplers allow for quantitative estimates of density and biomass. Potential methods are discussed in Zimmerman et al. (1984) and Minello (2000).

**Method 2:** Use lift nets to sample small/medium crustaceans and fish on the marsh platform and in shallow open water habitat. Potential methods are discussed in Rozas (1992).

**Method 3:** Use throw traps to sample small/medium crustaceans and fish on the marsh platform and in shallow open water habitat. Potential methods are discussed in Kushlan (1981) and Jordan et al. (1997). Throw traps are not as effective in areas of dense vegetation – drop samplers or lift nets are preferable gears for such conditions (Rozas and Minello, 1997).

**Method 4:** Use lift nets to sample small/medium crustaceans and fish on oyster reefs (Boudreaux et al., 2006; Crabtree and Dean, 1982; Tolley and Volety, 2005; Wenner et al., 2006).

## Density, Marine Mammals

### Parameter Details (available in DIVER picklist):

- By Taxon

No additional methods or guidance for this parameter. All above general guidance applies.

## Density, Other

**Additional Units:** individuals per square meter (number/m<sup>2</sup>) or individuals per square kilometers (number/km<sup>2</sup>)

### Parameter Details (available in DIVER picklist):

- By Taxon

### Definition for Other, Non-Target Species

Density, Other is the total number of other, non-target species per unit area. Density, Other can be used to capture density of prey, predator, invasive, and/or competing species.

## Density, Oysters

**Additional Units:** number of individual oysters per square meter (oysters/m<sup>2</sup>), number of spat per square meter per day (spat/m<sup>2</sup>-day), number of spat per square meter (spat/m<sup>2</sup>), number of spat per liter of shell (spat/L of shell), number of spat per weight of shell (spat/kg of shell), or number of spat per individual shell (spat/shell), depending on the method used

### Parameter Details (available in DIVER picklist):

- Dead Oysters

- Live Oysters
- Seed Oysters

### Oyster-Specific Definition

Density, Oysters is the number of oysters, including recruits, per unit area. The density of live and dead oysters should be calculated separately. The age or size of recruits is project-specific and should be clearly defined.

### Additional Oyster Methodologies

#### **Method 1:** Settlement Plates or Shell Strings

Deploy settlement plates or shell strings. Collect and replace plates every 3 or 4 weeks. More frequent replacement will yield finer-scale temporal patterns of settlement. Report as number of oysters/m<sup>2</sup> unit area per day.

#### **Method 2:** Quadrat

Place a quadrat on the reef and excavate all live and dead oysters within the quadrat. For rigid structures, place a quadrat on the surface of the reef structure and excavate to a depth necessary to collect all live oysters within the quadrat. For reefs constructed of bagged shell, take random samples by removing a bag of shell; the area sampled is the areal coverage of the bag. Convert densities to number per m<sup>2</sup>. If placed along a shoreline, also report a number per linear meter of shore. Stratify samples as appropriate, such as by reef height, orientation to mainland, or distance from shore. For more information see Baggett et al. (2014).

Estimates of settlement may be obtained from quadrat samples used for density estimates. The number of oysters/quadrat should be expressed in number/m<sup>2</sup> so that density can be compared between project types and sites. If the project is a living shoreline or is designed to protect a marsh shoreline, then also report the number of oysters (by size class of interest) per linear meter of shoreline.

#### **Method 3:** Shell Bags

If sampling with mesh bags filled with oyster shell, bags should be placed adjacent to or directly on the site of interest. Record the number and volume of bags of cultch material. Report as number of oysters/L of pre-deployed shell, number of oysters/individual shell, or number of oysters/weight of pre-deployed shell.

#### **Method 4:** Hydraulic Tongs

Use hydraulic patent tongs to sample the oyster reef. Like quadrats, they sample a known area and density can be calculated. For more information see Chai et al. (1992).

### *Monitoring Location*

Samples may be taken over the entire area of the reef. See Baggett et al. (2014) for guidance on the appropriate number of samples.

*Guidance on Frequency and Duration*

Pre-restoration (once, if applicable), and annually for 5 or more years after restoration, is recommended. Density should be measured after the growing season unless project objectives dictate otherwise.

*Other Potential Analyses*

Density of large oysters (brood stock) may be calculated using density and the oyster size frequency distribution. “Large” is defined for each project as appropriate.

**Density, Sea Turtles****Parameter Details (available in DIVER picklist):**

- By Taxon

No additional methods or guidance for this parameter. All above general guidance applies.

**Density, Vegetation**

**Additional Units:** number of individual plants per square meter (number/m<sup>2</sup>) or number of individual plants per square kilometer (number/km<sup>2</sup>)

**Parameter Details (available in DIVER picklist):**

- By Taxon
- Shoot density

*Additional Vegetation Methodologies*

Use a quadrat to estimate plant species density within a defined area (e.g., 1 by 1-m plots or 2 by 2-m plots). Data recorded by collecting number of plants per unit area in the planted area typically includes:

- Species identification
- Density of native species
- Density of invasive species if present.

*Guidance on Frequency and Duration*

In general, monitoring is proposed (pre-implementation, immediately after implementation, and post-implementation). A baseline pre-implementation condition should be established if possible. Data collections could occur pre-implementation, immediately after implementation (could be included in as-built), and every 3 years for the minimum monitoring period. One additional contingency data collection could be included in the monitoring plan to be implemented as needed to account for storm impacts.

**E.4.15 Discharge**

**Parameter Type:** Calculated

**Units:** cubic meters per second (m<sup>3</sup>/s)



## Definition

Discharge is the volume of water through a channel (e.g., stream, river, or tidal creek) within a given time period, typically in units of cubic meters per second (m<sup>3</sup>/sec) or cubic feet per second (cfs). In general, discharge is calculated by multiplying the velocity of the water (e.g., m/s) by the cross-sectional area (m<sup>2</sup>).

## Potential Methodologies

**Method 1:** Calculate discharge by multiplying the water velocity by the cross-sectional area (m<sup>2</sup>) of the channel (see Section E.4.52 Water Velocity; and Section E.4.6 Channel Dimensions).

**Method 2:** An Acoustic Doppler Current Profiler (ADCP) can be used to measure both water velocity and water depth within a stream. Typically, the ADCP is mounted to a small watercraft and guided along the stream channel to take the measurements.

**Method 3:** For streams where a stream gage is installed, the discharge can be calculated based on a stage-discharge relation. The development of a stage-discharge relation requires numerous discharge measurements at the given reach across all ranges of streamflow (Rantz et al., 1982; Turnipseed and Sauer, 2010). However, the stage-discharge relationship cannot be applied to tidally affected areas.

**Method 4:** Installation of Acoustic Doppler Velocity Meters (ADVMS) at index-velocity stream gages. Discharge is calculated using the index velocity method (Levesque and Oberg, 2012). This approach is best to calculate discharge in reaches with unsteady streamflow that prevents the development of a stage-discharge relationship.

See Steyer and Llewellyn (2000) and Olson and Norris (2007) for more information on potential methodologies.

## Monitoring Location

Discharge should be measured or calculated for channels within the project area that are an important component of the project design. If discharge is calculated by multiplying the water velocity by the cross-sectional area, these two measurements should be taken in the same area. A reference and/or control site could be established, where appropriate and applicable.

## Guidance on Frequency and Duration

In general, monitoring is proposed pre-implementation, immediately after implementation, and post-implementation. A baseline pre-implementation condition could be established based on information obtained during the E&D. Sampling could be conducted pre-implementation (once), immediately following implementation (once), and annually thereafter. Additional sampling may be needed after large storm events.

For projects with tidal influence, if continuous recorders are used, data could be collected for 2 weeks or longer during a sampling event to be able to capture one lunar cycle of spring and neap tides, but longer time periods (e.g., 3–4 months or year-round) are preferred. For discrete measurements, the discharge could be assessed over several tidal cycles.

For projects with riverine influence, sampling events could be designed to capture both high- and low-flow events. If continuous recorders are used, data could be collected for 2 weeks or longer during high- and low-water conditions, but year-round data collection for 1 or more years is preferred to fully capture the seasonal variability in flow conditions. For discrete measurements, the discharge could be assessed over a few weeks during both high- and low-flow conditions.

### Other Potential Analyses

Discharge data may also be needed to model the area influenced by hydrologic restoration.

## E.4.16 Dissolved Oxygen (DO)

**Parameter Type:** Measured

**Units:** milligrams per liter (mg/L) or parts per million (ppm)

### Definition

DO represents the concentration of oxygen mixed and dissolved into the water column.

### Potential Methodologies

A DO meter, water quality sonde, or data logging system can be used to record measurement data taken with a DO sensor. Data collection and calibration procedures of data sondes will be determined by the respective instrument's Quality Assurance/Quality Control (QA/QC) procedures. Site determination for the data collection, as well as the frequency and duration, will be determined by the project-specific objectives. See USGS (2013).

## E.4.17 Education or Outreach Effectiveness

**Parameter Type:** Measured

**Units:** as appropriate based on the nature of the materials

**Parameter Details (available in DIVER picklist):**

- Percent Change in Awareness
- Percent Change in Survey Responses

### Definition

Education or Outreach Effectiveness is the change in public understanding or attitude(s) resulting from outreach, education, and engagement activities.

### Potential Methodologies

Working with social scientists and using techniques common to the environmental education field (e.g., USFWS, 2001), survey people before and after participating in an outreach, education, and/or engagement event and assess change in understanding, attitude, or behavior (e.g., Duda, Beppler, and Horstman, 2013).

### Guidance on Frequency and Duration

Education or Outreach Effectiveness should be monitored at least once before and once after participation in an education or outreach activity or more frequently, as needed.

## E.4.18 Education or Outreach Effort

**Parameter Type:** Measured or Qualitative

**Units:** number (count) or as appropriate based on the nature of the materials

**Parameter Details (available in DIVER picklist):**

- Events Held or Attended
- Materials Produced or Distributed by Type
- Number Contacted
- Number Educated
- Number of Participants or Organizations
- Number of Recipients
- Partnerships Developed
- Percent of Piers with Reporting Materials Available
- Programs Developed by Type

### Definition

Education or Outreach Effort is the number of, type, nature and/or extent of educational materials developed and/or distributed to promote environmental stewardship, education, and outreach. Materials may include flyers, pamphlets, videos, interactive learning screens, programs, or teacher-led activities.

See **Conservation Effort** for training activities.

### Potential Methodologies

Education or outreach activities should be implemented with social scientists and/or using techniques common to the environmental education field (e.g., USFWS, 2001). Monitoring methods will vary depending on the type of educational materials developed. For example, if educational flyers are developed, the collection technique may be documenting the number of flyers printed, the number of types of flyers developed, etc. The information collected should include the type and number of educational materials, as well as a summary of the information presented in the educational materials.

### Monitoring Location

Materials should be monitored at their distribution location(s). This could include location of signposts, flyer distribution points, or locations where education activities occur, such as a school.

## Guidance on Frequency and Duration

Materials could be monitored for the period in which they are produced. The materials will be distributed according to project specifications and the rate at which materials are distributed should be tracked throughout the distribution period and updated when needed.

## Other Potential Analyses

Knowledge of the number of materials produced along with the frequency in which they are accessed by the public can help determine user preferences toward educational materials.

## E.4.19 Elevation

### Elevation, Habitat

**Parameter Type:** Measured, Calculated, or Modeled

**Units:** meters (m)

**Parameter Details (available in DIVER picklist):**

- Subsidence
- Vertical Accretion

### Definition

Elevation is the height of the created or restored area/habitat relative to geodetic datums, tidal datums, or surrounding area.

### Potential Methodologies

#### *Topographic Methodologies*

To evaluate the effectiveness of the restoration on the elevation and area of beach, dune, oyster reef, SAV, and adjacent subtidal areas, measurements will be compared with previous measurements of shoreline position, elevation, beach and dune profile changes, and volumetric changes within the system when combined with bathymetric surveys as appropriate to the Restoration Approach. For guidance on elevation monitoring for beach, dune, and barrier island habitats, see FLDEP (2014). For guidance on elevation (reef height) monitoring for oysters, consult Baggett et al. (2014). For marsh habitats, topography and associated hydrologic regime are key determinants of the distribution and composition of marsh vegetation and faunal communities. To evaluate the effectiveness of the restoration design, targeted elevations should consider the desired wetland habitat.

**Method 1:** Topographic profiles. Topographic profiles can be done to measure land elevation by using RTK GPS surveys. Elevation is measured at evenly spaced distances along transects or on a grid and interpolated using spatial analysis software to create a Digital Elevation Model (DEM). See Louisiana Coastal Protection and Restoration Authority (CPRA) (2016) for an example protocol for conducting RTK GPS ground surveys within restoration projects.

**Method 2:** Airborne topographic Light Detection and Ranging or Laser Imaging Detection and Ranging (LIDAR). This is an optical remote sensing technology that can measure the distance

to targets by illuminating the target with laser light and analyzing the backscattered light. Ground control points should be established to calculate accuracy and ground surveys may be needed to develop ecosystem-specific correction factors in densely vegetated marshes. For additional information on the use of LIDAR to monitor marsh elevations, see Brock et al. (2002), Schmid et al. (2011), Hladik and Alber (2012), Heidemann (2014), Buffington et al. (2016), and Medeiros et al. (2015).

**Method 3:** Photogrammetric surveys along transects. Collect elevation data using stereo aerial photogrammetry, coupled with control point elevation measurements collected with RTK GPS (Smith and Vericat, 2015; Smith et al., 2016).

**Method 4:** For more frequent measurements of elevation to determine sediment compaction rates, settlement plates may be installed during project construction (Dunnicliff, 1993). Elevation of the plates and top of the structure can be measured using advanced surveying instrumentation (e.g., RTK GPS) and as-built elevation compared to elevation in years post-construction.

**Method 5:** Traditional survey equipment (level and rod or transit pole and self-leveling laser) (Baggett et al., 2014).

**Method 6:** Ruler, meter stick, or graduated rod (Baggett et al., 2014).

Regardless of the method employed, the elevation should be measured relative to geodetic and/or tidal datums (Rydland and Densmore, 2012). Vertical error should be summarized for all elevation measurements, regardless of the data collection method used. Remotely sensed elevation data should have vertical error reporting that adhere to American Society for Photogrammetry and Remote Sensing (ASPRS) standards, the general standards for gauging vertical error in DEMs.

### **Monitoring Location for Topographic Methodologies**

Topographic profiles should be collected along the entire project footprint (typically collected for a larger area). A reference and/or control site could be established, where appropriate and applicable.

### **Guidance on Frequency and Duration for Topographic Methodologies**

For beaches, dunes, barrier island, oyster reef, and SAV projects, data collection could occur pre-construction, immediately after construction (as-built), and at an appropriate frequency and duration relevant to project-specific conditions. A baseline pre-implementation condition could be established based on information obtained during the E&D.

For marsh restoration projects, monitoring could occur immediately after construction (as-built), and post-construction at an appropriate frequency and duration relevant to project-specific conditions. Funding could also be included for an additional contingency data collection, to be implemented as needed, in response to storm impacts.

### *Bathymetric Methodologies*

Bathymetric surveys can be performed to collect water depth information by using:

**Method 1:** RTK GPS in shallow waters.

**Method 2:** Single-beam sonar.

**Method 3:** Multi-beam sonar.

**Method 4:** Topobathymetric LIDAR surveys along transects.

**Method 5:** Echo-sounder (Baggett et al., 2014).

**Method 6:** Depth finder (Baggett et al., 2014).

**Method 7:** Sounding pole (Baggett et al., 2014).

For potential guidance on performing Methods 1 and/or 2, see Sallenger et al. (2003), Morton et al. (2005), Stockdon et al. (2009), Guy and Plant (2014), Heidemann (2014), and Smith et al. (2016). Elevation data acquired from remote sensing should have vertical error reporting and adhere to the ASPRS standards, the general standards for gauging vertical error in DEMs.

### **Monitoring Locations for Bathymetric Methodologies**

Bathymetric profiles should be collected along the entire project footprint (typically to be collected for a larger area). A reference and/or control site could be established, where appropriate and applicable.

### **Guidance on Frequency and Duration for Bathymetric Methodologies**

In general, monitoring is proposed pre-construction, immediately after construction (as-built), and post-construction. A baseline pre-construction condition could be established based on profiles obtained during the E&D. Collections could be conducted pre-construction, immediately after construction (as-built), and post-construction at an appropriate frequency and duration relevant to site-specific conditions. Funding could also be included for an additional contingency data collection, to be implemented as needed in response to storm impacts or other factors that may influence elevation.

### *Other Potential Analyses*

For beaches, dunes, and barrier islands, additional potential analyses using elevation data include shoreline change, habitat change, beach and dune profile change, volume change, bathymetric profile change, volume change, and sediment movement. For marshes, elevation data could be used to support calculation of the area of habitat built or enhanced within a particular elevation zone and to calculate the sediment compaction rate.

### **Elevation, Water Level**

**Parameter Type:** Measured or Modeled

**Units:** meters (m)

## Definition

Elevation, Water Level is the elevation of the water surface, measured or modeled, relative to a geodetic or tidal datum. Water level measurements or estimates can be used to characterize the flooding regimes across the range of habitats restored, including the depth, frequency, and duration of flooding on the marsh surface and within any channels. When channels are an important feature of the project design, water level in the channel(s) should be measured or calculated at mean low tide to evaluate access to marsh surface for marine organisms.

## Potential Methodologies

The elevations of water level recorders and/or staff gauges should be determined and referenced to an appropriate vertical datum to obtain a relationship to marsh surface elevation. Water-level data can also be used to calculate the frequency and duration of flooding at specific locations within the restored area.

**Method 1:** Deploy multiple water level recorders to collect continuous measurements across the restored habitats.

**Method 2:** Collect elevation/bathymetry data (see [Section E.4.17 Elevation](#)) and install a single water level recorder to monitor the water surface elevation at one point, and calculate water levels across the marsh surface based on the elevation data. Assumes hydrologic connectivity is uniform across project area.

**Method 3:** Collect elevation/bathymetry data (see [Section E.4.17 Elevation](#)) and utilize data from an existing permanently deployed water level recorder(s) within or near the project site to calculate water levels across the marsh surface based on the elevation data.

**Method 4:** Install staff gauges at specific locations and make measurements by visual inspection, in combination with installation of one or more continuous water level recorders.

**Method 5:** To evaluate water level in narrow channels, take in-situ measurements using water level loggers along the created channel during mean low tide, including the channel openings or on either side of culverts, or other features that could constrict flow.

See Neckles and Dionne (2000), Steyer and Llewellyn (2000), and Sauer and Turnipseed (2010) for more information on potential methodologies.

## Monitoring Location

Spatial distribution of water level recorders will depend on the project type and the hydrologic characteristics of the project area. Potential locations for water level recorders include near the source of restored hydrologic flows, within the project boundary, near the edge of the influenced area, and outside the influenced area, if adjacent to other habitats. A reference and/or control site could be established, where appropriate and applicable.

## Guidance on Frequency and Duration

Frequency and duration will be project-dependent based on objectives and the need for corrective actions, but in general monitoring is proposed pre-construction, immediately after construction (as-built), and annually post-construction.

If continuous recorders are used, data could be collected for 2 weeks or longer during a sampling event to capture one lunar cycle of spring and neap tides, but longer time periods (e.g., 3–4 months or year-round) are preferred. Frequency of measurement from continuous recorders (tide gauges and water level loggers) can vary from every 5 minutes to every 1 hour and could be selected based on the resolution needed to meet project objectives.

If discrete measurements are taken, the water level should be assessed over several tidal cycles.

For projects with riverine influence, sampling events could be designed to capture both high- and low-flow events. If continuous recorders are used, data could be collected for at least 2 weeks during high- and low-water conditions, but year-round data collection for 1 or more years is preferred to fully capture seasonal variability in the water level. If discrete measurements are taken, the water level should be assessed over a few weeks during both high- and low-flow conditions.

#### Other Potential Analyses

Bathymetric profile change, sediment movement, hydrologic connectivity, saturation of root zone, accessibility by fish or waterbirds, and meteorological events and conditions.

### E.4.20 Enterococci

**Parameter Type:** Measured

**Units:** concentration expressed as the most probably number per hectoliter (MPN/100 L) or as Colony-Forming Units per deciliter (CFU/100 mL)

#### Definition

Pathogenic bacteria, or indicator species, are indicators of recent fecal matter contamination and that pathogens dangerous to human beings may be present.

#### Potential Methodologies

For methods on assessing Enterococci, see IDEXX Enterolert (Baird et al., 2017; U.S. Environmental Protection Agency [USEPA], 2017). Data collection and calibration procedures of detection instruments will be determined by the respective instrument's QA/QC procedures. Site determination for the data collection, as well as the frequency and duration, will be determined by the project-specific objectives.

#### Other Potential Analyses

Coliphages are additional pathogens that could be assessed as indicators of recent fecal matter contamination and exposure likelihood.

### E.4.21 Equipment Effectiveness, FWCI (Fish and Water Column Invertebrates)

**Parameter Type:** Measured



**Units:** as appropriate based on the nature of the activity/gear

**Parameter Details (available in DIVER picklist):**

- Catch Rate
- Degradation Time

### Definition

Equipment Effectiveness is the number or biomass of animals (by species) caught by unmodified traps standardized to 1 year.

### Potential Methodologies

**Method 1:** For catch rate, deploy traps and retrieve them after a known amount of time, then count and weigh individuals caught (by species). Standardize to 1 year. Alternatively, count and weigh individuals (by species) found in unmodified traps recovered during derelict fishing gear removal projects. For traps with degradable components, estimate catch rate for the period during which the degradable components are still intact. After degradable components break down, catch rate is assumed to be zero.

**Method 2:** For degradation time, place sample traps in habitats where they are likely to be used. Examine monthly or quarterly and examine degradable components.

### Guidance on Frequency and Duration

Equipment Effectiveness should be monitored for the duration of the project, or for as long as traps are deployed. Monitoring may be repeated seasonally to account for temporal differences in species composition and behavior.

### Other Potential Analyses

Compare with traps containing degradable parts to estimate number or biomass of animals saved with the degradable traps.

## E.4.22 Equipment Enhancements

**Parameter Type:** Measured or Qualitative

**Units:** number (count) or as appropriate based on the nature of the activity/gear

### Definition

Equipment Enhancements is the count and nature of the equipment and/or gear purchased, distributed, installed, or in use as part of a restoration project. This includes light modifications installed for sea turtle and bird projects and degradable fishing traps for FWCI projects.

### Potential Methodologies

Count and describe the equipment and/or gear purchased, distributed, installed, or in use and the objective of the equipment or gear. Counts may be collected by type of equipment or gear.

Collection methods will vary depending on the type of equipment or gear purchased or distributed.

### **Equipment Enhancements, Birds**

#### **Parameter Details (available in DIVER picklist):**

- Light Modifications
- Number Acquired or Purchased by Type
- Number Developed by Type
- Number Distributed or Deployed by Type
- Number Developed by Type
- Number of Trips with Enhancements
- Number Used by Type
- Proportion Using Enhanced Equipment

No additional methods or guidance for this parameter. All above general guidance applies.

### **Equipment Enhancements, FWCI (Fish and Water Column Invertebrates)**

#### **Parameter Details (available in DIVER picklist):**

- Number Acquired or Purchased by Type
- Number Developed by Type
- Number Distributed or Deployed by Type
- Number Evaluated or Tested by Type
- Number of Trips with Enhancements
- Number Used by Type

No additional methods or guidance for this parameter. All above general guidance applies.

### **Equipment Enhancements, Marine Mammals**

#### **Parameter Details (available in DIVER picklist):**

- Equipment Cache Locations
- Number Acquired or Purchased by Type
- Number Distributed or Deployed by Type
- Number Used by Type

#### **Marine Mammal Methodologies**

Provide the count and description of the equipment and/or gear purchased, distributed, installed, or in use and the objective of the equipment or gear. Counts may be collected by type of equipment or gear. Collection methods may vary depending on the type of equipment or gear purchased or distributed.

For project enhancing equipment caches, provide the latitude and longitude of the cache locations to enable mapping and potential network analysis.

## Equipment Enhancements, MDBC (Mesophotic and Deep Benthic Communities)

### Parameter Details (available in DIVER picklist):

- Number Distributed or Deployed by Type
- Number Used by Type

No additional methods or guidance for this parameter. All above general guidance applies.

## Equipment Enhancements, Sea Turtles

### Parameter Details (available in DIVER picklist):

- Light Modifications
- Number Acquired or Purchased by Type
- Number Developed by Type
- Number Distributed or Deployed by Type
- Number Used by Type
- Percent Vessels Using Enhanced Equipment

No additional methods or guidance for this parameter. All above general guidance applies.

### E.4.23 **Escherichia coli (E. coli)**

**Parameter Type:** Measured or Calculated

**Units:** concentration expressed as the most probable number per hectoliter (MPN/100 L) or as Colony-Forming Units per deciliter (CFU/100 mL)

#### Definition

E. coli are indicators of recent fecal matter contamination, and that pathogens dangerous to human beings may be present.

#### Potential Methodologies

For methods on detection of E. coli in water samples, see IDEXX Colilert, IDEXX Colilert-18, EPA 1604, SM 9223 B (Baird et al., 2017; USEPA, 2002, 2017). Data collection and calibration procedures of detection instruments will be determined by the respective instrument's QA/QC procedures. Site determination for the data collection, as well as the frequency and duration, will be determined by the project-specific objectives.

### E.4.24 **Fecal Coliform Bacteria**

**Parameter Type:** Measured

**Units:** Colony-Forming Units per deciliter (CFU/100 mL)

#### Definition

A subset of total coliform bacteria, which are more fecal-specific in origin, are indicators that pathogenic bacteria, viruses, or protozoans dangerous to human beings may be present.

## Potential Methodologies

*Standard Methods for the Examination of Water and Wastewater* (Baird et al., 2017; USEPA, 2017) provide analytical techniques for the determination of water quality. Data collection and calibration procedures of detection instruments will be determined by the respective instrument's QA/QC procedures. Site determination for the data collection, as well as the frequency and duration, will be determined by the project-specific objectives.

### E.4.25 Habitat Damage, SAV (Submerged Aquatic Vegetation)

**Parameter Type:** Measured or Calculated

**Count Units:** none

**Length Units:** meters (m)

**Depth Units:** centimeters (cm)

**Area Units:** square meters (m<sup>2</sup>)

**Parameter Details (available in DIVER picklist):**

- Propeller Scar Area
- Propeller Scar Depth
- Propeller Scar Length
- Propeller Scar Number

#### Definition

Habitat Damage, SAV is disturbed or damaged SAV and surrounding sediments resulting from boat propeller damages or other human impacts. Measurement includes counts, lengths, depths, and areas of scars.

## Potential Methodologies

**Method 1:** Scar boundaries, number, and length can be mapped based on aerial imagery collected by airplane, helicopter, UAS; high-resolution satellite imagery; or other appropriate remote sensing platforms. Recommended landscape-scale monitoring is 1: 9,600 scale to effectively estimate bare patches (< 2-3 m<sup>2</sup>, Dunton and Pulich, 2007). Imagery used to establish SAV boundaries should include true color and infrared bands and have a spatial resolution of 1 m or less. Source imagery should be orthorectified [i.e., free from distortions related to sensor optics, sensor tilt, and differences in elevation; see Rufe (2014)]. Collected imagery should be imported to spatial analysis software to digitize the perimeter of the project footprint and the boundaries of habitat areas within the project footprint. Additional guidance on using aerial imagery can also be found in Anders and Byrnes (1991), Crowell et al. (1991), Morton (1991), and FLDEP (2014).

**Method 2:** Ground surveys can be used to map the area of small scars. Use a RTK GPS to take continuous measurements while walking the perimeter of the project and along the boundaries of specific habitats within the project footprint. If taking depth measurements, record depth of scar at various waypoints while mapping the area of the scar.

**Method 3:** Grid mapping can be used to calculate the area of prop scars; it is best used when scarring is linear (EBAP and FLDEP, 2015). A fiberglass measuring tape is extended down the midline of the scar from two anchor points located at each end of the scar. At specified intervals (~1 m) length measurements are taken at right angles from the centerline to the edges of the scar (Hudson and Goodwin, 2001). Using this information, a graphical representation of the injury can be made by plotting measured points on a Cartesian plane from which the area of the scarring can be calculated.

**Method 4:** GPS/Trimble Method is best used on wide scars, or scars that may have merged to form larger patches (EBAP and FLDEP, 2015). NOAA and the FLDEP utilize this method to collect data about areas with high boat traffic. The Trimble receiver collects points while being walked around the perimeter of the scar or being dragged in a float. The total number of points recorded is dependent on the complexity of the scar; more complex features will require more points to accurately represent the shape. The points are then connected to create a polygon feature in ESRI ArcView or Trimble Pathfinder Office. From that, the area of scarring can be calculated.

### Monitoring Location

Area of habitat impacted should be determined for the entire project footprint. Some data, such as aerial photography, may be collected over larger areas. If using signage and/or buoys to mark boundaries of the project, scarring should be monitored within the boundaries.

### Guidance on Frequency and Duration

In general, monitoring is proposed twice a year, once in the growing season (approximately April through October) and once again in the dormant season, allowing data collection to coincide with the yearly minimum and maximum seagrass densities (EBAP and FLDEP, 2015). In general, monitoring is proposed pre-restoration, immediately after restoration, and post-restoration.

### Other Potential Analyses

Scarring measurements may also be used in conjunction with other parameters listed herein (e.g., elevation, vegetation percent cover and composition, turbidity) to perform the following calculations and analyses: habitat type changes, bathymetric profile change, and sediment movement.

## E.4.26 Habitat Length

**Parameter Type:** Measured or Calculated

**Units:** meters (m) or kilometers (km); ratios are unitless

**Parameter Details (available in DIVER picklist):**

- Shoreline Acquired, Conserved, or Enhanced
- Shoreline Armoring
- Wetland Edge

## Definition

Habitat Length may be defined in multiple ways depending on the project objectives. Projects should indicate which definition(s) is/are being used. Additional definitions may also be developed for specific projects, as needed.

**Length of Project Footprint:** the maximum length (e.g., along the coast) of the footprint of restoration activities, which may or may not account for habitat patchiness. This could consist of a straight-line distance or follow the curve of the coastline.

**Length of Project Influence:** the maximum length of restoration activities as determined by the Implementing Trustee. This length may extend beyond the project footprint.

**Length of Habitat:** the length of various habitat types along the project footprint.

**Wetland Edge:** The boundary between the vegetated wetland surface and non-wetland areas, including water features such as tidal creeks, ponds, unvegetated bottom, or other open water areas.

## Potential Methodologies

For all methodologies, measured positions should be georeferenced (latitude, longitude, elevation).

### Planning Methodologies

The length (e.g., along the coast) of the project boundary can be documented using planning materials (e.g., design documents, as-built designs) that include information on the project boundary.

### Field-Based or Remote Sensing Methodologies

**Method 1:** The length (e.g., along the coast) of the project boundary can be mapped based on aerial imagery collected by airplane, helicopter, UAS; high-resolution satellite imagery; or other appropriate remote sensing platforms. See the description for this method under **Area** for additional details.

**Method 2:** Ground surveys can be used to map an area and determine the length of the project boundary for smaller projects. See the description for this method under **Area** for additional details.

### Wetland Edge Methodologies

A number of different methods can be used to approximate the amount of wetland edge. Note that not all of these methods measure the same aspect of wetland edge and they, therefore, may not produce comparable data.

**Method 1:** The linear distance of wetland edge and the total area of marsh habitat can be calculated based on imagery collected by airplane, helicopter, or UAS; high-resolution satellite imagery; or other appropriate remote sensing platform. Imagery used to map wetland boundaries should include true color and infrared bands and have a spatial resolution of 1 m or less. Imagery acquired should be orthorectified imagery (i.e., free from distortions related to

sensor optics, sensor tilt, and differences in elevation). For guidance on collecting aerial orthoimagery, please see Rufe (2014). The boundaries of wetland habitats and water features can be delineated, and the linear length of wetland edge habitat can be measured using appropriate spatial analysis software. For additional information and references related to mapping wetland boundaries based on remote sensing data, see **Area**.

**Method 2:** Conduct a field survey to map the boundaries of vegetated wetland habitat and water features within the project area. The length of the wetland edge, the total area of wetland habitat, and the ratio of marsh edge to interior marsh habitat can then be calculated. For additional information and references related to conducting ground surveys of wetland boundaries, see **Area**.

**Method 3:** Ratio of wetland habitat to open water (sometimes referred to as land:water ratio) is also used as a proxy for edge in habitat suitability index models. For additional methods on mapping wetlands, see **Area**. Note that this method does not result in an edge-to-interior ratio, and cannot be directly compared to data collected using Methods 1 and 2.

**Method 4:** A number of different fragmentation indices have been developed to quantitatively describe the configuration of wetland and water. See Suir et al. (2013) and Couvillion et al. (2016) for examples.

#### *Other Potential Analyses*

In **Method 1**, once the linear distance of wetland edge and total area of marsh habitat is calculated, the ratio of linear wetland edge to total area of interior wetland habitat can then be derived.

#### *Monitoring Location*

Length of habitat built or enhanced should be determined for the entire project perimeter. Some data, such as aerial photography, may be collected over larger areas. A reference and/or control site could be established, where appropriate and applicable.

#### *Guidance on Frequency and Duration*

For projects that do not include construction, project monitoring is suggested before and after project implementation. In general, for projects including construction activities, monitoring is proposed pre-construction, immediately after construction (as-built), and post-construction. A baseline pre-construction condition could be established based on data obtained during the E&D period. See the description for this method under **Area** for additional details.

For Wetland Edge, monitoring is recommended immediately following construction (as-built) with one to two additional monitoring events, or more over the monitoring period. Funding for one additional contingency monitoring event could be included in the monitoring budget, which could be implemented as needed to account for storm impacts.

## **E.4.27 Model Performance**

**Parameter Type:** Calculated

**Units:** area, AIC, BIC, kappa,  $r^2$ , % deviance

## Definition

A measure of a model's predictive performance.

## Potential Methodologies

Generally, model performance can be determined using a correlation between observations and predictions and graphically using residual versus fitted plots. Additional methods can be used to assess other metrics for model performance. Note that not all of these methods measure the same metrics and they, therefore, may not produce comparable data.

**Method 1:** For binary response data and continuous model predictions: area under a receiver operating characteristic curve (AUC).

**Method 2:** For binary response data and binary model predictions: kappa statistic and similar confusion matrix statistics (may also be modified for more than two categories).

**Method 3:** For continuous data and continuous model predictions: root mean square error and similar residual error metrics.

**Method 4:** More generally to compare models fitted to different data:  $r^2$ , percent deviance explained.

**Method 5:** To compare versions of models fitted to the same data, use Akaike's Information Criterion (AIC) or Bayesian Information Criterion (BIC) or a similar information criterion metric. These metrics should be corrected for small sample sizes as appropriate, such as AICc.

## E.4.28 Necropsies

**Parameter Type:** Measured, Calculated, or Qualitative

**Units:** individuals (count), percent (proportion), or as appropriate based on the nature of the activities

### Definition

Necropsies is the count and type of necropsies conducted as part of a restoration project, including qualitative descriptions of evidence of human interaction (e.g., vessel strikes, interactions with recreational or commercial fisheries).

### Necropsies, Birds

**Parameter Details (available in DIVER picklist):**

- Evidence of Human Interaction
- Number Conducted by Taxon

No additional methods or guidance for this parameter. All above general guidance applies.



## Necropsies, Marine Mammals

### Parameter Details (available in DIVER picklist):

- Evidence of Human Interaction
- Number Conducted by Taxon
- Proportion of Strandings Necropsied

#### Marine Mammal Methodologies

Count and describe the type of necropsies conducted. By Federal Law, all necropsies must be conducted by trained and authorized individuals at permitted facilities in coordination with the Marine Mammal Stranding Network (MMSN) State Coordinator. Necropsy data will be collected on standardized data collection forms; this data includes descriptions of evidence of human interactions with the deceased individual (e.g., Friedlaender, McLellan, and Pabst, 2001; NMFS, 2020).

#### *Monitoring Location*

Necropsies may be conducted in the field if the decomposition of the animal or the size of the animal or location of the stranding event prevent the carcass from being collected for a laboratory necropsy.

## Necropsies, Sea Turtles

### Parameter Details (available in DIVER picklist):

- Evidence of Human Interaction
- Number Conducted by Taxon

#### Sea Turtle Methodologies

Necropsies, Sea Turtles is the count and type of sea turtle necropsies conducted as part of the restoration project. Necropsies must be conducted by trained and permitted individual in coordination with the Sea Turtle Stranding and Salvage Network (STSSN) State Coordinator.

#### *Monitoring Location*

Necropsies may be conducted in the field by trained and permitted STSSN responders if the decomposition of the animal or the size of the animal or location of the stranding event prevent the carcass from being collected for a laboratory necropsy. All other necropsies will be conducted at permitted facilities by trained and permitted individuals. Stranding and necropsy data will be collected on standardized data collection forms.

## E.4.29 Organism Linear Measurements

**Parameter Type:** Measured

**Units:** millimeters (mm), centimeters (cm), or meters (m)

## Definition

Organism Linear Measurement is a linear measurement of the size of an organism such as body length, carapace width, or some other length, width, or height. For biomass/weight, see **Biomass**.

### Organism Linear Measurements, Birds

No additional methods or guidance for this parameter. All above general guidance applies.

### Organism Linear Measurements, Corals

**Parameter Details (available in DIVER picklist):**

- By Taxon

No additional methods or guidance for this parameter. All above general guidance applies.

### Organism Linear Measurements, Epibenthic and Infaunal Organisms

No additional methods or guidance for this parameter. All above general guidance applies.

### Organism Linear Measurements, FWCI

**Parameter Details (available in DIVER picklist):**

- By Taxon

#### FWCI Methodologies

Measure length according to the usual length measurement (e.g., total length, standard length, or fork length) for that species. Estimate mass from length-mass curves. See NMFS (2019, 2020) for details.

### Organism Linear Measurements, Other

No additional methods or guidance for this parameter. All above general guidance applies.

### Organism Linear Measurements, Oysters

**Parameter Details (available in DIVER picklist):**

- Shell Height

#### Oyster-Specific Definition

Organism Linear Measures, Oysters is the shell height measured from the umbo to the opposite edge of the shell.

#### Potential Oyster Methodologies

Measure the shell height (umbo to opposite edge) of each live and dead oyster collected.

### *Monitoring Locations*

Samples may be taken over the entire area of the reef. Measure at least 50 oysters per sample, or enough oysters to equal 250 per reef (Baggett et al., 2014).

### *Guidance on Frequency and Duration*

Measurements should be taken pre-restoration (once, if applicable), and recommended, at least annually for up to 5 years or more after restoration. Sampling should be performed at the end of the oyster growing season in conjunction with sampling for oyster density. If possible, sampling should occur after newly settled oysters have grown to a size greater than 10 mm and can be confidently classified as recruits (Baggett et al., 2014).

## **E.4.30 Percent Cover, Vegetation**

**Parameter Type:** Calculated or Modeled

**Units:** percentage (%)

**Parameter Details (available in DIVER picklist):**

- Invasive or Non-Native by Taxon
- Native by Taxon
- Other by Taxon

### **Definition**

Percent Cover, Vegetation is the proportion of ground area in a sampling unit covered by the canopy (leaves, stems, etc.).

### **Potential Methodologies**

**Method 1:** Establish plots within the project area and record plot locations with a GPS and/or mark the plots with corner poles to allow for revisiting over time. Estimate percent cover as defined in the project MAM Plan. Percent cover of each species or species category of interest (e.g., native, invasive, herbaceous layer) may also be collected during this time if Vegetation Species Composition is a parameter of interest, as defined in the project MAM Plan. See USEPA (2011) for additional guidance on performing visual estimates of vegetation percent cover. Typical plot sizes are 0.25 to 1 m<sup>2</sup> for SAV, 1 to 4 m<sup>2</sup> for herbaceous vegetation, and 50 to 100 m<sup>2</sup> or greater for trees but will be project-dependent. Data collected will vary based on the project but would typically include:

- Visual assessment of total vegetation percent cover of target and undesirable species
- Percent cover by layer (e.g., herbaceous, shrubs, canopy), percent cover of native species, or percent cover of invasive species, if present.
- Percent cover of individual species, if also collecting Vegetation Species Composition.

For additional information on measuring and analyzing plant cover and composition, see Knapp (1984), Elzinga et al. (1998), Coulloudon et al. (1999), Bonham (2013), and Folse et al. (2014).

For SAV, monitoring often requires SCUBA divers to assess composition and percent cover along transects. Permanent transects are often used, with photographs along the transect line recommended for future comparisons (Kirkman, 1996; Neckles et al., 2012; Short et al., 2006). For shallow water monitoring, an aquascope or ‘fish eye’ can provide an accurate means of quantifying seagrass cover and composition without physically entering the water and disturbing sediments (Jackson and Nemeth, 2007; Thayer et al., 2005).

**Method 2:** Conduct a visual field inspection with ground photographs and/or high-resolution aerial photography to document that the performance criteria related to percent cover have been met. Note dominant species and the presence or absence of invasive species and any targeted species, along with their relative abundance. This method may be appropriate in some cases when it can be determined with high confidence based on visual inspection that the performance criteria for the project are being met. Note that it may not be appropriate to combine data collected using this method with data collected using Method 1.

**Method 3:** For SAV percent cover, analyze video footage of quadrats along transects to detect change in cover (McDonald et al., 2006). This method is particularly useful in fragile environments when there is a need to minimize disturbance to the site, although it may not be applicable in turbid areas.

**Method 4:** For areas with no or limited visibility, establish 100 m transects and use a rake to sample every 10 m and recording presence/absence. Species may also be recorded if also collecting **Species Composition, Vegetation** (Johnson and Newman, 2011; Rodusky et al., 2005).

### Monitoring Location

Vegetation percent cover should be measured throughout the entire project footprint. For hydrologic restoration projects, transects typically go from areas of higher hydrologic influence (such as close to creeks) to areas of lower hydrologic influence (such as interior marshes). A reference and/or control site could be established, where appropriate and applicable.

### Guidance on Frequency and Duration

In general, monitoring is proposed pre-implementation, immediately after implementation, and annually post-implementation for a duration long enough to evaluate performance criteria. Baseline pre-implementation conditions could be established based on information obtained during the E&D. Monitoring could occur pre-implementation, immediately after implementation (as-built), and then once a year at the peak of the growing season (mid- to late summer).

More frequent monitoring is proposed during the first 5 years following restoration to allow for the identification of problems and the implementation of adaptive management actions as needed. As the restoration project stabilizes, less-frequent monitoring may be appropriate. Monitoring should be conducted following disturbances to assess impacts and implement adaptive management actions, if needed.

While 5 years of monitoring is usually sufficient to demonstrate achievement of vegetation performance criteria for herbaceous vegetation, longer monitoring durations are generally needed for forested wetlands to demonstrate successful establishment of the plant community.

## Other Potential Analyses

Vegetation volume may also be calculated by estimating the percent cover (and of each species if also interested in **Species Composition, Vegetation**) and multiplying by height to provide a measure of aboveground structure. Vegetation percent cover when used in conjunction with **Species Composition, Vegetation** can also be used to assess biological diversity, species richness, and evenness. Community composition metrics include (see Matthews et al., 2009; Magurran and McGill, 2011; and references therein for more information on these metrics):

- Simpson's diversity index
- Shannon-Wiener index
- Mean coefficient of conservatism
- Floristic quality index (FQI) or Forested floristic quality Index (FFQI)
- Community diversity index.

### E.4.31 pH (acidity)

**Parameter Type:** Measured

**Units:** Standard Units (pH)

#### Definition

PH is the measure of acidity or potential activity of hydrogen ions (H<sup>+</sup>).

#### Potential Methodologies

pH can be measured using:

**Method 1:** An electronic pH meter.

**Method 2:** A litmus paper strip coated in a pH-indicating dye.

**Method 3:** pH dye testing kit for liquids.

Data collection and calibration procedures of detection instruments will be determined by the respective instrument's QA/QC procedures. Site determination for the data collection, as well as the frequency and duration, will be determined by the project-specific objectives.

### E.4.32 Presence

**Parameter Type:** Qualitative

**Units:** none (observed presence or absence of resource)

#### Definition

Observed presence or absence of a resource in a given area.

## Presence, Other

### Parameter Details (available in DIVER picklist):

- Invasives Present by Taxon

#### Definition for Other, Non-Target Species

Presence, Other can be used to capture presence/absence of prey, predator, invasive, and/or competing species.

## E.4.33 Reproduction

**Parameter Type:** Measured or Calculated

**Units:** number (count) or percent as relevant by activity

### Reproduction, Birds

#### Parameter Details (available in DIVER picklist):

- Fledgling Success
- Nest Occupancy
- Nest Success

#### Bird-Specific Definition

Reproduction, Birds refers to the success of a pair of birds in producing viable offspring. Bird reproductive success may be measured in a variety of ways. For the purposes of this monitoring guidance, bird reproduction includes Nest Occupancy, Nest Success, Fledgling Success, and/or Juvenile First Year Survival.

#### Bird Monitoring End Points and Methodologies

**Fledgling Success:** the number of offspring per pair that survive to the point that they have fledged. Fledging is generally defined as the offspring surviving to the point where they no longer receive parental care. Fledging Success may be monitored using the same methods as Nest Success if monitoring enables the evaluation of survival of individual young. Species which live in dense vegetation, such as those in saltmarsh, will be more difficult to track once they leave the nest unless some kind of device, such as a Very High Frequency radio tag is attached (Streby et al., 2015; Peterson et al., 2015).

**Nest Occupancy:** Count the number of nests occupied. Nest occupancy can be determined by ground or boat-based surveys or aerial photographic census (Colibri and Ford, 2015).

**Nest Success:** the success of a nesting pair of birds to produce offspring. Nest success can be determined several ways, ranging from the examination of nests after the nesting season is over to more intensive monitoring of the nest/young multiple times throughout the nesting season. The level of monitoring will depend, in part, on the species of interest. Nest monitoring of species with altricial young will likely be less intensive than species with precocial young, which typically leave the nest immediately after hatching. Nest Success modeling methodologies that take into account the error around the detection of nest success are recommended to produce

more accurate estimates of Nest Success rates (Gjerdrum et al., 2005; Murray, 2000). If possible, Nest Success monitoring should include identification of factors contributing to nest failure.

#### *Selection of the Most Appropriate Method to Meet Project Objectives*

The appropriate monitoring end point will depend in part on the species of interest, and their associated habitat. For colonial nesting species, more detailed methods may be more feasible because nests are easy to locate. For species whose nests are more dispersed, the density of nests, or the success of those nests might be more difficult.

The GOMAMN has developed a strategic monitoring plan to promote coordinated and consistent bird monitoring in the northern Gulf of Mexico (Woodrey et al., 2019). The GOMAMN plan and website (<https://gomamn.org/>) provide useful information development of monitoring approaches for specific for bird guilds. Additionally, GOMAMN taxonomic working group representatives may be consulted in the development of restoration project MAM plans (Woodrey et al., 2019, Appendix 3; <https://gomamn.org/>).

#### *Monitoring Location*

Reproduction should be monitored at the location(s) of the nests. A reference and/or control site could be established, where appropriate and applicable. Specific sampling locations will depend on the species targeted.

#### *Guidance on Frequency and Duration*

The frequency and duration of monitoring will depend on the project specifications. For birds, nest counts should be conducted at least once in peak nesting season but could be as frequent as every 7-10 days during breeding season. Depending on species, peak nesting generally occurs between April and July in the northern Gulf of Mexico.

## **Reproduction, Sea Turtles**

### **Parameter Details (available in DIVER picklist):**

- Hatchling Disorientation
- Nest Predation
- Nest Success

No additional methods or guidance for this parameter.

### **E.4.34 Right of Entry**

**Parameter Type:** Calculated

**Units:** days

## Definition

The right of entry to a project area is measured in terms of the number of days the area was open and closed to the public. This only applies to projects that can be closed or opened, and not to areas/projects that are always open.

## Potential Methodologies

Document the number of days the project area is open and closed using beach closure information, information on restrictions in place due to severe weather, or other similar information.

## Other Potential Analyses

The information can help inform trends in visitor use. For example, if severe weather prevents the opening of a facility, visitor use numbers typically declines during that period. This additional piece of information will help explain these patterns in visitor use.

## E.4.35 Salinity

**Parameter Type:** Measured or Modeled

**Units:** parts per thousand (ppt), Practical Salinity Units (PSU), or unitless. These systems of units are interchangeable, by design.

**Parameter Details (available in DIVER picklist):**

- Porewater
- Surface Water

## Definition

Salinity is the concentration of dissolved salts in water reported as parts per thousand (ppt), practical salinity units, or may be unitless (indicating the use of the Practical Salinity Scale).

## Potential Methodologies

**Method 1:** Surface water salinity may be measured continuously with an in-situ salinity/conductivity sonde and data logger.

**Method 2:** Take discrete samples using a hand-held salinity/conductivity probe or refractometer.

See Neckles and Dionne (2000), Steyer and Llewellyn (2000), Wagner et al. (2006), and U.S. EPA (2014) for additional information on salinity monitoring protocols.

## Monitoring Location

Spatial distribution of salinity measurements will depend on the project type and hydrologic characteristics of the project area. Salinity measurements could be taken near the source of the hydrologic restoration, within the boundary of the area influenced by the project, near the edge of boundary, and outside the boundary if adjacent to other habitats. A reference and/or control site could be established, where appropriate and applicable.



### Guidance on Frequency and Duration

In general, monitoring is proposed pre-implementation, immediately after implementation, and post-implementation. A baseline pre-implementation condition could be established based on information obtained during the E&D. Recommend sampling immediately following implementation (as-built) and annually thereafter.

If the parameter is linked to a performance criterion the Implementing Trustee should establish a monitoring period long and frequent enough to satisfy project objectives. This may involve capturing annual/inter-annual variability based on factors that could influence salinity at the project site (e.g., precipitation, freshwater inflow).

## E.4.36 Samples

**Parameter Type:** Measured or Qualitative

**Units:** number (count)

### Definition

Samples is the count and type of samples collected or processed as part of a restoration project.

### Potential Methodologies

Count and qualitatively describe the type of samples collected or processed.

### Monitoring Location

Project specific.

### Guidance on Frequency and Duration

Project specific. Sampling duration and periodicity will depend on the monitoring objective, project location, and species targeted.

## Samples, Marine Mammals

**Parameter Details (available in DIVER picklist):**

- Number Analyzed by Type
- Number Collected by Type
- Sites Assessed by Activity

### Marine Mammal Methodologies

For marine mammal projects, this may include marine mammal tissue or blood samples or video recordings. All samples and/or photo and video must be collected in accordance with permit requirements.

Tissue or blood samples may be further analyzed for health assessments (e.g., Barratclough et al., 2019; McFee and Lipscomb, 2009; Sullivan et al., 2019) or assessments of human interactions (e.g., Friedlaender et al., 2001)

## Samples, Sea Turtles

### Parameter Details (available in DIVER picklist):

- Number Analyzed by Type
- Number Collected by Type
- Sites Assessed by Activity

### Sea Turtle Methodologies

For sea turtle projects, this may include collecting and/or analyzing sea turtle tissue or blood samples or photo/video recordings. All samples and/or photo and video must be collected in accordance with permit requirements.

## E.4.37 Shoreline Position

**Parameter Type:** Measured, Calculated, or Modeled

**Units:** positions should be georeferenced (latitude, longitude, elevation) or relative changes may be measured in meters (m)

### Definition

Shoreline Position is the location of the boundary between the land and water at a particular tidal elevation. Calculations of shoreline position will allow for documentation of shoreline change over time, including in response to particular disturbance events.

### Potential Methodologies

The shoreline position can be measured using high-resolution, near-vertical aerial imagery, RTK GPS survey data, or by measuring shoreline locations along established transects. Comparing shoreline position over time provides information on shoreline change. Any shoreline measurement may be tied to a relevant tidal datum [e.g., mean sea level (MSL), mean high water (MHW), mean low water (MLW)]. Shoreline change should be calculated between shorelines tied to the same tidal datum.

**Method 1:** Delineate the shoreline based on orthophotography collected by aerial survey (see Sections E.4.2 Area and E.4.17 Elevation for methods). Aerial surveying is a method of collecting geomatics or other imagery by using airplanes, helicopters, UAS, or other aerial methods. Imagery acquired should be orthorectified (i.e., free from distortions related to sensor optics, sensor tilt, and differences in elevation). For guidance on collecting aerial orthoimagery please see Rufe (2014). Orthoimagery for monitoring shoreline change should have a spatial resolution of at least 1 m. Additional guidance on using aerial imagery can also be found in Anders and Byrnes (1991), Crowell et al. (1991), Morton (1991), and FLDEP (2014).

**Method 2:** RTK GPS ground surveys can be used for smaller projects to measure land elevation. Walk the shoreline while taking continuous measurements using an RTK GPS. Import the spatial information into ArcGIS and map the shoreline position. For wetlands, the shoreline is defined as the lower/seaward extent of the emergent marsh vegetation. Import and analyze the data using spatial analysis software. Determine the shoreline loss/gain in meters per year. See Steyer and Llewellyn (2000) for more information on this method.

**Method 3:** Establish permanent base stakes along the length of the shoreline at least 10 m inward of the marsh edge and determine the GPS coordinates of each base stake. Measure the linear distance from the base stake to the marsh edge along an established compass direction. The marsh edge is defined as the lower/seaward extent of the emergent marsh vegetation. Import and analyze the data using spatial analysis software. Determine the shoreline loss/gain in meters per year. See Steyer and Llewellyn (2000) for more information on this method.

For additional information on shoreline mapping methods, see Morton et al. (2005), Fearnley et al. (2009), Martinez et al. (2009), FLDEP (2014), and Guy (2015).

Repeated measurements of the shoreline position over time enables calculations of shoreline change, including erosion or seaward expansion. Several references are available for calculating shoreline change over time (e.g., Moore, 2000; Ramsey et al., 2001; Boak and Turner, 2005; Morton et al., 2005; Thieler et al., 2009; Gens, 2010; Rangoonwala et al., 2016).

### Monitoring Location

The shoreline change should be determined for the entire project footprint. For some collection techniques, such as aerial photography, the data will be collected for a larger area. A reference and/or control site could be established, where appropriate and applicable, to calibrate and validate remote sensing data. Spatial variation in the direction and magnitude of shoreline displacement can be measured by selecting reference and/or control points that are surveyed repeatedly over time.

### Guidance on Frequency and Duration

In general, monitoring should be conducted pre-implementation, immediately following implementation, and post-implementation. A baseline pre-implementation condition should be established based on data obtained during the E&D. For beaches, dunes, and barrier islands, data collection could occur immediately following construction (as-built) and frequently enough to satisfy project objectives. For coastal wetlands projects, data collection could occur immediately following construction (as-built) and one to two more times over the monitoring period, or longer as defined by the Implementing Trustee. In some cases, sampling throughout the year may be useful to identify seasonal patterns in erosion or accretion. Funding for contingency data collection could be included to evaluate storm impacts, as needed.

The duration will ultimately depend on site-specific conditions, project objectives, and the monitoring period identified in the project-specific MAM Plan.

### Other Potential Analyses

Shoreline Position can be used to calculate shoreline erosion rate, habitat type changes, shoreline change, habitat change, beach and dune profile change, volume change, bathymetric profile change, volume change, and sediment movement.

## E.4.38 Species Composition

**Parameter Type:** Measured or Calculated

**Units:** none or percentage (%)

## Definition

Species Composition is the number of species present within a defined area of interest. Species Composition can be targeted at a specific taxon (e.g., avian guilds), or all individuals present at the monitored site.

## Potential Methodologies

**Method 1:** Express as a list of individual species within a given area.

**Method 2:** Measure as the relative abundance of each species (Lewis and Casagrande, 1997; Grippo et al., 2007). See Section E.4.1 Abundance for additional monitoring guidance.

### Monitoring Location

Survey locations will vary depending on the method chosen. Methods that consider effort or detection probability will require more rigid establishment of points and/or transects, versus presence only methods, which can be more opportunistic in nature. When possible, a reference and/or a control site should be established.

### Guidance on Frequency and Duration

In general, monitoring is proposed pre-implementation, immediately after implementation, and annually for the project's design lifetime, or a period of time defined by the Implementing Trustee. The season of the monitoring will be important depending on the restoration goals and the species of interest. A baseline pre-implementation condition should be established, and sampling is recommend immediately following implementation and at least annually thereafter, all in the same season and with the same methodology.

If the parameter is linked to a performance criterion the Implementing Trustee should establish a monitoring period long and frequent enough to satisfy project objectives. This may involve capturing annual/inter-annual variability based on factors that could influence bird abundance at the project site (e.g., habitat for migratory birds might not be used on the exact same dates each year, versus habitat for breeding birds may be more consistent, but not necessarily).

## Other Potential Analyses

Species composition can be used to determine community composition and other community-based metrics. See **Section E.4.7 Community Composition**.

## Species Composition, Birds

### Selection of the Most Appropriate Method to Meet Project Objectives

First, the Implementing Trustee should determine whether species composition is of interest at the species or guild level. Species level information will be more informative, but also requires more effort to collect. Trustees could include foraging guilds, taxonomic groups, or other biologically meaningful groupings of species that allow for the evaluation of restoration outcomes.

Species composition methods require careful consideration before selection, especially since in habitats including salt marsh, the relationship between community metrics, and site characteristics is not well understood (NAS, 2017).

The GOMAMN has developed a strategic monitoring plan to promote coordinated and consistent bird monitoring in the northern Gulf of Mexico (Woodrey et al., 2019). The GOMAMN plan and website (<https://gomamn.org/>) provide useful information development of monitoring approaches for specific for bird guilds. Additionally, GOMAMN taxonomic working group(s) representatives may be consulted in monitoring plan development (Woodrey et al., 2019, Appendix 3; <https://gomamn.org/>).

### **Species Composition, Epibenthic or Infaunal Organisms**

No additional methods or guidance for this parameter. All above general guidance applies.

### **Species Composition, FWCI (Fish and Water Column Invertebrates)**

No additional methods or guidance for this parameter. All above general guidance applies.

### **Species Composition, MDBC (Mesophotic and Deep Benthic Communities)**

No additional methods or guidance for this parameter. All above general guidance applies.

### **Species Composition, Other**

Definition for Other, Non-Target Species

Species Composition, Other can be used to capture the species composition of prey, predator, invasive, and/or competing species.

### **Species Composition, Sea Turtles**

No additional methods or guidance for this parameter. All above general guidance applies.

### **Species Composition, Vegetation**

Potential Methodologies

See **Percent Cover, Vegetation** for relevant methods and references.

## **E.4.39 Specific Conductance**

**Parameter Type:** Measured

**Units:** microsiemens per centimeter ( $\mu\text{S}/\text{cm}$ )

### **Definition**

Specific Conductance is the measure of how well water can conduct an electrical current.

### **Potential Methodologies**

**Method 1:** Specific conductance can be measured using a multi-parameter water quality sonde.

Data collection and calibration procedures of detection instruments will be determined by the respective instrument's QA/QC procedures. Site determination for the data collection, as well as the frequency and duration, will be determined by the project-specific objectives. See Wagner et al. (2006).

#### **E.4.40 Stranding and Rehabilitation (Rehab)<sup>5</sup>**

**Parameter Type:** Qualitative or Measured

**Units:** number (count) or as appropriate for the activities

##### **Definition**

Stranding and Rehab is the count and type of strandings and rehabilitation activities reported as part of the project, including species, date of stranding, and disposition of stranded/rehabbed animal. Strandings are defined as living resources that wash ashore, dead or alive, or are found floating dead or alive (if alive, generally in a weakened condition). The stranding responder may document injuries that appear to have resulted in stranding.

##### **Stranding and Rehab, Birds**

**Parameter Details (available in DIVER picklist):**

- Injury Type
- Number Admitted by Taxon
- Number by Outcome
- Number Rehabilitated by Taxon
- Number Rescued by Taxon
- Number Stranded by Taxon
- Proportion Released
- Response Rate
- Response Time

No additional methods or guidance for this parameter. All above general guidance applies.

##### **Stranding and Rehab, Marine Mammals**

**Parameter Details (available in DIVER picklist):**

- Injury Type
- Proportion Admitted by Taxon
- Proportion by Outcome
- Proportion Rehabilitated by Taxon
- Proportion Released
- Response Time

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<sup>5</sup> The shorthand "Rehab" is used throughout the MAM Manual and DIVER data management system to remain within data table character limits.

## Marine Mammal Methodologies

The data that are collected related to marine mammal strandings and rehabilitation depend on the project activities and the portion of the project that is funded or enhanced stranding network activities. The MMSN currently operates in the Gulf States and continually responds to strandings, recording stranding and necropsy information on standardized data collection forms (e.g., NMFS, 2020).

Count and qualitatively describe the type of marine mammal strandings reported, including species and date of stranding. Stranded animals may be sent to rehabilitation centers (e.g., Moore et al., 2007) and re-released (e.g., McHugh et al., 2021; Wells et al., 2013) if deemed appropriate by NMFS.

### *Guidance on Frequency and Duration*

Sampling duration and periodicity depend on the monitoring objective, project location, species targeted, and method of data collection. For example, if evaluation of response successfulness is measured through post-response team debriefings, the data are likely to be more consistent and reliable if collected soon after the response effort.

## Stranding and Rehab, Sea Turtles

### Parameter Details (available in DIVER picklist):

- Injury Type
- Number Admitted by Taxon
- Number by Outcome
- Number Rehabilitated by Taxon
- Number Stranded by Taxon
- Proportion Released
- Rehabilitation Time
- Response Time

### Additional Sea Turtle Methodologies

The data that is collected related to sea turtle strandings will depend on the project activities and the portion of the project that is funded or enhanced stranding network activities. The STSSN currently operates in the Gulf States and continually responds to strandings. Stranding and necropsy data will be collected on standardized data collection forms.

## E.4.41 Structural Integrity

**Parameter Type:** Qualitative or Measured

**Units:** none or as appropriate for the dimensions or functions evaluated

### Definition

A series of observations and/or measurements to evaluate the integrity and function of constructed project features, such as breakwaters, weirs, culverts, tidal channels/creeks and/or access control measures such as signs, boardwalks, and fencing. The consolidation of a

structure over time may also be monitored through repeated elevation measurements. The integrity of the structure, and its foundation and function are evaluated so that appropriate maintenance or alternative actions can be taken if the constructed feature is not performing as constructed or designed.

## Potential Methodologies

The type of infrastructure will vary depending on the project objective(s) and the specific item or process that is being enhanced. The contractor is responsible for collecting this information and should record this as a part of their reporting and on-site inspections. Comparisons of as-built plans/reports and site inspections to construction drawings or other planning materials may be necessary.

**Method 1:** Conduct visual observations and photograph the project site. Visual surveys may be used subjectively to record the overall conditions, integrity, and effectiveness of the structure, including observations of material movement, changes in profile, change in habitat, etc. For hydrologic connectivity projects in which culverts are used, this should include checking for any obstructions to flow through the culvert. For recreational use projects, this may include an inspection of the project features such as entry points, parking lots, signage, and self-registration booths. For barrier island, dune, or beach projects, this may include an inspection of the project features such as dune walkovers, bollards and cable functioning, and other habitat protection features. For SAV projects, this may include inspection of bird stakes used to enhance nutrient levels (Powell et al., 1991), signage, and/or buoys which delineate the edges of the restoration zone, or breakwaters which could include oyster reefs or bio-engineered products.

**Method 2:** Use imagery collected during aerial surveys (see **Area**) to measure changes to the structure.

**Method 3:** Conduct an elevation and/or bathymetric survey of the structure to describe its outer surface geometry and measure changes over time. Measure the elevation of two to ten points on the structure in relation to an established datum.

- Composition: Position and size of unstable pieces, including major voids and exposures to core or underlayer
- Element composition: shape, size, and position of armor stone, including any fractures.

See Chapter 10 of CIRIA et al. (2007).

## Monitoring Location

Structural Integrity can be monitored along the entire length of the structure or at the project site.

## Guidance on Frequency and Duration

Post-construction observations could be made immediately following construction (as-built) and annually for 5 years post-construction. Additional observations may be needed following extreme weather events. Intervals between monitoring could be predetermined by the risk associated with particular failure mechanisms, structural elements, foundation conditions, exposure conditions, and design criteria.



Infrastructure could be monitored for three years post-construction or longer. For artificial reefs, pre-construction monitoring might be related to siting and determining there is no hard substrate already present. Post-construction monitoring could occur annually for 2 years or longer. Depending on the project-specific objectives, other hard structures could be monitored more frequently and/or for a longer duration to evaluate weathering of the infrastructure.

### Other Potential Analyses

Repeated measurements of the elevation of a structure can be used to calculate a consolidation rate.

### Structural Integrity

#### Parameter Details (available in DIVER picklist):

- Completed as Designed
- Consolidation

No additional methods or guidance for this parameter. All above general guidance applies.

### Structural Integrity, Oysters

#### Parameter Details (available in DIVER picklist):

- Consolidation
- Reef Dimensions
- Reef Height
- Reef Volume
- Volume of Cultch Placed

#### Oyster-Specific Definition

Structural Integrity, Oysters may be used to document oyster reefs that are created, restored, or enhanced as part of a project. The reef dimensions (including height), volume, or volume of cultch material placed may be captured under this parameter.

#### Oyster Methodologies

**Method 1:** Reef volume may be calculated by multiplying reef area by elevation (mean reef height).

**Method 2:** Data from a combination of sources may be used to calculate reef volume. Data from side-scan sonar can be digitized into raster data and analyzed in ArcGIS or other software. Reef elevation data can be gathered from a scientific echo sounder (or other appropriate sonar devices like multibeam or interferometric sides scan sonar). Pre- and post-restoration elevation data allows the elevation above surrounding non-reef areas to be determined.  $\text{Area} \times \text{mean height} = \text{reef volume}$ .

#### Monitoring Location

Reef volume may be calculated for the entire area occupied by the reef.

### *Guidance on Frequency and Duration*

Reef volume could be calculated immediately after project implementation and annually for up to 5 years following implementation. Additional measurements could be taken after events that could alter reef volume, such as storms, or extended periods of water quality detrimental to oyster survival (e.g., low salinity events).

### Other Potential Analyses

Reef volume may be used to calculate a shell budget for the reef.

## **E.4.43 Survival**

**Parameter Type:** Calculated or Modeled

**Units:** percent (%) or probability

### **Definition**

Count, estimated percentage, or calculation of surviving individuals.

### **Survival, Birds**

**Parameter Details (available in DIVER picklist):**

- Adult Survival
- First Year Survival
- Fledgling Survival
- Nest Survival (Mayfield) or Daily Survival Rate of Marked Nests

**Juvenile First Year Survival:** the survival of juvenile birds for their first year (or for multiple years for some longer-lived species) until they are reproductively viable. This may involve determining survival through periods of migration, dispersal, or other times of movement. Depending on the species, mark-recapture/re-sighting methods or telemetry may be used to monitor juvenile survival (Pollock, 1981; Powell et al., 2000).

### **Survival, Corals**

**Parameter Details (available in DIVER picklist):**

- Transplants by Taxon

No additional methods or guidance for this parameter. All above general guidance applies.

### **Survival, FWCI (Fish and Water Column Invertebrates)**

**Parameter Details (available in DIVER picklist):**

- Survivorship Rate by Taxon

### Potential FWCI Methodologies

Tag a subset of fish lowered with and without descender devices with satellite tags to determine survivorship rate.

## Survival, Oysters

### Oyster-Specific Definition

Survival, Oysters is the proportion of live oysters on a reef expressed as a percentage.

### Potential Oyster Methodologies

Divide the number of live oysters by the total number of live and dead oysters and express as a percentage.

### Monitoring Locations

Samples may be taken over the entire area of the reef or control sites if appropriate habitats exist in the area. Control areas could consist of natural reefs, non-reef areas, or other restoration projects depending on the restoration goals. See Baggett et al. (2014) for guidance on the appropriate number of samples and “oyster density” above.

### Guidance on Frequency and Duration

Recommended frequency: Pre-restoration (once, if applicable), and is recommended at least annually for up to 5 years or more after restoration. Sampling should be performed at the end of the oyster growing season in conjunction with sampling for oyster density. If possible, sampling should occur after newly settled oysters have grown to a size greater than 10 mm and can be confidently classified as recruits (Baggett et al., 2014).

## Survival, Vegetation

### Parameter Details (available in DIVER picklist):

- Plantings by Taxon

### Vegetation-Specific Definition

Survival, Vegetation can be used to evaluate whether additional plantings are needed to promote and establish appropriate vegetation communities.

### Potential Vegetation Methodologies

**Method 1:** Count the total number of planted plants, and the number of live or dead plantings within established plots. Field sampling could include quadrats, transects, or point surveys. Data collected will be used to calculate vegetation survival.

See **Percent Cover, Vegetation** and **Species Composition, Vegetation** for additional methods and references.

**Method 2:** Conduct a visual field inspection with ground photographs and/or high-resolution aerial photography to document that performance criteria related to percent cover have been

met. Note dominant species and the presence or absence of invasive species and any targeted species, along with their relative abundance. This method may be appropriate in some cases when it can be determined with high confidence based on visual inspection that the performance criteria for the project are being met. Note that it may not be appropriate to combine data collected using this method with data collected using Method 1.

#### *Monitoring Location*

Plots could be distributed over the entire planted area.

#### *Guidance on Frequency and Duration*

For projects with a planting component, survival/mortality of marsh grasses may be assessed for at least one full year following the initial installation. Monitoring could occur twice during the first growing season after planting (recommend 30 days and 90 days post-planting) and again 1 year after planting, while seasonal sampling may be needed for species that exhibit high inter- and intra-annual variance due to seasonally changing environmental conditions. Additional monitoring may be needed if replanting is required. Survival/mortality of planted trees (e.g., mangroves) should be monitored for 3 years or longer (Lewis, 2005, 2009).

Once the planted vegetation has become established, vegetation monitoring could focus on cover and composition (see **Percent Cover, Vegetation** and **Species Composition, Vegetation**).

### **E.4.43 Temperature**

**Parameter Type:** Measured or Modeled

**Units:** degrees Celsius (°C)

#### **Definition**

A measure of the warmth or coldness of water with reference to some standard value.

#### **Potential Methodologies**

Can be obtained using a thermometer or temperature probe. Data collection and calibration procedures of detection instruments will be determined by the respective instrument's QA/QC procedures. Site determination for the data collection, as well as the frequency and duration, will be determined by the project-specific objectives. See also Wagner et al. (2006).

### **E.4.44 Threats Documented**

**Parameter Type:** Measured

**Units:** number (count), risk

#### **Definition**

The number and risk of threats to mesophotic and deep benthic communities documented by the project.

## Potential Methodologies

Count the number of threats to MDBC identified by the project or risk assessment.

## Other Potential Analyses

Threat documentation may be utilized to further analyze the relative impacts of the documented threats.

### E.4.45 Total Nitrogen (TN)

**Parameter Type:** Measured

**Units:** milligrams per liter (mg/L) or parts per million (ppm)

#### Definition

Total Nitrogen is the sum of organic and inorganic forms of nitrogen in a water sample.

## Potential Methodologies

For guidance on potential methodologies to measure TN, see ASTM D5176 (ASTM, 2013a, 2013b) and USGS-NWQL I-2650-03. However, in some cases, directly measured TN may not be statistically comparable to TKN + NO<sub>2</sub> + NO<sub>3</sub> (Patton and Kryskalla, 2003).<sup>6</sup> See also the USGS National Field Manual for the Collection of Water-Quality Data (<https://water.usgs.gov/owq/FieldManual/>). TN and total phosphorus (TP) measurements are the USEPA's preferred metrics for evaluating nutrient concentrations in waters of the United States (Stoner, 2011). Data collection and calibration procedures of detection instruments will be determined by the respective instrument's QA/QC procedures. Site determination for the data collection, as well as the frequency and duration, will be determined by the project-specific objectives. See the USGS National Field Manual for the Collection of Water-Quality Data (<https://water.usgs.gov/owq/FieldManual/>).

## Other Potential Analyses

Loads and depth of the sample and collection method could be recorded. Further, TKN, NH<sub>4</sub>-N (ammonium nitrogen), NO<sub>2</sub>-N + NO<sub>3</sub>-N (nitrite plus nitrate), NO<sub>2</sub>-N (nitrite), and NO<sub>3</sub>-N (nitrate) could be analyzed from the samples.

### E.4.46 Total Phosphorous (TP)

**Parameter Type:** Measured

**Units:** milligrams per liter (mg/L) or parts per million (ppm)

<sup>6</sup> TKN + NO<sub>2</sub> + NO<sub>3</sub> has been traditionally used by some agencies as an estimate of TN, but that practice is changing due to the development of less labor-intensive procedures (Walker, 2014) and more precise methods (Smart et al. 1981).

## Definition

Total Phosphorous is the measure of the sum of all forms of phosphorus, including inorganic and organic forms.

## Potential Methodologies

For guidance on potential methodologies to measure TP, see EPA 300.0, EPA 365.2, EPA 365.3, EPA 300.1, SM 4110C, SM 4110B, and USGS-NWQL I-4650-03. Data collection and calibration procedures of detection instruments will be determined by the respective instrument's QA/QC procedures. Site determination for the data collection, as well as the frequency and duration, will be determined by the project-specific objectives.

## Other Potential Analyses

Soluble reactive-P (orthophosphate phosphorus) and chlorophyll *a* may also be analyzed.

### E.4.47 Total Suspended Solids (TSS)

**Parameter Type:** Measured

**Units:** milligrams per liter (mg/L) or parts per million (ppm)

## Definition

Total Suspended Solids is the dry weight of sediment from the known volume of a sub-sample of the original water sample.

## Potential Methodologies

For methods on collection of TSS, see EPA 160.2. Data collection and calibration procedures of detection instruments will be determined by the respective instrument's QA/QC procedures. Site determination for the data collection, as well as the frequency and duration, will be determined by the project-specific objectives.

### E.4.48 Turbidity

**Parameter Type:** Measured

**Units:** nephelometric turbidity unit (NTU)

## Definition

Turbidity is a measure of intensity of light scattered by a sample, or the cloudiness or haziness of a sample.

## Potential Methodologies

For methods on assessing water turbidity see EPA 180.1 and Wagner et al. (2006).

Data collection and calibration procedures of detection instruments will be determined by the respective instrument's QA/QC procedures. Site determination for the data collection, as well as the frequency and duration, will be determined by the project-specific objectives.

## E.4.49 Visitors

**Parameter Type:** Measured or Qualitative

**Units:** individuals (count), number of visitors per unit of time (day, month, year, etc.), or as appropriate based on activity

**Parameter Details (available in DIVER picklist):**

- Visitor Count
- Visitor Satisfaction
- Visitor Trips
- Visitor Use by Activity

### Definition

Visitors is the public access to the natural resources or project area and/or the number of visitors using the recreational area; visitor behavior in, and satisfaction with, project areas; or the amount of recreational use on the land and/or water, organized by category, where the activities take place, and for how long or how often.

### Potential Methodologies

**Method 1:** Direct observations, including staff observations on-site using hand counters or recording forms, camera recordings, remote sensing, aerial surveys.

**Method 2:** On-site counters, including devices or sensors used to generate counts, such as pressure pads, turnstiles, light beams, active or passive infra-red, or acoustic data loggers.

**Method 3:** Review registrations, including voluntary registrations or permit records, such as track registers, site visitor books, registration or entrance fees, or trip bookings.

**Method 4:** Inferred counts, including indirect counts, such as interviews or counts of elements linked to visitor use such as car park counts, litter, or trail deterioration.

**Method 5:** Conduct surveys. Social indicator monitoring systems can be used to measure visitor satisfaction with restoration project areas, and monitor response behavior toward restoration activities. Monitoring could be conducted using key location or onsite surveys, as well as offsite regional telephone or mail surveys. These surveys should be conducted at key locations across the recreational use area. Surveys may include the following types of questions:

- How often do you visit the acquired land?
- With whom are you visiting the acquired land (commercial tour operator vs. family/friends/self)?
- What is your motivation for visiting the site?
- What benefits do you expect from visiting the site?
- What activities are you participating in (could provide a list based on what recreational activities the land may be used for, with an option for “other”)?
- How long are you at the acquired land (hours, overnight, days)?

- How would you rate the amount of influence that various setting features had on your experience?

See Moscardo and Ormsby (2004), U.S. Census Bureau et al. (2011), Louisiana Department of Culture, Recreation, and Tourism (2014), and Miller et al. (2014) for additional information. For guidance and methodologies of how to measure visitor use, see Cessford and Muhar (2003), Moscardo and Ormsby (2004), FWS (2005), Leggett (2015, 2017), and Horsch et al. (2017).

### Monitoring Location

Visitor use patterns may vary depending on the activity, the number of individuals engaged, and the areas these activities take place. As a result, counting locations should be identified at strategic locations that are representative of the whole recreational use area. Priority sites may include:

- Places of specific management concern
- Places where specific management actions are under consideration
- Places that are considered representative of broader management issues
- Access points such as entrances to public areas/parks
- Locations that represent the diversity of activities such as along beaches, swimming areas, etc. (particularly if completing a survey).

Sampling locations could include a mixture of permanent sites, rotating sites according to needs, and flexible sites identified on case-by-case locations for short-term needs (Cessford and Muhar, 2003).

For visitor satisfaction surveys, selection of respondents should use a systematic random sampling procedure within the units chosen for study. This is intended to ensure that the respondents within a location have an equal probability of being asked to participate, and the choice of target respondents is determined by the sampling system and not by the interviewers. An offsite regional telephone survey, a key locations survey, or an onsite survey may be used (Moscardo and Ormsby, 2004).

### Guidance on Frequency and Duration

Data collection is proposed pre-implementation, immediately after implementation (as-built), and at an appropriate frequency and duration relevant to project-specific conditions. The variety of monitoring options to meet differing needs and site situations will impact the timing and frequency of monitoring. Generally, counts should be representative of as full a range of site conditions as possible, taking into account varying times of the day, week, or year; seasonal variations; weather variation; and special use occasions such as holidays or community events. Counts may also be established as a continuous and long-term process at a site, depending on the method utilized. Monitoring should aim to cover different seasons and include weekdays, weekends, and holidays.

### Other Potential Analyses

Visitor use counts should consider the number of days the acquired land is accessible/closed in order to accurately interpret changes in visitor use patterns. Project managers should also track



the number of days the area is open or closed and the reasons for closure (e.g., beach closures due to water quality concern). See **Right of Entry**.

Visitor satisfaction and behavior may be influenced by an array of outside drivers. Consideration of these factors during the survey can help interpret survey responses:

- Visitor characteristics, especially motives and levels of experience with both the places visited and activities participated in, and cultural background
- Visitors' perceptions of the quality of the physical environment, especially judgments of scenic beauty and human impacts on the setting
- Interactions with other people, including tour and park staff
- Effectiveness of programs or activities available
- Perceived quality of the service provided
- Perceived quality of the facilities and built infrastructure.

Visitor satisfaction surveys could also be designed to collect information on visitor impact on acquired lands for protection or restoration. Sampling strategies for determination of impacts within visitor nodes (e.g., sites) and linkages (e.g., trails) are well-developed and have been extensively reviewed [e.g., Hammitt and Cole (1998), Monz (2000), and others] and applied (Monz and Leung, 2006). The National Park Service (NPS) Visitor Impact Phase 1 and 2 Reports can provide additional guidance on monitoring methods (Monz and Leung, 2003a, 2003b). This information could also be used to inform potential wildlife behavior responses resulting from visitor use.

The survey could be conducted pre- and post-construction or more often depending on the objectives of the project. If appropriate for the project, monitoring should aim to cover different seasons and include weekdays, weekends, and holidays.

## E.4.50 Water Velocity

**Parameter Type:** Measured, Modeled, or Calculated

**Units:** meters per second (m/s)

### Definition

The speed of water moving in a particular direction. Flow velocity can be measured for constrained flow within channels or structures (e.g., culverts), but can also be measured for sheet flow. Velocity can also be measured for bi-directional tidal flows, where flow in the opposite direction has a negative velocity.

### Potential Methodologies

**Method 1:** Measure water velocity (typically in units of m/s) within a channel with a current meter. Typically, multiple velocity measurements should be taken both across the stream and at different depths.

**Method 2:** An ADCP can be used to measure both water velocity and water depth within a stream. Typically, the ADCP is mounted to a small watercraft and guided along the stream channel to take the measurements.

## Monitoring Location

Water velocity should be measured for channels within the project area that are an important component of the project design, or at other locations within the project footprint where the maintenance or restoration of hydrologic flows is important. Water velocity can be measured at a reference and/or control site, where appropriate and applicable.

## Guidance on Frequency and Duration

In general, monitoring is proposed pre-construction, immediately after construction, and post-construction. A baseline pre-implementation condition could be established based on information obtained during the E&D. Propose conducting sampling pre-construction (once), immediately following construction (once), and annually thereafter. Additional sampling may be needed after large storm events.

For projects with tidal influence and if continuous recorders are used, the data could be collected for 2 weeks or longer during a sampling event to be able to capture one lunar cycle of spring and neap tides, but longer time periods (e.g., 3-4 months or year-round) are preferred. If discrete measurements are taken, the water velocity could be assessed over several tidal cycles.

For projects with riverine influence, sampling events could be designed to capture both high- and low-flow events. If continuous recorders are used, the data could be collected for 2 weeks or longer during high- and low-water conditions, but year-round data collection for 1 or more years is preferred to fully capture the seasonal variability in flow conditions. If discrete measurements are taken, the water velocity could be assessed over a few weeks during both high- and low-flow conditions.

If velocity measurements will be used to calculate discharge (volume of flow), velocity could be measured at about the same time the channel dimensions are measured.

## Other Potential Analyses

Can be used with **Channel Dimensions** to calculate the flow volume, or **Discharge**.

### E.4.51 Wave Direction; Wave Height; Wave Period

**Parameter Type:** Measured or Modeled

**Units:** wave heights should be measured in meters (m), directions should use compass headings, wave period should be measured in seconds (s)

## Potential Methodologies

Wave generation in inland or sheltered coastal water bodies are influenced by wind speed and duration and available fetch such that heights and periods are generally less than those observed on open ocean coastlines (Miller et al., 2015). Instrumentation used in monitoring waves should thus be tailored to those capable of capturing these conditions.

**Method 1:** Field based measurements of wave heights, direction, and period can be collected using a number of instruments, depending on application, and include pressure gauges,

accelerometer buoy, acoustic wave gauge, acoustic doppler current profilers, wave wires, and remote sensing techniques (Miller et al., 2015; Pandian et al., 2010)

**Method 2:** In conjunction with field data collection described in Method 1, wave models may also be used to evaluate wave conditions around the entire project site (e.g., Coast & Harbor Engineering, 2015; Thomas and Dwarakish, 2015). The use of models will also require calibration and validation procedures to ensure model results accurately reproduce the physical measurements (Miller et al., 2015).

### Monitoring Location

The monitoring location will depend on the methods selected, as some deployments require certain depths or to be placed in an array, for example. Wave information should be collected on either side of constructed feature, if used, so that comparisons of wave heights can be made to determine whether performance criteria have been met. In modeling applications, monitoring locations may extend beyond the immediate project site in order to capture necessary boundary conditions.

### Guidance on Frequency and Duration

The appropriate sampling interval and duration should be tied to the conditions the monitoring is intended to sample. Changes in weather patterns (especially winds) will affect wave conditions at a local site so monitoring frequency and duration may consider capturing the range of conditions most frequently experienced at the project site. Rapid response monitoring to capture extreme weather events (e.g., hurricanes) may also be considered for some projects.

For living shoreline projects that are intended to reduce wave heights, monitoring may be needed through several growing seasons of the living shoreline in order to achieve targeted wave reduction benefits.

Additional monitoring may also be needed if changes in the conformation of natural or constructed features that reduce wave energy occur. For example, a breakwater may partially collapse if undercut by scouring, resulting in changes in wave energy around the structure. This monitoring data could be used to inform decisions regarding potential corrective actions.

### Other Potential Analyses

Wave energy, maximum wave height, wave attenuation, and other commonly used statistics can be calculated from measurements of wave heights, periods, and direction.

## E.5 Create, Restore, and Enhance Coastal Wetlands: Monitoring Guidance



*This guidance is intended to promote consistency in data collection among similar types of projects and allow for future analysis across TIGs and Restoration Types, (Section 10.6.2 of SOP; DWH NRDA Trustees, 2021). This guidance may also assist the TIGs by providing recommended methodologies for monitoring restoration projects, saving time and money spent developing suitable monitoring protocols for individual restoration projects. If adjustments from this monitoring guidance are needed for a particular project, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). Project teams within each TIG will identify parameters applicable to the objectives for each individual restoration project when developing the project MAM Plan. In addition to the project monitoring guidance identified in this MAM Manual, specific monitoring may be required to comply with permits granted by regulatory agencies. The TIGs are not restricted from including additional parameters if applicable, and other project monitoring that may be needed for specific projects should be determined by the TIGs. The Cross-TIG MAM work group developed this monitoring guidance by following the process described in the main body of this report.*

This guidance is intended to assist the TIGs in developing MAM Plans for restoration projects, as appropriate. Specifically, it provides:

- Examples of Restoration Techniques
- Guidance on example restoration objectives, example drivers, and example uncertainties
- Guidance on core performance monitoring parameters for projects within the Restoration Approach
- Guidance on supplemental performance monitoring parameters for specific restoration objectives.

The monitoring parameters identified within a project MAM Plan should be consistent with the recommended monitoring defined within this guidance document, wherever appropriate. Depending on the nature of the restoration project, TIGs may also choose not to include some of the elements described in this guidance document (e.g., drivers, uncertainties). If adjustments from the monitoring guidance are needed, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). The guidance provided should not be considered exhaustive. Therefore, TIGs may develop project-level objectives, drivers, uncertainties, and monitoring parameters that have not

been previously identified. The TIGs will develop MAM objectives and monitoring parameters that pertain to their restoration activities; and will determine the frequency and duration of monitoring, and the associated budget they deem appropriate. Finally, this section is subject to change as new monitoring parameters, methods, and technologies are identified and/or developed.

The monitoring parameters recommended in this guidance document are further detailed in Attachment E Section E.4, which includes a complete list of core and objective-specific monitoring parameters identified by the Cross-TIG MAM work group and guidance on measurement unit(s) and monitoring methods. Guidance on monitoring locations, frequencies, durations of sampling and potential analyses is also provided where appropriate.

### **E.5.1 Restoration Techniques**

Restoration Techniques are specific restoration actions the Trustees identified for each of the Restoration Approaches. Restoration Techniques may be used individually or in combination. See Appendix 5.D of the PDARP/PEIS (DWH NRDA Trustees, 2016). The following are example Restoration Techniques included in the PDARP/PEIS for this Restoration Approach. This list should not be considered exhaustive; additional Restoration Techniques may be developed and/or identified.

1. Create or enhance coastal wetlands through placement of dredged material
2. Backfill canals
3. Restore hydrologic connections to enhance coastal habitats
4. Construct breakwaters.

### **E.5.2 Example Project-Level Restoration Objectives**

Project-level restoration objectives should be specific to the resource injuries and clearly specify the desired outcome(s) of the restoration project (15 CFR § 990.55(b)(2)). See Section 2.4.1 of the main body of this Manual for guidance on establishing restoration objectives. The following are example project-level restoration objectives that may apply to one or more of the above-mentioned Restoration Techniques. This list should not be considered exhaustive; additional objectives may be developed and/or identified.

- Create or restore intertidal wetland elevations
- Restore targeted coastal wetland hydrology
- Increase or maintain native coastal wetland vegetation
- Restore targeted salinity regime
- Reduce shoreline erosion rate
- Restore hydrologic connectivity
- Provide habitat for fish and invertebrates
- Provide habitat for birds
- Increase abundance and/or density of birds
- Increase bird diversity
- Increase habitat connectivity
- Increase the abundance of targeted species
- Remove invasive species.

### E.5.3 Example Drivers

Drivers are outside forces, natural or anthropogenic, that have the potential to influence the outcome(s) of a restoration project. Drivers tend to be large-scale, long-term forces that are not easily controlled at the scale of a single restoration project (Harwell et al., 2016). See Section 2.4.2 of the main body of this Manual for guidance on establishing the conceptual setting for a MAM Plan, including identifying drivers. The following are example drivers that may be applicable to this Restoration Approach. This list should not be considered exhaustive; additional drivers may be identified.

- Hydrologic regime
- Freshwater inflow
- Precipitation
- Sediment input/load
- Subsidence
- Nutrients
- Sea level rise
- Storms/wave energy
- Sediment accretion/erosion
- Grazing/herbivory
- Invasive species
- Hard-freeze events
- Physical impacts
- Boat wakes
- Adjacent development/land use
- Chemical impacts (e.g., oil spills).

### E.5.4 Example Uncertainties

Uncertainties or information gaps have the potential to affect adaptive management decisions for individual or multiple restoration projects. These decisions may include how to improve the likelihood of achieving favorable project outcomes or selecting corrective actions in the event a project is not performing as intended. See Section 2.4.3 of the main body of this Manual for guidance on identifying potential sources of uncertainty for a MAM Plan. The following are example uncertainties that may be applicable to this Restoration Approach. This list should not be considered exhaustive; additional uncertainties may be identified.

- Local subsidence and accretion rates (e.g., organic, mineral)
- Optimal hydrologic conditions (e.g., depth, duration, frequency of flooding) for sustainability of the created/restored/enhanced marsh
- Long-term precipitation trends
- Frequency, duration, and severity of freeze events
- Sediment and nutrient inputs
- Vegetation stress due to herbivory, disease, competition by invasive species
- Appropriate habitat characteristics for targeted species, whether the habitat is a limiting factor for the species
- Use of the habitat by targeted species

- Predation on targeted species
- Land use changes
- Construction of new hydrologic barriers (e.g., roads, canals, berms)
- Wetland buffer conversion/management.

## E.5.5 Guidance on Developing Parameters for Project-Level Performance

This section includes two types of monitoring parameters for consideration under the Create, Restore, and Enhance Coastal Wetlands Restoration Approach:

1. **Core performance monitoring parameters.** These parameters are applicable to most projects within a Restoration Approach and Restoration Type (core performance monitoring parameters are those used consistently across projects in order to facilitate the aggregation of project monitoring results and the evaluation of restoration progress for each Restoration Type; Appendix 5.E.4 of PDARP/PEIS; DWH NRDA Trustees 2016). The PDARP/PEIS lists the Create, Restore, and Enhance Coastal Wetlands Restoration Approach under six Restoration Types: Wetlands, Coastal, and Nearshore Habitats; Habitat Projects on Federally Managed Lands; Nutrient Reduction; Water Quality; Birds; and Provide and Enhance Recreational Opportunities. Table E.5.1 summarizes the core parameters that are applicable regardless of Restoration Type, and also provides additional core parameters that may be applicable for projects that are implemented under the Nutrient Reduction, Water Quality, Birds, or Provide and Enhance Recreational Opportunities Restoration Types.
2. **Objective-specific performance monitoring parameters.** These parameters are only applicable to projects with a particular restoration objective. See Table E.5.2.

Additional adaptive management and/or validation monitoring parameters for consideration have also been identified. These additional parameters may be helpful for resolving uncertainties, explaining outside drivers, optimizing project implementation, supporting decisions about corrective actions and other adaptive management of the project, and informing the planning of future DWH NRDA restoration projects. Tables E.5.1 and E.5.2 should not be considered exhaustive, and other parameters may be considered, as appropriate. See the complete list of core and objective-specific monitoring parameters, Section E.4 above, for details on the core performance monitoring parameters including definitions, units, and other guidance.

Parameter names are listed in the monitoring guidance tables and parameter details (which provide greater specificity on the type of data being collected) are provided as sub-bullets under the parameter name. Note that not every monitoring parameter has associated parameter details. Where parameters are used across Restoration Types or across resources, the Restoration Type or resource may be provided after the parameter name and separated by a comma. Using the parameter “Abundance” as an example, this parameter is used under Restoration Approaches for multiple resources such as birds and sea turtles. In the Birds guidance table (Section E.18), the parameter is listed as “Abundance, Birds” and may be listed with parameter details in sub-bullets. To indicate where an Implementing Trustee can choose

the appropriate targeted injured resource to monitor based on project objectives, a bracketed “[targeted injured resource]” is included after the comma.

**Table E.5.1.** Core performance monitoring parameters and additional parameters for consideration under the Create, Restore, and Enhance Coastal Wetlands Restoration Approach, organized by Restoration Type <sup>a</sup>

	Core performance monitoring parameters	Parameters for consideration (as appropriate)
Parameters applicable across Restoration Types	<ul style="list-style-type: none"> <li>• Area</li> <li>• Elevation, habitat</li> <li>• Percent cover, vegetation</li> <li>• Species composition, vegetation</li> <li>• Survival, vegetation <sup>b</sup></li> </ul>	<ul style="list-style-type: none"> <li>• Biomass, [targeted injured resource]</li> <li>• Biomass, vegetation - <ul style="list-style-type: none"> <li>○ Aboveground</li> <li>○ Belowground</li> </ul> </li> <li>• Density, vegetation</li> <li>• Elevation, habitat - <ul style="list-style-type: none"> <li>○ Subsidence</li> <li>○ Vertical accretion</li> </ul> </li> <li>• Elevation, water level</li> <li>• Height, vegetation - <ul style="list-style-type: none"> <li>○ Emergent</li> </ul> </li> <li>• Project Point Locations</li> <li>• Salinity - <ul style="list-style-type: none"> <li>○ Porewater</li> <li>○ Surface water</li> </ul> </li> <li>• Sediment texture</li> <li>• Soil bulk density</li> <li>• Soil moisture content</li> <li>• Soil organic matter</li> <li>• Structural integrity <ul style="list-style-type: none"> <li>○ Consolidation of constructed features</li> </ul> </li> </ul>
Additional parameters applicable to Nutrient Reduction or Water Quality Restoration Types	<ul style="list-style-type: none"> <li>• Area <ul style="list-style-type: none"> <li>○ Project influence</li> </ul> </li> <li>• Conservation improvements, water quality <ul style="list-style-type: none"> <li>○ E.g., number implemented</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Ammonium nitrogen (NH<sub>4</sub>-N)</li> <li>• Loads (water level and flow)</li> <li>• Nitrite plus nitrate nitrogen (NO<sub>2</sub>-N + NO<sub>3</sub>-N)</li> <li>• Total Kjeldahl Nitrogen (TKN)</li> </ul>
Additional parameters applicable to Birds Restoration Type	<ul style="list-style-type: none"> <li>• Abundance, birds</li> <li>• Density, birds</li> <li>• Species composition, birds or Community composition, birds</li> </ul>	

<sup>a</sup> See Enhance Public Access to Natural Resource for Recreational Use or Enhance Recreational Experience Monitoring Guidance (Sections E.12 and E.13 of Attachment E) for additional parameters applicable to the Provide and Enhance Recreational Opportunities Restoration Type.

<sup>b</sup> If project is planted with vegetation.



**Table E.5.2.** Performance monitoring parameters and additional parameters for consideration for projects with specific restoration objectives. Appropriate parameters would be collected in addition to the parameters listed in Table E.5.1.

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Restore targeted salinity regime	<ul style="list-style-type: none"> <li>• Salinity - <ul style="list-style-type: none"> <li>○ Surface water</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Salinity - <ul style="list-style-type: none"> <li>○ Porewater</li> </ul> </li> </ul>
Reduce shoreline erosion rate	<ul style="list-style-type: none"> <li>• Shoreline position</li> <li>• Structural integrity</li> </ul>	<ul style="list-style-type: none"> <li>• Elevation, habitat</li> <li>• Fetch</li> <li>• Sediment consolidation</li> <li>• Water velocity</li> <li>• Wave attenuation</li> <li>• Wave energy</li> <li>• Wave height</li> </ul>
Restore hydrologic connectivity	<ul style="list-style-type: none"> <li>• Channel dimensions <sup>a, b</sup></li> <li>• Structural integrity</li> </ul>	<ul style="list-style-type: none"> <li>• Discharge <sup>a, b</sup></li> <li>• Dissolved oxygen</li> <li>• Salinity</li> <li>• Surface water</li> <li>• Sediment deposition</li> <li>• Soil moisture</li> <li>• Soil nutrients</li> <li>• Surface water nutrients</li> <li>• Water velocity in channels, culverts <sup>a, b</sup></li> </ul>
Provide habitat for fish and invertebrate species	<ul style="list-style-type: none"> <li>• Abundance, epibenthic or infaunal organisms</li> <li>• Abundance, FWCI</li> <li>• Channel dimensions <sup>a</sup></li> <li>• Community composition, epibenthic or infaunal organisms</li> <li>• Community composition, FWCI</li> <li>• Density, epibenthic or infaunal organisms</li> <li>• Density, FWCI</li> <li>• Habitat length, wetland edge</li> <li>• Species composition, epibenthic or infaunal organisms</li> <li>• Species composition, FWCI</li> </ul>	<ul style="list-style-type: none"> <li>• Abundance, other</li> <li>• Biomass, epibenthic or infaunal organisms</li> <li>• Biomass, FWCI</li> <li>• Density, other</li> <li>• Dissolved oxygen</li> <li>• Organism linear measurements, FWCI</li> <li>• Salinity <ul style="list-style-type: none"> <li>○ Surface water</li> </ul> </li> <li>• Temperature</li> <li>• Water velocity <sup>a, b</sup></li> </ul>
Provide habitat for birds	<ul style="list-style-type: none"> <li>• Abundance, birds</li> <li>• Area <ul style="list-style-type: none"> <li>○ Habitat by type</li> </ul> </li> <li>• Community composition, birds</li> <li>• Density, birds</li> <li>• Species composition, birds</li> </ul>	<ul style="list-style-type: none"> <li>• Bird health</li> <li>• Emigration/Immigration</li> <li>• Habitat quality</li> <li>• Reproduction, birds</li> <li>• Survival, birds</li> </ul>
Increase the abundance of targeted injured species	<ul style="list-style-type: none"> <li>• Abundance, [targeted injured resource]</li> <li>• Density, [targeted injured resource]</li> </ul>	<ul style="list-style-type: none"> <li>• Abundance, other</li> <li>• Density, other</li> <li>• Reproduction, [targeted injured resource]</li> </ul>

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Increase the abundance and/or density of birds	<ul style="list-style-type: none"> <li>• Abundance, birds</li> <li>• Density, birds</li> </ul>	<ul style="list-style-type: none"> <li>• Bird health</li> <li>• Emigration/Immigration</li> <li>• Habitat quality</li> <li>• Reproduction, birds</li> <li>• Survival, birds</li> </ul>
Increase bird diversity	Species composition, birds Community composition, birds	None identified
Reduce nutrient concentrations and loadings	See Reduce Nutrient Loads to Coastal Watersheds Monitoring Guidance (Section E.9 of Attachment E) for objective-specific monitoring parameters.	-
Improve in-situ water quality	See Reduce Pollution and Hydrologic Degradation to Coastal Watersheds Monitoring Guidance (Section E.9 of Attachment E) for objective-specific monitoring parameters.	-
Enhance recreational use	See Enhance Public Access to Natural Resource for Recreational Use or Enhance Recreational Experience Monitoring Guidance (Sections E.12 and E.13 of Attachment E) for additional objective-specific monitoring parameters.	-

<sup>a</sup> If channels are included in the project design.

<sup>b</sup> If culverts are included in the project design.

## E.6 Create, Restore, and Enhance Barrier and Coastal Islands and Headlands: Monitoring Guidance



*This guidance is intended to promote consistency in data collection among similar types of projects and allow for future analysis across TIGs and Restoration Types, (Section 10.6.2 of SOP; DWH NRDA Trustees, 2021). This guidance may also assist the TIGs by providing recommended methodologies for monitoring restoration projects, saving time and money spent developing suitable monitoring protocols for individual restoration projects. If adjustments from this monitoring guidance are needed for a particular project, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). Project teams within each TIG will identify parameters applicable to the objectives for each individual restoration project when developing the project MAM Plan. In addition to the project monitoring guidance identified in this MAM Manual, specific monitoring may be required to comply with permits granted by regulatory agencies. The TIGs are not restricted from including additional parameters if applicable, and other project monitoring that may be needed for specific projects should be determined by the TIGs. The Cross-TIG MAM work group developed this monitoring guidance by following the process described in the main body of this report.*

This guidance is intended to assist the TIGs in developing MAM Plans for restoration projects, as appropriate. Specifically, it provides:

- Examples of Restoration Techniques
- Guidance on example restoration objectives, example drivers, and example uncertainties
- Guidance on core performance monitoring parameters for projects within the Restoration Approach
- Guidance on supplemental performance monitoring parameters for specific restoration objectives.

The monitoring parameters identified within a project MAM Plan should be consistent with the recommended monitoring defined within this guidance document, wherever appropriate. Depending on the nature of the restoration project, TIGs may choose not to include some of the elements described in this guidance document (e.g., drivers, uncertainties). If adjustments from the monitoring guidance are needed, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). The guidance provided should not be considered exhaustive. Therefore, TIGs may

develop project-level objectives, drivers, uncertainties, and monitoring parameters that have not been previously identified. The TIGs will develop MAM objectives and monitoring parameters that pertain to their restoration activities; and will determine the frequency and duration of monitoring, and the associated budget they deem appropriate. Finally, this section is subject to change as new monitoring parameters, methods, and technologies are identified and/or developed.

The monitoring parameters recommended in this guidance document are further detailed in Attachment E Section E.4, which includes a complete list of core and objective-specific monitoring parameters identified by the Cross-TIG MAM work group and guidance on measurement unit(s) and monitoring methods. Guidance on monitoring locations, frequencies, durations of sampling and potential analyses is also provided where appropriate.

### **E.6.1 Restoration Techniques**

Restoration Techniques are specific restoration actions the Trustees identified for each of the Restoration Approaches. Restoration Techniques may be used individually or in combination. See Appendix 5.D of the PDARP/PEIS (DWH NRDA Trustees, 2016). The following are example Restoration Techniques included in the PDARP/PEIS for this Restoration Approach. This list should not be considered exhaustive; additional Restoration Techniques may be developed and/or identified.

1. Restore or construct barrier and coastal islands and headlands via placement of dredged sediments
2. Plant vegetation on dunes and back-barrier marsh.

### **E.6.2 Example Project-Level Restoration Objectives**

Project-level restoration objectives should be specific to the resource injuries and clearly specify the desired outcome(s) of the restoration project (15 CFR § 990.55(b)(2)). See Section 2.4.1 of the main body of this Manual for guidance on establishing restoration objectives. The following are example project-level restoration objectives that may apply to one or more of the above-mentioned Restoration Techniques. This list should not be considered exhaustive; additional objectives may be developed and/or identified.

- Restore a barrier island that is sustained for the expected project lifespan to provide coastal habitat(s) important for the restoration of ecosystem functions and stability
- Restore a barrier island structure to reduce potential storm damage impacts on coastal habitats
- Promote establishment of beach dune and back-barrier marsh vegetation to:
  - Stabilize marsh and beach sediments
  - Stabilize the shoreline
  - Promote longevity of the subaerial island
  - Reduce erosion
  - Encourage sediment deposition
- Contribute to the ecosystem function (habitat for birds and native species) of dunes and back-barrier marshes

- Increase availability of high-quality beach and/or dune habitat in support of species utilization, foraging, and/or nesting activity
- Promote recovery of Threatened and Endangered (T&E) Species
- Create or restore bird nesting habitat
- Increase bird abundance
- Increase bird nest success
- Increase bird diversity
- Improve the long-term littoral drift/sediment transport system to naturally sustain barrier systems
- Enhance recreational use
- Maintain a sand beach and dune system to improve the resilience and sustainability of coastal habitat by the capture or retention of sand. Reduce the rate of sediment loss and/or reduce erosion
- Maintain beach, dune, back-barrier marsh elevation profile and area, as well as adjacent subtidal areas
- Minimize habitat loss and fragmentation; reduce adverse human impacts (e.g., development, vehicular and pedestrian traffic) to protect the barrier or coastal island system.

### E.6.3 Example Drivers

Drivers are outside forces, natural or anthropogenic, that have the potential to influence the outcome(s) of a restoration project. Drivers tend to be large-scale, long-term forces that are not easily controlled at the scale of a single restoration project (Harwell et al., 2016). See Section 2.4.2 of the main body of this Manual for guidance on establishing the conceptual setting for a MAM Plan, including identifying drivers. The following are example drivers that may be applicable to this Restoration Approach. This list should not be considered exhaustive; additional drivers may be identified.

- Adjacent development/land use
- Sediment availability
- Wave dynamics
- Storm events
- Sea level rise
- Substrate types and composition
- Vegetative community structure.

### E.6.4 Example Uncertainties

Uncertainties or information gaps have the potential to affect adaptive management decisions for individual or multiple restoration projects. These decisions may include how to improve the likelihood of achieving favorable project outcomes or selecting corrective actions in the event a project is not performing as intended. See Section 2.4.3 of the main body of this Manual for guidance on identifying potential sources of uncertainty for a MAM Plan. The following are

example uncertainties that may be applicable to this Restoration Approach. This list should not be considered exhaustive; additional uncertainties may be identified.

- Natural variability in ecological and physical processes, such as wave-driven transport or vegetation growth, and in the associated barrier island response (e.g., geomorphic variability and barrier island evolution)
- Short- and long-term fate of natural and/or placed material
- Climate variability, such as tropical cyclone frequency, intensity, and timing; and the impact on redistributing natural or placed sand on vegetation types, growth, and distribution
- Future rate of local relative sea level rise (e.g., subsidence plus eustatic variability), including if the rate of rise will be relatively constant or will accelerate the ecological and geomorphic response of the island to sea level rise
- Adequate availability of appropriate borrow sources
- Availability of property
- Timeframe for recolonization of native fauna species (e.g., year-round residential species, nesting species, T&E Species, migratory species, vegetation, invertebrates)
- Sustainability of long-term project management (e.g., continued funding)
- Permitting
- Frequency of over wash or nest site flooding (e.g., during heavy rains).

### E.6.5 Guidance on Developing Parameters for Project-Level Performance

This section includes two types of monitoring parameters for consideration under the Create, Restore, and Enhance Barrier and Coastal Islands and Headlands Restoration Approach:

1. **Core performance monitoring parameters.** These parameters are applicable to most projects within a Restoration Approach and Restoration Type (core performance monitoring parameters are those used consistently across projects in order to facilitate the aggregation of project monitoring results and the evaluation of restoration progress for each Restoration Type; Appendix 5.E.4 of PDARP/PEIS; DWH NRDA Trustees 2016). The PDARP/PEIS lists the Create, Restore, and Enhance Barrier and Coastal Islands and Headlands Restoration Approach under four Restoration Types: Wetlands, Coastal, and Nearshore Habitats; Habitat Projects on Federally Managed Lands; Birds; and Provide and Enhance Recreational Opportunities. Table E.6.1 summarizes the core parameters that are applicable regardless of Restoration Type, and also provides additional core parameters that may be applicable for projects that are implemented under the Birds or Provide and Enhance Recreational Opportunities Restoration Types.
2. **Objective-specific performance monitoring parameters.** These parameters are only applicable to projects with a particular restoration objective. See Table E.6.2.

Additional adaptive management and/or validation monitoring parameters for consideration have also been identified. These additional parameters may be helpful for resolving uncertainties, explaining outside drivers, optimizing project implementation, supporting decisions about corrective actions and other adaptive management of the project, and informing the planning of future DWH NRDA restoration projects. Tables E.6.1 and E.6.2 should not be

considered exhaustive, and other parameters may be considered, as appropriate. See the complete list of core and objective-specific monitoring parameters, Section E.4 above, for details on the core performance monitoring parameters including definitions, units, and other guidance.

Parameter names are listed in the monitoring guidance tables and parameter details (which provide greater specificity on the type of data being collected) are provided as sub-bullets under the parameter name. Note that not every monitoring parameter has associated parameter details. Where parameters are used across Restoration Types or across resources, the Restoration Type or resource may be provided after the parameter name and separated by a comma. Using the parameter “Abundance” as an example, this parameter is used under Restoration Approaches for multiple resources such as birds and sea turtles. In the Birds guidance table (Section E.18), the parameter is listed as “Abundance, Birds” and may be listed with parameter details in sub-bullets. To indicate where an Implementing Trustee can choose the appropriate targeted injured resource to monitor based on project objectives, a bracketed “[targeted injured resource]” is included after the comma.

**Table E.6.1.** Core performance monitoring parameters and additional parameters for consideration under the Create, Restore, and Enhance Barrier and Coastal Islands and Headlands Restoration Approach, organized by Restoration Type. <sup>a</sup>

	Core performance monitoring parameters	Parameters for consideration (as appropriate)
Parameters applicable across Restoration Types	<ul style="list-style-type: none"> <li>• Area</li> <li>• Elevation, habitat</li> <li>• Shoreline position</li> </ul>	<ul style="list-style-type: none"> <li>• Area               <ul style="list-style-type: none"> <li>○ Habitat by type</li> </ul> </li> <li>• Frequency and extent of overtopping and overwash</li> <li>• Habitat connectivity</li> <li>• Persistence or exposure of hardbottom habitats</li> <li>• Position of hardbottom and submerged habitats</li> <li>• Project Point Locations</li> <li>• Relief</li> <li>• Sediment budget and transport patterns</li> <li>• Sediment distribution within hardbottom habitats</li> <li>• Substratum type</li> <li>• Water velocity and patterns</li> <li>• Wave height/energy/attenuation</li> <li>• Width (beach, dune, island)</li> </ul>
Additional parameters applicable to the Birds Restoration Type	<ul style="list-style-type: none"> <li>• Abundance, birds</li> <li>• Density, birds</li> <li>• Species composition, birds or Community composition, birds</li> </ul>	

<sup>a</sup> See Enhance Public Access to Natural Resource for Recreational Use or Enhance Recreational Experience Monitoring Guidance (Sections E.12 and E.13 of Attachment E) for additional parameters applicable to the Provide and Enhance Recreational Opportunities Restoration Type.

**Table E.6.2.** Performance monitoring parameters and additional parameters for consideration for projects with specific restoration objectives. Appropriate parameters would be collected in addition to the parameters listed in Table E.6.1.

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Stabilize marsh and/or shoreline by promoting establishment of beach, dune, and back-barrier marsh vegetation	<ul style="list-style-type: none"> <li>• Density, vegetation</li> <li>• Percent cover, vegetation</li> <li>• Species composition, vegetation</li> </ul>	<ul style="list-style-type: none"> <li>• Height, vegetation</li> <li>• Survival, vegetation</li> </ul>
Reduce sediment loss and erosion and/or reduce adverse human impacts	<ul style="list-style-type: none"> <li>• Structural integrity</li> </ul>	<ul style="list-style-type: none"> <li>• Abundance, other</li> <li>• Conservation improvements, habitat               <ul style="list-style-type: none"> <li>○ Number of protected sites</li> </ul> </li> <li>• Density, other</li> <li>• Density, vegetation</li> <li>• Habitat length               <ul style="list-style-type: none"> <li>○ Extent of shoreline armoring</li> </ul> </li> <li>• Percent cover, vegetation</li> <li>• Sediment budget and transport patterns</li> <li>• Sediment depth data, texture, type, and consolidation rate</li> <li>• Species composition, vegetation</li> <li>• Species habitat utilization</li> <li>• Visitors               <ul style="list-style-type: none"> <li>○ Visitor count</li> <li>○ Visitor use by activity</li> </ul> </li> </ul>
Living coastal marine resource or T&E Species habitat, utilization, foraging, nesting, or recovery	<ul style="list-style-type: none"> <li>• Abundance, [targeted injured resource]</li> <li>• Community composition, [targeted injured resource]</li> <li>• Density, [targeted injured resource]</li> <li>• Species composition, [targeted injured resource]</li> </ul>	<ul style="list-style-type: none"> <li>• Area               <ul style="list-style-type: none"> <li>○ Habitat by type</li> </ul> </li> <li>• Abundance, epibenthic or infaunal organisms</li> <li>• Biomass, epibenthic or infaunal organisms</li> <li>• Dissolved oxygen</li> <li>• Salinity               <ul style="list-style-type: none"> <li>○ Surface water</li> </ul> </li> <li>• Sediment depth data, texture, type, and consolidation rate</li> <li>• Species composition, epibenthic or infaunal organisms</li> <li>• Targeted injured species habitat utilization</li> <li>• Turbidity</li> </ul>
Provide habitat for birds	<ul style="list-style-type: none"> <li>• Abundance, birds</li> <li>• Community composition, birds</li> <li>• Density, birds</li> <li>• Species composition, birds</li> </ul>	<ul style="list-style-type: none"> <li>• Bird health</li> <li>• Emigration/Immigration</li> <li>• Habitat quality</li> <li>• Habitat use and seasonal home range size</li> <li>• Reproduction, birds</li> <li>• Survival, birds</li> </ul>



Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Increase the abundance and/or density of birds	<ul style="list-style-type: none"> <li>• Abundance, birds</li> <li>• Density, birds</li> </ul>	<ul style="list-style-type: none"> <li>• Bird health</li> <li>• Emigration/Immigration</li> <li>• Habitat quality</li> <li>• Reproduction, birds</li> <li>• Survival, birds</li> </ul>
Increase bird diversity	<ul style="list-style-type: none"> <li>• Community composition, birds</li> <li>• Species composition, birds</li> </ul>	None Identified
Enhance recreational use	See Enhance Public Access to Natural - Resources for Recreational Use Monitoring Guidance (Section E.12 of Attachment E of this manual) for core and objective- specific performance monitoring parameters	

## E.7 Restore and Enhance Dunes and Beaches: Monitoring Guidance



*This guidance is intended to promote consistency in data collection among similar types of projects and allow for future analysis across TIGs and Restoration Types, (Section 10.6.2 of SOP; DWH NRDA Trustees, 2021). This guidance may also assist the TIGs by providing recommended methodologies for monitoring restoration projects, saving time and money spent developing suitable monitoring protocols for individual restoration projects. If adjustments from this monitoring guidance are needed for a particular project, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). Project teams within each TIG will identify parameters applicable to the objectives for each individual restoration project when developing the project MAM Plan. In addition to the project monitoring guidance identified in this MAM Manual, specific monitoring may be required to comply with permits granted by regulatory agencies. The TIGs are not restricted from including additional parameters if applicable, and other project monitoring that may be needed for specific projects should be determined by the TIGs. The Cross-TIG MAM work group developed this monitoring guidance by following the process described in the main body of this report.*

This guidance is intended to assist the TIGs in developing MAM Plans for restoration projects, as appropriate. Specifically, it provides:

- Examples of Restoration Techniques
- Guidance on example restoration objectives, example drivers, and example uncertainties
- Guidance on core performance monitoring parameters for projects within the Restoration Approach
- Guidance on supplemental performance monitoring parameters for specific restoration objectives.

The monitoring parameters identified within a project MAM Plan should be consistent with the recommended monitoring defined within this guidance document, wherever appropriate. Depending on the nature of the restoration project, TIGs may choose not to include some of the elements described in this guidance document (e.g., drivers, uncertainties). If adjustments from the monitoring guidance are needed, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). The guidance provided should not be considered exhaustive. Therefore, TIGs may

develop project-level objectives, drivers, uncertainties, and monitoring parameters that have not been previously identified. The TIGs will develop MAM objectives and monitoring parameters that pertain to their restoration activities; and will determine the frequency and duration of monitoring, and the associated budget they deem appropriate. Finally, this section is subject to change as new monitoring parameters, methods, and technologies are identified and/or developed.

The monitoring parameters recommended in this guidance document are further detailed in Attachment E Section E.4, which includes a complete list of core and objective-specific monitoring parameters identified by the Cross-TIG MAM work group and guidance on measurement unit(s) and monitoring methods. Guidance on monitoring locations, frequencies, durations of sampling and potential analyses is also provided where appropriate.

### **E.7.1 Restoration Techniques**

Restoration Techniques are specific restoration actions the Trustees identified for each of the Restoration Approaches. Restoration Techniques may be used individually or in combination. See Appendix 5.D of the PDARP/PEIS (DWH NRDA Trustees, 2016). The following are example Restoration Techniques included in the PDARP/PEIS for this Restoration Approach. This list should not be considered exhaustive; additional Restoration Techniques may be developed and/or identified.

1. Renourish beaches through sediment addition
2. Restore dune and beach systems through the use of passive techniques to trap sand
3. Plant vegetation on dunes
4. Construct groins and breakwaters or use sediment bypass methods
5. Protect dune systems through the use of access control.

### **E.7.2 Example Project-Level Restoration Objectives**

Project-level restoration objectives should be specific to the resource injuries and clearly specify the desired outcome(s) of the restoration project (15 CFR § 990.55(b)(2)). See Section 2.4.1 of the main body of this Manual for guidance on establishing restoration objectives. The following are example project-level restoration objectives that may apply to one or more of the above-mentioned Restoration Techniques. This list should not be considered exhaustive; additional objectives may be developed and/or identified.

- Create, stabilize, protect, restore, and/or enhance the beach and/or dune system, to improve the resilience (e.g., to storm damage) and sustainability of coastal habitats
- Promote establishment of beach dune and marsh vegetation to stabilize sediment, stabilize shoreline, reduce erosion, encourage sediment deposition, and contribute to the ecosystem function (e.g., habitat for birds and native species) of dunes and marshes
- Increase availability of a high-quality specific beach and/or dune habitat for species utilization, including foraging, loafing, and/or nesting for birds or other target species.
- Promote recovery of T&E Species
- Improve the long-term littoral drift/sediment transport system to promote more sustainable beach and dune systems
- Enhance recreational use

- Maintain a sand beach and dune system to improve the resilience and sustainability of coastal habitat by the capture or retention of sand
- Reduce the rate of sediment loss and/or reduce erosion
- Minimize habitat loss/fragmentation and reduce adverse human impacts (e.g., development, vehicular and pedestrian traffic) to protect system
- Provide or enhance habitat for birds through vegetation management other methods
- Increase bird abundance
- Enhance diversity of birds of restoration interest

### E.7.3 Example Drivers

Drivers are outside forces, natural or anthropogenic, that have the potential to influence the outcome(s) of a restoration project. Drivers tend to be large-scale, long-term forces that are not easily controlled at the scale of a single restoration project (Harwell et al., 2016). See Section 2.4.2 of the main body of this Manual for guidance on establishing the conceptual setting for a MAM Plan, including identifying drivers. The following are example drivers that may be applicable to this Restoration Approach. This list should not be considered exhaustive; additional drivers may be identified.

- Adjacent development/land use
- Sediment availability
- Wave dynamics
- Storm events
- Sea level rise
- Freshwater inputs

### E.7.4 Example Uncertainties

Uncertainties or information gaps have the potential to affect adaptive management decisions for individual or multiple restoration projects. These decisions may include how to improve the likelihood of achieving favorable project outcomes or selecting corrective actions in the event a project is not performing as intended. See Section 2.4.3 of the main body of this Manual for guidance on identifying potential sources of uncertainty for a MAM Plan. The following are example uncertainties that may be applicable to this Restoration Approach. This list should not be considered exhaustive; additional uncertainties may be identified.

- Natural variability in ecological and physical processes, such as wave-driven transport or vegetation growth, and natural variability in the associated dune and beach response (e.g., geomorphic variability and evolution)
- Increased or decreased freshwater inputs to estuaries supporting foraging/nesting species
- Short- and long-term fate of natural and/or placed material
- Climate change variability, such as tropical cyclone frequency, intensity, and timing; and the impact on redistributing natural and/or placed sand on vegetation types, growth, and distribution
- Future rate of local relative sea level rise (e.g., subsidence plus eustatic variability), including if the rate of rise will be relatively constant or will accelerate, and subsequently changes in how the shoreline will respond

- Adequate availability of appropriate borrow sources
- Willingness of landowners to sell property or otherwise allow restoration activities
- Timeframe for re-establishment/recolonization of native flora and fauna species (e.g., year-round resident, nesting species, migratory species, T&E Species, invertebrates/prey base, vegetation).

## E.7.5 Guidance on Developing Parameters for Project-Level Performance

This section includes two types of monitoring parameters for consideration under the Restore and Enhance Dunes and Beaches Restoration Approach:

1. **Core performance monitoring parameters.** These parameters are applicable to most projects within a Restoration Approach and Restoration Type (core performance monitoring parameters are those used consistently across projects in order to facilitate the aggregation of project monitoring results and the evaluation of restoration progress for each Restoration Type; Appendix 5.E.4 of PDARP/PEIS; DWH NRDA Trustees, 2016). The PDARP/PEIS lists the Restore and Enhance Dunes and Beaches Restoration Approach under four Restoration Types: Wetlands, Coastal, and Nearshore Habitats; Habitat Projects on Federally Managed Lands; Birds; and Provide and Enhance Recreational Opportunities. Table E.7.1 summarizes the core parameters that are applicable regardless of Restoration Type and provides additional core parameters that may be applicable for projects that are implemented under the Birds or Provide and Enhance Recreational Opportunities Restoration Types.
2. **Objective-specific performance monitoring parameters.** These parameters are only applicable to projects with a particular restoration objective. See Table E.7.2.

Additional adaptive management and/or validation monitoring parameters for consideration have also been identified. These additional parameters may be helpful for resolving uncertainties, explaining outside drivers, optimizing project implementation, supporting decisions about corrective actions and other adaptive management of the project, and informing the planning of future DWH NRDA restoration projects. Tables E.7.1 and E.7.2 should not be considered exhaustive, and other parameters may be considered, as appropriate. See the complete list of core and objective-specific monitoring parameters, Section E.4 above, for details on the core performance monitoring parameters including definitions, units, and other guidance.

Parameter names are listed in the monitoring guidance tables and parameter details (which provide greater specificity on the type of data being collected) are provided as sub-bullets under the parameter name. Note that not every monitoring parameter has associated parameter details. Where parameters are used across Restoration Types or across resources, the Restoration Type or resource may be provided after the parameter name and separated by a comma. Using the parameter “Abundance” as an example, this parameter is used under Restoration Approaches for multiple resources such as birds and sea turtles. In the Birds guidance table (Section E.18), the parameter is listed as “Abundance, Birds” and may be listed with parameter details in sub-bullets. To indicate where an Implementing Trustee can choose

the appropriate targeted injured resource to monitor based on project objectives, a bracketed “[targeted injured resource]” is included after the comma.

**Table E.7.1.** Core performance monitoring parameters and additional parameters for consideration under the Restore and Enhance Dunes and Beaches Restoration Approach, organized by Restoration Type. <sup>a</sup>

	Core performance monitoring parameters	Parameters for consideration (as appropriate)
Parameters applicable across Restoration Types	<ul style="list-style-type: none"> <li>• Area</li> <li>• Elevation, habitat</li> <li>• Shoreline position</li> </ul>	<ul style="list-style-type: none"> <li>• Area <ul style="list-style-type: none"> <li>○ Habitat by type</li> </ul> </li> <li>• Distribution of sediment within hardbottom habitats</li> <li>• Frequency and extent of overtopping and overwash</li> <li>• Habitat connectivity</li> <li>• Hardbottom persistence or exposure</li> <li>• Position of hardbottom and submerged habitats</li> <li>• Project Point Locations</li> <li>• Relief</li> <li>• Sediment budget and transport patterns</li> <li>• Substratum type</li> <li>• Water velocity and pattern</li> <li>• Wave height/energy/attenuation</li> <li>• Width (beach, dune, island)</li> </ul>
Additional parameters applicable to the Birds Restoration Type	<ul style="list-style-type: none"> <li>• Abundance, birds</li> <li>• Density, birds</li> <li>• Species composition, birds or Community composition, birds</li> </ul>	

<sup>a</sup> See Enhance Public Access to Natural Resource for Recreational Use or Enhance Recreational Experience Monitoring Guidance (Sections E.12 and E.13 of Attachment E) for additional parameters applicable to the Provide and Enhance Recreational Opportunities Restoration Type.

**Table E.7.2.** Performance monitoring parameters and additional parameters for consideration for projects with specific restoration objectives. Appropriate parameters would be collected in addition to the parameters listed in Table E.7.1.

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Promote establishment of beach dune and back-barrier marsh vegetation	<ul style="list-style-type: none"> <li>• Density, vegetation</li> <li>• Percent cover, vegetation</li> <li>• Species composition, vegetation</li> </ul>	<ul style="list-style-type: none"> <li>• Height, vegetation</li> <li>• Survival, vegetation</li> </ul>

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Reduce sediment loss and erosion and/or reduce adverse human impacts	<ul style="list-style-type: none"> <li>• Structural integrity</li> <li>• For example, beach and dune protection features, including groins, breakwater, sand fencing and/or access control</li> </ul>	<ul style="list-style-type: none"> <li>• Abundance, [targeted injured resource]</li> <li>• Conservation improvements, habitat -               <ul style="list-style-type: none"> <li>○ Number of protected sites</li> </ul> </li> <li>• Density, [targeted injured resource]</li> <li>• Density, vegetation</li> <li>• Habitat length               <ul style="list-style-type: none"> <li>○ Extent of shoreline armoring</li> </ul> </li> <li>• Percent cover, vegetation</li> <li>• Species composition, vegetation</li> <li>• Species habitat utilization</li> <li>• Sediment depth data, texture, type, consolidation rate</li> <li>• Visitors               <ul style="list-style-type: none"> <li>○ Visitor count</li> <li>○ Visitor use</li> </ul> </li> </ul>
Living coastal marine resource or T&E Species habitat, utilization, foraging, nesting, or recovery	<ul style="list-style-type: none"> <li>• Abundance, [targeted injured resource]</li> <li>• Community composition, [targeted injured resource]</li> <li>• Density, [targeted injured resource]</li> <li>• Species composition, [targeted injured resource]</li> </ul>	<ul style="list-style-type: none"> <li>• Area               <ul style="list-style-type: none"> <li>○ Habitat by type</li> </ul> </li> <li>• Abundance, epibenthic or infaunal organisms</li> <li>• Biomass, epibenthic or infaunal organisms</li> <li>• Biomass, FWCI</li> <li>• Dissolved oxygen</li> <li>• Salinity               <ul style="list-style-type: none"> <li>○ Surface water</li> </ul> </li> <li>• Sediment depth data, texture, type, and consolidation rate</li> <li>• Species composition, epibenthic or infaunal organisms</li> <li>• Targeted injured species habitat utilization</li> <li>• Turbidity</li> </ul>
Provide habitat for birds	<ul style="list-style-type: none"> <li>• Abundance, birds</li> <li>• Community composition, birds</li> <li>• Density, birds</li> <li>• Species composition, birds</li> </ul>	<ul style="list-style-type: none"> <li>• Bird health</li> <li>• Emigration/Immigration</li> <li>• Habitat quality</li> <li>• Habitat use and seasonal home range size</li> <li>• Reproduction, birds</li> <li>• Site fidelity</li> <li>• Survival, birds</li> </ul>
Increase the abundance and/or density of birds	<ul style="list-style-type: none"> <li>• Abundance, birds</li> <li>• Density, birds</li> </ul>	<ul style="list-style-type: none"> <li>• Bird health</li> <li>• Emigration/Immigration</li> <li>• Habitat quality</li> <li>• Reproduction, birds</li> </ul>
Enhance bird diversity	<ul style="list-style-type: none"> <li>• Community composition, birds</li> <li>• Species composition, birds</li> </ul>	None Identified

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Create or restore bird nesting habitat	<ul style="list-style-type: none"> <li>• Abundance, birds (nest count by taxon)</li> <li>• Community composition, birds</li> <li>• Density, birds</li> <li>• Species composition, birds</li> </ul>	<ul style="list-style-type: none"> <li>• Abundance, other</li> <li>• Density, vegetation</li> <li>• Habitat quality</li> <li>• Incidence of overwash</li> <li>• Percent cover, vegetation</li> <li>• Reproduction, birds</li> <li>• Species composition, other</li> <li>• Species composition, vegetation</li> <li>• Structural integrity</li> </ul>
Enhance recreational use	See Enhance Public Access to Natural Resources for Recreational Use Monitoring Guidance (Section E.12 of Attachment E of this manual) for core and objective-specific performance monitoring parameters	-



## E.8 Protect and Conserve Marine, Coastal, Estuarine, and Riparian Habitats: Monitoring Guidance



*This guidance is intended to promote consistency in data collection among similar types of projects and allow for future analysis across TIGs and Restoration Types, (Section 10.6.2 of SOP; DWH NRDA Trustees, 2021). This guidance may also assist the TIGs by providing recommended methodologies for monitoring restoration projects, saving time and money spent developing suitable monitoring protocols for individual restoration projects. If adjustments from this monitoring guidance are needed for a particular project, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). Project teams within each TIG will identify parameters applicable to the objectives for each individual restoration project when developing the project MAM Plan. In addition to the project monitoring guidance identified in this MAM Manual, specific monitoring may be required to comply with permits granted by regulatory agencies. The TIGs are not restricted from including additional parameters if applicable, and other project monitoring that may be needed for specific projects should be determined by the TIGs. The Cross-TIG MAM work group developed this monitoring guidance by following the process described in the main body of this report.*

This guidance is intended to assist the TIGs in developing MAM Plans for restoration projects, as appropriate. Specifically, it provides:

- Examples of Restoration Techniques
- Guidance on example restoration objectives, example drivers, and example uncertainties
- Guidance on core performance monitoring parameters for projects within the Restoration Approach
- Guidance on supplemental performance monitoring parameters for specific restoration objectives.

The monitoring parameters identified within a Protect and Conserve Marine, Coastal, Estuarine and Riparian project MAM Plan should be consistent with the recommended monitoring defined within this guidance document, wherever appropriate. Depending on the nature of the restoration project, TIGs may choose not to include some of the elements described in this guidance document (e.g., drivers, uncertainties). If adjustments from the monitoring guidance are needed, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). The guidance provided should not be considered exhaustive. Therefore, TIGs may develop project-level objectives, drivers, uncertainties, and monitoring parameters that have not been previously

identified. The TIGs will develop MAM objectives and monitoring parameters that pertain to their restoration activities; and will determine the frequency and duration of monitoring, and the associated budget they deem appropriate. Finally, this guidance may change as new monitoring parameters, methods, and technologies are identified and/or developed.

The monitoring parameters recommended in this guidance document are further detailed in Attachment E Section E.4, which includes a complete list of core and objective-specific monitoring parameters identified by the Cross-TIG MAM work group and guidance on measurement unit(s) and monitoring methods. Guidance on monitoring locations, frequencies, durations of sampling and potential analyses is also provided where appropriate.

### **E.8.1 Restoration Techniques**

Restoration Techniques are specific restoration actions the Trustees identified for each of the Restoration Approaches. Restoration Techniques may be used individually or in combination. See Appendix 5.D of the PDARP/PEIS (DWH NRDA Trustees, 2016). The following are example Restoration Techniques included in the PDARP/PEIS for this Restoration Approach. This list should not be considered exhaustive; additional Restoration Techniques may be developed and/or identified.

1. Acquire lands for conservation.
2. Develop and implement management actions in conservation areas and/or restoration projects.
3. Establish or expand protections for marine areas.

### **E.8.2 Example Project-Level Restoration Objectives**

Project-level restoration objectives should be specific to the resource injuries and clearly specify the desired outcome(s) of the restoration project (15 CFR § 990.55(b)(2)). See Section 2.4.1 of the main body of this Manual for guidance on establishing restoration objectives. The following are example project-level restoration objectives that may apply to one or more of the above-mentioned Restoration Techniques. This list should not be considered exhaustive; additional objectives may be developed and/or identified.

Acquire or conserve land to conserve target habitats for fish and wildlife; create connections between natural areas; provide protective buffers for existing protected lands, sensitive habitats, and/or water bodies; and /or to facilitate habitat management

- Acquire or conserve land to prevent threats of development
- Establish or expand protections for marine habitat to help maintain essential ecological processes, preserve genetic diversity, and/or ensure sustainable use of species and ecosystems
- Acquire or conserve land to provide mechanisms for protected species management
- Develop and/or implement management actions to enhance habitats to benefit target fish, wildlife and/or ecosystem services. Example actions include debris removal, invasive species control, vegetation management, controlled burns, and/or visitor access.
- Implement management actions to enhance nesting and foraging habitat for birds

- Acquire or conserve land to protect critical freshwater inflows to estuaries

### E.8.3 Example Drivers

Drivers are outside forces, natural or anthropogenic, that have the potential to influence the outcomes of a restoration project. Drivers tend to be large-scale, long-term forces that are not easily controlled at the scale of a single restoration project (Harwell et al., 2016). See Section 2.4.2 of the main body of this Manual for guidance on establishing the conceptual setting for a MAM Plan, including identifying drivers. The following are example drivers that may be applicable to this Restoration Approach. This list should not be considered exhaustive; additional drivers may be identified.

- Anthropogenic development
- Sea level rise
- Regeneration of native vegetative communities
- Habitat degradation
- Storm impacts
- Ocean acidification

### E.8.4 Example Uncertainties

Uncertainties or information gaps have the potential to affect adaptive management decisions for individual or multiple restoration projects. These decisions may include how to improve the likelihood of achieving favorable project outcomes or selecting corrective actions in the event a project is not performing as intended. See Section 2.4.3 of the main body of this Manual for guidance on identifying potential sources of uncertainty for a MAM Plan. The following are example uncertainties that may be applicable to this Restoration Approach. This list should not be considered exhaustive; additional uncertainties may be identified.

- Availability of land for protection or conservation
- Ability to identify willing sellers that own targeted habitats
- Ability to coordinate management of target habitats with existing management plans or agencies with management authority
- Lack of understanding of the threats affecting species targeted for restoration
- Future rate of local relative sea level rise
- Present or future visitor use patterns
- Time lag between management actions and response (e.g., protection actions and system response, interval of invasive plant regeneration through seedbank)
- Opportunities for or barriers to habitat migration
- Ability to enforce management actions

## E.8.5 Guidance on Developing Parameters for Project-Level Performance

This section includes two types of monitoring parameters for consideration under the Protect and Conserve Marine, Coastal, Estuarine, and Riparian Habitats Restoration Approach:

1. **Core performance monitoring parameters.** These parameters are applicable to most projects within a Restoration Approach and Restoration Type (core performance monitoring parameters are those used consistently across projects in order to facilitate the aggregation of project monitoring results and the evaluation of restoration progress for each Restoration Type; Appendix 5.E.4 of PDARP/PEIS; DWH NRDA Trustees, 2016). The PDARP/PEIS lists the Protect and Conserve Marine, Coastal, Estuarine, and Riparian Habitats Restoration Approach under eight Restoration Types: Wetlands, Coastal, and Nearshore Habitats; Habitat Projects on Federally Managed Lands; Nutrient Reduction; Water Quality; Sturgeon; Marine Mammals; Birds; and Provide and Enhance Recreational Opportunities. Table E.8.1 summarizes the core parameters that are applicable regardless of Restoration Type, and also provides additional core parameters that may be applicable for projects that are implemented under the Nutrient Reduction, Water Quality, Birds, or Provide and Enhance Recreational Opportunities Restoration Types.<sup>7</sup> 89
2. **Objective-specific performance monitoring parameters.** These parameters are only applicable to projects with a particular restoration objective. See Table E.8.2.

Additional adaptive management and/or validation monitoring parameters for consideration have also been identified. These additional parameters may be helpful for resolving uncertainties, explaining outside drivers, optimizing project implementation, supporting decisions about corrective actions and other adaptive management of the project, and informing the planning of future DWH NRDA restoration projects. Tables E.8.1 and E.8.2 should not be considered exhaustive, and other parameters may be considered, as appropriate. See the complete list of core and objective-specific monitoring parameters in Section E.4 for details on the core performance monitoring parameters including definitions, units, and other guidance.

Parameter names are listed in the monitoring guidance tables and parameter details (which provide greater specificity on the type of data being collected) are provided as sub-bullets under the parameter name. Note that not every monitoring parameter has associated parameter details. Where parameters are used across Restoration Types or across resources, the Restoration Type or resource may be provided after the parameter name and separated by a comma. Using the parameter “Abundance” as an example, this parameter is used under

<sup>7</sup> A similar restoration approach, “Enhance sea turtle hatchling productivity and restore and conserve nesting beach habitat”, falls under the Sea Turtles Restoration Type. Monitoring guidance for this Restoration Approach is contained in Section E.16 Sea Turtles Restoration Type: Monitoring Guidance.

<sup>8</sup> Monitoring guidance for Sturgeon Restoration Type projects has not been developed. As such, Sturgeon project teams should determine appropriate core and objective-specific parameters for their projects.

<sup>9</sup> Additional core parameters or parameters for consideration related to the Marine Mammal Restoration Type would depend on the restoration project objectives. See Section E.17 Marine Mammals Restoration Type: Monitoring Guidance for additional monitoring guidance for projects funded under the Marine Mammals Restoration Type.

Restoration Approaches for multiple resources such as birds and sea turtles. In the Birds guidance table (Section E.18), the parameter is listed as “Abundance, Birds” and may be listed with parameter details in sub-bullets. To indicate where an Implementing Trustee can choose the appropriate targeted injured resource to monitor based on project objectives, a bracketed “[targeted injured resource]” is included after the comma.

**Table E.8.1.** Core performance monitoring parameters and additional parameters for consideration under the Protect and Conserve Marine, Coastal, Estuarine, and Riparian Habitats Restoration Approach, organized by Restoration Type

	Core performance monitoring parameters	Parameters for consideration (as appropriate)
Parameters applicable across Restoration Types	<ul style="list-style-type: none"> <li>• Area               <ul style="list-style-type: none"> <li>○ Project footprint</li> </ul> </li> <li>• Conservation improvements, habitat               <ul style="list-style-type: none"> <li>○ Terms of agreements or plans are meta</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Abundance, [targeted injured resource]</li> <li>• Elevation, habitat</li> <li>• Habitat utilization by target species</li> <li>• Project Point Locations</li> <li>• Species composition, [targeted injured resource]</li> </ul>
Additional parameters applicable to the Nutrient Reduction or Water Quality Restoration Types	<ul style="list-style-type: none"> <li>• Area               <ul style="list-style-type: none"> <li>○ Project influence</li> </ul> </li> <li>• Conservation improvements, water quality</li> <li>• For example, number of water quality improvement practices implemented</li> </ul>	
Additional parameters applicable to the Birds Restoration Type	<ul style="list-style-type: none"> <li>• Abundance, birds</li> <li>• Conservation improvements, birds –               <ul style="list-style-type: none"> <li>○ For example, number by activity</li> </ul> </li> <li>• Density, birds</li> <li>• Species composition, birds or Community composition, birds</li> </ul>	
Additional parameters applicable to the Provide and Enhance Recreational Opportunities Restoration Type	<ul style="list-style-type: none"> <li>• Right of entry</li> <li>• Visitors               <ul style="list-style-type: none"> <li>○ Visitor counts</li> <li>○ Visitor use</li> </ul> </li> </ul>	

<sup>a</sup> If project includes a conservation agreement/management plan.

**Table E.8.2.** Performance monitoring parameters and additional parameters for consideration for projects with specific restoration objectives. Appropriate parameters would be collected in addition to the parameters listed in Table E.8.1.

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Acquire or conserve land to create connections between natural areas	<ul style="list-style-type: none"> <li>• Area               <ul style="list-style-type: none"> <li>○ Project influence</li> </ul> </li> </ul>	None identified
Management of invasive species and enhancement of native plantings	<ul style="list-style-type: none"> <li>• Percent cover, vegetation</li> <li>• Species composition, vegetation</li> <li>• Survival, vegetation</li> </ul>	<ul style="list-style-type: none"> <li>• Density, vegetation</li> </ul>

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Management, control, and removal of debris	<ul style="list-style-type: none"> <li>• Debris accumulated</li> <li>• Debris removed</li> </ul>	None identified
Enhance habitat for targeted species (e.g., sea turtles, birds)	<ul style="list-style-type: none"> <li>• Abundance, [targeted injured resource]</li> <li>• Density, [targeted injured resource]</li> </ul>	<ul style="list-style-type: none"> <li>• Abundance, other</li> <li>• Density, other</li> <li>• Reproduction, [targeted injured resource]</li> </ul>
Improve coastal water quality <sup>a</sup>	<ul style="list-style-type: none"> <li>• Discharge</li> <li>• Dissolved oxygen</li> <li>• pH</li> <li>• Salinity               <ul style="list-style-type: none"> <li>○ Surface water</li> </ul> </li> <li>• Specific conductance</li> <li>• Temperature</li> <li>• Turbidity</li> </ul>	<ul style="list-style-type: none"> <li>• Nutrients</li> <li>• Pathogens (bacteria)</li> <li>• Sediments</li> </ul>
Enhance bird nesting and foraging habitat	<ul style="list-style-type: none"> <li>• Abundance, birds</li> <li>• Community composition, birds</li> <li>• Conservation improvements, birds               <ul style="list-style-type: none"> <li>○ For example, number by activity</li> </ul> </li> <li>• Density, birds</li> <li>• Species composition, birds</li> </ul>	<ul style="list-style-type: none"> <li>• Bird health</li> <li>• Habitat quality</li> <li>• Reproduction, birds</li> <li>• Survival, birds</li> </ul>
Vegetation management via mechanical, chemical, or fire methods	<ul style="list-style-type: none"> <li>• Percent cover, vegetation</li> <li>• Species composition, vegetation</li> </ul>	None identified
Create or restore bird nesting habitat	<ul style="list-style-type: none"> <li>• Abundance, birds               <ul style="list-style-type: none"> <li>○ Nest count by taxon</li> </ul> </li> <li>• Community composition, birds</li> <li>• Density, birds</li> <li>• Species composition, birds</li> </ul>	<ul style="list-style-type: none"> <li>• Abundance, other</li> <li>• Density, vegetation</li> <li>• Incidence of overwash</li> <li>• Habitat quality</li> <li>• Percent cover, vegetation</li> <li>• Reproduction, birds</li> <li>• Species composition, birds</li> <li>• Species composition, vegetation</li> <li>• Structure and function of habitat types</li> </ul>
Enhance recreational use	See Enhance Public Access to Natural Resources for Recreational Use Monitoring Guidance (Section E.12 of Attachment E of this Manual) for core and objective-specific performance monitoring parameters	

<sup>a</sup> See the “Reduce Nutrient Loads to Coastal Watershed & Reduce Pollution and Hydrologic Degradation to Coastal Watersheds: Monitoring Guidance” for additional details.

## E.9 Reduce Nutrient Loads to Coastal Watersheds & Reduce Pollution and Hydrologic Degradation to Coastal Watersheds: Monitoring Guidance



*This guidance is intended to promote consistency in data collection among similar types of projects and allow for future analysis across TIGs and Restoration Types, (Section 10.6.2 of SOP; DWH NRDA Trustees, 2021). This guidance may also assist the TIGs by providing recommended methodologies for monitoring restoration projects, saving time and money spent developing suitable monitoring protocols for individual restoration projects. If adjustments from this monitoring guidance are needed for a particular project, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). Project teams within each TIG will identify parameters applicable to the objectives for each individual restoration project when developing the project MAM Plan. In addition to the project monitoring guidance identified in this MAM Manual, specific monitoring may be required to comply with permits granted by regulatory agencies. The TIGs are not restricted from including additional parameters if applicable, and other project monitoring that may be needed for specific projects should be determined by the TIGs. The Cross-TIG MAM work group developed this monitoring guidance by following the process described in the main body of this report.*

This guidance is intended to assist the TIGs in developing MAM Plans for restoration projects, as appropriate. Specifically, this document provides:

- Examples of Restoration Techniques
- Guidance on example restoration objectives, example drivers, and example uncertainties
- Guidance on core performance monitoring parameters for projects within the Restoration Approaches
- Guidance on supplemental performance monitoring parameters for specific restoration objectives.

The monitoring parameters identified within a project MAM Plan should be consistent with the recommended monitoring defined within this guidance document, wherever appropriate. Depending on the nature of the restoration project, TIGs may choose not to include some of the elements described in this guidance document (e.g., drivers, uncertainties). If adjustments from the monitoring guidance are needed, these adjustments should be described in the project-

specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). The guidance provided should not be considered exhaustive. Therefore, TIGs may develop project-level objectives, drivers, uncertainties, and monitoring parameters that have not been previously identified. The TIGs will develop MAM objectives and monitoring parameters that pertain to their restoration activities; and will determine the frequency and duration of monitoring, and the associated budget they deem appropriate. Finally, this section is subject to change as new monitoring parameters, methods, and technologies are identified and/or developed.

The monitoring parameters recommended in this guidance document are further detailed in Attachment E Section E.4, which includes a complete list of core and objective-specific monitoring parameters identified by the Cross-TIG MAM work group and guidance on measurement unit(s) and monitoring methods. Guidance on monitoring locations, frequencies, durations of sampling and potential analyses is also provided where appropriate.

### **E.9.1 Restoration Techniques**

Restoration Techniques are specific restoration actions the Trustees identified for each of the Restoration Approaches. Restoration Techniques may be used individually or in combination. See Appendix 5.D of the PDARP/PEIS (DWH NRDA Trustees, 2016). The following are example Restoration Techniques included in the PDARP for these Restoration Approaches. This list should not be considered exhaustive; additional Restoration Techniques may be developed and/or identified.

1. Agricultural conservation practices
2. Forestry management practices
3. Low-impact development practices
4. Traditional stormwater control measures
5. Erosion and sediment control practices
6. Hydrologic restoration practices.

### **E.9.2 Example Project-Level Restoration Objectives**

Project-level restoration objectives should be specific to the resource injuries and clearly specify the desired outcome(s) of the restoration project (15 CFR § 990.55(b)(2)). See Section 2.4.1 of the main body of this Manual for guidance on establishing restoration objectives. The following are example project-level restoration objectives that may apply to one or more of the above-mentioned Restoration Techniques. This list should not be considered exhaustive; additional objectives may be developed and/or identified.

- Reduce nutrient, sediment, and/or pathogen (e.g., bacteria) concentrations and loadings
- Enhance dissolved oxygen concentration, turbidity, pH, salinity, and/or specific conductance.

### **E.9.3 Example Drivers**

Drivers are outside forces, natural or anthropogenic, that have the potential to influence the outcomes of a restoration project. Drivers tend to be large-scale, long-term forces that are not easily controlled at the scale of a single restoration project (Harwell et al., 2016). See Section



2.4.2 of the main body of this Manual for guidance on establishing the conceptual setting for a MAM Plan, including identifying drivers. The following are example drivers that may be applicable to these Restoration Approaches. This list should not be considered exhaustive; additional drivers may be identified.

- Coastal development
- Changes in land use
- Land-use practices (e.g., application of fertilizer)
- Alterations to freshwater flows.

## E.9.4 Example Uncertainties

Uncertainties or information gaps have the potential to affect adaptive management decisions for individual or multiple restoration projects. These decisions may include how to improve the likelihood of achieving favorable project outcomes or selecting corrective actions in the event a project is not performing as intended. See Section 2.4.3 of the main body of this Manual for guidance on identifying potential sources of uncertainty for a MAM Plan. The following are example uncertainties that may be applicable to these Restoration Approaches. This list should not be considered exhaustive; additional uncertainties may be identified.

- Willingness of landowners to participate
- Linkages between water quality improvements and ecosystem benefits
- Degree to which local improvements in water quality contribute to water quality improvements downstream
- Combination and placement of projects within a watershed to maximize benefits in receiving estuary
- Pollutant transport and freshwater flow through Gulf coastal watersheds
- Relationship between watershed pollutant loadings and occurrence of Gulf coastal ecosystem threats and human use impacts.

## E.9.5 Guidance on Developing Parameters for Project-Level Performance

This section includes two types of monitoring parameters for consideration under the Reduce Nutrient Loads to Coastal Watersheds & Reduce Pollution and Hydrologic Degradation to Coastal Watersheds Restoration Approaches:

1. **Core performance monitoring parameters.** These parameters are applicable to most projects within a Restoration Approach and Restoration Type (core performance monitoring parameters are those used consistently across projects in order to facilitate the aggregation of project monitoring results and the evaluation of restoration progress for each Restoration Type; Appendix 5.E.4 of PDARP/PEIS; DWH NRDA Trustees, 2016). The PDARP/PEIS lists the Reduce Nutrient Loads to Coastal Watersheds Restoration Approach under three Restoration Types: Nutrient Reduction; Water Quality; and Sturgeon. The PDARP/PEIS lists the Reduce Pollution and Hydrologic Degradation to Coastal Watersheds Restoration Approaches under two Restoration Types: Nutrient Reduction; and Water Quality. Table E.9.1 summarizes the core parameters that are

applicable regardless of Restoration Type.<sup>10</sup> Note, the PDARP/PEIS lists one of the goals of the Nutrient Reduction (Nonpoint Source) Restoration Type is to, “Where appropriate, co-locate nutrient load reduction projects with other restoration projects to enhance ecological services provided by other Restoration Approaches.” This could include projects from other restoration types beyond the three listed above such as Wetlands, Coastal, Nearshore Habitats, Oysters, etc.

2. **Objective-specific performance monitoring parameters.** These parameters are only applicable to projects with a particular restoration objective. See Table E.9.2.

Additional adaptive management and/or validation monitoring parameters for consideration have also been identified. These additional parameters may be helpful for resolving uncertainties, explaining outside drivers, optimizing project implementation, supporting decisions about corrective actions and other adaptive management of the project, and informing the planning of future DWH NRDA restoration projects. Tables E.9.1 and E.9.2 should not be considered exhaustive, and other parameters may be considered, as appropriate. See the complete list of core and objective-specific monitoring parameters, Section E.4 above, for details on the core performance monitoring parameters including definitions, units, and other guidance.

Generally, in-situ water quality parameters will be collected at the same time as chemical (nutrients, sediments, pathogens, and others) and/or ecological/biological sampling; and at the same locations, frequencies, and depths.

Parameter names are listed in the monitoring guidance tables and parameter details (which provide greater specificity on the type of data being collected) are provided as sub-bullets under the parameter name. Note that not every monitoring parameter has associated parameter details. Where parameters are used across Restoration Types or across resources, the Restoration Type or resource may be provided after the parameter name and separated by a comma. Using the parameter “Abundance” as an example, this parameter is used under Restoration Approaches for multiple resources such as birds and sea turtles. In the Birds guidance table (Section E.18), the parameter is listed as “Abundance, Birds” and may be listed with parameter details in sub-bullets. To indicate where an Implementing Trustee can choose the appropriate targeted injured resource to monitor based on project objectives, a bracketed “[targeted injured resource]” is included after the comma.

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<sup>10</sup> Monitoring guidance for Sturgeon Restoration Type projects has not been developed. As such, Sturgeon project teams should determine appropriate core and objective-specific parameters for their projects.

**Table E.9.1.** Core performance monitoring parameters and additional parameters for consideration under the Reduce Nutrient Loads to Coastal Watersheds & Reduce Pollution and Hydrologic Degradation to Coastal Watersheds Restoration Approaches

	Core performance monitoring parameters	Parameters for consideration (as appropriate)
Parameters applicable across Restoration Types	<ul style="list-style-type: none"> <li>• Conservation improvements, water quality               <ul style="list-style-type: none"> <li>○ Number implemented</li> </ul> </li> <li>• Area               <ul style="list-style-type: none"> <li>○ Project footprint</li> <li>○ Project influence</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Ammonium nitrogen (NH<sub>4</sub>-N)</li> <li>• Loads (water level and flow)</li> <li>• Nitrite plus nitrate nitrogen (NO<sub>2</sub>- N + NO<sub>3</sub>-N)</li> <li>• Project Point Locations</li> <li>• Total Kjeldahl Nitrogen (TKN)</li> </ul>

**Table E.9.2.** Performance monitoring parameters and additional parameters for consideration for projects with specific restoration objectives. Appropriate parameters would be collected in addition to the parameters listed in Table E.9.1.

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Reduce nutrient concentrations and loadings	<ul style="list-style-type: none"> <li>• Total nitrogen (TN)</li> <li>• Total phosphorus (TP)</li> </ul>	<ul style="list-style-type: none"> <li>• Chlorophyll <i>a</i></li> <li>• Soluble Reactive P (Orthophosphate phosphorus)</li> <li>• Tidal cycle</li> <li>• Water depth</li> </ul>
Reduce sediment concentrations and loadings	<ul style="list-style-type: none"> <li>• Total suspended solids (TSS)</li> <li>• Turbidity</li> </ul>	<ul style="list-style-type: none"> <li>• Bedload/bed sediment</li> <li>• Loads (discharge and concentration)</li> <li>• Secchi depth</li> <li>• Suspended sediment concentration (SSC)</li> <li>• Water depth</li> </ul>
Reduce pathogen concentrations and/or exposures	<ul style="list-style-type: none"> <li>• E. coli</li> <li>• Enterococci</li> <li>• Fecal coliform bacteria</li> </ul>	<ul style="list-style-type: none"> <li>• Coliphages</li> <li>• Vibrio cholera</li> <li>• Vibrio vulnificus</li> </ul>
Improve in-situ water quality	<ul style="list-style-type: none"> <li>• Dissolved oxygen (DO)</li> <li>• pH</li> <li>• Salinity               <ul style="list-style-type: none"> <li>○ Surface water</li> </ul> </li> <li>• Specific conductance</li> <li>• Temperature</li> <li>• Turbidity</li> <li>• Water velocity</li> </ul>	<ul style="list-style-type: none"> <li>• Chlorophyll <i>a</i> (biomass)</li> <li>• Loading</li> <li>• Phytoplankton (biomass and/or biovolume)</li> <li>• Pigments</li> </ul>
Restore natural hydrology and/or reduce hydrologic degradation	<ul style="list-style-type: none"> <li>• Salinity               <ul style="list-style-type: none"> <li>○ Surface water</li> </ul> </li> <li>• Water velocity</li> </ul>	<ul style="list-style-type: none"> <li>• Elevation, water level</li> </ul>

## E.10 Restore and Enhance Submerged Aquatic Vegetation: Monitoring Guidance



*This guidance is intended to promote consistency in data collection among similar types of projects and allow for future analysis across TIGs and Restoration Types, (Section 10.6.2 of SOP; DWH NRDA Trustees, 2021). This guidance may also assist the TIGs by providing recommended methodologies for monitoring restoration projects, saving time and money spent developing suitable monitoring protocols for individual restoration projects. If adjustments from this monitoring guidance are needed for a particular project, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). Project teams within each TIG will identify parameters applicable to the objectives for each individual restoration project when developing the project MAM Plan. In addition to the project monitoring guidance identified in this MAM Manual, specific monitoring may be required to comply with permits granted by regulatory agencies. The TIGs are not restricted from including additional parameters if applicable, and other project monitoring that may be needed for specific projects should be determined by the TIGs. The Cross-TIG MAM work group developed this monitoring guidance by following the process described in the main body of this report.*

This guidance is intended to assist the TIGs in developing MAM Plans for restoration projects, as appropriate. Specifically, it provides:

- Examples of Restoration Techniques
- Guidance on example restoration objectives, example drivers, and example uncertainties
- Guidance on core performance monitoring parameters for projects within the Restoration Approach
- Guidance on supplemental performance monitoring parameters for specific restoration objectives.

The monitoring parameters identified within a Restore and Enhance Submerged Aquatic Vegetation project MAM Plan should be consistent with the recommended monitoring defined within this guidance document, wherever appropriate. Depending on the nature of the restoration project, TIGs may choose not to include some of the elements described in this guidance document (e.g., drivers, uncertainties). If adjustments from the monitoring guidance are needed, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). The guidance

provided should not be considered exhaustive. Therefore, TIGs may develop project-level objectives, drivers, uncertainties, and monitoring parameters that have not been previously identified. The TIGs will develop MAM objectives and monitoring parameters that pertain to their restoration activities; and will determine the frequency and duration of monitoring, and the associated budget they deem appropriate. Finally, this guidance may change as new monitoring parameters, methods, and technologies are identified and/or developed.

The monitoring parameters recommended in this guidance document are further detailed in Attachment E Section E.4, which includes a complete list of core and objective-specific monitoring parameters identified by the Cross-TIG MAM work group and guidance on measurement unit(s) and monitoring methods. Guidance on monitoring locations, frequencies, durations of sampling and potential analyses is also provided where appropriate.

### **E.10.1 Restoration Techniques**

Restoration Techniques are specific restoration actions the Trustees identified for each of the Restoration Approaches. Restoration Techniques may be used individually or in combination. See Appendix 5.D of the PDARP/PEIS (DWH NRDA Trustees, 2016). The following are example Restoration Techniques included in the PDARP/PEIS for this Restoration Approach. This list should not be considered exhaustive; additional Restoration Techniques may be developed and/or identified.

1. Backfill scars with sediment
2. Revegetate SAV beds via propagation and/or transplanting
3. Enhance SAV beds through nutrient addition
4. Protect SAV beds with buoys, signage, and/or other protective measures
5. Protect and enhance SAV through wave attenuation structures

### **E.10.2 Example Project-Level Restoration Objectives**

Project-level restoration objectives should be specific to the resource injuries and clearly specify the desired outcome(s) of the restoration project (15 CFR § 990.55(b)(2)). See Section 2.4.1 of the main body of this Manual for guidance on establishing restoration objectives. The following are example project-level restoration objectives that may apply to one or more of the above-mentioned Restoration Techniques. This list should not be considered exhaustive; additional objectives may be developed and/or identified.

- Restore sea floor elevation to promote SAV
- Promote regrowth of native SAV
- Increase or maintain native SAV
- Increase or maintain site-specific nutrient levels to enhance SAV beds (e.g., bird stakes)
- Improve or maintain water quality
- Reduce current velocity and wave action to protect or restore SAV
- Provide habitat for targeted species (e.g., fish, wildlife)
- Increase abundance of targeted injured species (e.g., fish, wildlife)
- Provide food resources for targeted injured species (e.g., fish and wildlife)

### E.10.3 Example Drivers

Drivers are outside forces, natural or anthropogenic, that have the potential to influence the outcome(s) of a restoration project. Drivers tend to be large-scale, long-term forces that are not easily controlled at the scale of a single restoration project (Harwell et al., 2016). See Section 2.4.2 of the main body of this Manual for guidance on establishing the conceptual setting for a MAM Plan, including identifying drivers. The following are example drivers that may be applicable to this Restoration Approach. This list should not be considered exhaustive; additional drivers may be identified.

- Hydrologic regime
- Freshwater inflow
- Precipitation
- Sediment input/load
- Burial
- Subsidence
- Nutrients
- Sea level rise
- Storms/wave energy
- Sediment accretion/erosion
- Grazing/herbivory
- Hard-freeze events
- Invasive species
- Physical impacts, including boat scarring
- Boat wakes
- Adjacent development/land use
- Chemical impacts (e.g., oil spills)

### E.10.4 Example Uncertainties

Uncertainties or information gaps have the potential to affect adaptive management decisions for individual or multiple restoration projects. These decisions may include how to improve the likelihood of achieving favorable project outcomes or selecting corrective actions in the event a project is not performing as intended. See Section 2.4.3 of the main body of this Manual for guidance on identifying potential sources of uncertainty for a MAM Plan. The following are example uncertainties that may be applicable to this Restoration Approach. This list should not be considered exhaustive; additional uncertainties may be identified.

- Local subsidence and accretion rates (e.g., organic, mineral)
- Optimal hydrologic conditions (e.g., turbidity, wave energy) for sustainability of the SAV bed
- Sediment and nutrient inputs
- Vegetation stress due to herbivory, disease, competition by invasive species
- Best method to revegetate SAV bed (e.g., seed, propagule)
- Appropriate habitat characteristics for targeted species, whether the habitat is a limiting factor for the species
- Use of the habitat by targeted species

- Adjacent habitat conversion, management, and restoration activities
- Presence of floating aquatic vegetation (FAV)
- Germination or general reproductive triggers
- Frequency/intensity of tropical storms

## E.10.5 Guidance on Developing Parameters for Project-Level Performance

This section includes two types of monitoring parameters for consideration under the Restore and Enhance Submerged Aquatic Vegetation Restoration Approach:

1. **Core performance monitoring parameters.** These parameters are applicable to most projects within a Restoration Approach and Restoration Type (core performance monitoring parameters are those used consistently across projects in order to facilitate the aggregation of project monitoring results and the evaluation of restoration progress for each Restoration Type; Appendix 5.E.4 of PDARP/PEIS; DWH NRDA, 2016). The PDARP/PEIS lists the Restore and Enhance Submerged Aquatic Vegetation Restoration Approach under five Restoration Types: Wetlands, Coastal, and Nearshore Habitats; Habitat Projects on Federally Managed Lands; SAV; Birds; and Provide and Enhance Recreational Opportunities. Table E.10.1 summarizes the core parameters that are applicable regardless of Restoration Type, and also provides additional core parameters that may be applicable for projects that are implemented under Birds or Provide and Enhance Recreational Opportunities Restoration Types.
2. **Objective-specific performance monitoring parameters.** These parameters are only applicable to projects with a particular restoration objective. See Table E.10.2.

Additional adaptive management and/or validation monitoring parameters for consideration have also been identified. These additional parameters may be helpful for resolving uncertainties, explaining outside drivers, optimizing project implementation, supporting decisions about corrective actions and other adaptive management of the project, and informing the planning of future DWH NRDA restoration projects. Tables E.10.1 and E.10.2 should not be considered exhaustive, and other parameters may be considered, as appropriate. See the complete list of core and objective-specific monitoring parameters, Section E.4 above, for details on the core performance monitoring parameters including definitions, units, and other guidance.

Parameter names are listed in the monitoring guidance tables and parameter details (which provide greater specificity on the type of data being collected) are provided as sub-bullets under the parameter name. Note that not every monitoring parameter has associated parameter details. Where parameters are used across Restoration Types or across resources, the Restoration Type or resource may be provided after the parameter name and separated by a comma. Using the parameter “Abundance” as an example, this parameter is used under Restoration Approaches for multiple resources such as birds and sea turtles. In the Birds guidance table (Section E.18), the parameter is listed as “Abundance, Birds” and may be listed with parameter details in sub-bullets. To indicate where an Implementing Trustee can choose the appropriate targeted injured resource to monitor based on project objectives, a bracketed “[targeted injured resource]” is included after the comma.

**Table E.10.1.** Core performance monitoring parameters and additional parameters for consideration under the Restore and Enhance Submerged Aquatic Vegetation Restoration Approach, organized by Restoration Type. <sup>a</sup>

	Core performance monitoring parameters	Parameters for consideration (as appropriate)
Parameters applicable across Restoration Types	<ul style="list-style-type: none"> <li>• Area</li> <li>• Percent cover, vegetation</li> <li>• Species composition, vegetation</li> <li>• Survival, vegetation <sup>b</sup></li> </ul>	<ul style="list-style-type: none"> <li>• Biomass, vegetation <ul style="list-style-type: none"> <li>○ Aboveground</li> <li>○ Belowground</li> </ul> </li> <li>• Density, vegetation <ul style="list-style-type: none"> <li>○ Shoot density</li> </ul> </li> <li>• Elevation, habitat <ul style="list-style-type: none"> <li>○ Vertical accretion</li> </ul> </li> <li>• Elevation, water level</li> <li>• Percent cover, vegetation</li> <li>• Photosynthetically active radiation (PAR)</li> <li>• Project Point Locations</li> <li>• Salinity <ul style="list-style-type: none"> <li>○ Surface water</li> </ul> </li> <li>• Secchi depth</li> <li>• Sediment nutrients</li> <li>• Sediment organic matter</li> <li>• Sediment texture</li> <li>• Temperature</li> <li>• Turbidity</li> <li>• Water velocity</li> <li>• Wave energy</li> </ul>
Additional parameters applicable to the Birds Restoration Type	<ul style="list-style-type: none"> <li>• Abundance, birds</li> <li>• Density, birds</li> </ul>	<ul style="list-style-type: none"> <li>• Bird health</li> <li>• Habitat quality</li> <li>• Survival, birds</li> </ul>

<sup>a</sup> See Enhance Public Access to Natural Resource for Recreational Use or Enhance Recreational Experience Monitoring Guidance (Sections E.12 and E.13 of Attachment E) for additional parameters applicable to the Provide and Enhance Recreational Opportunities Restoration Type.

<sup>b</sup> If project is planted with vegetation.

**Table E.10.2.** Performance monitoring parameters and additional parameters for consideration for projects with specific restoration objectives. Appropriate parameters would be collected in addition to the parameters listed in Table E.10.1.

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Restore sea floor elevation to promote SAV (water depth)	<ul style="list-style-type: none"> <li>• Elevation, habitat</li> <li>• Elevation, water level</li> </ul>	<ul style="list-style-type: none"> <li>• Elevation, habitat <ul style="list-style-type: none"> <li>○ Subsidence</li> </ul> </li> <li>• Water velocity</li> <li>• Wave energy</li> </ul>



Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Promote regrowth of native SAV	<ul style="list-style-type: none"> <li>• Habitat damage, SAV               <ul style="list-style-type: none"> <li>○ Scar area</li> <li>○ Scar depth</li> <li>○ Scar length</li> <li>○ Scar number <sup>a</sup></li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Dissolved oxygen (DO)</li> <li>• Elevation, water level</li> <li>• Light availability</li> <li>• pH</li> <li>• Salinity               <ul style="list-style-type: none"> <li>○ Surface water</li> </ul> </li> <li>• Specific conductance</li> <li>• Temperature</li> <li>• Total Nitrogen</li> <li>• Total Phosphorus</li> <li>• Turbidity</li> </ul>
Increase or maintain nutrient levels to enhance SAV beds	<ul style="list-style-type: none"> <li>• Total Nitrogen</li> <li>• Total Phosphorus</li> <li>• Structural integrity <sup>b</sup></li> </ul>	<ul style="list-style-type: none"> <li>• Hydroperiod</li> <li>• Tidal regime</li> </ul>
Increase or maintain water quality	<ul style="list-style-type: none"> <li>• Dissolved oxygen (DO)</li> <li>• pH</li> <li>• Salinity               <ul style="list-style-type: none"> <li>○ Surface water</li> </ul> </li> <li>• Specific conductance</li> <li>• Temperature</li> <li>• Turbidity</li> </ul>	<ul style="list-style-type: none"> <li>• Cloud cover</li> <li>• Day length</li> <li>• Fetch</li> <li>• Frequency and duration of storms</li> <li>• Hydroperiod</li> <li>• Tidal regime</li> <li>• Water velocity</li> </ul>
Reduce current velocity and wave action to protect or restore SAV	<ul style="list-style-type: none"> <li>• Structural integrity, oysters</li> <li>• Wave direction</li> <li>• Wave height</li> <li>• Wave period</li> </ul>	<ul style="list-style-type: none"> <li>• Elevation, habitat</li> <li>• Fetch</li> <li>• Sediment consolidation</li> <li>• Water velocity</li> </ul>
Increase the abundance of targeted injured species	<ul style="list-style-type: none"> <li>• Abundance, [targeted injured resource]</li> <li>• Density, [targeted injured resource]</li> </ul>	<ul style="list-style-type: none"> <li>• Abundance, other</li> <li>• Density, other</li> <li>• Reproduction, [targeted injured resource]</li> </ul>
Provide habitat for targeted injured species	<ul style="list-style-type: none"> <li>• Abundance, [targeted injured resource]</li> <li>• Density, [targeted injured resource]</li> </ul>	<ul style="list-style-type: none"> <li>• Biomass, [targeted injured resource]</li> <li>• Bird health</li> <li>• Habitat quality</li> <li>• Survival, [targeted injured resource]</li> </ul>
Provide food resources for targeted injured species	<ul style="list-style-type: none"> <li>• Abundance, birds</li> <li>• Abundance, epibenthic or infaunal organisms</li> <li>• Abundance, FWCI</li> <li>• Abundance, sea turtles</li> <li>• Community composition, [targeted injured resource]</li> <li>• Density, birds</li> <li>• Density, epibenthic or infaunal organisms</li> <li>• Density, FWCI</li> <li>• Species composition, epibenthic or infaunal organisms</li> <li>• Species composition, FWCI</li> </ul>	<ul style="list-style-type: none"> <li>• Bird health</li> <li>• Habitat quality</li> <li>• Survival, [targeted injured resource]</li> </ul>

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Enhance recreational use	See Enhance Public Access to Natural Resource for Recreational Use Monitoring Guidance (Section E.12 of Attachment E of this Manual) for core and objective-specific performance monitoring parameters	-

<sup>a</sup> If project is addressing prop scars.

<sup>b</sup> If project includes the construction of structural features.

## E.11 Restore Oyster Reef Habitat: Monitoring Guidance



*This guidance is intended to promote consistency in data collection among similar types of projects and allow for future analysis across TIGs and Restoration Types, (Section 10.6.2 of SOP; DWH NRDA Trustees, 2021). This guidance may also assist the TIGs by providing recommended methodologies for monitoring restoration projects, saving time and money spent developing suitable monitoring protocols for individual restoration projects. If adjustments from this monitoring guidance are needed for a particular project, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). Project teams within each TIG will identify parameters applicable to the objectives for each individual restoration project when developing the project MAM Plan. In addition to the project monitoring guidance identified in this MAM Manual, specific monitoring may be required to comply with permits granted by regulatory agencies. The TIGs are not restricted from including additional parameters if applicable, and other project monitoring that may be needed for specific projects should be determined by the TIGs. The Cross-TIG MAM work group developed this monitoring guidance by following the process described in the main body of this report.*

This guidance is intended to assist the TIGs in developing MAM Plans for restoration projects, as appropriate. Specifically, it provides:

- Examples of Restoration Techniques
- Guidance on example restoration objectives, example drivers, and example uncertainties
- Guidance on core performance monitoring parameters for projects within the Restoration Approach
- Guidance on supplemental performance monitoring parameters for specific restoration objectives

The monitoring parameters identified within a Restore Oyster Reef Habitat project MAM Plan should be consistent with the recommended monitoring defined within this guidance document, wherever appropriate. Depending on the nature of the restoration project, TIGs may also choose not to include some of the elements described in this guidance document (e.g., drivers, uncertainties). If adjustments from the monitoring guidance are needed, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). The guidance provided in this document should not be considered exhaustive. Therefore, TIGs may develop project-level objectives, drivers, uncertainties, and monitoring parameters that have not been previously identified. The TIGs will

develop MAM objectives and monitoring parameters that pertain to their restoration activities and will determine the frequency and duration of monitoring and the associated budget they deem appropriate. This guidance may change as new monitoring parameters, methods, and technologies are identified and/or developed. Additional guidance may be found in the Strategic Framework for Oyster Restoration Activities (DWH NRDA Trustees, 2017a).

The monitoring parameters recommended in this guidance document are further detailed in Attachment E Section E.4, which includes a complete list of core and objective-specific monitoring parameters identified by the Cross-TIG MAM work group and guidance on measurement unit(s) and monitoring methods. Guidance on monitoring locations, frequencies, durations of sampling and potential analyses is also provided where appropriate.

### **E.11.1 Restoration Techniques**

Restoration Techniques are specific restoration actions the Trustees identified for each of the Restoration Approaches. Restoration Techniques may be used individually or in combination. See Appendix 5.D of the PDARP/PEIS (DWH NRDA Trustees, 2016). The following are example Restoration Techniques included in the PDARP/PEIS for this Restoration Approach. This list should not be considered exhaustive; additional Restoration Techniques may be identified and/or developed.

1. Restore or create oyster reefs through placement of cultch in nearshore and subtidal areas.
2. Construct living shorelines.
3. Enhance oyster reef productivity through spawning stock enhancement projects such as planting hatchery raised oysters, relocating wild oysters to restoration sites, oyster gardening programs, and other similar projects.
4. Develop a network of oyster reef spawning reserves.

### **E.11.2 Example Project-Level Restoration Objectives**

Project-level restoration objectives should be specific to the resource injuries and clearly specify the desired outcome(s) of the restoration project (15 CFR § 990.55(b)(2)). See Section 2.4.1 of the main body of this Manual for guidance on establishing restoration objectives. The following are example project-level restoration objectives that may apply to one or more of the above-mentioned Restoration Techniques. This list should not be considered exhaustive; additional objectives may be developed and/or identified.

- Increase reef height and/or area through cultch placement
- Establish new or increase capacity of existing shell recycling programs to increase amount of shell available for restoration
- Reduce wave energy reaching the shoreline
- Create substrate for colonization by oysters and other reef organisms
- Provide shelter for reef-dwelling organisms
- Re-establish ecological connections at the land-water interface
- Increase density of spawning-size oysters
- Create spawning reserves that are protected from harvest
- Enhance survival, growth, and reproduction of oysters

- Provide habitat for targeted injured species (e.g., birds, fish)
- Provide food resources for targeted injured species (e.g., birds, fish)
- Increase abundance of targeted injured species (e.g., birds, fish)

### E.11.3 Example Drivers

Drivers are outside forces, natural or anthropogenic, that have the potential to influence the outcome(s) of a restoration project. Drivers tend to be large-scale, long-term forces that are not easily controlled at the scale of a single restoration project (Harwell et al., 2016). See Section 2.4.2 of the main body of this Manual for guidance on establishing the conceptual setting for a MAM Plan, including identifying drivers. The following are example drivers that may be applicable to this Restoration Approach. This list should not be considered exhaustive; additional drivers may be identified.

- Salinity
- Dissolved oxygen concentration
- Temperature
- Pollution
- Phytoplankton
- Harmful algal blooms
- pH
- Disease
- Larval transport (currents)
- Bottom hardness
- Sedimentation
- Wave exposure
- Tidal position
- Sea level rise
- Subsidence of cultch
- Commercial harvest
- Predation
- Competition for space or food
- Water management practices affecting local water quality
- Natural resource management policies

### E.11.4 Example Uncertainties

Uncertainties or information gaps have the potential to affect adaptive management decisions for individual or multiple restoration projects. These decisions may include how to improve the likelihood of achieving favorable project outcomes or selecting corrective actions in the event a project is not performing as intended. See Section 2.4.3 of the main body of this Manual for guidance on identifying potential sources of uncertainty for a MAM Plan. The following are example uncertainties that may be applicable to this Restoration Approach. This list should not be considered exhaustive; additional uncertainties may be identified.

- Cultch availability and cost
- Freshet frequency and severity
- Illegal harvest

- Coastal acidification trends
- Adjacent land use
- Spatial (horizontal and vertical) effects from anoxia events
- Effects from local resource management, such as water or sediment diversions
- Most effective way to restore oysters

### E.11.5 Guidance on Developing Parameters for Project-Level Performance

This section includes two types of monitoring parameters for consideration under the Restore Oyster Reef Habitat Approach:

1. **Core performance monitoring parameters.** These parameters are applicable to most projects within a Restoration Approach and Restoration Type (core performance monitoring parameters are those used consistently across projects in order to facilitate the aggregation of project monitoring results and the evaluation of restoration progress for each Restoration Type; Appendix 5.E.4 of PDARP/PEIS; DWH NRDA, 2016). The PDARP/PEIS lists the Restore Oyster Reef Habitat Restoration Approach under four Restoration Types: Wetlands, Coastal, and Nearshore Habitats; Habitat Projects on Federally Managed Lands; Oysters; and Provide and Enhance Recreational Opportunities. Table E.11.1 summarizes the core parameters that are applicable regardless of Restoration Type.<sup>11</sup>
2. **Objective-specific performance monitoring parameters.** These parameters are only applicable to projects with a particular restoration objective. See Table E.11.2.

Additional adaptive management and/or validation monitoring parameters for consideration have also been identified. These additional parameters may be helpful for resolving uncertainties, explaining outside drivers, optimizing project implementation, supporting decisions about corrective actions and other adaptive management of the project, and informing the planning of future DWH NRDA restoration projects. Tables E.11.1 and E.11.2 should not be considered exhaustive, and other parameters may be considered, as appropriate. See the complete list of core and objective-specific monitoring parameters in Section E.4 for details on the core performance monitoring parameters including definitions, units, and other guidance.

Parameter names are listed in the monitoring guidance tables and parameter details (which provide greater specificity on the type of data being collected) are provided as sub-bullets under the parameter name. Where parameters are used across Restoration Types or across resources, the Restoration Type or resource may be provided after the parameter name and separated by a comma. Using the parameter “Abundance” as an example, this parameter is used under Restoration Approaches for multiple resources such as birds and sea turtles. In the Birds guidance table (Section E.18), the parameter is listed as “Abundance, Birds” and may be listed with parameter details in sub-bullets. To indicate where an Implementing Trustee can

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<sup>11</sup> See Enhance Public Access to Natural Resource for Recreational Use or Enhance Recreational Experience Monitoring Guidance (Sections E.12 and E.13 of Attachment E) for additional parameters applicable to the Provide and Enhance Recreational Opportunities Restoration Type.

choose the appropriate targeted injured resource to monitor based on project objectives, a bracketed “[targeted injured resource]” is included after the comma.

**Table E.11.1.** Core performance monitoring parameters and additional parameters for consideration under the Restore Oyster Habitat Restoration Approach.

Category	Core performance monitoring parameters	Parameters for consideration (as appropriate)
Reef dimensions	<ul style="list-style-type: none"> <li>• Area               <ul style="list-style-type: none"> <li>○ Habitat by type</li> <li>○ Project footprint</li> </ul> </li> <li>• Structural integrity, oysters -               <ul style="list-style-type: none"> <li>○ Reef height</li> <li>○ Reef volume</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Low tide exposure</li> <li>• Reef patchiness</li> <li>• Reef rugosity</li> <li>• Structural integrity, oysters -               <ul style="list-style-type: none"> <li>○ Consolidation</li> </ul> </li> <li>• Substrate type, amount, and condition</li> </ul>
Oyster demography	<ul style="list-style-type: none"> <li>• Density, oysters               <ul style="list-style-type: none"> <li>○ Dead oysters</li> <li>○ Live oysters</li> </ul> </li> <li>• Organism linear measurement, oysters               <ul style="list-style-type: none"> <li>○ Shell height</li> </ul> </li> <li>• Survival, oysters</li> </ul>	<ul style="list-style-type: none"> <li>• Dermo disease prevalence and intensity</li> <li>• Growth rates</li> <li>• Recruitment</li> <li>• Shell volume (for determination of shell budget)</li> </ul>
Benthic predatory, pest, or competitive species	None identified	<ul style="list-style-type: none"> <li>• Density, other</li> <li>• Percent cover, other</li> <li>• Presence, other</li> </ul>
Environmental conditions	None identified	<ul style="list-style-type: none"> <li>• Chlorophyll <i>a</i></li> <li>• Dissolved oxygen (DO)</li> <li>• Salinity</li> <li>• pH</li> <li>• Project point locations</li> <li>• Total suspended solids</li> <li>• Turbidity</li> <li>• Water temperature</li> <li>• Water velocity</li> </ul>

**Table E.11.2.** Performance monitoring parameters and additional parameters for consideration for projects with specific restoration objectives. Appropriate parameters would be collected in addition to the parameters listed in Table E.11.1.

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Habitat enhancement for fauna	<ul style="list-style-type: none"> <li>• Abundance, FWC1               <ul style="list-style-type: none"> <li>○ Catch per unit effort (CPUE)</li> </ul> </li> <li>• Biomass, [targeted injured resource]</li> <li>• Community composition, [targeted injured resource]</li> <li>• Density, [targeted injured resource]</li> <li>• Organism linear measurement, [targeted injured resource]</li> <li>• Species composition, [targeted injured resource]</li> </ul>	None identified

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Living shorelines	<ul style="list-style-type: none"> <li>• Shoreline position</li> </ul>	<ul style="list-style-type: none"> <li>• Density, vegetation</li> <li>• Elevation, habitat</li> <li>• Percent cover, vegetation</li> <li>• Species composition, vegetation</li> <li>• Wave height</li> </ul>
Increased reef productivity	<ul style="list-style-type: none"> <li>• Abundance, oysters               <ul style="list-style-type: none"> <li>◦ Count of spat</li> </ul> </li> <li>• Density, oysters</li> </ul>	<ul style="list-style-type: none"> <li>• Gonad development status</li> <li>• Sex ratio</li> </ul>
Provide habitat for targeted injured species	<ul style="list-style-type: none"> <li>• Abundance, [targeted injured resource]</li> <li>• Area</li> <li>• Density, [targeted injured resource]</li> <li>• Elevation, habitat</li> </ul>	<ul style="list-style-type: none"> <li>• Bird health</li> <li>• Habitat quality</li> <li>• Survival, [targeted injured resource]</li> </ul>
Provide food resources for targeted injured species	<ul style="list-style-type: none"> <li>• Abundance, birds</li> <li>• Abundance, epibenthic or infaunal organisms</li> <li>• Abundance, FWCI</li> <li>• Density, birds</li> <li>• Density, epibenthic or infaunal organisms</li> <li>• Density, FWCI</li> <li>• Species composition, epibenthic or infaunal organisms</li> <li>• Species composition, FWCI</li> </ul>	<ul style="list-style-type: none"> <li>• Bird health</li> <li>• Habitat quality</li> <li>• Survival, birds</li> </ul>
Enhance recreational use	<p>See Enhance Public Access to Natural Resources for Recreational Use Monitoring Guidance (Section E.12 of Attachment E of this manual) for core and objective-specific monitoring parameters</p>	-



## E.12 Enhance Public Access to Natural Resources for Recreational Use: Monitoring Guidance



*This guidance is intended to promote consistency in data collection among similar types of projects and allow for future analysis across TIGs and Restoration Types, (Section 10.6.2 of SOP; DWH NRDA Trustees, 2021). This guidance may also assist the TIGs by providing recommended methodologies for monitoring restoration projects, saving time and money spent developing suitable monitoring protocols for individual restoration projects. If adjustments from this monitoring guidance are needed for a particular project, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). Project teams within each TIG will identify parameters applicable to the objectives for each individual restoration project when developing the project MAM Plan. In addition to the project monitoring guidance identified in this MAM Manual, specific monitoring may be required to comply with permits granted by regulatory agencies. The TIGs are not restricted from including additional parameters if applicable, and other project monitoring that may be needed for specific projects should be determined by the TIGs. The Cross-TIG MAM work group developed this monitoring guidance by following the process described in the main body of this report.*

This guidance is intended to assist the TIGs in developing MAM Plans for restoration projects, as appropriate. Specifically, it provides:

- Examples of Restoration Techniques
- Guidance on example restoration objectives, example drivers, and example uncertainties
- Guidance on core performance monitoring parameters for projects within the Restoration Approach
- Guidance on supplemental performance monitoring parameters for specific restoration objectives.

The monitoring parameters identified within a project MAM Plan should be consistent with the recommended monitoring defined within this guidance document, wherever appropriate. Depending on the nature of the restoration project, TIGs may choose not to include some of the elements described in this guidance document (e.g., drivers, uncertainties). If adjustments from the monitoring guidance are needed, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). The guidance provided should not be considered exhaustive. Therefore, TIGs may develop project-level objectives, drivers, uncertainties, and monitoring parameters that have not

been previously identified. The TIGs will develop MAM objectives and monitoring parameters that pertain to their restoration activities; and will determine the frequency and duration of monitoring, and the associated budget they deem appropriate. Finally, this section is subject to change as new monitoring parameters, methods, and technologies are identified and/or developed.

The monitoring parameters recommended in this guidance document are further detailed in Attachment E Section E.4, which includes a complete list of core and objective-specific monitoring parameters identified by the Cross-TIG MAM work group and guidance on measurement unit(s) and monitoring methods. Guidance on monitoring locations, frequencies, durations of sampling and potential analyses is also provided where appropriate.

## E.12.1 Restoration Techniques

Restoration Techniques are specific restoration actions the Trustees identified for each of the Restoration Approaches. Restoration Techniques may be used individually or in combination. See Appendix 5.D of the PDARP/PEIS (DWH NRDA Trustees, 2016). The following are example Restoration Techniques included in the PDARP/PEIS for this Restoration Approach. This list should not be considered exhaustive; additional Restoration Techniques may be developed and/or identified.<sup>12</sup>

1. Acquire land to serve as public access points
2. Enhance or construct infrastructure (e.g., boat ramps, piers, boardwalks, dune crossovers, camp sites, educational/interpretive spaces, navigational channel improvements and dredging, safe harbors, navigational aids, ferry services, rebuilding of previously damaged or destroyed facilities, promenades, trails, roads and bridges to access natural resources, and marina pump out stations).

## E.12.2 Example Project-Level Restoration Objectives

Project-level restoration objectives should be specific to the resource injuries and clearly specify the desired outcome(s) of the restoration project (15 CFR § 990.55(b)(2)). See Section 2.4.1 of the main body of this Manual for guidance on establishing restoration objectives. The following are example project-level restoration objectives that may apply to one or more of the above-mentioned Restoration Techniques. This list should not be considered exhaustive; additional objectives may be developed and/or identified.

- Reduce or eliminate the potential for development to enhance access
- Increase access for recreational use through acquisition
- Enhance public access through infrastructure development
- Enhance public access by increasing visitor use of protected or enhanced lands
- Enhance public access by improving visitor satisfaction of the availability of recreational opportunities/protected lands
- Enhance public access by increasing access to wildlife-viewing opportunities by protecting wildlife habitat
- Minimize negative impacts on local community (e.g., noise, debris).

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<sup>12</sup> An additional technique that could be utilized under this approach is artificial reefs.

### E.12.3 Example Drivers

Drivers are outside forces, natural or anthropogenic, that have the potential to influence the outcomes of a restoration project. Drivers tend to be large-scale, long-term forces that are not easily controlled at the scale of a single restoration project (Harwell et al., 2016). See Section 2.4.2 of the main body of this Manual for guidance on establishing the conceptual setting for a MAM Plan, including identifying drivers. The following are example drivers that may be applicable to this Restoration Approach. This list should not be considered exhaustive; additional drivers may be identified.

- Development and changes in land use
- Seller motivation
- Public acceptance and use
- Frequency and intensity of hurricanes
- Infrastructure development
- Public interest or need.

### E.12.4 Example Uncertainties

Uncertainties or information gaps have the potential to affect adaptive management decisions for individual or multiple restoration projects. These decisions may include how to improve the likelihood of achieving favorable project outcomes or selecting corrective actions in the event a project is not performing as intended. See Section 2.4.3 of the main body of this Manual for guidance on identifying potential sources of uncertainty for a MAM Plan. The following are example uncertainties that may be applicable to this Restoration Approach. This list should not be considered exhaustive; additional uncertainties may be identified.

- Ability to acquire the land (e.g., willingness of sellers)
- Increased use of the area
- Ability to attract public use of the area
- Potential need for ecological restoration (e.g., as a result of increased use of the area)
- Potential impact on local community (e.g., noise related to having too many visitors, trash).

### E.12.5 Guidance on Developing Parameters for Project-Level Performance

This section includes two types of monitoring parameters for consideration under the Enhance Public Access to Natural Resources for Recreational Use Restoration Approach:

1. **Core performance monitoring parameters.** These parameters are applicable to most projects within a Restoration Approach and Restoration Type (core performance monitoring parameters are those used consistently across projects in order to facilitate the aggregation of project monitoring results and the evaluation of restoration progress for each Restoration Type; Appendix 5.E.4 of PDARP/PEIS; DWH NRDA Trustees, 2016). The PDARP/PEIS lists the Enhance Public Access to Natural Resources for Recreational Use Restoration Approach under one Restoration Type: Provide and

Enhance Recreational Opportunities. Table E.12.1 summarizes the core parameters for the Restoration Type.

2. **Objective-specific performance monitoring parameters.** These parameters are only applicable to projects with a particular restoration objective. See Table E.12.2.

Additional adaptive management and/or validation monitoring parameters for consideration have also been identified. These additional parameters may be helpful for resolving uncertainties, explaining outside drivers, optimizing project implementation, supporting decisions about corrective actions and other adaptive management of the project, and informing the planning of future DWH NRDA restoration projects. Tables E.12.1 and E.12.2 should not be considered exhaustive, and other parameters may be considered, as appropriate. See the complete list of core and objective-specific monitoring parameters, Section E.4 above, for details on the core performance monitoring parameters including definitions, units, and other guidance.

Parameter names are listed in the monitoring guidance tables and parameter details (which provide greater specificity on the type of data being collected) are provided as sub-bullets under the parameter name. Note that not every monitoring parameter has associated parameter details. Where parameters are used across Restoration Types or across resources, the Restoration Type or resource may be provided after the parameter name and separated by a comma. Using the parameter “Abundance” as an example, this parameter is used under Restoration Approaches for multiple resources such as birds and sea turtles. In the Birds guidance table (Section E.18), the parameter is listed as “Abundance, Birds” and may be listed with parameter details in sub-bullets. To indicate where an Implementing Trustee can choose the appropriate targeted injured resource to monitor based on project objectives, a bracketed “[targeted injured resource]” is included after the comma.

**Table E.12.1.** Core performance monitoring parameters and additional parameters for consideration under the Enhance Public Access to Natural Resources for Recreational Use Restoration Approach.

Core performance monitoring parameters	Parameters for consideration (as appropriate)
<ul style="list-style-type: none"> <li>• Area               <ul style="list-style-type: none"> <li>○ Project footprint (for land acquisition projects)</li> </ul> </li> <li>• Visitors               <ul style="list-style-type: none"> <li>○ Visitor use by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Habitat connectivity</li> <li>• Economic benefit</li> <li>• Project Point Locations</li> </ul>

**Table E.12.2.** Performance monitoring parameters and additional parameters for consideration for projects with specific restoration objectives. Appropriate parameters would be collected in addition to the parameters listed in Table E.12.1.

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Enhance access through land acquisition, if lands may be closed for a period of time during the year (for various reasons such as beach closures)	<ul style="list-style-type: none"> <li>• Right of entry</li> </ul>	None identified
Enhance access through infrastructure	<ul style="list-style-type: none"> <li>• Structural integrity               <ul style="list-style-type: none"> <li>○ Completed as designed</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Visitors               <ul style="list-style-type: none"> <li>○ Visitor use by activity</li> </ul> </li> </ul>
Increase visitor use of recreational activities	<ul style="list-style-type: none"> <li>• Visitors               <ul style="list-style-type: none"> <li>○ Visitor use by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Wildlife behavior response</li> </ul>
Improve visitor satisfaction	<ul style="list-style-type: none"> <li>• Visitors               <ul style="list-style-type: none"> <li>○ Visitor satisfaction</li> <li>○ Visitor use by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Wildlife behavior response</li> </ul>
Enhance wildlife-viewing opportunities	<ul style="list-style-type: none"> <li>• Visitors               <ul style="list-style-type: none"> <li>○ Visitor use by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Physical disturbance (local)</li> <li>• Wildlife behavior response</li> </ul>
Improve local citizen satisfaction	<ul style="list-style-type: none"> <li>• Visitors               <ul style="list-style-type: none"> <li>○ Visitor satisfaction</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Economic benefit</li> <li>• Physical disturbance (local)</li> </ul>

## E.13 Enhance Recreational Experiences: Monitoring Guidance



*This guidance is intended to promote consistency in data collection among similar types of projects and allow for future analysis across TIGs and Restoration Types, (Section 10.6.2 of SOP; DWH NRDA Trustees, 2021). This guidance may also assist the TIGs by providing recommended methodologies for monitoring restoration projects, saving time and money spent developing suitable monitoring protocols for individual restoration projects. If adjustments from this monitoring guidance are needed for a particular project, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). Project teams within each TIG will identify parameters applicable to the objectives for each individual restoration project when developing the project MAM Plan. In addition to the project monitoring guidance identified in this MAM Manual, specific monitoring may be required to comply with permits granted by regulatory agencies. The TIGs are not restricted from including additional parameters if applicable, and other project monitoring that may be needed for specific projects should be determined by the TIGs. The Cross-TIG MAM work group developed this monitoring guidance by following the process described in the main body of this report.*

This guidance is intended to assist the TIGs in developing MAM Plans for restoration projects, as appropriate. Specifically, this document provides:

- Examples of Restoration Techniques
- Guidance on example restoration objectives, example drivers, and example uncertainties
- Guidance on core performance monitoring parameters for projects within the Restoration Approach
- Guidance on supplemental performance monitoring parameters for specific restoration objectives.

The monitoring parameters identified within a project MAM Plan should be consistent with the recommended monitoring defined within this guidance document, wherever appropriate. Depending on the nature of the restoration project, TIGs may choose not to include some of the elements described in this guidance document (e.g., drivers, uncertainties). If adjustments from the monitoring guidance are needed, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). The guidance provided should not be considered exhaustive. Therefore, TIGs may develop project-level objectives, drivers, uncertainties, and monitoring parameters that have not

been previously identified. The TIGs will develop MAM objectives and monitoring parameters that pertain to their restoration activities; and will determine the frequency and duration of monitoring, and the associated budget they deem appropriate. Finally, this section is subject to change as new monitoring parameters, methods, and technologies are identified and/or developed.

The monitoring parameters recommended in this guidance document are further detailed in Attachment E Section E.4, which includes a complete list of core and objective-specific monitoring parameters identified by the Cross-TIG MAM work group and guidance on measurement unit(s) and monitoring methods. Guidance on monitoring locations, frequencies, durations of sampling and potential analyses is also provided where appropriate.

### **E.13.1 Restoration Techniques**

Restoration Techniques are specific restoration actions the Trustees identified for each of the Restoration Approaches. Restoration Techniques may be used individually or in combination. See Appendix 5.D of the PDARP/PEIS (DWH NRDA Trustees, 2016). The following are example Restoration Techniques included in the PDARP/PEIS for this Restoration Approach to enhance experiences such as swimming, boating, bird watching, hiking, beach-going, snorkeling, or scuba diving. This list should not be considered exhaustive; additional Restoration Techniques may be developed and/or identified.<sup>13</sup>

1. Place stone, concrete, or permissible materials to create artificial reef structures
2. Enhance recreational fishing opportunities through aquaculture
3. Reduce and remove land-based debris.

### **E.13.2 Example Project-Level Restoration Objectives**

Project-level restoration objectives should be specific to the resource injuries and clearly specify the desired outcome(s) of the restoration project (15 CFR § 990.55(b)(2)). See Section 2.4.1 of the main body of this Manual for guidance on establishing restoration objectives. The following are example project-level restoration objectives that may apply to one or more of the above-mentioned Restoration Techniques. This list should not be considered exhaustive; additional objectives may be developed and/or identified.

- Enhance fishing, snorkeling, and scuba-diving opportunities and experiences
- Enhance swimming opportunities and experiences
- Enhance beach-going experiences
- Enhance hiking opportunities and experiences
- Enhance bird watching opportunities and experiences
- Enhance coastal visitors' experiences by reducing land-based debris
- Protect coastal wildlife by reducing land-based debris.

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<sup>13</sup> Due to the diverse nature of possible techniques under this Restoration Approach, we acknowledge that the specific methodologies and units used to collect monitoring information for the core parameter (i.e., visitor satisfaction surveys) may vary, and therefore visitor satisfaction surveys may not be used in all instances.

### E.13.3 Example Drivers

Drivers are outside forces, natural or anthropogenic, that have the potential to influence the outcome(s) of a restoration project. Drivers tend to be large-scale, long-term forces that are not easily controlled at the scale of a single restoration project (Harwell et al., 2016). See Section 2.4.2 of the main body of this Manual for guidance on establishing the conceptual setting for a MAM Plan, including identifying drivers. The following are example drivers that may be applicable to this Restoration Approach. This list should not be considered exhaustive; additional drivers may be identified.

- Infrastructure development
- Human attachment to or interest in recreational activities
- Time and resources (e.g., income, transportation) available to participate in recreational activities
- Weather and climate events that limit time recreational activities
- State of economy
- Population trends.

### E.13.4 Example Uncertainties

Uncertainties or information gaps have the potential to affect adaptive management decisions for individual or multiple restoration projects. These decisions may include how to improve the likelihood of achieving favorable project outcomes or selecting corrective actions in the event a project is not performing as intended. See Section 2.4.3 of the main body of this Manual for guidance on identifying potential sources of uncertainty for a MAM Plan. The following are example uncertainties that may be applicable to this Restoration Approach. This list should not be considered exhaustive; additional uncertainties may be identified.

- Ability to attract public use of the area
- Potential need for ecological restoration (e.g., as a result of increased use of the area)
- Potential negative impacts on wildlife resulting from recreational uses
- Potential impact on local community (e.g., noise related to having too many visitors, trash).

### E.13.5 Guidance on Developing Parameters for Project-Level Performance

This section includes two types of monitoring parameters for consideration under the Enhance Recreational Experiences Restoration Approach:

1. **Core performance monitoring parameters.** These parameters are applicable to most projects within a Restoration Approach and Restoration Type (core performance monitoring parameters are those used consistently across projects in order to facilitate the aggregation of project monitoring results and the evaluation of restoration progress for each Restoration Type; Appendix 5.E.4 of PDARP/PEIS; DWH NRDA Trustees, 2016). The PDARP/PEIS lists the Enhance Recreational Experiences Restoration Approach under one Restoration Type: Provide and Enhance Recreational Opportunities. Table E.13.1 summarizes the core parameters for the Restoration Type.



2. **Objective-specific performance monitoring parameters.** These parameters are only applicable to projects with a particular restoration objective. See Table E.13.2.

Additional adaptive management and/or validation monitoring parameters for consideration have also been identified. These additional parameters may be helpful for resolving uncertainties, explaining outside drivers, optimizing project implementation, supporting decisions about corrective actions and other adaptive management of the project, and informing the planning of future DWH NRDA restoration projects. Tables E.13.1 and E.13.2 should not be considered exhaustive, and other parameters may be considered, as appropriate. See the complete list of core and objective-specific monitoring parameters, Section E.4 above, for details on the core performance monitoring parameters including definitions, units, and other guidance.

Parameter names are listed in the monitoring guidance tables and parameter details (which provide greater specificity on the type of data being collected) are provided as sub-bullets under the parameter name. Where parameters are used across Restoration Types or across resources, the Restoration Type or resource may be provided after the parameter name and separated by a comma. Using the parameter “Abundance” as an example, this parameter is used under Restoration Approaches for multiple resources such as birds and sea turtles. In the Birds guidance table (Section E.18), the parameter is listed as “Abundance, Birds” and may be listed with parameter details in sub-bullets. To indicate where an Implementing Trustee can choose the appropriate targeted injured resource to monitor based on project objectives, a bracketed “[targeted injured resource]” is included after the comma.

**Table E.13.1.** Core performance monitoring parameters and additional parameters for consideration under the Enhance Recreational Experiences Restoration Approach.

Core performance monitoring parameters	Parameters for consideration (as appropriate)
<ul style="list-style-type: none"> <li>• Visitors               <ul style="list-style-type: none"> <li>○ Visitor satisfaction</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Area</li> <li>• Economic benefit</li> <li>• Project Point Locations</li> <li>• Visitors               <ul style="list-style-type: none"> <li>○ Visitor counts</li> <li>○ Visitor use by activity</li> </ul> </li> </ul>

**Table E.13.2.** Performance monitoring parameters and additional parameters for consideration for projects with specific restoration objectives. Appropriate parameters would be collected in addition to the parameters listed in Table E.13.1.

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Enhancement through infrastructure	<ul style="list-style-type: none"> <li>• Structural integrity               <ul style="list-style-type: none"> <li>○ Completed as designed</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Visitors               <ul style="list-style-type: none"> <li>○ Visitor counts</li> <li>○ Visitor use by activity</li> </ul> </li> </ul>
Enhancement through marine debris removal	<ul style="list-style-type: none"> <li>• Debris accumulated</li> <li>• Debris removed</li> </ul>	<ul style="list-style-type: none"> <li>• Area</li> <li>• Visitors               <ul style="list-style-type: none"> <li>○ Visitor counts</li> <li>○ Visitor use by activity</li> </ul> </li> </ul>

## E.14 Promote Environmental Stewardship, Education, and Outreach: Monitoring Guidance



*This guidance is intended to promote consistency in data collection among similar types of projects and allow for future analysis across TIGs and Restoration Types, (Section 10.6.2 of SOP; DWH NRDA Trustees, 2021). This guidance may also assist the TIGs by providing recommended methodologies for monitoring restoration projects, saving time and money spent developing suitable monitoring protocols for individual restoration projects. If adjustments from this monitoring guidance are needed for a particular project, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). Project teams within each TIG will identify parameters applicable to the objectives for each individual restoration project when developing the project MAM Plan. In addition to the project monitoring guidance identified in this MAM Manual, specific monitoring may be required to comply with permits granted by regulatory agencies. The TIGs are not restricted from including additional parameters if applicable, and other project monitoring that may be needed for specific projects should be determined by the TIGs. The Cross-TIG MAM work group developed this monitoring guidance by following the process described in the main body of this report.*

This guidance is intended to assist the TIGs in developing MAM Plans for restoration projects, as appropriate. Specifically, this section provides:

- Examples of Restoration Techniques
- Guidance on example restoration objectives, example drivers, and example uncertainties
- Guidance on core performance monitoring parameters for projects within the Restoration Approach
- Guidance on supplemental performance monitoring parameters for specific restoration objectives.

The monitoring parameters identified within a project MAM Plan should be consistent with the recommended monitoring defined within this guidance document, wherever appropriate. Depending on the nature of the restoration project, TIGs may choose not to include some of the elements described in this guidance document (e.g., drivers, uncertainties). If adjustments from the monitoring guidance are needed, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). The guidance provided should not be considered exhaustive. Therefore, TIGs may

develop project-level objectives, drivers, uncertainties, and monitoring parameters that have not been previously identified. The TIGs will develop MAM objectives and monitoring parameters that pertain to their restoration activities; and will determine the frequency and duration of monitoring, and the associated budget they deem appropriate. Finally, this section is subject to change as new monitoring parameters, methods, and technologies are identified and/or developed.

The monitoring parameters recommended in this guidance document are further detailed in Attachment E Section E.4, which includes a complete list of core and objective-specific monitoring parameters identified by the Cross-TIG MAM work group and guidance on measurement unit(s) and monitoring methods. Guidance on monitoring locations, frequencies, durations of sampling and potential analyses is also provided where appropriate.

### **E.14.1 Restoration Techniques**

Restoration Techniques are specific restoration actions the Trustees identified for each of the Restoration Approaches. Restoration Techniques may be used individually or in combination. See Appendix 5.D of the PDARP/PEIS (DWH NRDA Trustees, 2016). The following are example Restoration Techniques included in the PDARP/PEIS for this Restoration Approach. This list should not be considered exhaustive; additional Restoration Techniques may be developed and/or identified.

1. Create or enhance natural resource-related education facilities
2. Create or enhance natural resource-related education programs.

### **E.14.2 Example Project-Level Restoration Objectives**

Project-level restoration objectives should be specific to the resource injuries and clearly specify the desired outcome(s) of the restoration project (15 CFR § 990.55(b)(2)). See Section 2.4.1 of the main body of this Manual for guidance on establishing restoration objectives. The following are example project-level restoration objectives that may apply to one or more of the above-mentioned Restoration Techniques. This list should not be considered exhaustive; additional objectives may be developed and/or identified.

- Increase access to environmental education and outreach opportunities
- Increase visitor use of educational resources and opportunities
- Improve visitors' satisfaction with the educational resources and opportunities provided
- Increase production and distribution of outreach materials
- Educate visitors about natural resources and restoration
- Increase public interest in and understanding of the natural science and environment of the Gulf coastal region.

### **E.14.3 Example Drivers**

Drivers are outside forces, natural or anthropogenic, that have the potential to influence the outcomes of a restoration project. Drivers tend to be large-scale, long-term forces that are not easily controlled at the scale of a single restoration project (Harwell et al., 2016). See Section 2.4.2 of the main body of this Manual for guidance on establishing the conceptual setting for a MAM Plan, including identifying drivers. The following are example drivers that may be

applicable to this Restoration Approach. This list should not be considered exhaustive; additional drivers may be identified.

- Lack of understanding of the natural science, resources, and environment of the Gulf coastal region
- Lack of understanding of marine ecosystems
- Human attachment to or interest in the environment
- Public opinion of environmental issues
- Time and resources (e.g., income, transportation) available to take advantage of educational or recreational opportunities
- State of economy
- Population trends
- Interest or need in the educational facilities and programs.

#### E.14.4 Example Uncertainties

Uncertainties or information gaps have the potential to affect adaptive management decisions for individual or multiple restoration projects. These decisions may include how to improve the likelihood of achieving favorable project outcomes or selecting corrective actions in the event a project is not performing as intended. See Section 2.4.3 of the main body of this Manual for guidance on identifying sources of uncertainty for a MAM Plan. The following are example uncertainties that may be applicable to this Restoration Approach. This list should not be considered exhaustive; additional uncertainties may be identified.

- Ability to attract public interest and use of the area
- Potential negative impacts on local community (e.g., noise related to having too many visitors, trash)
- Potential negative impacts to the surrounding environment
- Optimum location of outreach materials or opportunities to maximize public access or participation
- Optimum medium to communicate information (e.g., visual, written, oral materials, information)
- Weather and climate events that limit ability to travel to or access educational or recreational opportunities.

#### E.14.5 Guidance on Developing Parameters for Project-Level Performance

This section includes two types of monitoring parameters for consideration under the Promote Environmental Stewardship, Education, and Outreach Restoration Approach:

1. **Core performance monitoring parameters.** These parameters are applicable to most projects within a Restoration Approach and Restoration Type (core performance monitoring parameters are those used consistently across projects in order to facilitate the aggregation of project monitoring results and the evaluation of restoration progress for each Restoration Type; Appendix 5.E.4 of PDARP/PEIS; DWH NRDA Trustees, 2016). The PDARP/PEIS lists the Promote Environmental Stewardship, Education, and Outreach Restoration Approach under two Restoration Types: Habitat Projects on

Federally Managed Lands; and Provide and Enhance Recreational Opportunities. Table E.14.1 summarizes the core parameters that are applicable regardless of Restoration Type.

2. **Objective-specific performance monitoring parameters.** These parameters are only applicable to projects with a particular restoration objective. See Table E.14.2.

Additional adaptive management and/or validation monitoring parameters for consideration have also been identified. These additional parameters may be helpful for resolving uncertainties, explaining outside drivers, optimizing project implementation, supporting decisions about corrective actions and other adaptive management of the project, and informing the planning of future DWH NRDA restoration projects. Tables E.14.1 and E.14.2 should not be considered exhaustive, and other parameters may be considered, as appropriate. See the complete list of core and objective-specific monitoring parameters, Section E.4 above, for details on the core performance monitoring parameters including definitions, units, and other guidance.

Parameter names are listed in the monitoring guidance tables and parameter details (which provide greater specificity on the type of data being collected) are provided as sub-bullets under the parameter name. Note that not every monitoring parameter has associated parameter details. Where parameters are used across Restoration Types or across resources, the Restoration Type or resource may be provided after the parameter name and separated by a comma. Using the parameter “Abundance” as an example, this parameter is used under Restoration Approaches for multiple resources such as birds and sea turtles. In the Birds guidance table (Section E.18), the parameter is listed as “Abundance, Birds” and may be listed with parameter details in sub-bullets. To indicate where an Implementing Trustee can choose the appropriate targeted injured resource to monitor based on project objectives, a bracketed “[targeted injured resource]” is included after the comma.

**Table E.14.1.** Core performance monitoring parameters and additional parameters for consideration under the Promote Environmental Stewardship, Education, and Outreach Restoration Approach.

Core performance monitoring parameters	Parameters for consideration (as appropriate)
<ul style="list-style-type: none"> <li>• Education or outreach effort               <ul style="list-style-type: none"> <li>○ Materials produced or distributed by type</li> <li>○ Programs developed</li> </ul> </li> <li>• Visitors               <ul style="list-style-type: none"> <li>○ Visitor use by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> <li>• Visitors               <ul style="list-style-type: none"> <li>○ Visitor satisfaction</li> </ul> </li> </ul>

**Table E.14.2.** Performance monitoring parameters and additional parameters for consideration for projects with specific restoration objectives. Appropriate parameters would be collected in addition to the parameters listed in Table E.14.1.

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Enhancement through education-related infrastructure	<ul style="list-style-type: none"> <li>• Right of entry</li> <li>• Structural integrity               <ul style="list-style-type: none"> <li>○ Completed as designed</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Visitors               <ul style="list-style-type: none"> <li>○ Visitor satisfaction</li> </ul> </li> </ul>
Increasing public's interest in and understanding of natural resources	<ul style="list-style-type: none"> <li>• Visitors               <ul style="list-style-type: none"> <li>○ Visitor satisfaction</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Economic benefits</li> </ul>

## E.15 Fish and Water Column Invertebrates Restoration Type: Monitoring Guidance



*This guidance is intended to promote consistency in data collection among similar types of projects and allow for future analysis across TIGs and Restoration Types, (Section 10.6.2 of SOP; DWH NRDA Trustees, 2021). This guidance may also assist the TIGs by providing recommended methodologies for monitoring restoration projects, saving time and money spent developing suitable monitoring protocols for individual restoration projects. If adjustments from this monitoring guidance are needed for a particular project, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). Project teams within each TIG will identify parameters applicable to the objectives for each individual restoration project when developing the project MAM Plan. In addition to the project monitoring guidance identified in this MAM Manual, specific monitoring may be required to comply with permits granted by regulatory agencies. The TIGs are not restricted from including additional parameters if applicable, and other project monitoring that may be needed for specific projects should be determined by the TIGs. The Cross-TIG MAM work group developed this monitoring guidance by following the process described in the main body of this report.*

This guidance is intended to assist the TIGs in developing MAM Plans for restoration projects planned under the Fish and Water Column Invertebrates Restoration Type, as appropriate. Specifically, it provides:

- A review of the Fish and Water Column Invertebrate Restoration Approaches and Techniques
- Guidance on example restoration objectives, example drivers, and example uncertainties
- Guidance on developing parameters for project-level performance monitoring for projects under this Restoration Type (across all Restoration Approaches and Techniques)

The monitoring parameters identified within a project MAM Plan should be consistent with the recommended monitoring defined within this guidance document, wherever appropriate. Depending on the nature of the restoration project, TIGs may also choose not to include some of the elements described in this guidance document (e.g., drivers, uncertainties). If adjustments from the monitoring guidance are needed, these adjustments should be described in the project

specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). The guidance provided should not be considered exhaustive. Therefore, TIGs may develop project-level objectives, drivers, uncertainties, and monitoring parameters that have not been previously identified. The TIGs will develop MAM objectives and monitoring parameters that pertain to their restoration activities; and will determine the frequency and duration of monitoring, and the associated budget they deem appropriate. Finally, this section is subject to change as new monitoring parameters, methods, and technologies are identified and/or developed.

The monitoring parameters recommended in this guidance document are further detailed in Attachment E Section E.4 of this MAM Manual, which includes a complete list of core and objective-specific monitoring parameters identified by the Cross-TIG MAM work group and guidance on measurement unit(s) and monitoring methods. Guidance on monitoring locations, frequencies, durations of sampling and potential analyses is also provided where appropriate.

### **E.15.1 Fish and Water Column Invertebrates Restoration Approaches and Techniques**

In accordance with the ecosystem approach for restoration, the Trustees will implement a three-fold approach to the restoration of fish and water column invertebrates:

1. Coastal and nearshore habitat restoration, discussed and implemented under the Wetlands, Coastal, and Nearshore Habitats (PDARP/PEIS Section 5.5.2), SAV (PDARP/PEIS Section 5.5.8) and Oysters (PDARP/PEIS Section 5.5.9) Restoration Types.
2. Offshore habitat restoration, discussed and implemented under the Mesophotic and Deep Benthic Communities Restoration Type (PDARP/PEIS Section 5.5.13).
3. Mortality reduction, accomplished by addressing known sources of mortality to fish and invertebrates by reducing bycatch and fisheries interactions discussed and implemented under this Restoration Type (PDARP/PEIS Section 5.5.6).

This monitoring guidance document covers the mortality reduction aspect of fish and water column invertebrate restoration. Monitoring guidance for habitat restoration may be found in the documents specific to each habitat type.

Restoration Approaches are general restoration actions the Trustees identified for each of the Restoration Types. Restoration Approaches describe options for implementation, and some include examples for specific methods (Appendix 5.D of PDARP/PEIS; DWH NRDA Trustees, 2016). The PDARP/PEIS (DWH NRDA Trustees, 2016) identifies seven Restoration Approaches under the Fish and Water Column Invertebrate Restoration Type. The PDARP/PEIS also identifies Restoration Techniques, which are specific restoration actions for each of the Restoration Approaches. Restoration Techniques may be used individually or in combination. Example Restoration Techniques for each of the seven Restoration Approaches are listed below.



1. Reduce impacts of ghost fishing through gear conversion and/or removal of derelict fishing gear
  - a. Implement contract and volunteer removal programs to collect existing derelict fishing gear.
  - b. Conduct voluntary gear conversion programs.
2. Reduce mortality among Highly Migratory Species and other oceanic fishes
  - a. Promote gear conversion to circle hooks and weak hooks.
  - b. Promote gear conversion to greenstick and buoy gear.
  - c. Implement incentive-based annual time closure (repose period).
3. Voluntary reduction in Gulf menhaden harvest
  - a. Establish voluntary, company-specific quotas.
4. Incentivize Gulf of Mexico commercial shrimp fishers to increase gear selectivity and environmental stewardship
  - a. Promote gear conversion to more efficient bycatch reduction devices.
  - b. Promote gear conversion to a hopper post-catch sorting system.
5. Voluntary fisheries-related actions to increase fish biomass
  - a. Support emerging fishing technologies.
  - b. Support reductions in illegal, unregulated, or unreported fishing.
6. Reduce post-release mortality of red snapper and other reef fishes in the Gulf of Mexico recreational fishery using fish descender devices
7. Reduce Gulf of Mexico commercial red snapper or other reef fish discards through IFQ allocation subsidy program

## E.15.2 Example Project-Level Restoration Objectives

Project-level restoration objectives should be specific to the resource injuries and clearly specify the desired outcome(s) of the restoration project (15 CFR § 990.55(b)(2)). See Section 2.4.1 of the main body of this manual for guidance on establishing restoration objectives. For all projects undertaken under the mortality reduction approach, the primary objective is to reduce mortality of fish and water column invertebrates.

Fish and water column invertebrate project-level objectives should be tied to the type(s) of activities being conducted as part of the project. Fish and water column invertebrate restoration projects may include a combination of activities, such as data collection (e.g., fishing effort, estimated bycatch, compliance), data analyses (e.g., analysis of existing data to determine bycatch cofactors and options to reduce bycatch), and/or implementation of projects or programs (e.g., participation, education/outreach, and program development or enhancement).

## E.15.3 Example Drivers

Drivers are outside forces, natural or anthropogenic, that have the potential to influence the outcomes of a restoration project. Drivers tend to be large-scale, long-term forces that are not easily controlled at the scale of a single restoration project (Harwell et al., 2016). See Section 2.4.2 for guidance on establishing the conceptual setting for a MAM Plan, including identifying drivers. The following are example drivers that may be applicable to this Restoration Type. This list should not be considered exhaustive; additional drivers may be identified.

- Tropical storms
- Oil spills
- Harmful algal bloom events (large-scale/regional)
- International threats to fish and water column invertebrate populations
- Climate change
- Disease
- Unintended consequences identified during or post project implementation
- Fisheries management actions

### E.15.4 Example Uncertainties

Uncertainties or information gaps have the potential to affect adaptive management decisions for individual or multiple restoration projects. These decisions may include how to improve the likelihood of achieving favorable project outcomes or selecting corrective actions in the event a project is not performing as intended. See Section 2.4.3 for guidance on identifying potential sources of uncertainty for a MAM Plan. The following are example uncertainties that may be applicable to this Restoration Type. This list should not be considered exhaustive; additional uncertainties may be identified.

- Ability to contract with appropriate partners
- Ability to attract participants
- Costs for various activities
- The level of effort required to achieve a project goal
- The availability of appropriate equipment
- Market price for fish

### E.15.5 Guidance on Developing Parameters for Project-Level Performance

When planning a restoration project, TIGs should identify appropriate monitoring parameter(s) based on the type(s) of activities included within the project and the project-level objectives. Many restoration projects implemented under the Fish and Water Column Invertebrate Restoration Type are likely to employ similar project activities for each Restoration Approach and therefore, may have similar restoration objectives and monitoring parameters. As such, this guidance document has been organized according to Restoration Approach. Note that only one core performance monitoring parameter has been identified for the Fish and Water Column Invertebrate Restoration Type (Table E.15.1).

Table E.15.2 summarizes the Fish and Water Column Invertebrate Restoration Approaches, and approach-specific performance monitoring parameters and additional parameters for consideration. Core and approach-specific performance monitoring parameter and parameters for consideration are defined as follows.

1. **Core performance monitoring parameter.** This parameter is applicable to all Fish and Water Column Invertebrate Approaches (core performance monitoring parameters are those used consistently across projects in order to facilitate the aggregation of project monitoring results and the evaluation of restoration progress for each Restoration Type; Appendix 5.E.4 of PDARP/PEIS; DWH NRDA, 2016). See Table E.15.1.

2. **Approach-specific performance monitoring parameters.** These parameters are only applicable to projects using a particular Restoration Approach. See Table E.15.2.
3. **Parameters for consideration** are example parameters based on the relevant Restoration Approach that may or may not apply to a specific project. Based on the project activities and objectives, this list may be helpful in identifying appropriate parameters for project monitoring. Additional adaptive management and/or validation monitoring parameters may be identified by the TIGs. These additional parameters may be helpful for resolving uncertainties, explaining outside drivers, optimizing project implementation, supporting decisions about corrective actions and other adaptive management of the project, and informing the planning of future DWH NRDA restoration projects. See Table E.15.2.

Parameters are organized by Restoration Approach, and project types may cover several approaches. The list of parameters is not exhaustive; the TIG may measure other parameters as appropriate.

Parameter names are listed in the monitoring guidance tables and parameter details (which provide greater specificity on the type of data being collected) are provided as sub-bullets under the parameter name. Note that not every monitoring parameter has associated parameter details. Where parameters are used across Restoration Types or across resources, the Restoration Type or resource may be provided after the parameter name and separated by a comma. Using the parameter “Abundance” as an example, this parameter is used under Restoration Approaches for multiple resources such as birds and sea turtles. In the Birds guidance table (Section E.18), the parameter is listed as “Abundance, Birds” and may be listed with parameter details in sub-bullets. To indicate where an Implementing Trustee can choose the appropriate targeted injured resource to monitor based on project objectives, a bracketed “[targeted injured resource]” is included after the comma.

**Table E.15.1.** Core performance monitoring parameter under the Fish and Water Column Invertebrate Restoration Type.

Objective	Core Parameter
Reduce sources of mortality	<ul style="list-style-type: none"> <li>• Biomass, FWCI               <ul style="list-style-type: none"> <li>○ Avoided by taxon</li> <li>○ Dead discards by taxon</li> </ul> </li> </ul>

**Table E.15.2.** Performance monitoring parameters and additional parameters for consideration for projects under each Restoration Approach. Appropriate parameters would be collected in addition to the parameters listed in Table E.15.1.

Restoration Approach	Approach-Specific Performance Monitoring Parameters	Parameters for Consideration (as appropriate)
Reduce impacts of ghost fishing through gear conversion <sup>a</sup>	<ul style="list-style-type: none"> <li>• Debris accumulated <ul style="list-style-type: none"> <li>○ Gear abandonment rate</li> </ul> </li> <li>• Equipment effectiveness, FWCI <ul style="list-style-type: none"> <li>○ Catch rate</li> </ul> </li> <li>• Equipment enhancements, FWCI <ul style="list-style-type: none"> <li>○ Number acquired or purchased by type</li> <li>○ Number distributed or deployed by type</li> <li>○ Number used by type</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Conservation effort, FWCI <ul style="list-style-type: none"> <li>○ Number of participants or organizations</li> <li>○ Number of trainees</li> </ul> </li> <li>• Project point locations</li> </ul>
Reduce impacts of ghost fishing through removal of derelict fishing gear	<ul style="list-style-type: none"> <li>• Debris removed <ul style="list-style-type: none"> <li>○ By source</li> <li>○ By type</li> </ul> </li> <li>• Equipment effectiveness, FWCI <ul style="list-style-type: none"> <li>○ Catch rate</li> <li>○ Degradation time</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Reduce mortality among Highly Migratory Species and other oceanic fishes	<ul style="list-style-type: none"> <li>• Bycatch, FWCI <ul style="list-style-type: none"> <li>○ Number or biomass released alive by taxon,</li> <li>○ Number or biomass released dead by taxon</li> </ul> </li> <li>• Organism linear measurement, FWCI <ul style="list-style-type: none"> <li>○ By taxon</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Annual net profit</li> <li>• Conservation effort, FWCI <ul style="list-style-type: none"> <li>○ Number of trainees</li> <li>○ Trainings offered by activity</li> </ul> </li> <li>• Conservation improvements, FWCI <ul style="list-style-type: none"> <li>○ Agreements executed by activity</li> <li>○ Number implemented by activity</li> <li>○ Percent compliance by activity</li> </ul> </li> <li>• Equipment enhancements, FWCI <ul style="list-style-type: none"> <li>○ Number distributed or deployed by type</li> <li>○ Number of trips with enhancements</li> <li>○ Number used by type</li> </ul> </li> <li>• Project point locations</li> </ul>
Voluntary reduction in Gulf menhaden harvest	<ul style="list-style-type: none"> <li>• Biomass, FWCI <ul style="list-style-type: none"> <li>○ Caught by taxon</li> </ul> </li> <li>• Conservation improvements, FWCI <ul style="list-style-type: none"> <li>○ Fishing effort reduced</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>

Restoration Approach	Approach-Specific Performance Monitoring Parameters	Parameters for Consideration (as appropriate)
Reduce post-release mortality of red snapper and other reef fishes in the Gulf of Mexico recreational fishery using fish descender devices	<ul style="list-style-type: none"> <li>• Organism linear measurement, FWCI               <ul style="list-style-type: none"> <li>○ By taxon</li> </ul> </li> <li>• Survival, FWCI               <ul style="list-style-type: none"> <li>○ Survivorship rate by taxon</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Conservation effort, FWCI               <ul style="list-style-type: none"> <li>○ Number of trainees</li> <li>○ Trainings offered by activity</li> </ul> </li> <li>• Education or outreach effort               <ul style="list-style-type: none"> <li>○ Number educated</li> <li>○ Number of recipients</li> <li>○ Number produced or distributed by type</li> </ul> </li> <li>• Equipment enhancements, FWCI               <ul style="list-style-type: none"> <li>○ Number distributed or deployed by type</li> <li>○ Number of trips with enhancements</li> <li>○ Number used by type</li> </ul> </li> <li>• Project point locations</li> <li>• Salinity</li> <li>• Temperature</li> <li>• Water depth</li> </ul>
Incentivize Gulf of Mexico commercial shrimp fishers to increase gear selectivity and environmental stewardship	<ul style="list-style-type: none"> <li>• Biomass, FWCI               <ul style="list-style-type: none"> <li>○ By taxon</li> </ul> </li> <li>• Bycatch, FWCI               <ul style="list-style-type: none"> <li>○ Released alive by taxon</li> <li>○ Released dead by taxon</li> </ul> </li> <li>• Organism linear measurement, FWCI               <ul style="list-style-type: none"> <li>○ By taxon</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Conservation effort, FWCI               <ul style="list-style-type: none"> <li>○ Number of trainees</li> <li>○ Trainings offered by activity</li> </ul> </li> <li>• Education or outreach effort               <ul style="list-style-type: none"> <li>○ Number educated</li> <li>○ Number of recipients</li> <li>○ Number produced or distributed by type</li> </ul> </li> <li>• Equipment enhancements, FWCI               <ul style="list-style-type: none"> <li>○ Number distributed or deployed by type</li> <li>○ Number used by type</li> </ul> </li> <li>• Project point locations</li> <li>• Salinity</li> <li>• Temperature</li> <li>• Water Depth</li> </ul>
Voluntary fisheries-related actions to increase fish biomass	<ul style="list-style-type: none"> <li>• Biomass, FWCI               <ul style="list-style-type: none"> <li>○ By taxon</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Reduce Gulf of Mexico commercial red snapper or other reef fish discards through IFQ allocation subsidy program	<ul style="list-style-type: none"> <li>• Abundance, FWCI               <ul style="list-style-type: none"> <li>○ Count by taxon</li> </ul> </li> <li>• Biomass, FWCI               <ul style="list-style-type: none"> <li>○ By taxon</li> </ul> </li> <li>• Organism linear measurement, FWCI</li> </ul>	<ul style="list-style-type: none"> <li>• Annual net profit</li> <li>• Conservation effort, FWCI               <ul style="list-style-type: none"> <li>○ Number of participants or organizations</li> </ul> </li> <li>• Conservation improvements, FWCI               <ul style="list-style-type: none"> <li>○ Agreements executed</li> </ul> </li> <li>• Project point locations</li> <li>• Salinity</li> <li>• Temperature</li> <li>• Water Depth</li> </ul>

<sup>a</sup> The PDARP lists Reduce Impacts of Ghost Fishing Through Gear Conversion and/or Removal of Derelict Fishing Gear as one Restoration Approach. However, it is broken down into two rows to improve clarity of the Approach-Specific Core Parameters based on the implemented technique.

## E.16 Sea Turtles Restoration Type: Monitoring Guidance



*This guidance is intended to promote consistency in data collection among similar types of projects and allow for future analysis across TIGs and Restoration Types, (Section 10.6.2 of SOP; DWH NRDA Trustees, 2021). This guidance may also assist the TIGs by providing recommended methodologies for monitoring restoration projects, saving time and money spent developing suitable monitoring protocols for individual restoration projects. If adjustments from this monitoring guidance are needed for a particular project, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). Project teams within each TIG will identify parameters applicable to the objectives for each individual restoration project when developing the project MAM Plan. In addition to the project monitoring guidance identified in this MAM Manual, specific monitoring may be required to comply with permits granted by regulatory agencies. The TIGs are not restricted from including additional parameters if applicable, and other project monitoring that may be needed for specific projects should be determined by the TIGs. The Cross-TIG MAM work group developed this monitoring guidance by following the process described in the main body of this report.*

This guidance is intended to assist the TIGs in developing MAM Plans for restoration projects, as appropriate. Specifically, it provides:

- A review of the Sea Turtle Restoration Approaches and Techniques
- Guidance on example restoration objectives, example drivers, and example uncertainties
- Guidance on developing parameters for project-level performance monitoring

The monitoring parameters identified within a project MAM Plan should be consistent with the recommended monitoring defined within this guidance document, wherever appropriate. Depending on the nature of the restoration project, TIGs may also choose not to include some of the elements described in this guidance document (e.g., drivers, uncertainties). If adjustments from the monitoring guidance are needed, these adjustments should be described in the project specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). The guidance provided should not be considered exhaustive. Therefore, TIGs may

develop project-level objectives, drivers, uncertainties, and monitoring parameters that have not been previously identified. The TIGs will develop MAM objectives and monitoring parameters that pertain to their restoration activities; and will determine the frequency and duration of monitoring, and the associated budget they deem appropriate. Finally, this section is subject to change as new monitoring parameters, methods, and technologies are identified and/or developed.

The monitoring parameters recommended in this guidance document are further detailed in Attachment E Section E.4, which includes a complete list of core and objective-specific monitoring parameters identified by the Cross-TIG MAM work group and guidance on measurement unit(s) and monitoring methods. Guidance on monitoring locations, frequencies, durations of sampling, and potential analyses is also provided where appropriate.

### **E.16.1 Sea Turtles Restoration Approaches**

Restoration Approaches are general restoration actions the Trustees identified for each of the Restoration Types. Restoration Approaches describe options for implementation, and some include examples for specific methods (Appendix 5.D of PDARP/PEIS; DWH NRDA Trustees, 2016). The PDARP/PEIS identifies seven Restoration Approaches under the Sea Turtle Restoration Type.

1. Reduce sea turtle bycatch in commercial fisheries through identification (ID) and implementation of conservation measures
2. Reduce sea turtle bycatch in commercial fisheries through enhanced training and outreach to the fishing communities
3. Enhance sea turtle hatchling productivity, and restore and conserve nesting beach habitat
4. Reduce sea turtle bycatch in recreational fisheries through development and implementation of conservation measures
5. Reduce sea turtle bycatch in commercial fisheries through enhanced state enforcement efforts to improve compliance with existing sea turtle conservation requirements
6. Increase sea turtle survival through enhanced mortality investigation, and early detection of and response to anthropogenic threats and emergency events
7. Reduce injury and mortality of sea turtles from vessel strikes.

### **E.16.2 Sea Turtles Restoration Techniques**

The PDARP/PEIS (DWH NRDA Trustees, 2016) and the Sea Turtle Strategic Framework (DWH NRDA Trustees, 2017b) identify Sea Turtle Restoration Techniques, which are specific restoration actions the Trustees identified for each of the Sea Turtle Restoration Approaches. Restoration Techniques may be used individually or in combination. Example Restoration Techniques are identified for each of the seven Restoration Approaches listed above and can be found in Appendix 5.D of the PDARP/PEIS and the table on page 3 of Module 1 in the Sea Turtles Strategic Framework.

### E.16.3 Project-Level Restoration Objectives

Project-level restoration objectives should be specific to the resource injuries and clearly specify the desired outcome(s) of the restoration project (15 CFR § 990.55(b)(2)). See Section 2.4.1 of the main body of this Manual for guidance on establishing restoration objectives.

Sea turtle restoration projects are likely to include a combination of activities, such as data collection (e.g., fisheries observer coverage, fishing effort, estimated bycatch data, compliance data), data analyses (e.g., analysis of existing data to determine bycatch cofactors and options to reduce bycatch), and/or implementation of sea turtle projects or programs (e.g., participation, regulatory compliance, education/outreach, enforcement, habitat restoration, and program development or enhancement). Project objectives may relate to the types of activities being implemented as part of the project.

Example project objectives and descriptions of those objectives are provided in Table E.16.1 below.

**Table E.16.1.** Example Sea Turtle Restoration Type objectives and associated descriptions

Objectives	Objective Description
Enhance or Improve Sea Turtle Resources or Programs	Parameters related to the implementation, evaluation, and/or effort associated with sea turtle restoration programs or conservation measures such as data collection, gear or methods development/testing, incentivized threat-reduction, beach lighting reduction, survey efforts, stranding response efforts, or other resource/program development or enhancement projects.
Improving Sea Turtle Restoration Through Equipment Enhancements	Parameters related to equipment (e.g., gear) purchased, acquired, used, or modified as part of a sea turtle restoration program or conservation measure.
Enhance Collection of Sea Turtle Samples	Parameters related to samples collected or processed. Samples may be collected from turtles, nests, habitat, fishing gear, or other sources related to a given project.
Enhance Sea Turtle Habitat	Parameters related to terrestrial or marine habitat utilized by sea turtles and/or their prey including the size and characteristics of the habitat, lighting levels, prey availability, and other habitat-related parameters.
Enhance Sea Turtles Survival or Restoration Efforts (nesting)	Parameters related to sea turtles in the terrestrial environment and related to nesting (i.e., includes nesting females, nests, eggs, hatchlings, etc.).
Reduce Sea Turtle Injury and Mortality in the Marine Environment	Parameters related to sea turtles in the marine environment and stranded turtles on land; may be associated with migrations, foraging, or mating, or with the natural or anthropogenic marine threats to sea turtles.
Enhance Sea Turtle Education or Outreach	Parameters related to sea turtle restoration education and outreach including beach users, coastal communities, fishing communities (commercial and recreational), state and federal law enforcement, and natural resource managers, etc.

### E.16.4 Example Drivers

Drivers are outside forces, natural or anthropogenic, that have the potential to influence the outcomes of a restoration project. Drivers tend to be large-scale, long-term forces that are not easily controlled at the scale of a single restoration project (Harwell et al., 2016). See Section 2.4.2 for guidance on establishing the conceptual setting for a MAM Plan, including identifying



drivers. The following are example drivers that may be applicable to this Restoration Type. This list should not be considered exhaustive; additional drivers may be identified.

- Tropical storms
- Oil spills
- Harmful algal bloom events (large-scale/regional)
- Cold stunning events (medium and large-scale)
- International threats to sea turtle populations
- Climate change
- Disease
- Sky glow/artificial lighting (broad-scale)
- Unintended consequences identified during or post project implementation

### E.16.5 Example Uncertainties

Uncertainties or information gaps have the potential to affect adaptive management decisions for individual or multiple restoration projects. These decisions may include how to improve the likelihood of achieving favorable project outcomes or selecting corrective actions in the event a project is not performing as intended. See Section 2.4.3 for guidance on identifying potential sources of uncertainty for a MAM Plan. The following are example uncertainties that may be applicable to this Restoration Type. This list should not be considered exhaustive; additional uncertainties may be identified.

- Ability to contract with appropriate partners
- Ability to attract participants
- Costs for various activities
- The level of effort required to achieve a project goal
- The availability of appropriate equipment

### E.16.6 Guidance on Developing Parameters for Project-Level Performance

When planning a restoration project, TIGs should identify appropriate monitoring parameter(s) based on the type(s) of activities included within the project and the project-level objectives. Many restoration projects implemented under the Sea Turtle Restoration Type are likely to employ similar project activities (regardless of the Restoration Approach or Restoration Technique) and therefore, may require similar restoration objectives and monitoring parameters. As such, this guidance document has been organized according to project objectives. Note that core performance monitoring parameters have not been identified for the Sea Turtle Restoration Type, however recommended objective-specific parameters may be similar for projects implemented under different Restoration Approaches if the project objectives are similar.

Objective-specific performance monitoring parameter and parameters for consideration are defined as follows.

1. **Objective-Specific performance monitoring parameters** are parameters that are likely to be applicable to most projects with the specific objective regardless of Restoration Approach. Objective-specific performance monitoring parameters are those

used consistently across projects with similar objectives to facilitate the aggregation of project monitoring results and the evaluation of restoration progress (Appendix 5.E.4 of PDARP/PEIS; DWH NRDA Trustees, 2016). See the Restoration Approach Core and Objective-Specific Performance Monitoring Parameters section of Attachment E of this MAM Manual for details on performance monitoring parameters including definitions, units, and other guidance.

2. **Parameters for consideration** are example parameters based on the relevant Restoration Approach and objective that may or may not apply to a specific project. Based on the project activities and objectives, this list may be helpful in identifying appropriate parameters for project monitoring. Additional adaptive management and/or validation monitoring parameters may be identified by the TIGs. These additional parameters may be helpful for resolving uncertainties, explaining outside drivers, optimizing project implementation, supporting decisions about corrective actions and other adaptive management of the project, and informing the planning of future DWH NRDA restoration projects.

Parameter names are listed in the monitoring guidance tables and parameter details (which provide greater specificity on the type of data being collected) are provided as sub-bullets under the parameter name. Note that not every monitoring parameter has associated parameter details. Where parameters are used across Restoration Types or across resources, the Restoration Type or resource may be provided after the parameter name and separated by a comma. Using the parameter “Abundance” as an example, this parameter is used under Restoration Approaches for multiple resources such as birds and sea turtles. In the Birds guidance table (Section E.18), the parameter is listed as “Abundance, Birds” and may be listed with parameter details in sub-bullets. To indicate where an Implementing Trustee can choose the appropriate targeted injured resource to monitor based on project objectives, a bracketed “[targeted injured resource]” is included after the comma.

The following tables provide guidance on monitoring parameters organized by Restoration Approach and project objective. These tables should not be considered exhaustive, and other parameters may be considered, as appropriate.

### Commercial Fisheries Restoration Approaches

Table E.16.2 provides specific guidance for the following Sea Turtle Restoration Approaches: (1) Reduce sea turtle bycatch in commercial fisheries through identification (ID) and implementation of conservation measures, (2) Reduce sea turtle bycatch in commercial fisheries through enhanced training and outreach to the fishing communities, and (5) Reduce sea turtle bycatch in commercial fisheries through enhanced state enforcement efforts to improve compliance with existing sea turtle conservation requirements. These Restoration Approaches are similar and may often be combined within projects.

**Table E.16.2.** Monitoring parameters related to commercial fisheries Restoration Approaches

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Enhance or Improve Sea Turtle Resources or Programs	<ul style="list-style-type: none"> <li>• Conservation improvements, sea turtles               <ul style="list-style-type: none"> <li>○ Number developed by activity</li> <li>○ Number evaluated or tested by activity</li> <li>○ Number implemented by activity</li> </ul> </li> <li>For example, this could include number of new observer programs piloted</li> </ul>	<ul style="list-style-type: none"> <li>• Conservation effort, sea turtles               <ul style="list-style-type: none"> <li>○ Days by activity</li> <li>○ Hours by activity</li> <li>○ Inspections conducted</li> <li>○ Percent coverage</li> </ul> </li> <li>• Conservation improvements, sea turtles               <ul style="list-style-type: none"> <li>○ Percent compliance</li> </ul> </li> <li>• Project point locations</li> </ul>
Improving Sea Turtle Restoration Through Equipment Enhancements	<ul style="list-style-type: none"> <li>• Equipment enhancements, sea turtles               <ul style="list-style-type: none"> <li>○ Number acquired or purchased by type</li> <li>○ Number distributed or deployed by type</li> <li>○ Number used by type</li> </ul> </li> <li>For example, gear conversions or modifications</li> </ul>	<ul style="list-style-type: none"> <li>• Equipment enhancements, sea turtles               <ul style="list-style-type: none"> <li>○ Percent vessels using enhanced equipment</li> </ul> </li> <li>• Project Point Locations</li> </ul>
Enhance Collection of Sea Turtle Samples	<ul style="list-style-type: none"> <li>• Samples, sea turtles               <ul style="list-style-type: none"> <li>○ Number analyzed by type</li> <li>○ Number collected by type</li> </ul> </li> <li>For example, video sampling</li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Reduce Sea Turtle Injury and Mortality in the Marine Environment	<ul style="list-style-type: none"> <li>• Bycatch, sea turtles               <ul style="list-style-type: none"> <li>○ Caught by taxon</li> <li>○ Landed by taxon</li> <li>○ Number reported</li> </ul> </li> <li>• Necropsies, sea turtles               <ul style="list-style-type: none"> <li>○ Number conducted</li> </ul> </li> <li>For example, number of field necropsies, carcasses collected for laboratory necropsies, or with evidence of fisheries interactions</li> <li>• Stranding and rehab, sea turtles               <ul style="list-style-type: none"> <li>○ Number admitted by taxon</li> <li>○ Number stranded by taxon</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Enhance Sea Turtle Education or Outreach	<ul style="list-style-type: none"> <li>• Conservation effort, sea turtles               <ul style="list-style-type: none"> <li>○ Number of trainees</li> <li>○ Trainings offered by type</li> </ul> </li> <li>For example, number of state enforcement officer trainings or number of people trained, including members of the public or commercial fishermen</li> <li>• Education or outreach effort               <ul style="list-style-type: none"> <li>○ Materials produced or distributed by type</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Outreach or education effort               <ul style="list-style-type: none"> <li>○ Number contacted</li> <li>○ Number of recipients</li> </ul> </li> <li>• Project point locations</li> </ul>

### Recreational Fisheries Restoration Approach

Table E.16.3 provides specific guidance for Sea Turtle Restoration Approach 4: Reduce sea turtle bycatch in recreational fisheries through development and implementation of conservation measures.

**Table E.16.3.** Monitoring parameters related to recreational fisheries Restoration Approach

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Enhance or Improve Sea Turtle Resources or Programs	<ul style="list-style-type: none"> <li>• Conservation improvements, sea turtles               <ul style="list-style-type: none"> <li>○ Number developed by activity</li> <li>○ Number evaluated or tested by activity</li> <li>○ Number implemented by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Education or outreach effort               <ul style="list-style-type: none"> <li>○ Number contacted</li> </ul> </li> <li>• Project point locations</li> <li>• Samples, sea turtles               <ul style="list-style-type: none"> <li>○ Sites assessed by activity</li> </ul> </li> </ul>
Improving Sea Turtle Restoration Through Equipment Enhancements	<ul style="list-style-type: none"> <li>• Equipment enhancements, sea turtles               <ul style="list-style-type: none"> <li>○ Number acquired or purchased by type</li> <li>○ Number distributed or deployed by type</li> <li>○ Number used by type</li> </ul> </li> </ul> <p>For example, dehooking equipment</p>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Enhance Collection of Sea Turtle Samples	<ul style="list-style-type: none"> <li>• Samples, sea turtles               <ul style="list-style-type: none"> <li>○ Number analyzed by type</li> <li>○ Number collected by type</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Reduce Sea Turtle Injury and Mortality in the Marine Environment	<ul style="list-style-type: none"> <li>• Necropsies, sea turtles               <ul style="list-style-type: none"> <li>○ Number conducted</li> </ul> </li> </ul> <p>For example, number of field necropsies, carcasses collected for laboratory necropsies, or with evidence of hook and line gear entanglement</p> <ul style="list-style-type: none"> <li>• Stranding and rehab, sea turtles               <ul style="list-style-type: none"> <li>○ Number admitted by taxon</li> <li>○ Number stranded by taxon</li> </ul> </li> </ul> <p>For example, number with hook and line gear injuries</p>	<ul style="list-style-type: none"> <li>• Bycatch, sea turtles               <ul style="list-style-type: none"> <li>○ Caught by taxon</li> <li>○ Released alive by taxon</li> </ul> </li> <li>• Project point locations</li> <li>• Stranding and rehab, sea turtles               <ul style="list-style-type: none"> <li>○ Number by outcome</li> <li>○ Number rehabilitated by taxon</li> <li>○ Proportion released</li> <li>○ Rehabilitation time</li> <li>○ Response time</li> </ul> </li> </ul>
Enhance Sea Turtle Education or Outreach	<ul style="list-style-type: none"> <li>• Conservation effort, sea turtles               <ul style="list-style-type: none"> <li>○ Number of trainees</li> <li>○ Trainings offered by type</li> </ul> </li> <li>• Education or outreach effort               <ul style="list-style-type: none"> <li>○ Materials produced or distributed by type</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Education or outreach effectiveness               <ul style="list-style-type: none"> <li>○ Percent change in survey responses</li> </ul> </li> <li>• Education or outreach effort               <ul style="list-style-type: none"> <li>○ Number produced or distributed by type</li> <li>○ Percentage of piers with signage and reporting materials available</li> </ul> </li> <li>• Project point locations</li> </ul>

### Sea Turtle Hatchling and Nesting Habitat Restoration Approach

Table E.16.4 provides specific guidance for Sea Turtle Restoration Approach 3: Enhance sea turtle hatchling productivity, and restore and conserve nesting beach habitat.

**Table E.16.4.** Monitoring parameters related to hatchlings and nesting habitat Restoration Approach

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Enhance or Improve Sea Turtles Resources or Programs	<ul style="list-style-type: none"> <li>• Conservation improvements, sea turtles               <ul style="list-style-type: none"> <li>○ Number developed by activity</li> <li>○ Number evaluated or tested by activity</li> <li>○ Number implemented by activity</li> </ul> </li> <li>For example, number of predator control measures implemented, number of barriers removed, additional survey area covered, number of incidences where protocols were followed</li> </ul>	<ul style="list-style-type: none"> <li>• Conservation improvements, sea turtles               <ul style="list-style-type: none"> <li>○ Percent compliance</li> </ul> </li> <li>• Project point locations</li> </ul>
Improving Sea Turtle Restoration Through Equipment Enhancements	<ul style="list-style-type: none"> <li>• Equipment enhancements, sea turtles               <ul style="list-style-type: none"> <li>○ Light modifications</li> <li>○ Number acquired or purchased by type</li> <li>○ Number distributed or deployed by type</li> <li>○ Number used by type</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Enhance Collection of Sea Turtle Samples	<ul style="list-style-type: none"> <li>• Samples, sea turtles               <ul style="list-style-type: none"> <li>○ Number analyzed by type</li> <li>○ Number collected by type</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Enhance Sea Turtle Habitat	<ul style="list-style-type: none"> <li>• Area               <ul style="list-style-type: none"> <li>○ Project footprint</li> </ul> </li> <li>• Habitat length               <ul style="list-style-type: none"> <li>○ Shoreline protected, conserved, restored, or evaluated</li> </ul> </li> <li>For example, shoreline restored to suitable light levels or managed for predators</li> <li>• Samples, sea turtles -               <ul style="list-style-type: none"> <li>○ Sites assessed by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Enhance Sea Turtles Survival or Restoration Efforts (nesting)	<ul style="list-style-type: none"> <li>• Abundance, sea turtles               <ul style="list-style-type: none"> <li>○ Nest count by taxon</li> </ul> </li> <li>For example, number protected/in-situ/in corrals</li> </ul>	<ul style="list-style-type: none"> <li>• Abundance, sea turtles               <ul style="list-style-type: none"> <li>○ Hatchling count by taxon</li> </ul> </li> <li>• Project point locations</li> <li>• Reproduction, sea turtles               <ul style="list-style-type: none"> <li>○ Hatchling disorientation</li> <li>○ Nest success</li> </ul> </li> </ul>
Enhance Sea Turtle Education or Outreach	<ul style="list-style-type: none"> <li>• Conservation effort, sea turtles               <ul style="list-style-type: none"> <li>○ Number of trainees</li> <li>○ Trainings offered by type</li> </ul> </li> <li>• Education or outreach effort               <ul style="list-style-type: none"> <li>○ Materials produced or distributed by type</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Education or outreach effectiveness               <ul style="list-style-type: none"> <li>○ Percent change in awareness</li> </ul> </li> <li>• Project point locations</li> </ul>

### Sea Turtle Stranding Response and Mortality Investigation Restoration Approach

Table E.16.5 provides specific guidance for Sea Turtle Restoration Approach 6: Increase sea turtle survival through enhanced mortality investigation, and early detection of and response to anthropogenic threats and emergency events.

**Table E.16.5.** Monitoring parameters related to mortality investigations Restoration Approach

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Enhance or Improve Sea Turtles Resources or Programs	<ul style="list-style-type: none"> <li>• Conservation improvements, sea turtles               <ul style="list-style-type: none"> <li>○ Number developed by activity</li> <li>○ Number evaluated or tested by activity</li> <li>○ Number implemented by activity</li> </ul> </li> <li>For example, standardized surveys, capacity for necropsies and mortality investigations, enhancements made to stranding networks, level of increased rehabilitation capacity, number of people available to respond to an event</li> </ul>	<ul style="list-style-type: none"> <li>• Debris removed               <ul style="list-style-type: none"> <li>○ By type</li> </ul> </li> <li>• Project point locations</li> </ul>
Improving Sea Turtle Restoration Through Equipment Enhancements	<ul style="list-style-type: none"> <li>• Equipment enhancements, sea turtles               <ul style="list-style-type: none"> <li>○ Number acquired or purchased by type</li> <li>○ Number distributed or deployed by type</li> <li>○ Number used by type</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Enhance Collection of Sea Turtle Samples	<ul style="list-style-type: none"> <li>• Samples, sea turtles               <ul style="list-style-type: none"> <li>○ Number analyzed by type</li> <li>○ Number collected by type</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Enhance Sea Turtle Habitat	<ul style="list-style-type: none"> <li>• Area               <ul style="list-style-type: none"> <li>○ Project footprint</li> </ul> </li> <li>• Habitat length               <ul style="list-style-type: none"> <li>○ Shoreline protected, conserved, restored</li> </ul> </li> <li>• Samples, sea turtles               <ul style="list-style-type: none"> <li>○ Sites assessed by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Debris removed               <ul style="list-style-type: none"> <li>○ By type</li> </ul> </li> <li>• Project point locations</li> </ul>
Reduce Sea Turtle Injury and Mortality in the Marine Environment	<ul style="list-style-type: none"> <li>• Bycatch, sea turtles               <ul style="list-style-type: none"> <li>○ Caught by taxon</li> <li>○ Number reported</li> <li>○ Released alive by taxon</li> </ul> </li> <li>• Necropsies, sea turtles               <ul style="list-style-type: none"> <li>○ Number conducted</li> </ul> </li> <li>For example, number of field necropsies, carcasses collected for laboratory necropsies, or with evidence of hook and line gear entanglement</li> <li>• Stranding and rehab, sea turtles               <ul style="list-style-type: none"> <li>○ Number admitted</li> <li>○ Number stranded by taxon</li> <li>○ Response time</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> <li>• Stranding and rehab, sea turtles               <ul style="list-style-type: none"> <li>○ Number rehabilitated by taxon</li> </ul> </li> </ul>
Enhance Sea Turtle Education or Outreach	<ul style="list-style-type: none"> <li>• Conservation effort, sea turtles               <ul style="list-style-type: none"> <li>○ Number of trainees</li> <li>○ Trainings offered by type</li> </ul> </li> <li>• Education or outreach effort               <ul style="list-style-type: none"> <li>○ Materials produced or distributed by type</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>

## Sea Turtle Vessel Strike Restoration Approach

Table E.16.6 provides specific guidance for Sea Turtle Restoration Approach 7: Reduce injury and mortality of sea turtles from vessel strikes.

**Table E.16.6.** Monitoring parameters related to vessel strikes Restoration Approach

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Enhance or Improve Sea Turtles Resources or Programs	<ul style="list-style-type: none"> <li>• Conservation effort, sea turtles               <ul style="list-style-type: none"> <li>○ Staff available</li> </ul> </li> <li>• Conservation improvements, sea turtles               <ul style="list-style-type: none"> <li>○ Number developed by activity</li> <li>○ Number evaluated or tested by activity</li> <li>○ Number implemented by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Improving Sea Turtle Restoration Through Equipment Enhancements	<ul style="list-style-type: none"> <li>• Equipment enhancements, sea turtle               <ul style="list-style-type: none"> <li>○ Number acquired or purchased by type</li> <li>○ Number distributed or deployed by type</li> <li>○ Number used by type</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Enhance Collection of Sea Turtle Samples	<ul style="list-style-type: none"> <li>• Samples, sea turtles               <ul style="list-style-type: none"> <li>○ Number analyzed by type</li> <li>○ Number collected by type</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Enhance Sea Turtle Habitat	<ul style="list-style-type: none"> <li>• Area               <ul style="list-style-type: none"> <li>○ Project footprint</li> </ul>               For example, area with vessel strike prevention measures in place             </li> <li>• Habitat length               <ul style="list-style-type: none"> <li>○ Shoreline protected, conserved, restored</li> </ul> </li> <li>• Samples, sea turtles               <ul style="list-style-type: none"> <li>○ Sites assessed by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Reduce Sea Turtle Injury and Mortality in the Marine Environment	<ul style="list-style-type: none"> <li>• Necropsies, sea turtles               <ul style="list-style-type: none"> <li>○ Number conducted</li> </ul>               For example, number of field necropsies, carcasses collected for laboratory necropsies, or with evidence of vessel strikes             </li> <li>• Stranding and rehab, sea turtles               <ul style="list-style-type: none"> <li>○ Injury type</li> <li>○ Number admitted by taxon</li> <li>○ Number stranded by taxon</li> <li>○ Response time</li> </ul>               For example, with vessel collision injuries             </li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Enhance Sea Turtle Education or Outreach	<ul style="list-style-type: none"> <li>• Conservation effort, sea turtles               <ul style="list-style-type: none"> <li>○ Number of trainees</li> <li>○ Trainings offered by type</li> </ul> </li> <li>• Education or outreach effort               <ul style="list-style-type: none"> <li>○ Materials produced or distributed by type</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>

## E.17 Marine Mammals Restoration Type: Monitoring Guidance



*This guidance is intended to promote consistency in data collection among similar types of projects and allow for future analysis across TIGs and Restoration Types, (Section 10.6.2 of SOP; DWH NRDA Trustees, 2021). This guidance may also assist the TIGs by providing recommended methodologies for monitoring restoration projects, saving time and money spent developing suitable monitoring protocols for individual restoration projects. If adjustments from this monitoring guidance are needed for a particular project, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). Project teams within each TIG will identify parameters applicable to the objectives for each individual restoration project when developing the project MAM Plan. In addition to the project monitoring guidance identified in this MAM Manual, specific monitoring may be required to comply with permits granted by regulatory agencies. The TIGs are not restricted from including additional parameters if applicable, and other project monitoring that may be needed for specific projects should be determined by the TIGs. The Cross-TIG MAM work group developed this monitoring guidance by following the process described in the main body of this report.*

This guidance is intended to assist the TIGs in developing MAM Plans for restoration projects, as appropriate. Specifically, it provides:

- A review of the Marine Mammal Restoration Approaches and Techniques.
- Guidance on example restoration objectives, example drivers, and example uncertainties.
- Guidance on developing parameters for project-level performance monitoring.

The monitoring parameters identified within a project MAM Plan should be consistent with the recommended monitoring defined within this guidance document, wherever appropriate. Depending on the nature of the restoration project, TIGs may also choose not to include some of the elements described in this guidance document (e.g., drivers, uncertainties). If adjustments from the monitoring guidance are needed, these adjustments should be described in the project specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). The guidance provided should not be considered exhaustive. Therefore, TIGs may develop project-level objectives, drivers, uncertainties, and monitoring parameters that have not been previously identified. The TIGs will develop MAM objectives and monitoring parameters that pertain to their restoration activities; and will determine the frequency and duration of



monitoring, and the associated budget they deem appropriate. Finally, this section is subject to change as new monitoring parameters, methods, and technologies are identified and/or developed.

The monitoring parameters recommended in this guidance document are further detailed in Attachment E Section E.4, which includes a complete list of core and objective-specific monitoring parameters identified by the Cross-TIG MAM work group and guidance on measurement unit(s) and monitoring methods. Guidance on monitoring locations, frequencies, durations of sampling, and potential analyses is also provided where appropriate.

### **E.17.1 Marine Mammals Restoration Approaches**

Restoration Approaches are general restoration actions the Trustees identified for each of the Restoration Types. Restoration Approaches describe options for implementation, and some include examples for specific methods (Appendix 5.D of PDARP/PEIS; DWH NRDA Trustees, 2016). The PDARP/PEIS identifies seven Restoration Approaches under the Marine Mammals Restoration Type.

1. Reduce Commercial Fishery Bycatch through Collaborative Partnerships.
2. Reduce Injury and Mortality of Bottlenose Dolphins from Hook-and-Line Fishing Gear.
3. Increase Marine Mammal Survival through Better Understanding of Causes of Illness and Death as well as Early Detection and Intervention for Anthropogenic and Natural Threats.
4. Measure Noise to Improve Knowledge and Reduce Impacts of Anthropogenic Noise on Marine Mammals.
5. Reduce Injury, Harm, and Mortality to Bottlenose Dolphins by Reducing Illegal Feeding and Harassment Activities.
6. Reduce Marine Mammal Takes through Enhanced State Enforcement Related to the Marine Mammal Protection Act.
7. Reduce Injury and Mortality of Marine Mammals from Vessel Collisions.

### **E.17.2 Marine Mammals Restoration Techniques**

The PDARP/PEIS (DWH NRDA Trustees, 2016) and the Marine Mammal Strategic Framework (DWH NRDA Trustees, 2017c) identify Marine Mammal Restoration Techniques, which are specific restoration actions the Trustees identified for each of the Marine Mammals Restoration Approaches. Restoration Techniques may be used individually or in combination. Example Restoration Techniques are identified for each of the seven Restoration Approaches listed above and can be found in Appendix 5.D of the PDARP/PEIS and the table starting on page 3 of Module 1 in the Marine Mammals Strategic Framework (DWH NRDA Trustees, 2017c).

### **E.17.3 Project-Level Restoration Objectives**

Project-level restoration objectives should be specific to the resource injuries and clearly specify the desired outcome(s) of the restoration project (15 CFR § 990.55(b)(2)). See Section 2.4.1 of the main body of this Manual for guidance on establishing restoration objectives.

Marine mammal project-level objectives should be tied to the type(s) of activities being conducted as part of the project. Restoration projects are likely to include a combination of

activities and therefore may have more than one objective. Example project-level restoration objectives are provided by Restoration Approach in Section E.17.6. Additional examples are provided in the Marine Mammals Strategic Framework (DWH NRDA Trustees, 2017c).

### E.17.4 Example Drivers

Drivers are outside forces, natural or anthropogenic, that have the potential to influence the outcome(s) of a restoration project. Drivers tend to be large-scale, long-term forces that are not easily controlled at the scale of a single restoration project (Harwell et al., 2016). See Section 2.4.2 for guidance on establishing the conceptual setting for a MAM Plan, including identifying drivers. The following are example drivers that may be applicable to this Restoration Type. This list should not be considered exhaustive; additional drivers may be identified.

- Environmental factors that affect marine mammal distributions and behaviors (e.g., large scale circulation features, such as shifts in the Loop Current; prey distribution; and the distributions of natural and anthropogenic stressors)
- Climate change and associated stressors
- Cultural norms and beliefs about marine mammal behavior (e.g., viewing dolphins as friendly or viewing dolphins as competitors or pest species)
- Cultural and individual beliefs, language barriers, and practices that affect the attitudes of potential partners and other stakeholders toward the restoration program or the restoration project
- Socioeconomic conditions that may affect partner organizations, staff availability, or the attitudes of commercial and recreational fisheries toward the project
- Weather patterns, including major storms that may affect tourism, shipping routes, and commercial and recreational fishing

### E.17.5 Example Uncertainties

Uncertainties or information gaps have the potential to affect adaptive management decisions for individual or multiple restoration projects. These decisions may include how to improve the likelihood of achieving favorable project outcomes or selecting corrective actions in the event a project is not performing as intended. See Section 2.4.3 for guidance on identifying potential sources of uncertainty for a MAM Plan. The following are example drivers that may be applicable to this Restoration Type. This list should not be considered exhaustive; additional uncertainties may be identified.

- Unexplained variance, unidentified patterns, or other knowledge gaps in the system drivers listed above, e.g., the distribution of marine mammals relative to fishing activity, implementation of travel restrictions due to a pandemic
- The relative contributions of different threats to cetacean mortality within the project's area of influence
- The ability to cultivate buy-in from project stakeholders
- Climate change and impacts to cetacean populations
- Severe weather events that may affect the locality of the project, potentially including project equipment and access to project sites
- Logistical constraints affecting suppliers of response equipment and outreach materials

## E.17.6 Guidance on Developing Parameters for Project-Level Performance

When planning a restoration project, TIGs should identify appropriate monitoring parameter(s) based on the type(s) of activities included within the project and the project-level objectives. Many restoration projects implemented under the Marine Mammals Restoration Type are likely to employ unique project objectives. As such, this guidance document has been organized according to example project objectives. Note that core performance monitoring parameters have not been identified for the Marine Mammals Restoration Type, however recommended objective-specific parameters may be similar for projects implemented under different Restoration Approaches if the project objectives are similar.

Objective-specific performance monitoring parameters and parameters for consideration are defined as follows.

1. **Objective-Specific performance monitoring parameters** are parameters that are likely to be applicable to most projects with specific objectives for each Restoration Approach. Objective-specific performance monitoring parameters are those used consistently across projects with similar objectives to facilitate the aggregation of project monitoring results and the evaluation of restoration progress (Appendix 5.E.4 of PDARP/PEIS; DWH NRDA Trustees, 2016). See the Restoration Approach Core and Objective-Specific Performance Monitoring Parameters section of Attachment E of this MAM Manual for details on performance monitoring parameters including definitions, units, and other guidance.
2. **Parameters for consideration** are example parameters based on the relevant Restoration Approach and objective that may or may not apply to a specific project. Based on the project activities and objectives, this list may be helpful in identifying appropriate parameters for project monitoring. Additional adaptive management and/or validation monitoring parameters may be identified by the TIGs. These additional parameters may be helpful for resolving uncertainties, explaining outside drivers, optimizing project implementation, supporting decisions about corrective actions and other adaptive management of the project, and informing the planning of future DWH NRDA restoration projects.

Parameter names are listed in the monitoring guidance tables and parameter details (which provide greater specificity on the type of data being collected) are provided as sub-bullets under the parameter name. Note that not every monitoring parameter has associated parameter details. Where parameters are used across Restoration Types or across resources, the Restoration Type or resource may be provided after the parameter name and separated by a comma. Using the parameter “Abundance” as an example, this parameter is used under Restoration Approaches for multiple resources such as birds and sea turtles. In the Birds guidance table (Section E.18), the parameter is listed as “Abundance, Birds” and may be listed with parameter details in sub-bullets. To indicate where an Implementing Trustee can choose the appropriate targeted injured resource to monitor based on project objectives, a bracketed “[targeted injured resource]” is included after the comma.

## Reduce Commercial Fishery Bycatch through Collaborative Partnerships

### Example Project-Level Restoration Objectives

The following are example project objectives that may be applicable to this Restoration Approach:

- Increase the understanding of risk factors (gear configurations, fishing behavior, or marine mammal behavior) associated with commercial bycatch of marine mammals.
- Convene technical workshops with stakeholders to determine actions, needs, and feasibility analyses that would help reduce bycatch.
- Develop, test, improve, and/or implement conservation measures or programs to reduce bycatch of marine mammals in a specific commercial fishery (i.e., shrimp trawl, menhaden purse seine, gillnet, or crab pot).
- Increase knowledge of proposed conservation measures in targeted stakeholder groups.
- Expand and enhance a fishery observer program or MMSN program by providing training or training materials, equipment or other infrastructure, or funds to increase staffing or infrastructure.
- Develop forensic techniques and training for MMSN to detect, characterize, and document external and internal evidence of commercial fishery interactions (e.g., fishing line markings by type); and provide descriptive information on any gear associated with the strandings.

### Guidance on Parameters for Monitoring Project-Level Performance

The following table presents objective-specific performance monitoring parameters and parameters for consideration, based on the examples of restoration objectives presented above.

**Table E.17.1.** Objective-specific parameters and additional parameters for consideration under the Reduce Commercial Fishery Bycatch through Collaborative Partnerships Restoration Approach

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Develop, test, improve, and/or implement conservation measures or programs to reduce bycatch of marine mammals in a given commercial fishery	<ul style="list-style-type: none"> <li>• Equipment enhancements, marine mammals               <ul style="list-style-type: none"> <li>○ Number acquired or purchased by types</li> <li>○ Number distributed or developed by type</li> <li>○ Number used by type</li> </ul>               For example, this could include gear conversions or modifications             </li> <li>• Conservation improvements, marine mammals               <ul style="list-style-type: none"> <li>○ Number of improvements developed by activity</li> <li>○ Number of improvements evaluated or tested by activity</li> <li>○ Number of improvements implemented by activity</li> <li>○ Percent compliance</li> <li>○ Programs established by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Conservation effort, marine mammals               <ul style="list-style-type: none"> <li>○ Funds provided by activity</li> <li>○ Number of participants or organizations</li> <li>○ Spatial coverage by activity</li> <li>○ Percent coverage</li> </ul> </li> <li>• Project point locations</li> </ul>

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Expand and enhance a fishery observer program or Marine Mammal Stranding Network MMSN program by providing training or training materials, equipment or other infrastructure, or funds to increase staffing	<ul style="list-style-type: none"> <li>• Conservation effort, marine mammals               <ul style="list-style-type: none"> <li>○ Funds provided by activity</li> <li>○ Hours by activity</li> <li>○ Number of participants or organizations</li> <li>○ Number of trainees</li> <li>○ Number with adequate training</li> <li>○ Trainings offered by activity</li> </ul> </li> <li>• Conservation improvements, marine mammals               <ul style="list-style-type: none"> <li>○ Programs established by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Conservation effort, marine mammals               <ul style="list-style-type: none"> <li>○ Percent coverage</li> <li>○ Spatial coverage by activity</li> </ul> </li> <li>• Project point locations</li> <li>• Stranding and rehab, marine mammals               <ul style="list-style-type: none"> <li>○ Injury type                   <ul style="list-style-type: none"> <li>For example, number with hook and line gear injuries</li> </ul> </li> <li>○ Increase in ability to detect fishery interactions</li> </ul> </li> </ul>
Increase the understanding of the spatiotemporal distribution of free swimming, bycaught, stranded, injured, or entangled cetaceans relative to commercial fishing operations	<ul style="list-style-type: none"> <li>• Bycatch, marine mammals               <ul style="list-style-type: none"> <li>○ Caught by taxon</li> <li>○ Landed by taxon</li> <li>○ Number reported</li> <li>○ Released alive by taxon</li> <li>○ Released dead by taxon</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Identification of marine mammal behaviors that increase risk of bycatch</li> <li>• Project point locations</li> <li>• Stranding and rehab, marine mammals               <ul style="list-style-type: none"> <li>○ Injury type                   <ul style="list-style-type: none"> <li>For example, proportion of strandings with evidence of fishery interaction</li> </ul> </li> </ul> </li> </ul>
Increase knowledge of proposed conservation measures in targeted stakeholder groups	<ul style="list-style-type: none"> <li>• Education or outreach effort               <ul style="list-style-type: none"> <li>○ Events held or attended</li> <li>○ Materials produced or distributed by type</li> <li>○ Number contacted</li> <li>○ Number educated</li> <li>○ Number of participants or organizations</li> <li>○ Number of recipients</li> </ul> </li> <li>• Education or outreach effectiveness               <ul style="list-style-type: none"> <li>○ Percent Change in Awareness</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Education or outreach effectiveness               <ul style="list-style-type: none"> <li>○ Percent Change in Survey Responses</li> <li>○ Survey Reliability and Validity</li> <li>○ Survey Response Rate</li> </ul> </li> <li>• Project point locations</li> </ul>

## Reduce Injury and Mortality of Bottlenose Dolphins from Hook-and-Line Fishing Gear

### Example Project-Level Restoration Objectives

- Characterize the recreational fisheries, including hook-and-line anglers fishing from piers and vessels (both recreational and for-hire), to determine the frequency and geographic extent of dolphin interactions.
- Characterize anglers' attitudes towards dolphins and dolphin interactions with their gear and identify ways to reduce interactions.
- Characterize and evaluate hook-and-line fishing gear found on or in stranded bottlenose dolphins and associated injuries to determine gear factors, types, and characteristics that increase the risk of interactions resulting in death or serious injury (e.g., hook-and-line gear risk matrix).
- Examine the feasibility and potential long-term effectiveness of gear modifications and deterrence measures to safely prevent dolphin depredation of gear and scavenging on discarded bycatch.

### Guidance on Parameters for Monitoring Project-Level Performance

The following table presents objective-specific performance monitoring parameters and parameters for consideration, based on the examples of restoration objectives presented above.

**Table E.17.2.** Objective specific parameters and additional parameters for consideration under the Reduce Injury and Mortality of Bottlenose Dolphins from Hook-and-Line Fishing Gear Restoration Approach

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Characterize the recreational fisheries, including hook-and-line anglers fishing from piers and vessels (both recreational and for-hire), to determine the frequency and geographic extent of dolphin interactions and/or attitudes towards dolphins and dolphin interactions with their gear.	<ul style="list-style-type: none"> <li>• Samples, marine mammals               <ul style="list-style-type: none"> <li>○ Sites assessed by activity</li> </ul> </li> <li>• Data utility</li> </ul>	<ul style="list-style-type: none"> <li>• Education or outreach effectiveness               <ul style="list-style-type: none"> <li>○ Survey reliability and validity</li> <li>○ Survey response rate</li> </ul> </li> <li>• Education or outreach effort               <ul style="list-style-type: none"> <li>○ Events held or attended</li> <li>○ Materials produced or distributed by type</li> <li>○ Number contacted</li> <li>○ Number educated</li> <li>○ Number of recipients</li> </ul> </li> <li>• Project point locations</li> </ul>
Determine the frequency of hook-and-line interactions and entanglements and gear factors, types, and characteristics that increase the risk of interactions resulting in death or serious injury.	<ul style="list-style-type: none"> <li>• Samples, marine mammals               <ul style="list-style-type: none"> <li>○ Sites assessed by activity</li> </ul> </li> </ul> <p>For example, the number of piers observed</p>	<ul style="list-style-type: none"> <li>• Data utility</li> <li>• Project point locations</li> </ul>

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Develop, test, improve, and implement conservation measures or programs to reduce hook and line injury and mortality.	<ul style="list-style-type: none"> <li>• Conservation improvements, marine mammals               <ul style="list-style-type: none"> <li>○ Number of improvements developed by activity</li> <li>○ Number of improvements evaluated or tested by activity</li> <li>○ Number of improvements implemented by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Conservation improvements, marine mammals               <ul style="list-style-type: none"> <li>○ Percent compliance</li> <li>○ Location of installation</li> </ul>               For example, locations of recycling receptacles, equipment cache, etc.             </li> <li>• Debris removed               <ul style="list-style-type: none"> <li>○ Receptacles installed</li> <li>○ By source</li> <li>○ By type</li> </ul> </li> <li>• Project point locations</li> </ul>
Determine the potential long-term effectiveness of gear modifications and deterrence measures to safely prevent dolphin depredation of gear and scavenging on discarded bycatch.	<ul style="list-style-type: none"> <li>• Samples, marine mammals               <ul style="list-style-type: none"> <li>○ Sites assessed by activity</li> </ul> </li> <li>• Data utility</li> </ul>	<ul style="list-style-type: none"> <li>• Conservation improvements, marine mammals               <ul style="list-style-type: none"> <li>○ Number of improvements developed by activity</li> <li>○ Number of improvements evaluated or tested by activity</li> <li>○ Number of improvements implemented by activity</li> </ul> </li> <li>• Education or outreach effectiveness               <ul style="list-style-type: none"> <li>○ Survey reliability and validity</li> <li>○ Survey response rate</li> <li>○ Education or outreach effort</li> <li>○ Events held or attended</li> <li>○ Materials produced or distributed by type</li> <li>○ Number contacted</li> <li>○ Number educated</li> <li>○ Number of recipients</li> </ul> </li> <li>• Equipment enhancements, marine mammals</li> <li>• Project point locations</li> </ul>

## Increase Marine Mammal Survival through Better Understanding of Causes of Illness and Death as well as Early Detection and Intervention of Anthropogenic and Natural Causes

### Example Project-Level Restoration Objectives

- Improve MMSN capacity and capability by supporting personnel, equipment caches, resources, training, and data collection quality and accessibility for rapid and routine-response to live or dead stranded, injured, entangled, or out of habitat marine mammals
- Enhance mortality examinations by improving the timeliness, efficiency, expertise, and capacity to perform necropsies and collect data on illness and cause of death
- Improve capabilities for active surveillance to enhance detection of live or dead stranded animals and develop real-time warnings of out of habitat cetaceans and techniques to prevent, mitigate, or intervene

- Develop and implement a regionwide conservation medicine program and/or collaboration to identify illness and mortality risks including the development of triage, assessment, and health intervention tools and techniques for implementation
- Develop, distribute, and maintain regionwide standards and protocols for the MMSN and conservation medicine community to implement during live and dead cetacean response and research, as well as support the conservation medicine community infrastructure

### Guidance on Parameters for Monitoring Project-Level Performance

The following table presents objective-specific performance monitoring parameters and parameters for consideration, based on the examples of restoration objectives presented above.

**Table E.17.3.** Objective specific parameters and additional parameters for consideration under the Increase Marine Mammal Survival through Better Understanding of Causes of Illness and Death as well as Early Detection and Intervention of Anthropogenic and Natural Causes Restoration Approach

Project-specific Objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Improve MMSN capacity and capability by supporting personnel, equipment caches, resources, training, and data collection quality and accessibility for rapid and routine-response to threats to marine mammals	<ul style="list-style-type: none"> <li>• Conservation effort, marine mammals               <ul style="list-style-type: none"> <li>○ Funds provided by activity</li> <li>○ Hours by activity</li> <li>○ Percent coverage</li> <li>○ Spatial coverage by activity</li> </ul> </li> <li>• Conservation improvements, marine mammals               <ul style="list-style-type: none"> <li>○ Programs established by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Conservation improvements, marine mammals               <ul style="list-style-type: none"> <li>○ Location of installation</li> </ul>               For example, accessibility of caches, personnel stations, facilities, etc.             </li> <li>• Equipment enhancements, marine mammals               <ul style="list-style-type: none"> <li>○ Equipment cache locations</li> </ul> </li> <li>• Project point locations</li> <li>• Stranding and rehab, marine mammals               <ul style="list-style-type: none"> <li>○ Response time</li> </ul> </li> </ul>
Improve capabilities for active surveillance to enhance detection of live and dead stranded animals and develop real-time warnings of presence of cetaceans that are out of habitat and develop techniques to prevent, mitigate, or intervene in these situations	<ul style="list-style-type: none"> <li>• Conservation effort, marine mammals               <ul style="list-style-type: none"> <li>○ Number of trainees</li> <li>○ Number with adequate training</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Conservation improvements, marine mammals               <ul style="list-style-type: none"> <li>○ Programs established by activity</li> </ul> </li> <li>• Project point locations</li> <li>• Stranding and rehab, marine mammals</li> </ul>
Develop and implement a region- wide conservation medicine program and/or collaboration to identify illness and mortality risk including the development of triage, assessment, and health intervention tools and techniques for implementation	<ul style="list-style-type: none"> <li>• Conservation effort, marine mammals               <ul style="list-style-type: none"> <li>○ Number of trainees</li> <li>○ Number with adequate training</li> </ul> </li> <li>• Stranding and rehab, marine mammals               <ul style="list-style-type: none"> <li>○ Injury type</li> <li>○ Number admitted by taxon</li> <li>○ Number by outcome</li> <li>○ Number rehabilitated by taxon</li> <li>○ Number stranded by taxon</li> <li>○ Proportion released</li> <li>○ Response success rate</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Conservation improvements, marine mammals               <ul style="list-style-type: none"> <li>○ Programs established by activity</li> <li>○ Number of improvements developed by activity</li> </ul> </li> <li>• Project point locations</li> </ul>



Project-specific Objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Enhance mortality examinations by improving the timeliness, efficiency, expertise, and capacity to perform necropsies and collect data on illness and cause of death	<ul style="list-style-type: none"> <li>• Conservation effort, marine mammals               <ul style="list-style-type: none"> <li>○ Number of trainees</li> <li>○ Number with adequate training</li> </ul> </li> <li>• Stranding and rehab, marine mammals</li> </ul>	<ul style="list-style-type: none"> <li>• Necropsies, marine mammals               <ul style="list-style-type: none"> <li>○ Proportion of strandings necropsied</li> </ul> </li> </ul> <p>For example, proportion of code 2 or 3 stranded cetaceans for which complete necropsies are performed</p> <ul style="list-style-type: none"> <li>• Project point locations</li> </ul>

## Measure Noise to Improve Knowledge and Reduce Impacts of Anthropogenic Noise on Marine Mammals

### Example Project-Level Restoration Objectives

- Conduct a risk assessment to identify priority areas for implementing restoration actions that prevent or reduce noise impacts to cetaceans.
- Investigate, develop, and incentivize noise-reducing technologies (e.g., marine vibroseis and implementing Green Marine noise indicators at Gulf ports).
- Establish a long-term, standardized, and calibrated acoustic monitoring network that fills current gaps and monitors priority areas utilized by priority species, including collecting baseline data and conducting long-term monitoring to measure the effectiveness of noise- reduction mitigation.

### Guidance on Parameters for Monitoring Project-Level Performance

The following table presents objective-specific performance monitoring parameters and parameters for consideration, based on the examples of restoration objectives presented above.

**Table E.17.4.** Objective specific parameters and additional parameters for consideration under the Measure Noise to Improve Knowledge and Reduce Impacts of Anthropogenic Noise on Marine Mammals Restoration Approach

Project-specific Objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Conduct a risk assessment to identify priority areas for implementing restoration actions that prevent or reduce noise impacts to cetaceans.	<ul style="list-style-type: none"> <li>• Data utility</li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Establish a long-term, standardized, and calibrated acoustic monitoring network that fills current gaps and monitors priority areas utilized by priority species	<ul style="list-style-type: none"> <li>• Data utility</li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Investigate, develop, and incentivize noise-reducing technologies (e.g., marine vibroseis and implementing Green Marine noise indicators at Gulf ports).	<ul style="list-style-type: none"> <li>• Conservation improvements, marine mammals               <ul style="list-style-type: none"> <li>○ Number of improvements developed by activity</li> <li>○ Number of improvements evaluated or tested by activity</li> <li>○ Number of improvements implemented by activity</li> </ul> </li> </ul> <p>For example, noise reducing technologies</p>	<ul style="list-style-type: none"> <li>• Conservation effort, marine mammals</li> <li>• Conservation improvements, marine mammals               <ul style="list-style-type: none"> <li>○ Percent compliance</li> </ul> </li> <li>• Project point locations</li> </ul>

## Reduce Injury, Harm, and Mortality to Bottlenose Dolphins by Reducing Illegal Feeding and Harassment Activities

### Example Project-Level Restoration Objectives

- Determine the magnitude and extent of illegal feeding and harassment activities by user group and location, and develop and implement targeted outreach and educational campaigns and tools for high-priority groups (e.g., commercial and recreational fishing operations and commercial ecotours).
- Evaluate, augment, and update existing responsible viewing guidelines (e.g., jet skis, ecotourism vessels) to ensure they are scientifically based and provide the maximum potential conservation benefit to dolphins.
- Develop and implement targeted, comprehensive education and outreach tools and strategies to reduce illegal feeding and harassment activities by user group.
- Evaluate existing social science studies and determine appropriate educational messages and campaigns to reduce harassment and illegal feeding of dolphins.

### Guidance on Parameters for Monitoring Project-Level Performance

The following table presents objective-specific performance monitoring parameters and parameters for consideration, based on the examples of restoration objectives presented above.

**Table E.17.5.** Objective specific parameters and additional parameters for consideration under the Reduce Injury, Harm, and Mortality to Bottlenose Dolphins by Reducing Illegal Feeding and Harassment Activities Restoration Approach

Project-specific Objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Determine the magnitude and extent of illegal feeding activities by user group and location, and develop and implement targeted outreach and educational campaigns and tools for high-priority groups (e.g., commercial bait boats, commercial fishing discards, recreational anglers at cleaning stations)	<ul style="list-style-type: none"> <li>• Conservation improvements, marine mammals</li> <li>• Education or outreach effort</li> </ul>	<ul style="list-style-type: none"> <li>• Conservation effort, marine mammals</li> <li>• Project point locations</li> </ul>
Evaluate, augment, and update existing responsible viewing guidelines (e.g., jet skis, ecotourism vessels) to ensure they are scientifically based and provide the maximum potential conservation benefit to dolphins	<ul style="list-style-type: none"> <li>• Conservation improvements, marine mammals</li> </ul>	<ul style="list-style-type: none"> <li>• Conservation effort, marine mammals</li> <li>• Education or outreach effectiveness</li> <li>• Education or outreach effort</li> <li>• For example, obtaining feedback on potential effectiveness of updated guidelines</li> <li>• Project point locations</li> </ul>
Evaluate existing social science studies, determine appropriate educational messages and implement campaigns to reduce harassment and illegal feeding of dolphins	<ul style="list-style-type: none"> <li>• Conservation effort, marine mammals</li> <li>• Education or outreach effort               <ul style="list-style-type: none"> <li>○ Materials produced or distributed by type</li> </ul> </li> <li>• Number educated</li> </ul>	<ul style="list-style-type: none"> <li>• Education or outreach effectiveness               <ul style="list-style-type: none"> <li>○ Number of survey respondents</li> </ul> </li> <li>• Project point locations</li> </ul>

## Reduce Marine Mammal Takes through Enhanced State Enforcement Related to the Marine Mammal Protection Act

### Example Project-Level Restoration Objectives

- Establish collaborative partnerships to develop and implement a consistent and effective regionwide plan to train enforcement agency personnel on MMPA-related topics (e.g., training materials and annual in-person trainings).
- Provide funding for additional state law enforcement personnel hours and related resources (e.g., vessels, supplies) to maintain consistent and sustained enforcement efforts.
- Conduct standardized trainings for enforcement personnel on recurring and emerging issues with an emphasis on unique local threats and issues.

### Guidance on Parameters for Monitoring Project-Level Performance

The following table presents objective-specific performance monitoring parameters and parameters for consideration, based on the examples of restoration objectives presented above.

**Table E.17.6.** Objective specific parameters and additional parameters for consideration under the Reduce Marine Mammal Takes through Enhanced State Enforcement Related to the MMPA Restoration Approach

Project-specific Objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Establish collaborative partnerships to develop and implement a consistent and effective region-wide plan to train enforcement agency personnel on MMPA-related topics (e.g., training materials and annual in-person trainings)	<ul style="list-style-type: none"> <li>• Conservation effort, marine mammals               <ul style="list-style-type: none"> <li>○ Number of trainees</li> <li>○ Number with adequate training</li> </ul> </li> <li>• Conservation improvements, marine mammals               <ul style="list-style-type: none"> <li>○ Number of improvements developed by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Education or outreach effort               <ul style="list-style-type: none"> <li>○ Partnerships developed</li> </ul> </li> <li>• Equipment enhancements, marine mammals               <ul style="list-style-type: none"> <li>○ Equipment cache locations</li> </ul> </li> <li>• Project point locations</li> </ul>
Provide funding for additional state law enforcement personnel hours and related resources (e.g., vessels, supplies) to maintain consistent and sustained enforcement efforts	<ul style="list-style-type: none"> <li>• Conservation effort, marine mammals               <ul style="list-style-type: none"> <li>○ Number of trainees</li> <li>○ Number with adequate training</li> </ul> </li> <li>• Conservation improvements, marine mammals               <ul style="list-style-type: none"> <li>○ Programs established by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Conservation effort, marine mammals               <ul style="list-style-type: none"> <li>○ Spatial coverage by activity</li> <li>○ Percent coverage</li> </ul> </li> <li>• Conservation improvements, marine mammals               <ul style="list-style-type: none"> <li>○ For example, increased enforcement</li> </ul> </li> <li>• Project point locations</li> </ul>
Conduct standardized trainings for enforcement personnel on recurring and emerging issues with an emphasis on unique local threats and issues	<ul style="list-style-type: none"> <li>• Conservation effort, marine mammals               <ul style="list-style-type: none"> <li>○ Hours by activity</li> <li>○ Number of participants or organizations</li> <li>○ Number of trainees</li> <li>○ Number with adequate training</li> <li>○ Trainings offered by activity</li> </ul> </li> <li>• Conservation improvements, marine mammals               <ul style="list-style-type: none"> <li>○ Utility of improvements</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Conservation effort, marine mammals               <ul style="list-style-type: none"> <li>○ Spatial coverage by activity</li> <li>○ Percent coverage</li> </ul> </li> <li>• Project point locations</li> </ul>

## Reduce Injury and Mortality of Marine Mammals from Vessel Collisions

### Example Project-Level Restoration Objectives

- Conduct a risk assessment using vessel traffic characterizations, marine mammal distributions, and avoidance behaviors to identify vessel interaction hot spots to target restoration efforts.
- Develop vessel collision risk-reduction measures for identified hot spots.

### Guidance on Parameters for Monitoring Project-Level Performance

The following table presents objective-specific performance monitoring parameters and parameters for consideration, based on the examples of restoration objectives presented above.

**Table E.17.7.** Objective specific parameters and additional parameters for consideration under the Reduce Injury and Mortality of Marine Mammals from Vessel Collisions Restoration Approach

Project-specific objective	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Conduct a risk assessment using vessel traffic characterizations, marine mammal distributions, and avoidance behaviors to identify vessel interaction hot spots to target restoration efforts	<ul style="list-style-type: none"> <li>• Data utility</li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Develop vessel collision risk- reduction measures for hot spots	<ul style="list-style-type: none"> <li>• Conservation improvements, marine mammals               <ul style="list-style-type: none"> <li>○ Number of improvements developed by activity</li> <li>○ Number of improvements evaluated or tested by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Conservation effort, marine mammals               <ul style="list-style-type: none"> <li>○ Funds provided by activity. For example, incentivizing refits</li> </ul> </li> <li>• Conservation improvements, marine mammals               <ul style="list-style-type: none"> <li>○ Percent compliance</li> </ul> </li> <li>• Project point locations</li> </ul>

## E.18 Birds Restoration Type: Monitoring Guidance



*This guidance is intended to promote consistency in data collection among similar types of projects and allow for future analysis across TIGs and Restoration Types, (Section 10.6.2 of SOP; DWH NRDA Trustees, 2021). This guidance may also assist the TIGs by providing recommended methodologies for monitoring restoration projects, saving time and money spent developing suitable monitoring protocols for individual restoration projects. If adjustments from this monitoring guidance are needed for a particular project, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). Project teams within each TIG will identify parameters applicable to the objectives for each individual restoration project when developing the project MAM Plan. In addition to the project monitoring guidance identified in this MAM Manual, specific monitoring may be required to comply with permits granted by regulatory agencies. The TIGs are not restricted from including additional parameters if applicable, and other project monitoring that may be needed for specific projects should be determined by the TIGs. The Cross-TIG MAM work group developed this monitoring guidance by following the process described in the main body of this report.*

The Cross-TIG MAM work group has developed monitoring guidance, including core and recommended monitoring parameters and associated measurement units and data collection methods, for the Bird Restoration Approach, to promote consistency in data collection among similar types of projects and allow for future analysis across TIGs and Restoration Types (Section 10.6.2 of SOP; DWH NRDA Trustees, 2021). This guidance may also assist the TIGs by providing recommended methodologies for monitoring restoration projects, saving time and money spent developing suitable monitoring protocols for individual restoration projects. If adjustments from this monitoring guidance are needed for a project, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021).

The monitoring parameters recommended in this guidance document are further detailed in Section E.4 which includes guidance on measurement units and monitoring methods. Some parameters include guidance on monitoring locations, frequencies, sampling durations, and potential analyses where appropriate.

### E.18.1 Bird Restoration Approaches

Restoration Approaches are general restoration actions the Trustees identified for each of the Restoration Types. Restoration Approaches describe options for implementation, and some include examples for specific methods (Appendix 5.D of PDARP/PEIS; DWH NRDA Trustees, 2016). The Strategic Framework for Bird Restoration Activities (DWH NRDA Trustees, 2017d) identifies three Restoration Approaches under the Bird Restoration Type.

1. Restore and conserve bird nesting and foraging habitat
2. Establish or re-establish breeding colonies
3. Prevent incidental bird mortality

### E.18.2 Bird Restoration Techniques

The PDARP/PEIS (DWH NRDA Trustees, 2016) and the Strategic Framework for Bird Restoration Activities (DWH NRDA Trustees, 2017d) identify Bird Restoration Techniques, which are specific restoration actions the Trustees identified for each of the Bird Restoration Approaches. Restoration Techniques may be used individually or in combination. Example Restoration Techniques are identified for each of the three Restoration Approaches listed above and can be found in Appendix 5.D of the PDARP/PEIS and the table on page 8 of Module 4 in the Bird Strategic Framework.

The following sections are intended to provide guidance to the TIGs as they develop MAM Plans for restoration projects, as appropriate. Specifically, it provides:

- Guidance on example restoration drivers and example uncertainties
- A review of the three Bird Restoration Approaches and Techniques and guidance on parameters for project-level performance monitoring for each.

### E.18.3 Example Drivers

Drivers are outside forces, natural or anthropogenic, that have the potential to influence the outcome(s) of a restoration project. Drivers tend to be large-scale, long-term forces that are not easily controlled at the scale of a single restoration project (Harwell et al., 2016). See Section 2.4.2 for guidance on establishing the conceptual setting for a MAM Plan, including identifying drivers. The following are example drivers that may be applicable to this Restoration Approach. This list should not be considered exhaustive; additional drivers may be identified.

- Sea level rise
- Extreme weather events
- Predators
- Forage base
- Human disturbance.

### E.18.4 Example Uncertainties

Uncertainties or information gaps have the potential to affect adaptive management decisions for individual or multiple restoration projects. These decisions may include how to improve the likelihood of achieving favorable project outcomes or selecting corrective actions in the event a

project is not performing as intended. See Section 2.4.3 for guidance on identifying potential sources of uncertainty for a MAM Plan. The following are example uncertainties that may be applicable to this Restoration Approach. This list should not be considered exhaustive; additional uncertainties may be identified.

- Occurrence of sufficient numbers of adults of the target bird species to support a breeding colony
- Response of target birds to the restoration techniques
- Occurrence of forage base to support a breeding colony
- Return rates to breeding colonies
- Climate variability, such as changes in extreme weather events, sea level rise, changes in freshwater inflows, etc. and the resulting effects on bird survival and reproductive success.

### E.18.5 Guidance on Developing Parameters for Project-Level Performance

This guidance document identifies both core performance monitoring parameters and additional parameters for consideration that may apply for each Restoration Approach:

1. **Core performance monitoring parameters** are those used consistently across projects to facilitate the aggregation of project monitoring results and the evaluation of restoration progress for each Restoration Approach (Appendix 5.E.4 of PDARP/PEIS; DWH NRDA Trustees, 2016). See the Restoration Approach Core and Objective-Specific Performance Monitoring Parameters section of Attachment E of this MAM Manual for details on the core performance monitoring parameters including definitions, units, and other guidance.
2. **Additional parameters for consideration** are example parameters based on the relevant Restoration Approach and Technique that may or may not apply to a specific project. Based on the project activities and objectives, this list may be helpful in identifying appropriate parameters for project monitoring. Additional adaptive management and/or validation monitoring parameters may be identified by the TIGs. These additional parameters may be helpful for resolving uncertainties, explaining outside drivers, optimizing project implementation, supporting decisions about corrective actions and other adaptive management of the project, and informing the planning of future DWH NRDA restoration projects.

Tables E.18.1 through E.18.4 should not be considered exhaustive, and other parameters may be considered, as appropriate. See Section E.4 of Attachment E of this MAM Manual for details on the core performance monitoring parameters including definitions, units, and other guidance.

Parameter names are listed in the monitoring guidance tables and parameter details (which provide greater specificity on the type of data being collected) are provided as sub-bullets under the parameter name. Note that not every monitoring parameter has associated parameter details. Where parameters are used across Restoration Types or across resources, the Restoration Type or resource may be provided after the parameter name and separated by a comma. Using the parameter “Abundance” as an example, this parameter is used under



Restoration Approaches for multiple resources such as birds and sea turtles. In the Birds guidance table (Section E.18), the parameter is listed as “Abundance, Birds” and may be listed with parameter details in sub-bullets. To indicate where an Implementing Trustee can choose the appropriate targeted injured resource to monitor based on project objectives, a bracketed “[targeted injured resource]” is included after the comma.

### **Restore and Conserve Bird Nesting and Foraging Habitat**

The Strategic Framework for Bird Restoration Activities (DWH NRDA Trustees, 2017d) identified 20 Restoration Techniques for this Bird Restoration Approach. Twelve of these techniques are identified as Restoration Techniques for other injured resources. Therefore, bird-specific monitoring guidance for these Restoration Techniques is provided in the monitoring guidance documents for other Restoration Approaches. Please refer to the appropriate appendices (in parenthesis) in the MAM Manual for bird-specific monitoring guidance.

- Create, restore, or enhance coastal wetlands through placement of dredged material (Section E.5)
- Construct groins, breakwaters, or use sediment bypass methods (Section E.5)
- Backfill canals (Section E.5)
- Restore or construct barrier and coastal islands and headlands via placement of dredged sediments (Section E.6)
- Plant vegetation on dunes and back-barrier marshes (Section E.7)
- Renourish beaches through sediment addition (Section E.7)
- Restore dune and beach systems through the use of passive techniques to trap sand (Section E.7)
- Acquire lands for conservation (habitat acquisition through fee-title and/or easement purchase) (Section E.8)
- Develop and implement management actions in conservation areas and/or restoration projects (Section E.8)
- Restore hydrologic connections to enhance coastal habitats (Section E.9)
- Backfill scars with sediment (Section E.10)
- Revegetate SAV beds via propagation and/or transplanting (Section E.10)
- Protect SAV beds with buoys, signage, and/or other protective measures (Section E.10)
- Protect and Enhance SAV through wave attenuation structures (Section E.10)
- Create or enhance oyster shell rakes and beds (Section E.11)

Bird monitoring guidance for the following techniques is provided in this document:

- Enhance habitat through vegetation management
- Nesting and foraging area stewardship
- Increase availability of foraging habitat at inland, managed moist-soil impoundments, agricultural fields, aquaculture ponds, and wetlands
- Provide or enhance artificial nest sites
- Restore or create riverine islands

**Table E.18.1.** Core performance monitoring parameters and additional parameters for consideration under the Restore and Conserve Bird Nesting and Foraging Habitat Restoration Approach

Core performance monitoring parameters	Parameters for consideration (as appropriate)
<ul style="list-style-type: none"> <li>• Abundance, birds</li> <li>• Area</li> <li>• Density, birds</li> <li>• Species composition, birds</li> </ul>	<ul style="list-style-type: none"> <li>• Bird health</li> <li>• Community composition, birds</li> <li>• Habitat quality</li> <li>• Reproduction, birds</li> <li>• Project point locations</li> <li>• Survival, birds</li> </ul>

**Table E.18.2.** Performance monitoring parameters and additional parameters for consideration for projects with specific restoration techniques. Appropriate parameters would be collected in addition to the parameters listed in Table E.18.1.

Technique	Performance monitoring parameters	Parameters for consideration (as appropriate)
Enhance habitat through vegetation management	<ul style="list-style-type: none"> <li>• Conservation improvements, birds               <ul style="list-style-type: none"> <li>○ Number implemented by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Habitat quality</li> <li>• Reproduction, birds</li> </ul>
Nesting and foraging area stewardship	<ul style="list-style-type: none"> <li>• Conservation improvements, birds               <ul style="list-style-type: none"> <li>○ Number implemented by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Habitat quality</li> <li>• Reproduction, birds</li> </ul>
Increase availability of foraging habitat at inland, managed moist soil impoundments, agricultural fields, aquaculture ponds, and wetlands	<ul style="list-style-type: none"> <li>• Conservation improvements, birds               <ul style="list-style-type: none"> <li>○ Number implemented by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Habitat quality</li> </ul>
Provide or enhance artificial nest sites	<ul style="list-style-type: none"> <li>• Abundance, birds               <ul style="list-style-type: none"> <li>○ Nest count by taxon</li> </ul> </li> <li>• Reproduction, birds               <ul style="list-style-type: none"> <li>○ Nest occupancy</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Reproduction, birds</li> </ul>
Restore or create riverine islands	<ul style="list-style-type: none"> <li>• Area</li> <li>• Elevation, habitat</li> </ul>	<ul style="list-style-type: none"> <li>• Bird health</li> <li>• Habitat quality</li> <li>• Reproduction, birds               <ul style="list-style-type: none"> <li>○ Survival, birds</li> </ul> </li> </ul>

### Establish or Re-establish Breeding Colonies

The following is an example Restoration Technique included in the PDARP/PEIS for this Restoration Approach. This list should not be considered exhaustive; additional Restoration Techniques may be developed and/or identified.

- Use acoustic vocalization playbacks and decoys to attract breeding adults to restoration sites

**Table E.18.3.** Core performance monitoring parameters and additional parameters for consideration under the Establish or Re-Establish Breeding Colonies Restoration Approach

Core performance monitoring parameters	Parameters for consideration (as appropriate)
<ul style="list-style-type: none"> <li>• Abundance, birds               <ul style="list-style-type: none"> <li>○ Nest count by taxon</li> </ul> </li> <li>• Area</li> </ul>	<ul style="list-style-type: none"> <li>• Abundance, other</li> <li>• Density, birds</li> <li>• Elevation, habitat</li> <li>• Incidence of overwash</li> <li>• Reproduction, birds</li> <li>• Project point locations</li> <li>• Species composition, other</li> </ul>

### Prevent Incidental Bird Mortality

The following are example Restoration Techniques included in the PDARP/PEIS for this Restoration Approach. This list should not be considered exhaustive; additional Restoration Techniques may be developed and/or identified.

- Remove derelict fishing gear
- Support bird rehabilitation centers
- Reduce collisions by modifying lighting and or lighting patterns on oil and gas platforms
- Reduce seabird bycatch through voluntary fishing gear and/or technique modification

**Table E.18.4.** Core performance monitoring parameters and additional parameters for consideration under the Prevent Incidental Bird Mortality Approach

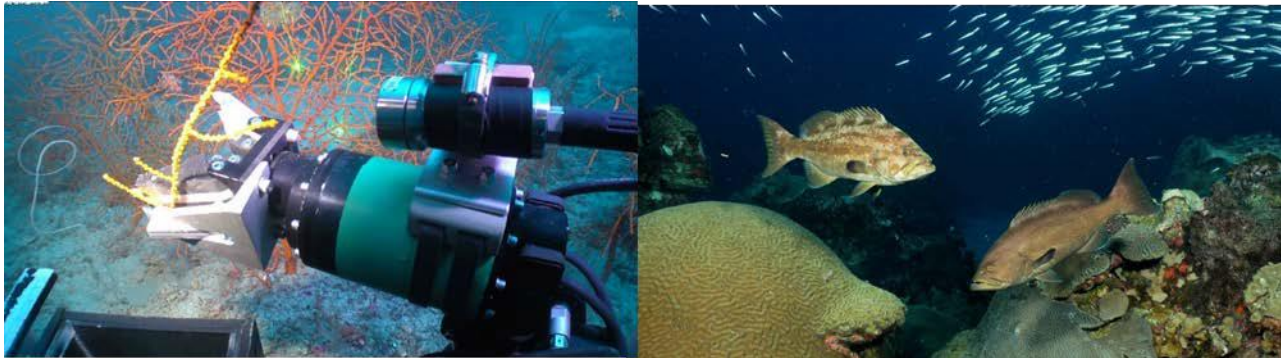
Technique	Core performance monitoring parameters	Parameters for consideration (as appropriate)
Remove derelict fishing gear	<ul style="list-style-type: none"> <li>• Debris removed               <ul style="list-style-type: none"> <li>○ By type</li> <li>○ Receptacles installed*</li> </ul> </li> <li>• Conservation effort, birds</li> </ul>	<ul style="list-style-type: none"> <li>• Area</li> <li>• Conservation improvements, birds               <ul style="list-style-type: none"> <li>○ Number implemented by activity</li> </ul> </li> <li>• Education or outreach effort               <ul style="list-style-type: none"> <li>○ Materials produced or distributed by type</li> </ul> </li> <li>• Project point locations</li> </ul>

Technique	Core performance monitoring parameters	Parameters for consideration (as appropriate)
Support bird rehabilitation centers	<ul style="list-style-type: none"> <li>• Stranding and rehab, birds               <ul style="list-style-type: none"> <li>○ Injury type</li> <li>○ Number rescued by taxon</li> <li>○ Proportion released</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Abundance, birds               <ul style="list-style-type: none"> <li>○ Hatchling count by taxon</li> </ul> </li> <li>• Conservation effort, birds               <ul style="list-style-type: none"> <li>○ FTE positions funded by activity</li> <li>○ Hours by activity</li> <li>○ Number of trainees</li> <li>○ Trainings offered by type</li> </ul> </li> <li>• Conservation improvements, birds               <ul style="list-style-type: none"> <li>○ Number developed by activity</li> <li>○ Number implemented by activity</li> </ul> </li> <li>• Education or outreach effort               <ul style="list-style-type: none"> <li>○ Materials produced or distributed by type</li> </ul> </li> <li>• Equipment enhancements, birds               <ul style="list-style-type: none"> <li>○ Number acquired or purchased by type</li> <li>○ Number distributed or deployed by type</li> </ul> </li> <li>• Necropsies, birds               <ul style="list-style-type: none"> <li>○ Number conducted by taxon</li> </ul> </li> <li>• Project point locations</li> <li>• Stranding and rehab, birds               <ul style="list-style-type: none"> <li>○ Response rate</li> <li>○ Response time</li> </ul> </li> <li>• Survival, birds</li> </ul>
Reduce collisions by modifying lighting and/or lighting patterns on oil and gas platforms	<ul style="list-style-type: none"> <li>• Conservation improvements, birds               <ul style="list-style-type: none"> <li>○ Number of participants or organizations</li> </ul> </li> <li>• Equipment enhancements, birds -               <ul style="list-style-type: none"> <li>○ Light modifications</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Area               <ul style="list-style-type: none"> <li>○ Project influence</li> </ul> </li> <li>• Conservation improvements, birds               <ul style="list-style-type: none"> <li>○ Number developed by activity</li> <li>○ Percent compliance</li> </ul> </li> <li>• Equipment enhancements, birds               <ul style="list-style-type: none"> <li>○ Number used by type</li> <li>○ Proportion using enhanced equipment</li> </ul> </li> <li>• Number of bird collisions and/or mortality</li> <li>• Number and/or duration of circulation events observed</li> <li>• Project point locations</li> </ul>

Technique	Core performance monitoring parameters	Parameters for consideration (as appropriate)
Reduce seabird bycatch through voluntary fishing gear and/or technique modification	<ul style="list-style-type: none"> <li>• Equipment enhancements, birds               <ul style="list-style-type: none"> <li>○ Number developed by type</li> <li>○ Number evaluated or tested by type</li> <li>○ Number used by type</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Bycatch, birds               <ul style="list-style-type: none"> <li>○ Caught by taxon</li> </ul> </li> <li>• Conservation effort, birds               <ul style="list-style-type: none"> <li>○ Number of trainees</li> <li>○ Trainings offered by type</li> </ul> </li> <li>• Conservation improvements, birds               <ul style="list-style-type: none"> <li>○ Incentives provided</li> <li>○ Percent compliance</li> </ul> </li> <li>• Education or outreach effort               <ul style="list-style-type: none"> <li>○ Materials produced or distributed by type</li> <li>○ Number contacted</li> <li>○ Number educated</li> <li>○ Number of recipients</li> </ul> </li> <li>• Equipment enhancements, birds               <ul style="list-style-type: none"> <li>○ Number distributed or deployed by type</li> <li>○ Number of trips with enhancements</li> <li>○ Number used by type</li> </ul> </li> <li>• Project point locations</li> <li>• Reduced uncertainty associated with bycatch estimates</li> <li>• Stranding and rehab, birds               <ul style="list-style-type: none"> <li>○ Number admitted by taxon</li> <li>○ Number stranded</li> </ul> </li> </ul>

\*If installing waste receptacles is a component of the project

## E.19 Mesophotic and Deep Benthic Communities Restoration Type: Monitoring Guidance



*This guidance is intended to promote consistency in data collection among similar types of projects and allow for future analysis across TIGs and Restoration Types, (Section 10.6.2 of SOP; DWH NRDA Trustees, 2021). This guidance may also assist the TIGs by providing recommended methodologies for monitoring restoration projects, saving time and money spent developing suitable monitoring protocols for individual restoration projects. If adjustments from this monitoring guidance are needed for a particular project, these adjustments should be described in the project-specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). Project teams within each TIG will identify parameters applicable to the objectives for each individual restoration project when developing the project MAM Plan. In addition to the project monitoring guidance identified in this MAM Manual, specific monitoring may be required to comply with permits granted by regulatory agencies. The TIGs are not restricted from including additional parameters if applicable, and other project monitoring that may be needed for specific projects should be determined by the TIGs. The Cross-TIG MAM work group developed this monitoring guidance by following the process described in the main body of this report.*

This guidance is intended to assist the TIGs in developing MAM Plans for restoration projects, as appropriate. Specifically, it provides:

- A review of the Mesophotic and Deep Benthic Community Restoration Approaches and Techniques
- Guidance on example restoration objectives, example drivers, and example uncertainties
- Guidance on developing parameters for project-level performance monitoring

The monitoring parameters identified within a project MAM Plan should be consistent with the recommended monitoring defined within this guidance document, wherever appropriate. Depending on the nature of the restoration project, TIGs may also choose not to include some of the elements described in this guidance document (e.g., drivers, uncertainties). If adjustments from the monitoring guidance are needed, these adjustments should be described in the project specific MAM Plan and agreed to by the TIG (Section 10.6.3 of SOP; DWH NRDA Trustees, 2021). The guidance provided should not be considered exhaustive. Therefore, TIGs may develop project-level objectives, drivers, uncertainties, and monitoring parameters that have not been previously identified. The TIGs will develop MAM objectives and monitoring parameters

that pertain to their restoration activities; and will determine the frequency and duration of monitoring, and the associated budget they deem appropriate. Finally, this section is subject to change as new monitoring parameters, methods, and technologies are identified and/or developed.

The monitoring parameters recommended in this guidance document are further detailed in Attachment E Section E.4, which includes a complete list of core and objective-specific monitoring parameters identified by the Cross-TIG MAM work group and guidance on measurement unit(s) and monitoring methods. Guidance on monitoring locations, frequencies, durations of sampling and potential analyses is also provided where appropriate.

### **E.19.1 Restoration Approaches and Techniques**

Restoration Approaches are general restoration actions the Trustees identified for each of the Restoration Types. Restoration Approaches describe options for implementation, and some include examples for specific methods (Appendix 5.D of PDARP/PEIS; DWH NRDA Trustees, 2016). The PDARP/PEIS identifies two Restoration Approaches under the Mesophotic and Deep Benthic Communities Restoration Type.

1. Place hard ground substrate and transplant coral
2. Protect and manage mesophotic and deep benthic coral communities

In addition to these two approaches, the PDARP/PEIS (DWH NRDA Trustees, 2016) acknowledges the need for robust resource-level monitoring and adaptive management of mesophotic and deep benthic communities to address critical uncertainties that may affect planning and evaluation of restoration of this Restoration Type. Resource level monitoring will be considered as a third Restoration Approach in this document.

In addition to Restoration Approaches, the PDARP/PEIS (DWH NRDA Trustees, 2016) also identifies Restoration Techniques. Restoration Techniques are specific restoration actions the Trustees identified for each of the Restoration Approaches. Restoration Techniques may be used individually or in combination. Example Restoration Techniques for the Restoration Approaches listed above can be found in Appendix 5.D of the PDARP/PEIS.

### **E.19.2 Project-Level Restoration Objectives**

Project-level restoration objectives should be specific to the resource injuries and clearly specify the desired outcome(s) of the restoration project (15 CFR § 990.55(b)(2)). See Section 2.4.1 of the main body of this document.

Mesophotic and Deep Benthic Community project-level objectives should be tied to the type(s) of activities being conducted as part of the project. Restoration projects may include activities such as data collection (e.g., measuring growth rates and mapping habitat), data analyses (e.g., analysis of ROV video transect data to determine to characterize habitat utilization by fauna), and/or implementation of on-the-ground restoration (e.g., transplanting corals).

The following are example project-level restoration objectives that may apply to the Restoration Approaches mentioned above. This list should not be considered exhaustive; additional objectives may be developed and/or identified.

- Develop methods and techniques for effective enhancement of coral recruitment and growth and recommend successful methods to be implemented at a large scale for restoration
- Directly compensate the loss of MDBC corals, associated benthic and water column communities, and soft bottom communities injured by the DWH oil spill
- Increase habitat for settlement of coral larvae by placing substrate
- Increase coral density through transplantation
- Increase coral density through fragmentation and redistribution
- Document the abundance and distribution of MDBC
- Document changes to soft sediment communities impacted by the DWH oil spill and by other natural and anthropogenic threats, relative to healthy reference habitats
- Provide fundamental information to prioritize and support protection and management activities and to target locations for direct restoration
- Fill critical data gaps (e.g., on the biology and ecology of species) and evaluate sites for potential direct restoration and protection activities, at both injured and reference sites
- Identify ongoing impacts and assess natural and anthropogenic threats to MDBC (e.g., oil spill related impacts, invasive species, water quality anomalies, vessel anchoring, fishing impacts, marine debris, contaminant releases, marine heatwaves, and climate change)
- Provide the background data needed to detect and quantify trends affecting MDBC habitats in preparation for potential future impacts (e.g., for prioritizing sites for protection and management) and to assess success of restoration efforts with respect to recovery, natural mortality, and growth rates
- Establish a baseline for health and condition to guide direct restoration and protection
- Manage and protect MDBC from known threats to achieve restoration goals identified in the DWH PDARP/PEIS, help maintain ecological integrity, and increase ecosystem resilience

### E.19.3 Example Drivers

Drivers are outside forces, natural or anthropogenic, that have the potential to influence the outcomes of a restoration project. Drivers tend to be large-scale, long-term forces that are not easily controlled at the scale of a single restoration project (Harwell et al., 2016). See Section 2.4.2 for guidance on establishing the conceptual setting for a MAM Plan, including identifying drivers. The following are example drivers that may be applicable to this Restoration Type. This list should not be considered exhaustive; additional drivers may be identified.

- Climate change
- Oil spills
- Water mass characteristics
- Food supply (or energy flux)
- Loop current and other physical oceanographic conditions
- Management regimes for benthic habitats



## E.19.4 Example Uncertainties

Uncertainties or information gaps have the potential to affect adaptive management decisions for individual or multiple restoration projects. These decisions may include how to improve the likelihood of achieving favorable project outcomes or selecting corrective actions in the event a project is not performing as intended. See Section 2.4.3 for guidance on identifying potential sources of uncertainty for a MAM Plan. The following are example uncertainties that may be applicable to this Restoration Type. This list should not be considered exhaustive; additional uncertainties may be identified.

- Larval transport patterns
- Effectiveness of techniques for restoration of deep-sea corals
- Length of time for coral larvae to colonize substrate
- Whether coral transplant techniques can be effectively scaled to a level meaningful in the scope and context of DWH injury
- Length of time to discern results of restoration projects
- Deep sea coral growth rates
- Ocean acidification (for *Lophelia* and other calcifiers)
- Life histories of focal species
- Recruitment and succession patterns of soft sediment infaunal communities
- Changes in regulations governing activities on the sea floor
- Whether data collected will suffice for management decisions
- Accuracy of models to predict MDBC habitat
- Total area that can be surveyed for MDBC
- The effectiveness of outreach, education, and engagement efforts.
- Rates of compliance with/adoption of measures to reduce bottom impacts from anchoring and use of bottom tending gear or to reduce user conflicts
- Identification of opportunities to perform marine debris removal activities that achieve a net benefit to MDBC habitats
- The potential for and effectiveness of remediating leaking or abandoned oil and gas infrastructure
- The potential to reduce invasive species abundances to levels that benefit native species
- Identification of community/ecosystem traits that provide resilience to stressor
- How protection and management will be carried out by non-trustee agencies

## E.19.5 Guidance on Developing Parameters for Project-Level Performance

When planning a restoration project, TIGs should identify appropriate monitoring parameter(s) based on the type(s) of activities included within the project and the project-level objectives. This guidance document has been organized according to example project objectives within each Restoration Approach. The list of objectives is not exhaustive, and the TIG may pursue other activities as appropriate. For each Restoration Approach, objective-specific monitoring parameters and parameters for consideration are presented.

1. **Objective-specific performance monitoring parameters** are parameters that are likely to be applicable to most projects within an objective for each Restoration

Approach. Objective-specific performance monitoring parameters are those used consistently across projects to facilitate the aggregation of project monitoring results and the evaluation of restoration progress for each objective (Appendix 5.E.4 of PDARP/PEIS; DWH NRDA Trustees, 2016). See the Restoration Approach Core and Objective-Specific Performance Monitoring Parameters section of Attachment E of this MAM Manual for details on the core performance monitoring parameters including definitions, units, and other guidance.

2. **Parameters for consideration** are example parameters based on the relevant Restoration Approach and objective that may or may not apply to a specific project. Based on the project activities and objectives, this list may be helpful in identifying appropriate parameters for project monitoring. Additional adaptive management and/or validation monitoring parameters may be identified by the TIGs. These additional parameters may be helpful for resolving uncertainties, explaining outside drivers, optimizing project implementation, supporting decisions about corrective actions and other adaptive management of the project, and informing the planning of future DWH NRDA restoration projects.

The list of parameters presented here should not be considered exhaustive; other parameters may be considered, as appropriate.

Parameter names are listed in the monitoring guidance tables and parameter details (which provide greater specificity on the type of data being collected) are provided as sub-bullets under the parameter name. Note that not every monitoring parameter has associated parameter details. Where parameters are used across Restoration Types or across resources, the Restoration Type or resource may be provided after the parameter name and separated by a comma. Using the parameter “Abundance” as an example, this parameter is used under Restoration Approaches for multiple resources such as birds and sea turtles. In the Birds guidance table (Section E.18), the parameter is listed as “Abundance, Birds” and may be listed with parameter details in sub-bullets. To indicate where an Implementing Trustee can choose the appropriate targeted injured resource to monitor based on project objectives, a bracketed “[targeted injured resource]” is included after the comma.

### **Restoration Approach: Place hard ground substrate and transplant coral**

This approach focuses on two techniques: providing hard ground substrate on which coral larvae may settle and the transplanting and/or fragmentation of coral to increase the number of colonies. Techniques for restoring deep sea corals are not well-developed, so technique development will be critical to implementation of this approach. Table E.19.1 provides parameter guidance for MDBC Restoration Approach: Place hard ground substrate and transplant coral.

**Table E.19.1.** Monitoring Parameters related to placing hard ground substrate and transplanting coral

Project objectives	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Restore MDBC by placing hard ground substrate	<ul style="list-style-type: none"> <li>• Abundance, corals               <ul style="list-style-type: none"> <li>○ Count by taxon</li> </ul> </li> <li>• Abundance, epibenthic or infaunal organism               <ul style="list-style-type: none"> <li>○ Count by taxon</li> </ul> </li> <li>• Area               <ul style="list-style-type: none"> <li>○ Project footprint</li> <li>○ Project influence</li> </ul> </li> <li>• Organism linear measurements, corals</li> <li>• Species composition, epibenthic or infaunal organisms</li> <li>• Species composition, FWCI</li> </ul>	<ul style="list-style-type: none"> <li>• Abundance, FWCI               <ul style="list-style-type: none"> <li>○ Count by taxon</li> </ul> </li> <li>• Abundance, Other</li> <li>• Community composition, epibenthic or infaunal organisms</li> <li>• Community composition, FWCI</li> <li>• Density, FWCI</li> <li>• Project point locations</li> </ul>
Develop techniques for coral transplantation	<ul style="list-style-type: none"> <li>• Conservation improvements, MDBC               <ul style="list-style-type: none"> <li>○ Number evaluated or tested by activity</li> <li>○ Number implemented by activity</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Cost/benefit of transplants and recruitment</li> </ul>
Increase coral abundance and density through transplantation	<ul style="list-style-type: none"> <li>• Abundance, corals               <ul style="list-style-type: none"> <li>○ Count by taxon</li> </ul> </li> <li>• Survival, corals               <ul style="list-style-type: none"> <li>○ Transplants by taxon</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Abundance, FWCI               <ul style="list-style-type: none"> <li>○ Count by taxon</li> </ul> </li> <li>• Organism linear measurement, corals               <ul style="list-style-type: none"> <li>○ Count by taxon</li> </ul> </li> <li>• Project point locations</li> </ul>

## Restoration Approach: Protect and manage mesophotic and deep benthic coral communities

This Restoration Approach focuses on establishing areas for spatially discrete management of and protection for mesophotic and deep benthic communities and associated resources. For some natural resources, projects that manage and prevent future injuries from known threats can often have more certain outcomes and be more cost-effective than projects designed to create these resources (Chapman and Julius, 2005). Table E.19.2 provides parameter guidance for MDBC Restoration Approach: Protect and manage mesophotic and deep benthic coral communities.

**Table E.19.2.** Monitoring Parameters related to protecting and managing mesophotic and deep benthic coral communities

Project objectives	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Identify and assess threats to MDBC	<ul style="list-style-type: none"> <li>• Data utility</li> <li>• Threats documented</li> </ul>	None Identified
Inform stakeholders and the public about MDBC restoration through outreach, education, and engagement	<ul style="list-style-type: none"> <li>• Education or outreach effectiveness</li> <li>• Education or outreach effort               <ul style="list-style-type: none"> <li>○ Events held or attended by type</li> <li>○ Number educated</li> <li>○ Number of recipients</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Education or outreach effort               <ul style="list-style-type: none"> <li>○ Number produced or distributed by type</li> <li>○ Number of inquiries or proposals received</li> </ul> </li> </ul>
Reduce marine debris in MDBC communities	<ul style="list-style-type: none"> <li>• Area               <ul style="list-style-type: none"> <li>○ Project footprint</li> </ul> </li> <li>• Debris removed               <ul style="list-style-type: none"> <li>○ By source</li> <li>○ By type</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Abundance, corals               <ul style="list-style-type: none"> <li>○ Count by taxon</li> </ul> </li> <li>• Abundance, other</li> <li>• Project point locations</li> </ul>
Reduce invasive species in MDBC communities	<ul style="list-style-type: none"> <li>• Abundance, other               <ul style="list-style-type: none"> <li>○ Count by taxon</li> </ul> </li> <li>• Biomass, other               <ul style="list-style-type: none"> <li>○ By taxon</li> </ul> </li> <li>• Presence, other               <ul style="list-style-type: none"> <li>○ Invasives by taxon</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Abundance, FWCI               <ul style="list-style-type: none"> <li>○ Count by taxon</li> </ul> </li> <li>• Density, epibenthic or infaunal organisms</li> <li>• Density, FWCI</li> <li>• Project point locations</li> <li>• Species composition, FWCI</li> </ul>
Mitigate impacts from abandoned/leaking oil and gas infrastructure	<ul style="list-style-type: none"> <li>• Area               <ul style="list-style-type: none"> <li>○ Project influence</li> </ul> </li> <li>• Conservation improvements, MBDC</li> </ul>	<ul style="list-style-type: none"> <li>• Project point locations</li> </ul>
Protect MDBC through enhanced capacity	<ul style="list-style-type: none"> <li>• Abundance, epibenthic and infaunal organisms</li> <li>• Abundance, FWCI</li> <li>• Species composition, epibenthic and infaunal organisms</li> <li>• Species composition, FWCI</li> <li>• Species composition, MDBC</li> </ul>	<ul style="list-style-type: none"> <li>• Community composition, MDBC</li> <li>• Conservation effort, MDBC               <ul style="list-style-type: none"> <li>○ Trainings offered by activity</li> </ul> </li> <li>• Conservation improvements, MDBC               <ul style="list-style-type: none"> <li>○ Agreements executed</li> <li>○ Number implemented by activity</li> </ul> </li> <li>• Equipment enhancements, MDBC               <ul style="list-style-type: none"> <li>○ Number used by type</li> </ul> </li> <li>• Project point locations</li> </ul>

Project objectives	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Protect MDBC through increased enforcement effectiveness	<ul style="list-style-type: none"> <li>Species composition, MDBC</li> </ul>	<ul style="list-style-type: none"> <li>Community composition, MDBC</li> <li>Conservation effort, MDBC <ul style="list-style-type: none"> <li>Inspections conducted</li> <li>Percent compliance</li> </ul> </li> <li>Project point locations</li> </ul>

### Restoration Approach: Improve Understanding of MDBC to Inform Better Management and Ensure Resiliency (note, Restoration Approach is not listed in the PDARP/PEIS)

Restoration for mesophotic and deep benthic communities is complicated by several factors, including a limited understanding of key biological functions, limited experience with restoration at depth or with these species, and remote locations that limit accessibility (Van Dover et al., 2013). Therefore, the Trustees have committed to a robust monitoring and adaptive management program for this Restoration Type to collect the data necessary to address critical uncertainties and inform adaptive decision-making. Table E.19.3 provides parameter guidance for MDBC Restoration Approach: Resource level monitoring and adaptive management.

**Table E.19.3.** Monitoring parameters related to resource level monitoring and adaptive management

Project objectives	Objective-specific performance monitoring parameters	Parameters for consideration (as appropriate)
Inform protection and management through data collection	<ul style="list-style-type: none"> <li>Data utility</li> </ul>	<ul style="list-style-type: none"> <li>Data sufficiency For example, for community metrics, population metrics; to establish recovery trajectories and restoration targets; to establish baseline conditions; to characterize threats</li> </ul>
Map the sea floor for MDBC habitat	<ul style="list-style-type: none"> <li>Area <ul style="list-style-type: none"> <li>Project footprint</li> </ul> </li> <li>Data Sufficiency For example, of groundtruthing samples or resolution for habitat characterization</li> </ul>	None Identified
Predict physical habitat, biological cover, and species distributions through models	<ul style="list-style-type: none"> <li>Model performance</li> </ul>	None Identified
Estimate the socioeconomic effects of MDBC restoration	<ul style="list-style-type: none"> <li>Data utility</li> </ul>	<ul style="list-style-type: none"> <li>Bias analysis of socioeconomic studies</li> </ul>

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