Appendix M. Marine Life Protection Act Initiative Consultant's Adaptive Management and Monitoring and Evaluation Framework

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This report was prepared for the California Marine Life Protection Act Initiative; contributions were made by a private consultant, stakeholders, government agencies, and MLPA Initiative staff.

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Executive Summary

The MLPA requires adaptive management to ensure that a system of MPAs meets its stated goals [Section 2853 (c) (3)]. The MLPA defines adaptive management as “a management policy that seeks to improve management of biological resources, particularly in areas of scientific uncertainty, by viewing program actions as tools for learning. Actions shall be designed so that, even if they fail, they will provide useful information for future actions, and monitoring and evaluation shall be emphasized so that the interaction of different elements within marine systems may be better understood” (Section 2852 (a)). Adaptive management requires learning from current experience to improve the process of achieving the goals of the MLPA over time. The law embeds ecosystem-based adaptive management, monitoring, and evaluation into the state policies related to the management of MPAs.

This approach will require the state to develop and implement a monitoring, evaluation, and adaptive management program. The MLPA Master Plan Framework (MPF) adopted by the California Fish and Game Commission (FGC) on August 18, 2005 describes the monitoring and evaluation for the MPAs. The AMMEF complements and expands upon the framework proposed by the MPF in two ways. First, it provides guidance on the institutions and processes for adaptive management which are not discussed in the MPF. Second, while the MPF discussion focuses on monitoring for evaluating the extent to which individual MPAs are accomplishing adopted goals and objectives (CDFG, 2005: pages 69-75) The AMMEF describes an administrative approach at the regional scale. In it, adaptive management, monitoring, and evaluation will be implemented at multiple spatial scales, including individual MPA, MPA networks in a region, and statewide when appropriate. The monitoring and evaluation section of MPF should be revised in the future to reflect this change.

This document presents and recommends a framework and process for the adaptive management and monitoring and evaluation of MPA arrays for the entire State of California. An important part of marine ecosystem management, and incorporated in this framework, is the establishment of programs to monitor, evaluate performance, and adaptively manage the biological, social, and economic status and trends of areas within and nearby the MPAs. Long-term monitoring data are critical for understanding the status and trends of resources and identifying emerging threats to MPAs. The data will help managers, policymakers, scientists, and stakeholders determine the impacts and effectiveness of the MPA array. Data will be used to evaluate the progress towards achieving the statewide goals, regional goals and objectives, and objectives for individual MPAs established by the MLPA and by the regional stakeholder groups. They will aid in understanding the structure and function of ecosystems within the MPA system, and thereby provide an improved scientific basis for future decision-making. These data will be used for adaptive management of the MPAs. Finally, the AMMEF will also provide guidance on how to implement the AMMEF.

A sequence of decisions is required to address adaptive management and monitoring and evaluation requirements of the Marine Life Protection Act (MLPA). Key decisions and recommendations for each are listed below by section of the document. Expanded discussion of each item is available in the framework document that follows:

Section 1*, Overview: Marine Life Protection Act Statewide Framework for Adaptive Management and Monitoring & Evaluation,* will provide a discussion on the requirements of the MLPA, purpose of the framework, and adaptive management and monitoring in the MLPA.

Section 2, *MLPA Adaptive Management Process*, will lay out the process, roles of institutions for adaptive management. The following key decisions are discussed in this section:

- Decision 1. Choose the geographical scale for adaptive management and specifically the number of regions, somewhere between two and four.

  Recommendation: Align the biogeographical regions for MLPA adaptive management with the Nearshore Fishery Management Plan regions.

- Decision 2. Designate the bodies which will recommend changes in MPAs required for adaptive management (changes recommended to the California Department of Fish and Game (DFG) which recommends to FGC, the formal policymaker).

  Recommendation: Create a new consolidated committee that combines the adaptive management functions related to the MLPA and those of the Nearshore Advisory Committees. A separate committee will be formed for each biogeographic region.

- Decision 3. Constitute the membership of the regional MPA management advisory committees.

  Recommendation: Named by the DFG Director; consisting of stakeholders and scientists who are knowledgeable about the key issues related to MLPA implementation.

Section 3, *Statewide Oversight and Management for Implementation of the AMMEF,* will discuss the resources necessary to implement the AMMEF, process for implementation, and issues for consideration. The following key decisions are discussed in this section:

- Decision 4. Develop the science questions that can inform adaptive management of networks of MPAs and those which can inform management of individual MPAs.

  Recommendation: These questions must support policymakers, address the concerns of key stakeholders, and be grounded by science. Many will derive from the rationale for adopting MPA networks or components of networks, the quality of the information on which the designation was based, and the network's, (or components of the network), stated goals. Similarly, many other questions will be suggested by the stated objectives of individual MPAs. Questions directed at individual MPAs are likely to be more easily developed and answered. Priority must be given to developing and addressing questions relevant to adaptive management of ecosystems, at scales ranging from individual MPAs to the biogeographic region. The set of questions selected must address this multi-scalar aspect of MLPA and adequately support adaptive management of ecosystems, which is the primary thrust of the MLPA.

- Decision 5. Resources must be acquired and deployed to implement the monitoring and evaluation plan and to support the processes of adaptive management.

Recommendation: Consistent with the long-term funding plan recommended by the MLPA Blue Ribbon Task Force (BRTF), the State of California should take the lead responsibility but actively seek to develop and to effectively manage partnerships with other governments, philanthropic institutions, research organizations, fishermen, and others.

- Decision 6. Develop the institutional capacity and processes and the technical infrastructure to develop protocols, collect, maintain, analyze, archive, and communicate monitoring and evaluation data over long periods of time. Over time, this capacity and infrastructure should, as needed, support the development of new monitoring modules and spin-off related research and development projects.

  Recommendation: A dedicated organization, (referred to as "the Institute"), should be created to perform this role, guided by the recommended MPA management advisory committees, but also closely linked to the management structures of the DFG which will develop data and analyses to support adaptive management of the state's MPA network and individual MPAs.

Section 4, *Guidance for Regional Implementation*, provides recommendations how each region, using the MLPA Central Coast Study Region as an illustrative example, should move forward with the implementation of the AMMEF. The role of partner organizations is critical for implementation and long-term success of the program. The following key decision is discussed in this section:

- Decision 7. Regional adaptive management, monitoring and evaluation plan (s) must be developed to address the questions posed by policymakers and support anticipated future decision-making.

  Recommendation: This draft plan should be developed initially by the Institute and then reviewed by the MPA management advisory committees and either adopted or sent back to the Institute for revision as necessary.

1. Overview: Marine Life Protection Act Statewide Framework for Adaptive Management and Monitoring & Evaluation

The Marine Life Protection Act (MLPA) requires adaptive management, monitoring and evaluation to ensure that that an effective system of marine protected areas (MPAs) is created and maintained for decades to come. The goals of the MLPA (MLPA Section 2859, see Appendix 1 for a complete list) are to protect natural heritage, diversity and abundance of marine life, sustain marine populations, improve recreation, education and study opportunities, ensure MPAs function as a network, and, manage them effectively. Monitoring and evaluation are critical to determine whether these goals are being met over time and to inform adaptive management that will refine MPA design, management and policy.

This document outlines a suggested statewide Adaptive Management and Monitoring and Evaluation Framework (AMMEF) for MPAs. It proposes and recommends a structure and process. It also provides guidance for the state and regions on how to implement monitoring, evaluation and adaptive management.

1A. Purpose of this Framework

This document presents and recommends a framework and process for the adaptive management and monitoring and evaluation of MPA networks for the entire State of California. An important part of marine ecosystem management[4] and incorporated in this framework is the establishment of programs to monitor, evaluate performance, and adaptively manage the biological, social, and economic status and trends of areas within and nearby the MPAs. Long-term monitoring data are critical for understanding the status and trends of resources and identifying emerging threats. Such data will help managers, policymakers, scientists, and stakeholders determine the impacts and effectiveness of the MPA array. It will also be used to evaluate the progress towards achieving goals and objectives for statewide, regional, and individual MPAs. Finally, these data will be used for adaptively managing the networks and MPAs.

The AMMEF will also provide guidance on how to implement adaptive management, monitoring and evaluation. *The Monitoring and Evaluation Report,* which describes the detailed methods for monitoring and evaluation statewide, will be developed for the state. It will describe the monitoring design recommendations as well as outline the methods used to collect the data to create a uniformity of data methods, collection, and management. This will be developed at a later date, revised as needed, and a living document. Each region should develop a plan that is a living document to implement the AMMEF, a *Regional Monitoring, Evaluation, and Adaptive Management Implementation Plan*. For further discussion on the regional implementation plans, see Section 4 and an illustrative table of contents in Section 4C.

[4] Ecosystem-based management is an integrated approach to management that considers the entire ecosystem, including humans. The goal of ecosystem-based management is to maintain an ecosystem in a healthy, productive and resilient condition so that it can provide the services humans want and need. Ecosystem-based management differs from current approaches that usually focus on a single species, sector, activity or concern; it considers the cumulative impacts of different sectors. (Compass. 2005. Consensus statement on marine ecosystem-based management. www.compassonline.org)

Six basic principles guide the AMMEF. The framework should: 1) be useful to decision-makers, managers, scientists and stakeholders for improving MPA design and management; 2) be practical in use and cost; 3) include both scientific and stakeholder input; 4) be flexible for use at different sites and in varying conditions; 5) be holistic in its focus on both natural and human perspectives; and, 6) be transparent in process and decision-making to all stakeholders and the public (Master Plan Framework, Section 6; 69).

1B. MLPA Requirements for Adaptive Management, Monitoring and Evaluation

The MLPA requires adaptive management to ensure that a system of MPAs meets its stated goals [Section 2853 (c) (3)]. The law embeds ecosystem-based adaptive management, monitoring, and evaluation into the state policies and management of marine resources and MPAs. This approach will require the state to develop and implement a cutting-edge monitoring, evaluation, and adaptive management program. The MLPA defines adaptive management as "a management policy that seeks to improve management of biological resources, particularly in areas of scientific uncertainty, by viewing program actions as tools for learning. Actions shall be designed so that, even if they fail, they will provide useful information for future actions, and monitoring and evaluation shall be emphasized so that the interaction of different elements within marine systems may be better understood" (Section 2852 (a)). Adaptive management requires learning from current experience to improve the process of achieving the goals of the MLPA over time. Success requires:

(a) Appropriately scaled, sustained institutional capacity to make legitimate choices;
(b) Possession, broad communication, and use of relevant information; and,
(c) Use of (a) and (b) to effect desired changes in policies, programs, and human behaviors intended to achieve the goals of the MLPA.

California's Marine Life Protection Act (1999) builds upon the state's prior policy efforts to protect and manage marine resources. It requires:

(a) The creation of systems of MPAs as a necessary element in achieving desired marine policy goals (complementary to, but regardless of, the effects of traditional fisheries management policies);
(b) The use of three classifications of MPAs (state marine reserve, state marine park, and state marine conservation area), with each protected area to be created with specific objectives;
(c) The development of networks of MPAs on a biogeographical region scale, designed to accomplish the complex goals of the MLPA by protecting ecosystems; and,
(d) The adaptive management of the statewide MPA network to better achieve the goals of the MLPA over time.

California, in implementing MLPA, leads efforts across the nation to develop policies, institutions, and processes for achieving adaptive management of MPAs. Consequently, few models exist to guide the design of the monitoring and evaluation framework. Application of adaptive management for the MLPA can draw upon other experiences from the past decade in

riparian and coastal marine ecosystems. Importantly, assessments of adaptive management in practice reveal that its use must be customized to the specific legal, institutional, and cultural contexts in which it is applied (Panel on Adaptive Management for Resource Stewardship, Natural Research Council 2004; Gray 2000).

The literature provides some, if not complete, guidance on adaptive management. Chornesky (2005) provides useful suggestions for developing data, information structures, and information flows to inform management of ecosystems, though the report does not address the institutions within which adaptive management must occur. Thoughtful exploration of developing natural and social indicators of the performance of individual MPAs is also available (Pomeroy, Parks and Watson 2004). However, neither document describes the institutions that might support adaptive management, nor indicators appropriate for adaptive management of an MPA array or network at the scale required by the MLPA.

This approach will require the state to develop and implement a cutting-edge monitoring, evaluation, and adaptive management program. The MLPA Master Plan Framework (MPF) adopted by the California Fish and Game Commission (FGC) on August 18, 2005 describes the Monitoring and Evaluation for the MPAs. The AMMEF complements and expands upon the framework proposed by the MPF in two ways. First, it provides guidance on the institutions and processes for adaptive management which are not discussed in the MPF. Second, while the MPF discussion focuses on monitoring for evaluating the extent to which individual MPAs are accomplishing adopted goals and objectives (CDFG, 2005: pages 69-75). The AMMEF describes an administrative approach at the regional scale. In it, adaptive management, monitoring, and evaluation will be implemented at multiple spatial scales, including individual MPAs, MPA networks in a region, and statewide when appropriate. The monitoring and evaluation section of the MPF should be revised in the future to reflect this change.

This document draws upon available experience from many policy areas, theories, and MPA case studies about improving decision-making and policies over time. It discusses some of the choices in developing related institutions and processes. It also advances guidance for monitoring and evaluation of ecosystems and specific MPAs that will, in turn, inform both adaptive management and day-to-day management of MPAs. More specific monitoring and evaluation plans will be required as networks or network components consisting of specific MPAs are designated (see Section 4). These plans will need to support the development of data sets over the long periods needed to detect changes in ecosystem condition with confidence. At the same time, they are likely change over time with experience and with changes in technology, scientific understanding, and the environmental and policy contexts of the state's MPA system.

1C. Adaptive Management and Monitoring in the Marine Life Protection Act

The MLPA requires adaptive management to ensure that the system of protected areas meets its stated goals [Section 2853 (c) (3)]. The act intends the creation and management of multiple MPAs as a network to protect marine life, habitats, and ecosystems (Section 2853). The act clearly distinguishes between individual MPAs, with each expected to meet its specified objectives, and the network of MPAs as a whole, which is expected to meet the goals of the act [Section 2857 (c) (5)]. Individual MPA objectives will feed into regional goals and objectives and those, in turn, will feed into goals of the act at the state level (See appendices 1

and 2 on MLPA goals and the MLPA central coast regional goals and objectives). The MLPA also requires that decision-making be based on the best readily available science and informed by stakeholder participation.

The definition of adaptive management used in the MLPA is consistent with contemporary understanding of this approach to improving policy performance over time, with one exception. Adaptive management seeks to address uncertainty about both (a) the natural and human systems within which policy is being implemented, and (b) the effects of the policy instruments being deployed. The MLPA does not mention uncertainty regarding human systems or policy instruments, both important to address in adaptive management. The intent of adaptive management is to learn more about both natural and human systems and policy instruments by implementing policy in ways that allow for learning and adaptation over time.

This framework for adaptive management is explicitly grounded in the legal, institutional, and cultural context of marine policies in California.

Decisions in Adaptive Management

One of the major challenges that effective implementation of adaptive management faces is identifying the types of decisions that need to be made about causation and outcomes (or ends and means). Such decisions relate to both scientific research and political questions. Lee (1999; 1993, chap. 4, modifying Thompson and Tuden, 1959) presents a theoretical matrix commonly used by analysts to help make policy decisions in situations characterized by conflict. According to Lee, adaptive management has particular relevance to policy areas where stakeholders disagree about desired policy outcomes and about the causes of problems and therefore the needed policy solutions. This is certainly the situation regarding the MLPA, where stakeholders disagree on what should be done and scientists are still trying to understand natural systems and confidently discern cause-and-effect relationships regarding the sources of ecosystem degradation and potential effects of MPAs in reversing this decline. (Russ *et. al*, 2005; Halpern & Warner, 2002; and McClanahan, 2000).

Consequently, a decision-making structure should be in place *before* an adaptive management exploration of the seascape proceeds. Since adaptive management requires a political resolution of policy choices, it is important to use scientific analyses and research to answer questions that are judged most useful to policymakers and key stakeholders.

This approach underlies the basis for the framework on how to integrate adaptive management for MLPA and each region. Designing this procedure **at the start of the program** provides an opportunity to lay out a clear, efficient, and effective process.

Monitoring

Monitoring improves our understanding of the natural and human dynamics of the marine environment and forms a critical part of effective management and scientific research. Generally three types of monitoring exist: monitoring the ecological health of the environment; monitoring to detect change; and compliance monitoring (Australia's Reef Futures website: http://www.reeffutures.org/topics/monitoring/why.cfm). Chornesky (2005) describes how

monitoring plays a critical role in adaptive management because it allows managers and interested parties to:

- Evaluate the impacts of specific management choices;
- Build knowledge about the managed ecosystem and thereby improve future management decisions;
- Identify emerging threats;
- Determine the extent to which the ecological and/or socioeconomic management goals for the ecosystem are being met; and,

Monitoring programs that do a good job of servicing the link between data and decision-making can improve policy and management decisions. Consequently, the AMMEF must include some monitoring capacity focused on synthesizing and communicating information about status, trends, and performance of individual MPAs, MPA arrays, and MPA networks at the region and statewide scales.

Clear schedules, rules, and procedures for comment, dialogue, and participation are important throughout the entire process adaptive management, as well as at planned periodic reviews or the end of a specific cycle. Objectives and criteria for measuring performance must be spelled out clearly (FAC, 2005). Representatives on the recommended MPA management advisory committee (see recommendation under Section 2B, Adaptive Management Process) will need to explicitly consider values as well as scientific analyses in establishing goals, objectives, and priorities within the context of the MLPA. Scientific working groups, analyses, and technical reviews will be needed to identify the best indicators to measure progress towards these goals and objectives and the feasibility of setting a benchmark or threshold that would trigger a change in policy or management.

2. MLPA Adaptive Management Process for Ecosystem-based Management

This section outlines adaptive management for ecosystem-based management. It begins by defining the boundaries determined by science and that will be used administratively, then discusses a process, structure, and roles of institutions.

2A. Adaptive Management at the Administrative and Regional Level

Adaptive management aims to improve and change policy and management practices based upon monitoring and evaluation results. The AMMEF is designed to consider ecosystem patterns and processes. It is grounded in science and defines goals on the basis of ecological, rather than political, boundaries and addresses ecological, social, and economic goals. The development and implementation of ecosystem management are critical in ensuring sustainability in California's coastal marine systems.

As a practical matter, adaptive management under MLPA will require defining both boundaries of natural systems, such as ecosystems, networks, and biogeographic regions and administrative units created by the MLPA, such as MPAs, arrays or regions of MPAs. Clarifying definitions is key, yet many basic terms are in flux. For example, various observers define the boundaries of natural systems differently, as seen in the discussions among members of the MLPA Master Plan Science Advisory Team about whether two, three, or more biogeographic regions exist in California and whether ecosystems may be in individual MPAs and/or networks of MPAs. The boundaries of the administrative units defined by policy choices are often hotly contested and change over time.

Other practical challenges arise in selecting the appropriate operational scale for adaptive management – e.g. should it be a region? – and for designing institutional structures and administrative processes. The implementing entities will need to have capacity and incentives to collect, manage, and analyze information and to make and implement adaptive management decisions at these scales. Moreover, they must be capable of making different kinds of decisions over different time periods (e.g., years to decades for MPA designations versus months to years for enforcement, education, and data collection).

Adaptive management under the MLPA should occur at several different levels – the individual MPA, MPA arrays / networks of MPAs across a region, and networks of MPAs across the state to ensure effective ecosystem-based management. However, networks of MPAs across a region should serve as the primary administrative scale for adaptive management. This administrative level, the network of MPAs across a region, will look at data and analyses from multiple levels to make recommendations to the California Department of Fish and Game (DFG) forwarding to the FGC for consideration and possible action. The MLPA Blue Ribbon Task Force adopted a recommendation to endorse the concept of two biogeographical regions within state waters, divided at Point Conception. The MLPA Master Plan Science Advisory Team (SAT) agreed that this was the strongest biogeographical divide within California, but discussed other biogeographical regional divides, with most judgments supporting identification of three to five bioregions in state marine environments.

Adopting the biogeographical region concept for adaptive management has many advantages:

- It corresponds to a significant unit of scale used by scientists (and underlying natural phenomenon);
- It matches the legal requirements of networks of MPAs within biogeographical regions;
- It results in a limited number of areas for information aggregation and decision-making;
- It is consistent with the use of the southern region outlined in the California Nearshore Fisheries Management Plan corresponding with a committee structure and process. The northern region of the California Nearshore Fisheries Management Plan is further divided into three regions; and,
- It can incorporate the recently-established MPAs at the northern Channel Islands into the southern bioregion network during the regional MLPA process which considers the southern California mainland and the other offshore islands. The designations of those MPAs may be changed in the course of developing a network of MPAs for the southern California bioregion.

The biogeographical region concept has a few disadvantages:

- It encompasses significant distances, which can encourage data-driven discussion removed from “ground truthing” in actual experiences;
- Aggregation at this scale could obscure smaller-scale phenomena that are ecologically important or significant to stakeholders and other interested parties; and,
- The difficulty, costs, and time required to do analyses at this scale will be greater.

The SAT can recommend a change in the number of regions to the DFG and then this recommendation can be presented to the FGC for adoption. Furthermore the identified four regions in the Nearshore Fishery Management Plan are discretionary, not statutory, and could be modified.

2B. Adaptive Management Process

The literature and experience in MPA and fisheries monitoring emphasize the strategic importance of involving policymakers and stakeholders early on in shaping monitoring and adaptive management priorities (See Appendix 3: Case Studies of Existing MPAs Monitoring & Evaluation Plans and Pomeroy 2004; NRC 1990, 2001; FAC, 2005). In fact, the authors of the 2001 National Academy of Science report argued that millions of dollars in monitoring proved of little use partly because the questions were framed by scientists operating apart from the users of the information (NRC, 2001).

Effective stewardship will need effective communication among all interested and affected policymakers and stakeholders, as well as the general public. Policymakers, stakeholders, and scientists should engage in conversations about their values and the relative role of these values to monitoring, evaluation and adaptive management in the context of the MLPA goals and requirements. This conversation should take place at an early stage in the development of the regional adaptive management and monitoring and evaluation plan after selection of the preferred alternative. Note, however, that there will still be considerable work for scientists and specialists to do in terms of identifying questions, stating assumptions, and constructing models. The more technical aspects of the work may not be appropriate for extensive

participation by policymakers and stakeholders. However, whenever possible, local knowledge and co-management strategies need to be incorporated into the planning process (FAC, 2005).

A committee structure is the most common practice for including stakeholders in adaptive management. The more transparent and forthright the process is, the more effective it will be in gaining stakeholder support, and developing a sense of shared stewardship.

Institutions and Work Flows for Adaptive Management

The MLPA clearly requires decision-making informed by science, details a particular form of participation for a team of scientists [Section 2855 (2), Section 2855 (3)], and calls for a stakeholder involvement [Section 2853 (c)(5), Section 2855 (c), Section 2857 (a)], and public participation [Section 2853 (c)(4), Section 2854)]. Formal policy making regarding MPA boundaries and regulations, including any creation or modification of individual MPAs, is within the authority of and requires action by the FGC (Sections 2859, 2860 and 2861), and in some cases the State Park and Recreation Commission (Marine Managed Areas Improvement Act of 2000). Indeed, the MLPA clearly requires after adoption of the master plan for all MPAs, the FGC shall "at least every three years, receive, consider, and promptly act upon petitions from the DFG or any other interested party, to add, delete, or modify MPAs, favoring those petitions that are compatible with the goals and guidelines of this chapter" [Section 2861 (a)].

For these reasons, adaptive management must include five institutional structures:

1) FGC, as formal policymaker and State Park and Recreation Commission for its role in creation and modification of state marine parks (SMPs);
2) A body of scientific advisors;
3) A process for stakeholder involvement;
4) Opportunities for public participation; and,
5) DFG and California Resource Agency[5].

The membership, powers, and operating procedures of the FGC can be changed only by statute, but more flexibility exists in how the other four elements are structured and operate. Importantly, these four elements may be complemented by other institutions, exemplified by the MLPA Blue Ribbon Task Force (BRTF) created by the memorandum of understanding (MOU) foundation of the MLPA Initiative. While the FGC operates at the scale of the State of California, the institutions to support adaptive management can be designed at other scales.

Thus the main choices in designing institutions and work flows for adaptive management of the MLPA in California focus on these areas:

- Geographical scale;
- Structures for scientific advice, stakeholder involvement, and public participation;
- Possible additional institutions (such as the MLPA Blue Ribbon Task Force); and,

[5] The California Resource Agency acts as the liaison between departments and the Governor.

- Work flow (which defines the relationships among actors).

Structures for Scientific Advice, Stakeholder Involvement, and Public Participation

Two approaches have been taken to develop structures of bodies/groups for scientific advice and stakeholder involvement in MPA policy making in California, and at least one other model exists elsewhere (see Appendix 3, Case Studies on Existing MPA Monitoring and Evaluation). Public involvement is often expected to occur through formal public meetings (such as those of the FGC). Three approaches to structures for scientific advice and stakeholder involvement are:

1) Scientists and stakeholders in one advisory structure (model of the Channel Islands and Monterey Bay National Marine sanctuaries, and other National Oceanic and Atmospheric Administration (NOAA) sanctuaries);
2) Scientists and stakeholders in separate groups, providing input to a seasoned group of policymakers (the MLPA Initiative model with a Blue Ribbon Task Force, Master Plan Science Advisory Team (SAT), and Central Coast Regional Stakeholder Group (CCRSG)), as well as the fishery management council model with a main council supported by a variety of advisory bodies including a scientific and statistical committee); and,
3) A stakeholder group as the key body to which scientists and technical staff provide support (The Grand Canyon Ecosystem Adaptive Management Program, 1999).

The structure most appropriate for the MLPA is structure (1) above because effective adaptive management occurs over long time periods and will benefit from participation by stakeholders and scientists who either have or can gain deep familiarity with the issues and the implications of their choices. Note, however, that membership in this group will need to cycle periodically, to avoid the development of entrenched positions and decision-making driven by the individual personalities of participants, and to refresh the base of knowledge and experience that informs the committee's deliberations.

The MLPA Initiative process has been characterized by extensive opportunities for public participation, including web posting of draft work products for review and comment, open meetings (most with public comment periods), webcasting and/or web-archiving of all meetings of the BRTF, CCRSG, and SAT, creation of a statewide interest group (consisting of stakeholder representatives) to design and monitor public participation, and extensive staff communication with individuals and groups.

The likely list of participants in an MPA advisory body is likely to overlap with, although it will not be identical to, the lists for bodies dealing with fisheries management policy making, such as the Pacific Fishery Management Council and of the proposed Nearshore Fishery Management Plan Committee for the State of California (for a full description see appendices 4 and 5).

RECOMMENDATION

This framework recommends the creation of an advisory body to DFG consisting of both stakeholders and scientists to guide adaptive management under the MLPA. This group would

be named the “MPA Management Advisory Committee for _____ Biogeographical Region.” Appointments to the body would be made by the director of DFG.

The roles of this group would include:

1) Identifying the questions, in collaboration with Institute staff, to be addressed by science to support adaptive management, including questions relevant to natural systems, human systems, and management actions pursuant to approved networks of MPA.
2) Reviewing the design of monitoring and evaluation efforts to address the identified questions.
3) On a regularly scheduled basis established when the network of MPAs is created, but no less frequently than every five years (although it may take longer than five years to see significant changes), complete a systematic review of performance of the network of MPAs within each biogeographical region and a review of the performance of individual MPAs for (a) their contribution to the network, and (b) against the objectives specified for that MPA.
5) Based on the judgments reached in these reviews, the management advisory committee (MAC) would develop recommendations in one or more of the following areas: (a) changes in management operations of individual MPAs within their current designation, such as a shift in enforcement or education activities, (b) changes in the boundaries or regulations of individual MPAs intended to better achieve network goals or the objectives of the individual MPA, (c) the abolition of an existing MPA, (d) creation of a new MPA, or (e) change in the goals being pursued with a network of MPAs.

The MACs will need to meet regularly to establish effective working relationships and to master their complex roles. Furthermore, all regional MACs should meet annually for statewide discussions about lessons learned across the state and to ensure consistency of process and approach. This can be re-assessed after a year to determine if more or fewer meetings are necessary.

The work load of MACs will vary. It is likely to be high during the initial phase of identifying researchable questions and approving monitoring and evaluation programs, then less during monitoring of implementation, and increasing again when considering possible changes to MPAs, goals, or objectives under the regularly scheduled adaptive management cycle. Given this variation in work load, it is reasonable to expect the need to meet will vary also, probably requiring two meetings per year in the periods of lighter work load and four meetings per year during heavier work loads. To offset the large workload members may receive a stipend.

As the geographical range encompassed by MACs will be large, the committees may consider establishing sub regional committees to assist the MACs. These groups would probably be busiest in the adaptive management cycle.

DFG currently coordinates or recently coordinated (some are no longer active) a total of 15 advisory committees (see Appendix 6 for the complete list with description of composition and function). In 2006 the DFG may create the Nearshore Advisory Committees (NAC), whose purpose overlaps with some of the MLPA goals. Regional committees may be developed to

serve the functions of both the MACs and the NAC for three reasons[6]. First, the DFG has limited resources, and managing all of these committees takes time and money. Second, the NACs have not yet been created and will advise on some of the same issues as those proposed by MLPA MACs. Finally, the NACs would be established within the timeline that works for the MLPA. The NAC and MAC will have equal representation and MAC members will have knowledge and interests in non-fishery issues such as management, recreation, aquaculture, climate change, monitoring and evaluation, and other issues relevant to the MLPA to ensure balance in the group. However, combining the two committees will be reviewed in the future to determine whether or it is effective and the committees may become independent if deemed necessary.

Roles in the MLPA Adaptive Management Processes

For adaptive management to succeed, sufficient capacity and incentives to undertake this approach must be present for the implementing organizations. The risks of lack of capacity and incentives are well illustrated in the Northern Coast Range Adaptive Management Area adopted in 1994, encompassing 113,000 hectares of federal land in the Coast Range of Oregon (Gray, 2000). Gray (2000: 16-17) identifies specific factors that contributed to the lack of effective adaptive management in Oregon's Coast Range region:

1) Uncertainty and conflict over the scale ("landscape," watershed, whole area) at which adaptive management decisions were to be made.
2) Tendency to prescribe solutions rather than identifying uncertainties and opportunities to pursue different alternatives as a way to learn.
3) Declining financial resources to key implementing organizations.
4) Lack of flexibility in organizational programs.
5) Tendency to limit choices considered to avoid prior battles.
6) No one (a single organization or profession) "owned" adaptive management.
7) No effective way was found to manage the inherent complexity of hundreds of species, ecosystem functions, and multiple spatial and temporal scales.

Significantly, with the possible exception of local risks to endangered species, all these suggestions are standard management prescriptions for achieving <u>any</u> long-term goal. Without appropriate project design, formal interagency commitments, job descriptions, and rewards, no policy will succeed. As Gray (2000: 18) suggests, institutionalizing adaptive management as a component of job descriptions, project designs, reporting, training, etc., is extremely important.

Chornesky (2005: 9-14) draws related relevant lessons about the kinds of information systems and flows that can best support adaptive ecosystem management from a review of case studies. Her lessons about monitoring are:

1) Create value and impact by directly linking monitoring to resource decision-making and ensuring that data are highly credible.

[6] Issues dealing with offshore MPAs will not be discussed by the NAC.

2) Ensure longevity by formalizing accountability of the participants and by developing sustained funding streams.
3) Make things happen with dedicated capacity and institutional autonomy.
4) Start out with an integrated information system.
5) Maximize data access, analysis, and reporting to support public processes.
6) Plan for change.

Multiple actors – public, private, and non profit – will likely be involved in adaptive management and monitoring and evaluation. But to ensure success, it is critical to give full support to the State of California's two responsible agencies: the DFG and the FGC. The DFG is the lead agency in implementing the MLPA. Currently, it only has a few individuals deeply knowledgeable about the MLPA, and budgeted funds generally have ebbed and flowed over the past decade. On a positive note, the DFG has seen substantial growth with terrestrial habitat conservation policies and programs – experience which is likely to be relevant to MLPA implementation. Still, the DFG may need to allocate more personnel to and focus on the adaptive management process related to MPAs. The FGC, in turn, is responsible for formal policy making, including any changes made through adaptive management process. It relies on the DFG and public input for information.

The challenge of orchestrating the cooperation of the multiple organizations represented on these committees and on the implementation of the AMMEF can be accomplished through the creation of new, staffed, independent, operating unit (referred to in the Executive Summary as the Institute) with the "**singular purpose and dedicated capacity** to allow the partnership to move forward" by coordinating monitoring and research, managing data, catalyzing research and development of new monitoring and analytical methods, translating results for different target audiences, and adaptive management. Various examples exist of such organizations, such as the Southern California Coastal Water Research Project Authority. In this way, the operating unit can ensure the operational relationships among monitoring, research, and the science needs of decision-making as well as deliver information about ecosystem condition and performance over the sustained time frame that will be essential for adaptive management. The long-term funding recommendations to Secretary for Resources Mike Chrisman approved by the MLPA Blue Ribbon Task Force include a recommendation to create a "California Marine Monitoring and Evaluation Institute" (referred to as the Institute) as a structure through which multiple parties can collaborate. (Recommendation 5.2)

Table 1 identifies roles describes the process in adaptive management under the MLPA that are recommended in this framework. It is important to try and streamline consultative and reporting functions as appropriate. The institutional choices follow the recommendations made in the sections above.

Table 1: Institutional Roles in MLPA Adaptive Management Processes

Entity	Identify science questions re. adaptive management	Design monitoring and evaluation program	Implement network of MPAs and monitoring and evaluation program	Monitor MLPA implementation and monitoring and evaluation program	Adaptive management review and recommendations
FGC: The FGC has authority to establish, modify, or delete state marine reserves and state marine conservation areas. The FGC may establish fishing regulations for state marine parks, but must have the concurrence of the State Park and Recreation Commission (see below) to establish, modify or delete a state marine park.	D	D	O	O	D
DFG: The DFG has management authority over living marine resources within state waters (generally between 0 and 3 nautical miles from shore or around offshore islands, with a few exceptions such as Monterey Bay) as well as authority to regulate fisheries that deliver catch to California ports. Thus, DFG has some authority beyond state waters and often enforces regulations outside the 3 nautical mile line. DFG enforces laws established by the California Legislature and regulations established by the FGC.	T	T	M[7]	A	T
MAC: Regional bodies of scientists and stakeholders appointed by the DFG Director to review and approve adaptive management of MPA networks. They make recommendations to the DFG	R	R	NR	R	R
The Institute: Statewide entity whose staff will support implementation of AMMEF. The steering committee will be appointed by the DFG. It will report to the DFG and work in coordination with the MACs.	A	M	M[8]	M	M

[7] Implement network of MPAs
[8] Implement monitoring and evaluation program

External Researchers/Experts: Institute will contract out aspects of work that require scientific input and expertise.	A	A	NR	A	A
Peer Reviewers: Independent scientific experts to review and assess implementation of adaptive management, monitoring and evaluation design and results.	A	A	NR	NR	A

Key: A=Analyze and provide recommendation and /or report, D=Authoritative decision, M=Operational management, R=Recommend (initial), T=Transmit, with recommendation, O=Oversight, N=No administrative, management, or decision-making role

3. Statewide Oversight and Management for AMMEF Implementation

There are many ways to set up the infrastructure for monitoring, evaluation, and adaptive management implementation. However, it is a challenge to orchestrate and sustain the cooperation of the multiple organizations involved in the MLPA. Funding and priorities of participating organizations change and new responsibilities can compete for staff time and energy (Chornesky, 2005). One way to avoid this issue is to create a new organization, the Institute, and identity that can push the partnership(s) forward (discussed in previous section).

A predictable funding stream and dedicated capacity and leadership, which will come from the creation of a new operating unit, are vital for implementing major portions of the monitoring plan and for promoting sustained implementation. Creating mechanisms of accountability for partners and participants as well as long-term sustainable financing will help ensure the long-term success of the MLPA AMMEF. This formalization could be accomplished by: 1) multiple agencies or organizations may enter into a statutory or voluntary agreement, and/or 2) partner institutions or individual scientists may receive grants or contracts for agreed upon work. The structure established to coordinate monitoring, evaluation, and adaptive management must provide transparency of the AMMEF adopted process. South Bay Salt Ponds Restoration and Southern California Coastal Water Research Project Authority are just two examples of organizations that were created with a partnership mandate and intend to create sustained funding streams.

3A. Indicators, Measurements of Progress, and Questions

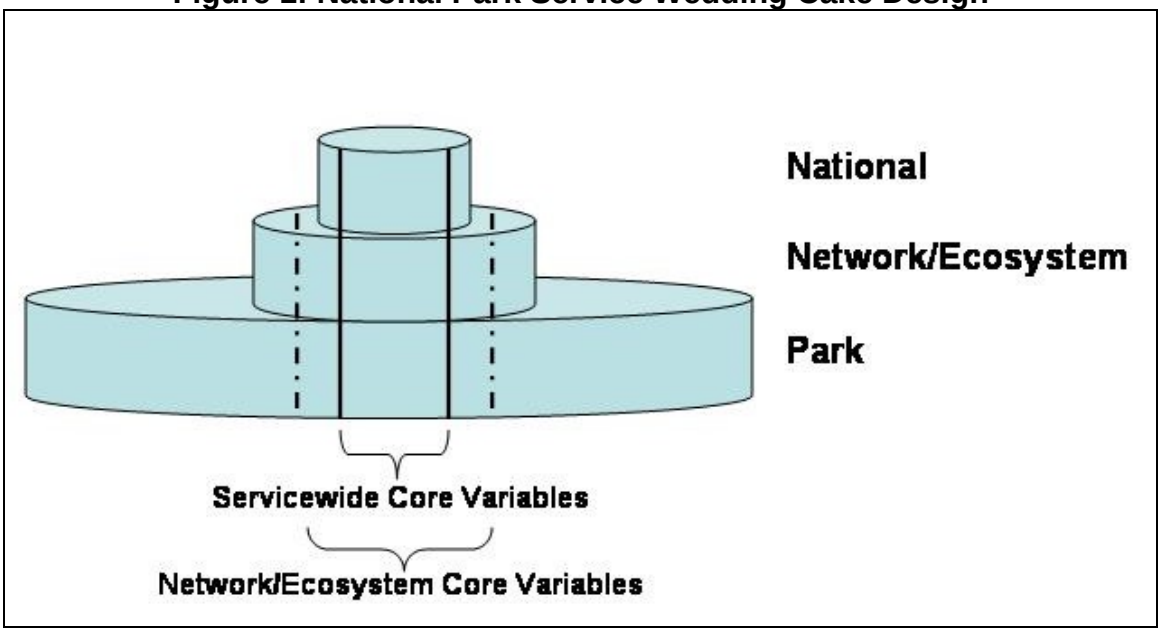
Monitoring Indicators

The indicators that will be selected to monitor throughout the MPA statewide network may follow the “wedding cake design” used by the National Park Service and adapted from the USDA Forest Service. Indicators will be needed at three levels (see figure 1). At the “park level” (in the MPA statewide network the equivalent is the individual MPA or local MPA network), site specific data will be needed by resource managers and other stakeholders to make management decisions. The “network/ecosystem level” (in the MPA statewide network the equivalent is the region) will also have a set of indicators that are monitored in a standardized way to allow for larger area comparisons, to assess system properties best addressed at this scale, and to synthesize the data. At the “national level” (in the MPA statewide network the equivalent is the statewide), again a set of indicators will be monitored that are most relevant for evaluating policies at this scale. For the MPA statewide network, a select group of MPAs can be monitored for the AMMEF (Section 2853 (c)(3) of the MLPA). However, developing a network monitoring program with control areas outside of MPAs will require a large investment in planning and design to guarantee it meets the requirements of the MLPA and objectives of each MPA. It is crucial to solicit stakeholders’ participation in deciding which indicators to monitor at all levels so that indicators reflect key values of interested parties and the public.

Once the *Monitoring and Evaluation Report* is developed, a core list of indicators will be established for the state and for each region. This list will be guided by the statewide goals, and the regional goals and objectives. The list of indicators will be drafted by the Institute staff

with scientific, MAC, and policymaker input. Individual MPAs will have a menu of indicators, but not all indicators will be measured in each MPA. As these data are collected, results will be analyzed by the Institute staff and cooperators to determine status and relative change. Further, data gathering activities need to be coupled with an effort to learn more about the system's properties over time – and therefore improve our ability to say with any certainty whether the MPA designation is yielding the desired result. Review of these results will be used to evaluate whether or not the MLPA is effective in achieving the goals and objectives at both the region and state level.

Figure 1: National Park Service Wedding Cake Design



Source: http://science.nature.nps.gov/im/monitor/3-PhaseApproach.htm
[National Park Service Inventory and Monitoring website]

Although the topic of indicators and measuring performance is presently under discussion between scientists and managers, several ongoing efforts are underway that could help inform the choices ahead in designing California's MPA monitoring system. Currently, NOAA's National MPA Center is hosting workshops with experts from around the United States to recommend a suite of indicators for the National MPA Network on Marine Natural Heritage. NOAA's working group now has a comprehensive list of indicators for the natural sciences that it will narrow down to seven. Syms and Carr (2001) propose a set of parameters for individual and networked conservation MPAs, with parameters at the species, community, and ecosystem level (see Appendix 7).

Similarly, the process of translating objectives into questions has not been done for many MPAs. However, experience in places like the Channel Islands, Great Barrier Reef Marine Park Authority (GBRMPA), and the Florida Keys National Marine Sanctuary can provide useful insights into potential methods for developing strategic science agendas.

The Channel Islands case study provides some experience with planning processes as well as lessons on how to improve that process. The DFG translated the MPA objectives for the Channel Islands MPA network into scientific questions and potential monitoring activities (DFG, 2004). Scientists developed a list of monitoring questions that reflected their interests and major goals and objectives. Stakeholder and scientist participation in workshops resulted in various documents on socioeconomic and biological monitoring (NOAA, 2003; DFG, 2004). In the end, however, this process did not clearly document the links among MPA goals, objectives, and monitoring. Nor did it establish an overall monitoring structure that could act as a clearinghouse for monitoring information, deliver monitoring results in a form accessible to interested audiences, or provide for permanent data archiving, access, and data quality control.

Since the Channel Islands MPAs were created outside of the MLPA process, they used a different set of goals than those in the MLPA, although some similarities exist. Since the Channel Islands MPAs ultimately will become part of the southern California region MPA network, the challenge will be to integrate their goals and objectives with those established under the MLPA regional implementation process. Some modification may occur. Similarly, the management plan and monitoring and evaluation plan developed for the network of MPAs created for the southern California region should incorporate the Channel Islands MPAs, which also may require modification of existing management and monitoring and evaluation plans.

The GBRMPA recently developed a detailed list of priority research questions for park management (GBRMPA 2005). The final 21 priority questions, out of an initial list of 270 research needs identified for park management, were deemed to be of critical importance, with answers needed within one to three years. This prioritization was accomplished through extensive consultation with staff, the scientific community, and GBRMPA's Tourism and Recreation Reef Advisory Committee. This process took two years and involved extensive scientific and stakeholder input. Although such an extended timeline will not work for the MLPA AMMEF, what can be learned from this process is that involving various stakeholders and policymakers at this stage is important in creating support for and trust in management and policy decisions.

Indicators can be selected in different ways. Conceptual modeling has been widely adapted across the National Park Service as a tool in ecosystem management projects. Conceptual models help formalize and articulate assumptions about ecosystem structure and function and the anticipated responses to management interventions. The Florida Keys National Marine Sanctuary (FKNMS) recently designed a conceptual model to determine which parameters to monitor (NOAA, 2005; FKNMS, 2003; NOAA, 1998). A conceptual model helped determine the relative importance of known functions of the major biological components of the ecosystem and helped identify critical parameters to monitor in order to detect changes in important attributes of the ecosystem.

Successfully applying lessons from the examples above to the central coast and other regions in California will involve policymakers, scientists, and stakeholders in the translation of goals and objectives into questions that may be answered through monitoring. Priorities must be set according to both values which define the shared vision of success for the future and scientific merit in evaluating progress towards this vision. While indicators should be simple and understood by all stakeholders, they need to be selected through a scientific process. It is also crucial to establish a clear statement of the desired outcome, while simultaneously considering variability and the multiple interacting factors which affect ecosystem condition as well as the long-time scale required for assessing ecosystem response (NFCC, 2004; FAC 2005).

Indicator Issues

There are many issues to consider when selecting indicators and the most relevant experience in marine systems comes from fishery applications which may not satisfy the full set of needs for evaluating MPA ecosystem condition.

The NOAA Working Group Natural Heritage identified several variables to consider when selecting indicators:

- Sensitivity (statistical power): ability of data to identify an effect or change
- Can a target be determined
- Can a threshold be determined
- Timeline: length of time for a metric to respond to a management action
- Ease of collecting data
- Cost to acquire data
- Response rate
- Variance: natural variability
- Translatable to the public

Other issues include, for example, considering fisheries independent and fisheries dependent. There are a number of ways in which these data can be biased because the purpose of fishing is to catch fish rather than to measure objectively fish stocks (CDFG, 2005). Further, metrics designed to reveal fishery dynamics may not address issues of ecosystem condition. The Institute staff, collaborating scientists, and scientists on the MAC will need to address such issues when selecting indicators.

Benchmarks or Relative Change

Some debate presently centers on the feasibility of developing explicit benchmarks for evaluating progress towards an MPA objective. This issue will need to be considered by the MAC in their consideration of monitoring designs proposed by the Institute staff.

When significant uncertainty exists regarding how ecosystems are structured and function, scientists may be reluctant or unable to make firm predictions about the system's response to management interventions. In such cases, scientists may rely upon measures of relative change in protected areas. This is the approach taken in the Channel Islands MPA monitoring plan, which does not use absolute benchmarks (e.g. x% kelp canopy cover or some specific value of a species diversity index). Instead, it defines performance relative to unprotected areas or other suitable reference locations (CDFG 2004). According to the present monitoring plan, the Channel Islands MPA network will be considered as performing satisfactorily, for example, if the biological trends within MPAs approach given estimates of potential change more rapidly than areas outside of the MPA.

In measuring relative performance, various options exist for selecting the performance metrics or benchmarks. The appropriate option may depend on the indicator under consideration. As the Channel Islands example above illustrates, one possible way to establish relative performance metrics entails asking whether there is a statistically significant difference in some quantity or amount (e.g. 20% greater) in some quantity when measured in the MPA vs. a reference site (or a Year 0) in some specified time interval. An alternative approach is to develop conceptual or quantitative models (such as the FKNMS example) that can guide predictions about anticipated responses of the system to MPA designation, and therefore aid in developing qualitative or quantitative benchmarks of progress.

The National Fisheries Conservation Center (NFCC) report, in addressing the challenge of long-time horizons for detecting changes in marine MPAs, suggests that monitoring "should focus on interim benchmarks of progress that reflect an underlying mechanistic understanding about how the MPA is expected to produce its desired effect(s)" (NFCC 2004) – an approach that is more consistent with the development of conceptual models. Syms and Carr propose determining targets, specified levels, or directions for each of these parameters or response variable, as well as assessing whether or not there are limits or acceptable deviations from specific targets. Institute staff, along with scientific feedback from the scientists, should propose to the MAC what is appropriate for each variable monitored.

Recommendations

For the development of each *Regional Monitoring, Evaluation, and Adaptive Management Implementation Plan,* the Institute staff with scientific input, feedback and review from MAC and policymakers should develop the questions and indicators in the context of the goals and requirements of the Act.

Where appropriate, the Institute staff should collaborate with and learn from others who are developing indicators, such as NOAA. In addition, a science-based process with expert input and external peer review will be necessary to design the most robust and strategic set of indicators for determining progress towards an objective. Furthermore, because certain of the indicators and methods must be consistent across the state, it will be critical for the *Monitoring and Evaluation Report* to be regularly reviewed and updated as more regions and MPAs join the state network and scientific knowledge improves.

3B. Science Design and Methods

The design of the monitoring, evaluation, and adaptive management program for network(s) of MPAs or components of a network, of this size is complex and confronts several issues discussed below. Addressing these issues will require a deliberate design process followed by rigorous external peer review prior to implementation.

There are many ways to set up the design for collecting biological, physical, and socio-economic data for the AMMEF. Four main approaches are:

1) A Statewide Survey: Statewide monitoring randomly or purposely stratified could provide robust results since it would eliminate the challenge of finding appropriate reference sites. However, a statewide survey could involve considerably more resources than monitoring only localized areas.
2) Within MPAs: This monitoring would provide information on the state of protected resources and ecosystems.
3) Inside MPAs vs. Outside MPAs: This approach would compare and contrast conditions over time. Inferences could be made on differences among MPAs. For this approach to be valid, it requires having control sites with comparable habitat as well as with fishing activities.

4) Multiple MPAs and Controls: This approach would allow inferences on general MPA effects, influence of MPA environmental design features, and predict effectiveness. Pairs of MPAs are selected inside and outside MPAs across a range.

In addition to location of monitoring, the timing of monitoring is also an important factor. Below are the two main approaches:

1) After-Control-Impact (ACI): If it is not possible to collect data prior to MPA establishment or at implementation, it can be collected intensively during the first year, as was done in the Channel Islands to supplement the 20-year baseline of non-MPA specific data collected prior to MPA establishment. Comparing data from inside and outside the MPAs can provide insight into how the establishment of the MPAs has affected the trajectories, trends and patterns of two systems over time and how the sites are changing in predicted ways.
2) The Before-After-Control-Impact (BACI): BACI can provide information on the effectiveness of MPAs at protecting species targeted for exploitation (Syms and Carr, 2001). BACI is more common than IVRS (see below) and requires that reference sites (to which MPAs will be compared) be as similar as possible to MPAs. Although these sites are often challenging to find, BACI is based on the model that temporal differences in sites are attributable to MPA effects and therefore can make site specific statements about MPA effectiveness (Syms and Carr, 2001). There is a rich literature on BACI designs (Steward-Oaten and Murdoch, 1986; Stewart-Oaten and Bence, 2001; Schroeter *et. al*., 2001).
    a. The Impact vs. Reference Site (IVRS): This approach uses before and after data for MPA comparisons. This approach assumes that the MPA and non-MPA sampled areas are independent, formally randomized experimental replicates, and therefore sites are randomly assigned to controls or MPAs. This approach requires that sites (either in MPAs or control areas) are independent (do not affect each other), but this condition of independence is often difficult in reality to maintain (Syms and Carr, 2001).

Based upon the timing of MLPA implementation and the MPA site selections, different approaches may work for different indicators and areas. BACI and IVRS approaches will most likely be effective in the central coast, where locations of MPAs known, and established in the near future.

A rich literature on research design can be reviewed once the questions and indicators are selected. It is recommended that the Institute staff in consultation with scientists on the MAC and other experts devise the general nature of the sampling design, especially in view of the availability of pre-establishment monitoring data relevant to selected indicators. Finally, although the MLPA (Section 2853 (c)(3)) and scientists may not require monitoring in every site, some form of periodic rapid assessment may be needed at sites that are not routinely monitored to ensure sound adaptive management and for policy and public education purposes.

Control Sites and Replicates

A number of additional challenges are associated with ensuring that sufficient data are collected to satisfy the primary purpose of a monitoring program. The primary purpose of collecting data inside and outside of MPAs is to make statements about differences between these two types of areas as related to the increased protection afforded by the MPA. Willis et al. (2003) critically evaluated experimental designs employed in published studies related specifically to reserves (one type of MPA) and identified problems with replication and lack of control sites:

- Only one site sampled inside and outside a reserve, or no control sites sampled at all (insufficient sample replication)
- All control sites located only at one end of the reserve (spatial confounding)
- Surveys only done at one time (lack of temporal replication)
- Not enough reserves sampled
- Reserves are often sited to include special or unique features so finding controls is difficult (Willis et al. 2003).

These problems can affect the ability to determine whether or not differences among control sites and MPAs exist. Willis et al. acknowledged that some of these problems are unavoidable due to the nature of the reserve system. However, while identifying a perfect set of controls and replicate sites may be impossible, ideally, control sites should be located in order to balance competing priorities regarding proximity to the protected areas to which they will be compared. Control sites should not be so close to the protected area that their biological features are enhanced because of the protected area. However, the sites should not be so far away that the conditions and habitats do not match (Gell and Roberts, 2003). It is recommended that the Institute staff develop criteria for control sites and replicates and the list of locations in consultation with the scientists on the MAC. The Institute will need sufficient planning time and resources to implement rigorous survey designs, intensive baseline data collection, and data management systems.

Spatial and Temporal Considerations of Research Design

In order to understand the trends and patterns of indicators being measured, scientists must understand how spatial and temporal variability can complicate data collection and analyses. Knowledge about trends and patterns of the indicator being measured should be incorporated into the monitoring design. For example, behavioral patterns, migration, and mobility of species can change annually or seasonally. Syms and Carr (2001) explain that some parameters may be restricted to within the boundary of the MPA, such as increased larval production, and others may be manifested over a greater spatial expanse, such as larval dispersal to, and replenishment of fish populations outside of, an MPA. Furthermore, natural spatial variability can confound control effects if the parameter of interest is not similar prior to the effect that is being measured (Osenberg and Schmitt, 1996). When selecting controls, pairs of geographically adjacent sites can minimize this spatial variation (Tissot and Hallacher, 2003). When conducting meta-data analysis, variability among the sizes of MPAs or reserves may need to be taken into account. Furthermore, confounding factors may interfere with large data sets.

Conceptual models of the ecosystem that reveal relevant temporal and spatial patterns can aid in ensuring effective monitoring designs at multiple spatial scales. Ideally, data or at least a conceptual model of relevant temporal trends and patterns of indicators should exist before determining how to monitor. Syms and Carr give the example that some parameters may respond quickly in some species after MPA establishment, such as change in population size structure of a fast growing species within a MPA, while others may take many years, such as the increased recruitment of a slow-growing species into a catchable stock outside the MPA. Different indicators need to be monitored at different time intervals. For example:

- Data measuring the recovery, measured as the proportion of the total MPA area or focal species population (abundance, biomass, or % of total pop.) that has experienced or "been restored" to assumed original target levels of either community composition, natural conditions, or viable populations levels and stock integrity, could be measured between every two to five years (Pomeroy *et. al.*, 2004).
- Survey data measuring the "perception of seafood availability" should be asked for the same time period every (season, month) of every year (Pomeroy *et. al.*, 2004).
- Survey data measuring the "local understanding" of the MPA rules and regulations can be collected at the start of the project and every year after (Pomeroy *et. al.*, 2004).

Most marine management organizations recommend indefinite monitoring (Pomeroy *et. al.*, 2004). Nevertheless, Gerber et al. developed a model to answer the question, "How long should we monitor the recovery of an over-fished stock to determine the fraction of that stock to reserve?" and concluded that monitoring was maximized between three and seven years, with a discounting rate of 1%, depending on the precision of monitoring (Gerber *et. al.*, 2005). However, this model is not applicable to MPA monitoring because of its simplified structure (e.g. covering a single species fishery) and assumptions (e.g., it did not take into account interactions between species). In comparison, a goal of MPA designation is to sustain ecosystem health and benefits in perpetuity – a challenge likely to require continued attention in a world where the environment and human uses and values are constantly changing. Table 2 illustrates the tasks and related time frames at which monitoring may need to occur. Following the NPS wedding cake (Figure 1), at the individual MPA there may be more indicators and they may be collected more frequently, whereas select sites and indicators at region or state scale may take place less frequently. The relative frequency of data analysis and reporting may similarly vary. Review and adaptive management will occur less frequently as the scale increases.

Institute staff in consultation with experts and MAC scientists should design data collection schemes that incorporate considerations of indicator sensitivity and spatial and temporal variability. Furthermore, where possible intensive data collection of all, or the most critical, indicators at all sites before MPA establishment is recommended. Where pre-designation data collections are not possible, surveys should be conducted at year 1 and then again in the future at intervals determined by indicator sensitivity. Mechanism that confer flexibility will also be needed so that monitoring activities can be rapidly mobilized in response to emerging threats (e.g., invasive species, oil spills, and the like) or unusual environmental perturbations.

Table 2: Illustrative Table of Scale and Temporal Comparison for Adaptive Management and Operations

Task	Individual MPA	Region	Statewide
Data Collection[9]	Seasonal or Annual	Annual - Biological Annual - Social	Multi-year - Biological Annual - Social
Data Review	Annual	Multi-year	Multi-year to Decadal
Operational Changes	Seasonal	Annual	Annual
Adaptive Management	Decadal - Biological Annual - Social	Decadal - Biological Multi-year - Social	Multi-decade - Biological Multi-year - Social

As determined by the overall monitoring design, In between intensive data collection years, a smaller subset of sites may need to be sampled.

Statewide Universal Methods and Data Management Requirements

All grantees, subcontractors, or partners awarded funds to collect data will be required to use methods explained in detail in the *Monitoring and Evaluation Report* and other protocols adopted by the Institute and to deliver data to the state MPA monitoring entity in a format compatible for data management. Further, scientists receiving permits for research activities at the state's MPAs or conducting research using the monitoring data will be required to share their findings and products, and where appropriate their data, with the state MPA monitoring entity for the latter's use in evaluation of MPA condition, information synthesis, reporting, and communication.

3C. Quality Control of Data

Issues of data quality control are critical when the results are intended to inform public processes. Enforcing consistent methods for data collection and storage as well as establishing an integrated statewide data and information management structure at the start will prevent problems often associated with analysis of large and complex data sets for broad geographical areas. Different components of the system will have different requirements. Furthermore, peer review of data collection protocols, management practices, and analytical approaches by disinterested parties, as well as legal review and public opinion, will ensure the information system's credibility. A monitoring effort of this magnitude will need processes for quality assurance and control (QA/QC).

Data could be collected by many different types of programs and entities such as staff of the organization implementing the AMMEF, the DFG, and other monitoring programs (e.g. Partnership for Interdisciplinary Studies of Coastal Oceans (PISCO), or Multi-Agency Rocky Intertidal Network (MARINe)). All of these data must be integrated into the MPA information management structure to enable data syntheses and overall assessments of MPA performance.

[9] Data collection should occur when most appropriate for the variable being collected. This table is designed for illustrative purposes.

For volunteer monitoring, an added challenge exists of broadening participation in monitoring and marine stewardship while establishing a protocol framework sufficiently rigorous to produce useful data. The Surface Water Ambient Monitoring Program (SWAMP) was proposed in a report to the California State Legislature to integrate existing water quality monitoring activities of the State Water Resources Control Board (SWRCB) and the regional water Quality control boards, and to coordinate with other monitoring programs (SWRCB 2005a, 2005b). SWRCB addressed the challenge of ensuring data quality and intercomparability by undertaking an intensive effort to define systematic data collection and analysis protocols, data quality objectives, procedures for data storage and management, and many other factors that all participants were trained on and abided by. Learning from this experience, it essential to communicate and implement standardized, universal methods of data collection and storage. Reef Check California, for example, has been working with the DFG to ensure their monitoring protocols will provide useful data. The Great Barrier Reef Marine Park Authority has also succeeded in this effort (Day, 2002). Chornesky (2005:2) advocates documenting standardized monitoring procedures and requirements and making this information easily available online. Such documentation creates transparency and helps ensure that results can be compared across multiple spatial scales, which will be essential for assessing progress for a statewide program.

The Institute staff, with scientific input, will provide clear guidance on indicators, methods, data formats, etc. for each indicator. This will be explained in *Monitoring and Evaluation Report* and new monitoring modules would be periodically developed. It could be an online document that changes as needed. Furthermore, if grantees, subcontractors, or partners are funded to collect data, they should be required to use methods approved by the MLPA monitoring and evaluation process. Such requirements could also be set forth in permits issued by the DFG, for example.

In summary, to ensure the credibility and acceptance of results by decision-makers and stakeholders, data need to receive external scientific review (Pomeroy *et. al*, 2004). The MAC, based on its members insights and experiences, will provide recommendations for a set of operating guidelines and expectations for external review to the DFG for presentation to the FGC. Equally important will be using a scientific process to strategically set the course for the AMMEF. External reviewers need to be unbiased and disinterested parties. The DFG already has a peer review process in place that might be used or built upon. This review should include consideration of methods and their implementation, quality control/assurance procedures, and, of course, data results and syntheses.

3D. Data Management

Developing an integrated information system concurrent with implementing the network component of MPAs that will be adopted by the FGC can increase and improve data analysis and synthesis as well as the use of data by policymakers and managers to make decisions.

The Institute should develop an overarching strategy for managing, archiving, and communicating monitoring data. This can help avoid inefficiencies in conducting data synthesis and dissemination to interested parties to support public processes. This strategy can also provide a framework for identifying and meeting the future needs and outline the structure, equipment, human and financial needs for implementation. Further, an integrated information

system should be developed at the statewide scale that enables broad access to data, provides long-term data archiving, establishes data management standards, and institutionalizes data access policies.

3E. Communication of Process and Results

Data, progress, and results of the AMMEF need to be communicated with policymakers, managers, stakeholders, and scientists since the main purpose is to communicate information on individual MPA or MPA array trends, status, and performance to improve policy and practice. Audiences include scientists, government staff, policymakers, and central coast consumptive users, non-consumptive users, local and private businesses, and the public. Many ecosystem management efforts across the nation now incorporate broad access to monitoring results. Given the multiple audiences, reports should be made accessible to policymakers, local stakeholders, and the public. The MPA monitoring program should have websites that include reports and other relevant information, such as access to data, technical papers, and public education materials.

Contentious public processes require that monitoring data and interpretive reports are easily available and arrive in a timely fashion. It is recommended that communication of progress needs to be presented continuously online. The website could provide information summarizing progress data, products as well as any updates or interesting news related to the AMMEF. Staff will determine key messages with illustrative examples for each audience and make a report card, a brochure, and/or webpage(s) with relevant information. Other possible approaches include producing synthetic reports that are continuously updated online or convening open public conferences that bring together scientists conducting monitoring and research activities. Other creative communication strategies using multimedia should be explored. Collaboration with the California Department of Parks and Recreation as well as local NGOs is encouraged to assist with outreach. Staff will create and periodically assess and revise a public information dissemination strategy.

Though the FGC will review proposals for changes to the MPA network every three years, a more extensive report will be written five years after MPAs are established. The recommendation to wait until year 5 is consistent with other processes in place already (e.g., Channel Islands MPAs) and provides time for preliminary biological changes to occur. All of these reports will be integrated into the public information dissemination strategy mentioned above.

3F. Role of Research in the AMMEF Framework

Research is important to enhance the AMMEF process, and it is an important way to support the adaptive management of ecosystems. Given the size and scope of MPAs and the MPA array, separate research activities will be needed to gain a better understanding of the underlying biological, chemical, or physical phenomena and human dimensions relevant to particular MPAs or an MPA network. Overlap and feedback naturally occur between the research and monitoring discussed above. For example, information about the status of some element of a particular ecosystem may raise questions that can only be addressed through a program of focused research. Focused research will almost certainly make use of the datasets

collected through the status and trends monitoring. In addition, applied research and development will be needed to develop new monitoring methods, indicators, modeling approaches, or other analytical methods as needs arise. Scarce financial resources require that research activities be prioritized.

The process employed by the Great Barrier Reef Marine Park Authority (GBRMPA) to determine research priorities for the Great Barrier Reef Marine Park provides one possible approach through which such priorities might be set in the MLPA and revisited over time (GBRMPA, 2001).

The GBRMPA periodically updates its research priorities based on emerging issues and the results of ongoing research and monitoring. The process and outcomes for a recent review of the GBRMPA research priorities are described in detail in "Australian Government GBRMPA 2005, Research Needs for Protection and Management of The Great Barrier Reef Marine Park 2005," but a similar consultative approach involving previously mentioned participants is used. During the update in 2005, the key research issues considered included importance to the protection of the Great Barrier Reef; national research priorities; legislative and policy imperatives; community interest; and relative urgency (GBRMPA, 2005).

Below is a brief description of three types of research relevant to the MLPA, in order of priority suggested by the SAT. Relevant aspects of all three should ideally be embedded in the regional plans. Scientists on the MAC in collaboration with Institute staff and external cooperators should identify key science needs, some of which would then need to be incorporated into the operational plan. The third research area is important, but would be supported through partnerships and outside funds rather than using resources to implement the AMMEF. Implementation of the AMMEF should motivate and provide resources and infrastructure to encourage scientists to conduct studies and ensure research findings flow to and are incorporated into the MAC and AMMEF operations and planning. Monitoring data should be broadly available to researchers to advance knowledge. Furthermore, in the MLPA Central Coast Project, for example, one of the regional objectives requires the MLPA to develop collaborative scientific monitoring and research projects evaluating MPAs that link with fisheries management information needs, classroom science curricula, volunteer dive programs, and fishermen of all ages. The research areas listed below relating to MPA monitoring, evaluation, and adaptive management, specifically categories 2 and 3, could be the focus for helping achieve this objective.

<u>1) Research applied to evaluate if MPAs are effective in achieving objectives</u>: In this category: (a) monitoring inside and outside of MPAs, and (b) occasional process-related studies that help explain patterns shown by monitoring work under (a). For example, if a nearshore rockfish species increased in density (an increase inside MPA compared to outside), a process study would be required to show how to interpret monitoring data. The purpose of this study might be to answer any number of questions: What is the potential reproductive capacity of rockfish based on densities within MPAs? What is the larval dispersal distance? Is there evidence of spillover?, etc. These process studies are needed to help interpret monitoring data related to effectiveness. The DFG, MAC and institute could either generate from the beginning what sort of process study needs exist or decide as the plan is implemented and preliminary results presented. An additional key area of needed research is the development of improved indicators that reveal ecosystem condition and trends (e.g., relative health and resilience).

Such indicators would go beyond conventional single species approaches to examine patterns and processes related to sustaining multi-species assemblages.

2) Research applied to test MPA effectiveness by decoupling natural and human changes: This line of research would test whether or not MPAs are an effective management tool by clarifying the relative contribution and interactions of different drivers affecting ecosystem condition, such as physical processes, climate change, and various anthropogenic activities including fishing.

3) Research studies of natural ecosystems that are not being influenced by fishing and other anthropogenic activities: These types of studies will provide baseline information that can help in guiding goals and objectives, developing conceptual models, and identifying meaningful monitoring indicators for the AM&ME. Examples include elucidation of natural food web dynamics, assessments of marine larval dispersal, the frequency and roles of diseases and parasites in unaltered systems, and interactions between marine community structure and oceanographic and biogeochemical processes (e.g. nutrient cycling, rate of sedimentation), etc. To the extent that MPA monitoring data are used in such research, mechanisms should be in place to ensure research findings are made available for use in the AMMEF.

The MLPA is challenged by the immense spatial scope of the MPA network(s) as well as the diversity of entities that will be conducting research and monitoring. In several of the monitoring case studies analyzed by Chornesky (2005), one or more committees have been structured to facilitate the links between data and decision-making. When linking science and policy in this way, it is important to keep the questions developed by policymakers and stakeholders in mind. At the same time, it is necessary to ensure that particular the types of questions the monitoring and research address are based on a scientific approach.

Permits

The DFG will need to work with the MACs to devise a mechanism for frequent review of applications for research permits that involve take, in conjunction with the DFG's scientific permitting process (Carr *et. al.* 2005). Priority should go towards research that will contribute to MPA evaluation and understanding ecosystem effects, projects involving local stakeholders, and existing research programs with historical data of value in understanding the status and trends of ecological systems within the MPAs. It is recommended that the DFG tie the data ownership to the permitting process and require delivery of data to the monitoring program for its use and to incorporate into various data syntheses and communication products.

3G. Ownership of Intellectual and Physical Property

There will be a need for clear guidelines governing ownership of data and associated intellectual property resulting from monitoring activities and research conducted at the state's MPAs. Organizations may include state agencies such as the DFG, as well as separate monitoring enterprises (PISCO, universities, other consortia, etc.) whose data are used in the monitoring and evaluation process. Data collected by the DFG, while owned by the DFG, are available to the public through the normal public information request process. It is recommended that all monitoring data collected for the state's MPAs should be owned by the state and, to the extent possible, made available to the public on the internet. This

arrangement should be spelled out in an MOU in order to ensure the state has timely access to data collected for the purpose of MPA monitoring. Data collected by separate monitoring enterprises (see Table 3 below), university researchers, and others should be owned by the state, but made available for research purposes and permission granted by the state for incorporation of the data into other monitoring data systems.

An unresolved issues that requires further deliberation is whether some “lag” period (of a year, for example) should be put in place by an MOU that would either delay public release while allowing use and reporting by the Institute or actually give other monitoring programs and external researchers exclusive use of the data they collect prior to use by the Institute and public release. The relative benefits and risks of such approaches and the extent to which they advance the state’s resource stewardship responsibilities should be considered by the MAC and AMMEF implementation staff.

There should also be clear guidelines to govern physical property (boats, vehicles, ROVs, monitoring instruments, laboratories, etc.) used in data collection and purchased with state funds. It is recommended that these guidelines be developed in concert with intellectual property guidelines and set in place through an MOU between the various public and private entities who will be sharing equipment.

4. Guidance for Regional Implementation

Assuming that the AMMEF will coincide with the Nearshore Fisheries Management Plan regions, each of the regions will develop a regional monitoring, evaluation and adaptive management implementation plan. Using the MLPA Central Coast Study Region as an example, a framework and some guidance for developing these plans is provided below. The plan for the southern region may differ from that of the other regions, since it will include a network component of MPAs established at the northern Channel Islands in 2003, well before the rest of the southern California bioregion was considered for MPA implementation.

4A. Central Coast Regional Goals, Objectives, and Questions

Goals and objectives in the MLPA network cascades from the state to the regional and then to the site level, in that state goals guide the regional goals and objectives, and the regional goals and objectives guide the individual MPA objectives. At the same time, each individual site has a unique combination of ecology, surrounding human communities and uses, and history. Thus, the goals and objectives of each MPA and network will need to reflect these idiosyncrasies, as will place-based efforts to evaluate ecosystem condition. Because this variation cannot be solely anticipated in a “top down” fashion, evaluations of MPA condition and performance will need to incorporate information at various scales. In accord with the “layer cake” model presented earlier, a relatively small number of performance measures will be applied for specifically for region- or state-level monitoring.

Appendix 2 summarizes the full suite of central coast regional goals and corresponding objectives. The regional goals come directly from the Central Coast Regional Stakeholder Group (CCRSG) and are derived from the statewide goals in section 2853(b) of the initiative These goals are general, comprehensive statements meant to guide large-scale marine ecosystem conservation, protection, and management. However, they are not meant to serve

directly as a basis for monitoring, evaluation, and adaptive management of individual MPAs or the network as a whole. Monitoring needs to address the full set of MPA objectives.

A first step in the process of translating MPA objectives into questions has already been accomplished by the CCRSG in developing for each regional goal a number of more specific regional objectives. These specific objectives provide operational definitions for each goal. These regional objectives, while more specific than the overarching goals, also do not directly serve as the basis for monitoring. They, too, must be further translated into a series of corresponding focused questions and then into a set of variables that will be monitored over time to answer these questions.

Below is an illustrative example, reviewed by the SAT and MLPA staff, to show what types of questions could be translated and developed from the central coast goals and objectives and what might be good indicators to monitor. This is a thorough list, and by no means do all of these questions need to be answered and indicators monitored. In cases where only “focal species” are monitored, some care should be given to the criteria for selecting these species.

Table 3: Illustrative Table of Objectives Translated into Questions for the Central Coast

Goal 1: To protect the natural diversity and abundance of marine life, and the structure, function, and integrity of marine ecosystems.

Objective	Translated into Measurable Questions	Indicator(s)	Baseline data[10]
1. Protect areas of high species diversity and maintain species diversity and abundance, consistent with natural fluctuations, of populations in representative habitats.	1. Do focal species inside MPAs stay the same or increase in size, numbers, and biomass relative to areas of similar habitat adjacent to and distant from MPAs?	Differential change in focal species size structure, age structure, abundance, and/or biomass inside MPAs vs. outside	Size/age structure of focal species, abundance and biomass measures; species richness and diversity in all key habitats
	2. Do species richness and/or diversity stay the same or increase in MPAs relative to areas of similar habitat adjacent to and distant from MPAs?	Differential change in species richness or diversity inside MPAs vs. outside	same as above
	3. Over what time period does the relative change take place for different species?	same as above	
2. Protect areas with diverse habitat types in close proximity to each other.	1. Has the selected alternative of MPAs protected areas with diverse habitat types in close proximity?	Baseline habitat mapping of all MPAs and adjacent sites; assessment of habitat diversity inside and outside MPAs	Baseline habitat mapping (all habitats, not just seafloor)
3. Protect natural size and age structure and genetic diversity of populations in representative habitats.	1. Do focal species inside marine reserves increase in size, numbers, and biomass relative to areas of similar habitat adjacent to and distant from MPAs?	Differential change in focal species size structure, age structure, abundance and/or biomass inside marine reserves vs. marine parks or marine conservation areas vs. outside	Size/age structure of focal species, abundance and biomass measures; species richness and diversity in al key habitats

[10] Important to clarify that best readily available data that has been collected may not be the appropriate baseline data.

4. Protect natural trophic structure and food webs in representative habitats.	1. Do the abundance and size/age structure of key predator and prey species differ inside marine reserves and marine parks, marine conservation areas, or outside areas of comparable habitat?	Differential change in abundance and size/age structure of key species at different trophic levels (note- not all species expected to increase)	Size/age structure of focal species, abundance and biomass measures; species richness and diversity in all key habitats
5. Protect ecosystem structure, function, integrity, and ecological processes to facilitate recovery of natural communities from disturbances both natural and human induced.	1. Do changes in fishing effort affect abundance, size/age structure of populations of selected species within and /or close to reserves?	Differential change in focal species size structure, age structure, abundance and/or biomass inside marine reserves vs. marine parks or marine conservation areas vs. outside	Size/age structure of focal species, abundance and biomass measures; species richness and diversity in all key habitats
	2. Does impaired water quality or other outside factors inhibit populations within reserves?	Measurement of a variety of environmental parameters that may affect populations of monitored species	Broad suite of environmental parameters
	3. What is the level of adult spillover/movement?	Catch per unit effort, size, date, and location of tag and recapture	Fishing effort and catch data
	4. Does the nature or timing of recovery of natural communities from disturbance events differ in different types of MPAs relative to outside areas?	TBD: indicator depends on nature of disturbance	Recruitment of ecosystem engineers or keystone species

Goal 2. To help sustain, conserve, and protect marine life populations, including those of economic value, and rebuild those that are depleted.

Objective	Translated into Measurable Questions	Indicator(s)	Baseline data
1. Help protect or rebuild populations of rare, threatened, endangered, depleted, or overfished species, where identified, and the habitats and ecosystem functions upon which they rely.	1. Do focal species inside MPAs increase in size, numbers, and biomass relative to areas of similar habitat adjacent to and distant from MPAs?	Predicted differential change in rare/threatened/depleted species size structure, age structure, abundance and/or biomass inside MPAs vs. outside	Size/age structure of rare/threatened/depleted species, abundance and biomass measures; species richness and diversity in all key habitats
2. Protect larval sources and restore reproductive capacity of species most likely to benefit from MPAs through retention of large, mature individuals.	1. Do recruitment rates of selected species change over time inside marine reserves versus areas outside?	Differential recruitment[11] of selected species inside and outside MPAs	Baseline juvenile and adult population abundance; recruitment rates inside and outside marine reserves
	2. Does recruitment affect adult abundance inside and outside MPAs?	Correlation of recruitment rates with adult abundances inside and outside MPAs	same as above
	3. Do reserves retain large, mature, fecund individuals of selected species?	Differential changes in size, age, and expected fecundity over time for individuals inside marine reserves versus marine parks, marine conservation areas, or outside areas	Size, abundance, and fecundity of selected species inside and outside marine reserves

[11] **Recruitment**: The amount of fish added to the exploitable stock each year due to growth and/or migration into the fishing area. For example, the number of fish that grow to become vulnerable to the fishing gear in one year would be the recruitment to the fishable population that year. This term is also used in referring to the number of fish from a year class reaching a certain age. For example, all fish reaching their second year would be age 2 recruits. (Source: "Technical Terms" **NOAA's National Marine Fisheries Service Northeast Fisheries Science Center** http://www.nefsc.noaa.gov/techniques/tech_terms.html)

	4. What is the relative effectiveness for the designated levels of protection? This will be answered by answering the question how does the marine system respond to different levels of protection (SMCA, SMPA, SMR) for a variety of species?	Differential changes in size, age, and expected fecundity over time for a variety of species inside marine reserves versus marine parks, marine conservation areas, or outside areas	Size, abundance, and fecundity of selected species inside and outside marine reserves
3. Protect selected species and the habitats on which they depend while allowing the harvest of migratory, highly mobile, or other species where appropriate through the use of state marine conservation areas and state marine parks.	1. Do the presence of marine parks and marine conservation areas affect fishing patterns for migratory and highly mobile species?	Distribution of catch by block and species group where caught and port where landed	Logbook, CPFV, CRFS data
	2. Are people fishing the boundary or "edge" of a reserve and what are they fishing for? Is there crowding on the edge of the reserve?	Distribution of catch by block and species group where caught and port where landed	Logbook, CPFV, CRFS data

Goal 3. To improve recreational, educational, and study opportunities provided by marine ecosystems that are subject to minimal human disturbances, and to manage these uses in a manner consistent with protecting biodiversity.

Objective	Translated into Measurable Questions	Indicator(s)	Baseline data
1. Ensure some MPAs are close to population centers and research and education institutions and include areas of traditional non-consumptive recreational use and are accessible for recreational, educational, and study opportunities.	1. How do population concentrations change along the coast? How does attendance/visitation change over time?	Measure distance to major population centers, census data. Measure ease of access, distance from major highways, parking availability, public transit. Attendance and visitation data should be stratified by uses and demographics over time.	Year 1 visitor use surveys
	2. Has research increased over time in MPAs and are results disseminated?	Trends in # of research studies conducted in MPAs over time; dissemination of results of research studies within CA MPAs (science citation search or similar).	Year 1 survey of research publications

	3. Are recreational consumptive users able to mitigate short-term costs of displacement from MPAs by conducting activities along the edge of MPAs? Will there be long-term benefits from the edge effect?	Changes in use patterns and catch of targeted species by consumptive users over time.	Year 1 consumptive use survey
	3. How are knowledge, attitudes, and perceptions regarding the MPAs changing over time?	Public and user group knowledge, attitudes, and perceptions of MPAs	Year 1 public/user knowledge survey
2. To enhance the likelihood of scientifically valid studies, replicate appropriate MPA designations, habitats, or control areas (including areas open to fishing) to the extent possible.	1. Has selected alternative provided a full range of replicate habitats and MPA designations?	Number of each type of MPA and indication of habitat replication inside and outside	Baseline habitat mapping (all habitats) and identification of comparable "impact" sites
3. Develop collaborative scientific monitoring and research projects evaluating MPAs that link with fisheries management information needs, classroom science curricula, volunteer dive programs, and fishermen of all ages, and identify participants.	1. Does access to central coast MPAs by educators/students increase through time?	Number and type of user of all MPAs	Baseline assessment of educational programs and use of MPAs
	2. Are researchers accessing the MPAs?	Number and type of research projects or programs carried out in MPAs	Any existing research programs present (PISCO, CRANE, etc.)?
4. Protect or enhance recreational experience by ensuring natural size and age structure of marine populations.	1. Are non-consumptive recreational experiences in areas subject to minimal disturbance improving? What are the attitudes and perceptions of users and their recreational experience and how has that changed over time?	Predicted increase in user group satisfaction based on user group surveys	Baseline assessment of knowledge, attitudes and perceptions. Year 1 user survey related to experience w/ marine populations. Thereafter survey annually.
	2. Are size and age structure of recreationally valued species increasing in SMRs over time?	Differential size/age structure of selected species inside and outside MPAs over time; onboard and dockside sampling of recreational catch, location, and effort.	Size/age structure of selected species; CA Recreational Fishery Survey data

Goal 4. To protect marine natural heritage, including protection of representative and unique marine life habitats in central California waters, for their intrinsic value.

Objective	Translated into Measurable Questions	Indicator(s)	Baseline data
1. Include within MPAs the following habitat types: estuaries, heads of submarine canyons, and pinnacles.	1. Did the selected alternative set of MPAs capture sufficient representation of estuaries, canyon heads, and pinnacles?	Habitat mapping within MPAs to groundtruth what is captured in MPAs. Gap analysis for unique habitats.	Baseline habitat mapping
2. Protect, and replicate to the extent possible, representatives of all marine habitats identified in the MLPA or the MPF across a range of depths.	1. Did the selected alternative set of MPAs capture sufficient representation of all central coast habitats?	Habitat mapping within MPAs to groundtruth what is captured in MPAs. Gap analysis for all habitats.	Baseline habitat mapping

Goal 5. To ensure that central California's MPAs have clearly defined objectives, effective management measures, and adequate enforcement, and are based on sound scientific guidelines.

Objective	Translated into Measurable Questions	Indicator(s)	Baseline data
1. Minimize negative socioeconomic impacts and optimize positive socioeconomic impacts for all users, to the extent possible and if consistent with the Marine Life Protection Act and its goals and guidelines.	1. Is the commercial catch or income changing along the central coast?	Quantity and value of catch and relative changes in fisheries	Commercial Fish Landing Receipts
	2. Are commercial catch per unit effort (CPUE), or fishing locations changing along the central coast?	Location, catch per unit effort, and presence and/or amount of displaced effort	Commercial Fish Log Books
	3. Are recreational catch per unit effort (CPUE) or fishing locations changing along the central coast?	Location, level of effort, species, size and amount of catch from recreational fisheries	California Recreational Fishery Survey
	4. Are locations of fishing and boating activities changing?	Level and location of fishing and boating, presence and/or amount of displace effort	
	5. Do impacts financially harm individual businesses? Do impacts harm local and or regional economies?	Monitor use, catch, and value	

	6. Are use, attendance, and visitation changing over time along the Central Coast?	Identify users and attendance and visitation	Baseline and recurring surveys and determine decline, maintenance, or an increase
	7. What is the real value of expenditures associated with identified users?	Surveys to estimate expenditures associated with activities above	Baseline and recurring surveys and determine decline, maintenance, or an increase
	8. How many companies and jobs are associated with identified uses and how has this changed over time?	Surveys to estimate number of companies and jobs that rely on user groups/activities	Baseline and recurring surveys and determine decline, maintenance, or an increase
	9. What is the non-market value per visit and total non-market values and how has that changed over time?	Surveys to estimate non-market value of these activities	Baseline and recurring surveys and determine decline, maintenance, or an increase
2. For all MPAs in the region, develop objectives, a long-term monitoring plan that includes standardized biological and socioeconomic monitoring protocols, and a strategy for MPA evaluation, and ensure that each MPA objective is linked to one or more regional objectives.	1. Are all MPAs in the region developing objectives and do they have a monitoring and evaluation program linked to one or more regional objective?	Number of MPAs with objectives linked to regional objectives, with long-term M & E plans linked to objectives	
	2. Are all MPAs using standardized biological and socioeconomic monitoring protocols?	Number of MPAs using standardized monitoring protocol	
	3. Is each MPA effective in meeting its stated objectives?	Measure indicators linked to objectives, changes in use patterns over time, changes in biological resources over time	
3. To the extent possible, effectively use scientific guidelines in the Master Plan Framework.	NA - will be part of evaluation		

Goal 6. To ensure that the Central Coast's MPAs are designed and managed, to the extent possible, as a component of a statewide network.

Objective	Translated into Measurable Questions	Indicator(s)	Baseline data

1. Develop a process for regional review and evaluation of implementation effectiveness that includes stakeholder involvement to determine if regional MPAs are an effective component of a statewide network.	1. Is there a process for regional review and evaluation of MPA effectiveness that includes stakeholders?	Stakeholder knowledge of process, number of opportunities for stakeholder comment, number of reports and data sets available to the stakeholders	NA
	2. Are individual and regional MPA arrays effective in building a statewide "network"?	Changes in biological resources over time; changes in use patterns over time; improvement in monitoring and management over time	NA
2. Develop a mechanism to coordinate with future MLPA regional stakeholder groups in other regions to ensure that the statewide MPA network meets the goals of the MLPA.	1. Is there a process for central coast stakeholders to engage with neighboring regions to ensure meeting statewide goals of MLPA?	Mechanism for statewide coordination	NA
	2. Is there coordination of MPA planning at the boundaries of study regions to ensure network connectivity and address any potential conflicts?	Mechanism for statewide coordination	NA

4C. Regional Monitoring Programs and Partnership

The scientific research within the MLPA Central Coast Study Region is diverse, ranging from water quality and fisheries management to deep sea biology, kelp forest ecology, and ocean conservation. Major marine monitoring programs in the region include Cooperative Research and Assessment of Nearshore Ecosystems (CRANE), Partnership for Interdisciplinary Studies of Coastal Oceans (PISCO), Central California Ocean Observing System (CenCOOS), Monterey Bay National Marine Sanctuary Integrated Monitoring Network (SIMoN), and Center for Integrative Coastal Observation, Research and Education (CI-CORE), to name a few (see Table 4). These organizations implement diverse marine research programs.

Data from major marine monitoring programs, small scientific studies, or even volunteer monitoring, such as the Citizen Watershed Monitoring Network in the Monterey Bay National Marine Sanctuary developed by the U.S. Environmental Protection Agency, may be used for the monitoring and evaluation if they coincide with indicators selected by the MAC.

Monitoring programs could be assessed to see if they are collecting the right type of data for the MLPA program. Often times the parameters being collected for a long-term monitoring program focus on different questions and may have different goals and objectives not in line with the purpose of monitoring, evaluation, and adaptive management. If the entity(ies) are collecting a desired parameter(s), the Institute staff would ask for these data to be peer reviewed and assessed for quality control. The DFG would then establish an MOU between the monitoring program and California Resources Agency to make the data available for this process as well as available to the public. The AMMEF website could provide links and internet search engines that provide access to relevant data resources. Volunteer and community monitoring programs have benefits that are not just solely for scientific purposes. By engaging in monitoring, a community group can play an active role in management, knowledge, and awareness of MPAs, as well as connect further with California's unique marine environment.

Many concentrated studies take place near marine research stations. Examples include the marine mammal studies at Terrace Point, Santa Cruz by Long Marine Lab, evolutionary physiology, biomechnanics, and ecology studies by Hopkins Marine Station, and fishery and fish population studies at Big Creek State Marine Reserve. PISCO focuses on long-term ecological and oceanographic monitoring to inform ocean conservation and management. The Monterey Bay National Marine Sanctuary's Long-term Monitoring Program & Experiential Training for Students (LIMPETS) trains middle- and high-school students and volunteer groups to monitor the rocky intertidal, sandy shore and offshore areas of Monterey Bay and Channel Islands to increase public awareness and influence policymakers. Elkhorn Slough National Estuarine Research Reserve's (ESNERR) monitoring programs target water quality and weather. The Santa Cruz Laboratory, part of the Southwest Fisheries Science Center of the National Marine Fisheries Service (NMFS), focuses on the Pacific Coast groundfish and salmon species. NOAA has the National Marine Sanctuary Program, National MPA Center and the Fisheries Lab. These examples illustrate the importance and diversity of marine research along the central coast. Map 1 provides location information for marine monitoring sites in and around the MLPA study region from the CenCOOS, PISCO, LIMPET, and Multi-Agency Rocky Intertidal Network (MARINe) programs (see Table 4).

Table 4: Research and Monitoring Programs in the Study Region[12]

CALCOFI Since 1949 California Cooperative Oceanic Fisheries Investigations (CalCOFI) has organized cruises to measure the physical and chemical properties of the California Current System and census populations of organisms from phytoplankton to avifauna. On each cruise a grid of 66 stations off Southern California is occupied. At each station an entire suite of physical and chemical measurements characterize the environment and map the distribution and abundance of phytoplankton, zooplankton, and fish eggs and larvae. http://www.calcofi.org/
CenCOOS The Central California Ocean Observing System is a new initiative and part of the national ocean observing system, the Integrated Ocean Observing System (IOOS). http://www.cencoos.org/
CRANE Cooperative Research and Assessment of Nearshore Ecosystems (CRANE), established in spring 2003, uses quantitative diver visual surveys to sample kelp forests for fishes, invertebrates, and algae.
LiMPETS LiMPETS is for middle school, high school, and other volunteer groups to monitor the rocky intertidal, sandy shore and offshore areas of the five west coast National Marine Sanctuaries. http://limpets.noaa.gov/
MARINe Scientists from federal, state, and local government agencies, universities, and private and volunteer organizations have formed MARINe to monitor important shoreline resources. The network is currently being supported by 23 organizations. Sites are monitored from San Luis Obispo County to San Diego County on the mainland and offshore Channel Islands. http://www.marine.gov/
PISCO PISCO is a large-scale marine research program that focuses on understanding the nearshore ecosystems of the U.S. West Coast. PISCO integrates long-term monitoring of ecological and oceanographic processes at dozens of coastal sites with experimental work in the lab and field. http://www.piscoweb.org/research/community/subtidal/index.html
SIMoN The SIMoN network is composed of many institutions and agencies that perform monitoring activities in the Monterey Bay National Marine Sanctuary and share their summary information with SIMoN. http://www.mbnms-simon.org/

As the statewide MPA network(s) and the components of networks continue to develop, the use of applicable methods, where they might exist, for example at the Channel Islands or other monitoring programs already in place, is encouraged. Establishing appropriate collaborations and partnerships between these different scientific agencies will lead to productive results.

[12] A map of monitoring sites can be found in the Regional Profile of the Central Coast Study Regional (MLPA, 2005).

Such collaborations are essential and will aid in the collection of data for adaptive management and monitoring and evaluation of MPAs.

It will be necessary to obtain baseline data for effective adaptive management and monitoring and evaluation. In order to collect such data in a timely fashion, a panel of marine life scientists should develop a priority list of variables for baseline data collection. Highest priority should be given to data which will be collected over time to support judgments about the effectiveness of marine protected areas (MPAs) at the ecosystem level. The members of the panel will inevitably include researchers likely to conduct baseline or later research, but should also include researchers who are unlikely to participate directly in such research. The resulting priority list should inform decisions of the DFG, the California Ocean Protection Council, and other state funders of marine science. This list, in turn, can serve to stimulate productive partnerships with other scientific institutions and funders.

4D. Sample Table of Contents for a Regional Implementation Plan

It is recommended that a *Regional Monitoring, Evaluation and Adaptive Management Implementation Plan* (see Table 5 for a sample) be developed for each region. As with all of these documents, this regional plan will be modified over time as more knowledge is gained and as more regions make plans.

Table 5: Sample Table of Contents for a Regional Monitoring, Evaluation and Adaptive Management Implementation Plan

1. Overview

1A. MLPA requirements for adaptive management, monitoring and evaluation
1B. Purpose of this plan
1C. Linkage among statewide, regional, and site-specific goals and objectives and statewide adaptive management questions

2. Regional Goals and Objectives and Translation into Measurable Questions with Indicators

2A. List of goals and objectives [will provide table of regional goals and objectives]
2B. Questions derived from regional goals and objectives [will discuss how the questions will be used by policymakers in adaptive management and relevance to stakeholders]
2C. Identification of indicators for each question [will describe each indicator for each question and goal/objective]
2D. Prioritization and review among indicators for each site [will review and prioritize indicators]
2E. Discuss selected benchmarks (if appropriate) [will briefly review indicators and quantifiable benchmarks (of progress on indicators) that will measure progress toward goals and objectives]

3. Methods and Research Design

3A. Indicators and methods [outline methods for data collection of each indicator]
3B. Research design [describe research design for all indicators]
3C. Indicators and monitoring schedule [present a monitoring schedule with locations and times for data collection for each indicator]
3D. Data quality control and assurance and management [outline process for data quality control and assurance and data management system]

4. Implementation Plan

4A. Partners [will discuss partnerships with other organizations and their existing monitoring programs and relevance to measuring indicators, with a map showing locations of monitoring sites relevant to MLPA indicators]
4B. Resource needs and staffing [will assess resource needs for measuring selected indicators]
4C. Communication of results [will present communications plan - discuss audiences targeted to receive results and dissemination, timing, medium etc.]
4D. Existing MPA monitoring and evaluation plans [will briefly review relevant monitoring and evaluation programs at existing MPAs and how these will be used for the region]
4E. Adaptive management, monitoring and evaluation project phasing and workplan [will describe detail of implementation]
4F. Steps resulting in adaptive management [will explain process and how adaptive management will work in the region]

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