

**Chesapeake Bay Program Management Board  
Advanced Briefing Materials for the  
April 14, 2009 Conference Call**

**ATTACHMENT A:**

**Rebalancing Chesapeake Bay Program Monitoring Funds:  
Report to the CBP Management Board**

By Denice Wardrop and Carlton Haywood for the Monitoring Rebalancing Action Team

**Background**

On March 13, 2009, the Management Board (MB) was presented with: (a) the results of a CBP review of how CBP monitoring funds (\$4.3M EPA plus associated match) are allocated; (b) a set of four options for a rebalancing of those funds between tidal and watershed monitoring; and (c) the elements of a transition plan to implement a level of rebalancing that they selected. The principal findings of the STAC review of monitoring program priorities and objectives, which the Management Board accepted, were that:

- 1) Delisting the tidal segments of the Bay and determining the effectiveness of management actions in the watershed should be the priorities of the CBP funded monitoring programs; and
- 2) The current allocation of monitoring resources does not reflect these priorities and there should be some rebalancing.

The rebalancing options presented to the Management Board included the status quo (funds allocated: 79% tidal, 21% watershed) and three levels of shift from tidal to watershed monitoring, ranging from option 1 (47% tidal, 53% watershed) to option 3 (58% tidal, 42% watershed).

The MB asked for additional information to be gathered and presented before they could make their decision. Denice Wardrop and Carlton Haywood were requested to form an action team to:

- Gather information on linkages between CBP monitoring and other monitoring that is occurring beyond the CBP;
- Explore ways to backfill resources for monitoring programs that the CBP may no longer invest in if their monitoring resources are realigned;
- Work with Rich Batiuk and Jim Edward on what timing flexibility is available for awarding EPA grants and possibly modifying those grants mid-term;
- Assess the implications of the options on the ability to make delisting decisions, continue valued communications with the public, and achieve scientific understanding that is critical to decision-making, and
- Report back to the MB with their findings on April 14.

**What has been Accomplished Since March 13**

- A core group for the Monitoring Rebalancing Action Team (MRAT) has been formed, including Ms. Wardrop and Mr. Haywood, Kirk Havens of STAC, the chairs of the tidal and non-tidal monitoring workgroups, and CBPO monitoring staff.
- Vigorous discussions with members of the monitoring community regarding additional participation in the MRAT and the scope and direction of any rebalancing of monitoring.
- Considerable information gathered on other monitoring programs, but that is not complete.
- Determined that it is possible for the EPA to proceed with the next round of monitoring grants with a partial funding award approximately July 1 and then amend those grants later in 2009 to account for any decisions regarding a rebalancing of monitoring funds.

Following numerous one-on-one discussions with interested parties and a several hour open conference call with over 50 state, Federal, and academic members of the non-tidal and tidal monitoring communities, the MRAT core group met and developed a plan to collect the information requested by the Management Board and, with extensive input from the larger monitoring community, develop a refined plan for rebalancing CBP monitoring resources.

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### **The Monitoring Rebalancing Action Team Plan**

The MRAT will deliver to the Management Board in October 2009 a detailed plan for rebalancing of CBP monitoring resources that would begin to be implemented in January 2010 (full transition to the new alignment may take 1-2 years). The plan will include an explanation of the implications ( + and - ) from changes to each current monitoring program and the results of efforts to find additional partners for monitoring, including ways to backfill programs that lose funding. If the Management Board approves the plan, then EPA monitoring grants will be amended by January 2010 to reflect the changed objectives. The target for shifting monitoring resources from tidal to watershed programs will be \$1 million, roughly equivalent in dollar terms to the Option 3 presented to the Management Board on March 13.

To develop this rebalancing plan the MRAT will create the following four Issue Teams, with membership drawn from and open to members of the monitoring and scientific community:

- 1) **Optimization of Existing Programs Team:** will develop an “optimal” and integrated suite of monitoring program elements that meets the budgetary rebalancing target and maximizes information for CBP management objectives, as identified in the STAC report.
- 2) **Partner Opportunities/Linkages Team:** will identify opportunities to collaborate with partners and leverage resources.
- 3) **Effectiveness/Criteria Assessment Team:** will develop technical and statistical requirements for management effectiveness and for criteria assessment monitoring.
- 4) **Communications and Indicators Team:** will develop requirements for monitoring that supports an indicator framework for communication with the public.

In addition, there will be a **Synthesis Team** to coordinate activities of other teams and write the monitoring rebalancing plan. The Synthesis Team will be composed of the core MRAT group that has been meeting since March 13. The plan development process will include several STAC supported/facilitated workshops, beginning in May; reports from the Issue Teams by the end of July; a final “Summit” workshop in early September at which a draft plan will be discussed with the monitoring and scientific communities; and a final report and recommendation to the Management Board in October.

### **Key Points of the Plan**

- Preserves the findings of the STAC review (approved by the MB at the 13 March meeting) that current allocation of resources should be changed, with focus on support for management decisions and on delisting decisions for tidal impaired waters.
- Provides an open process that members of the monitoring and scientific communities can actively participate in.
- Incorporates STAC involvement through support for necessary technical workshops, participation on both Issue and Synthesis Teams, and monitoring of the progress of the overall plan.
- Supports an adaptive management approach to better align activities with management priorities.
- Produces an integrated monitoring design that eliminates the “stove piping” of discrete monitoring programs (note there are no “tidal” or “watershed” Teams).
- Identifies a \$1M target for shifting funds as a “driver” for real change, but gives an allowance for 1-2 years to complete the rebalancing of funding, thereby providing some flexibility.
- Provides a structured process, with a feasible timeline, that can be externally monitored by STAC.
- Provides the necessary information to the Management Board for a final decision on monitoring rebalancing to be made in October.
- Allows changes to monitoring programs and networks to be enacted starting in January 2010.

### **Recommendation**

That the Management Board charge the MRAT with developing a plan for rebalancing CBP monitoring funds by October 2009 as described above.